

Connecting OneDesk to JIRA

Pre-requirements

- [JIRA](#) v6.x server accessible from the internet (or a JIRA on-demand account)
- [Zapier](#) account
- [OneDesk](#) account with a dedicated user for integrations with administrative rights

Description

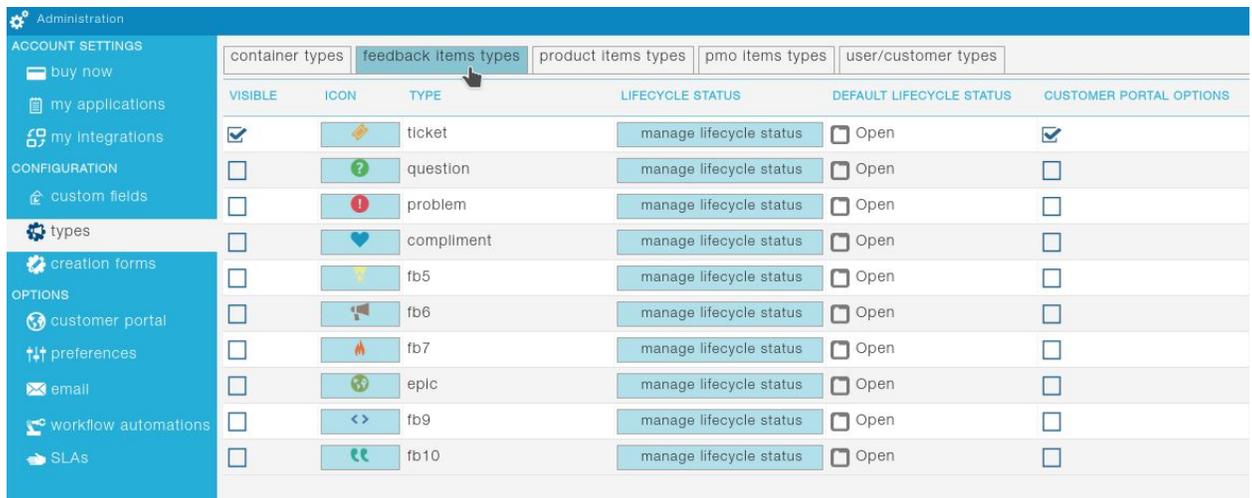
When fully configured the JIRA integration will synchronize in between the 2 systems the newly created items.

Optional configuration

You can use existing (pre-configured) item types and life cycle status to trigger the initial push from OneDesk to JIRA. The recommended way is to create a separate item type and/or a separate lifecycle status.

The steps to configure a new item type (epic) and a new lifecycle status (SYNC TO JIRA) are:

1. In your OneDesk account go to Administration -> Configuration -> types -> feedback item types:

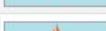


The screenshot shows the 'Administration' page in OneDesk, specifically the 'feedback items types' configuration. The table lists various item types with columns for visibility, icon, type name, lifecycle status, default lifecycle status, and customer portal options.

VISIBLE	ICON	TYPE	LIFECYCLE STATUS	DEFAULT LIFECYCLE STATUS	CUSTOMER PORTAL OPTIONS
<input checked="" type="checkbox"/>		ticket	manage lifecycle status	<input type="checkbox"/> Open	<input checked="" type="checkbox"/>
<input type="checkbox"/>		question	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		problem	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		compliment	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb5	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb6	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb7	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		epic	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb9	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb10	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>

2. [To configure an item type, otherwise skip to step 3] Choose any of the types that don't have the visible check-box checked, check the box to make it visible, enter "epic" for the

type name

<input type="checkbox"/>		Compliment	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb5	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb6	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb7	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		epic	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb9	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>
<input type="checkbox"/>		fb10	manage lifecycle status	<input type="checkbox"/> Open	<input type="checkbox"/>

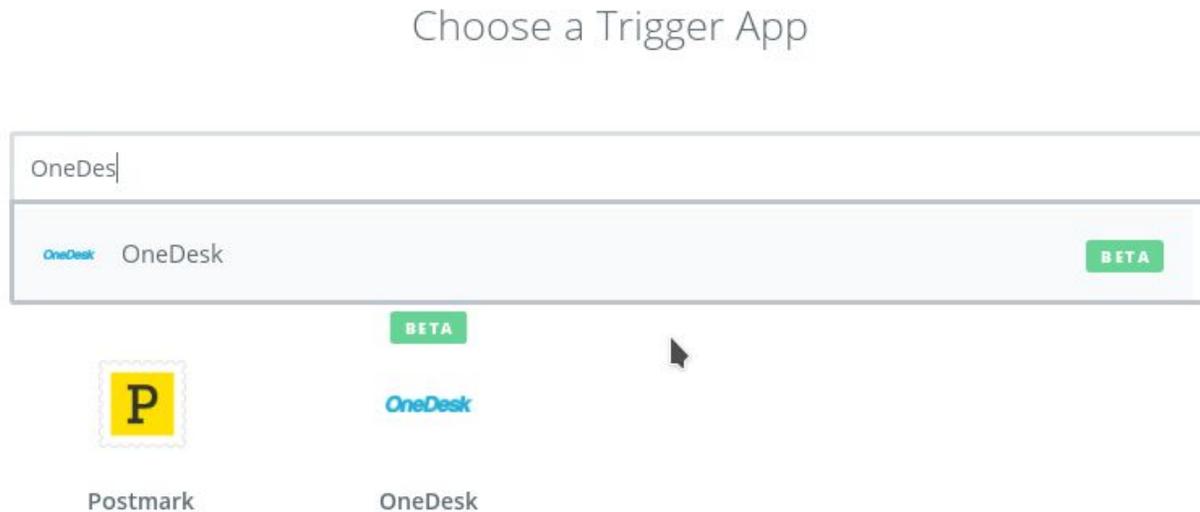
3. [To configure a new lifecycle status, otherwise skip to step 4] Select the type of items that you want to use to initiate a push (in our case “epic”) and click on the “manage lifecycle status” button. Enter “SYNC TO JIRA” and click the “add” button. For the new Lifecycle status choose the state “in progress”.
4. Remember the item type name and the lifecycle status that you chose or created. You will need to type them in a case-sensitive way (Epic is different from ePIC) in Zapier.

1. ZAP1 - Initial push from OneDesk to JIRA

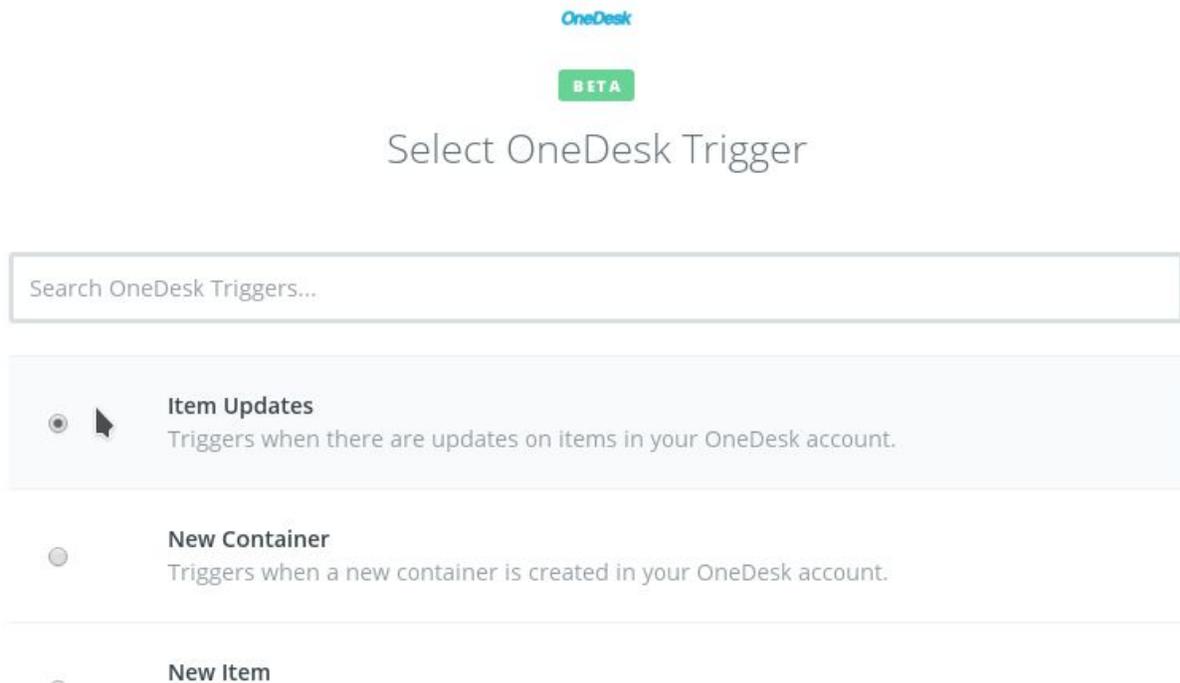
The purpose of this ZAP is to push to JIRA only the items of a specific type(s) and only when they reach a certain lifecycle status(es). This enables you to do all your planning / approval flow in OneDesk and push the storied (epics) only when they are ready to be developed.

- 1.1. In your Zapier account click on “Make A ZAP” button.

- 1.2. Type “OneDesk” in the search fields to locate the OneDesk application, or select the OneDesk application from the list of applications below the search box:



- 1.3. Select “Item Updates” Trigger from the list of triggers and click Save + Continue:



- 1.4. Click on the Connect a New Account and fill-in the credentials for your OneDesk integration user. You need to have a dedicated integration user with administrative privileges. This user SHOULD ONLY be used for integrations,

otherwise it will not detect all the changes in your OneDesk account.



Allow Zapier access to your OneDesk account?

Email (required)

Password (required)

Yes, continue

- 1.5. On the set up OneDesk item update select “LifeCycle Status” and click continue.

OneDesk
BETA

Set up OneDesk item update

Updates on (required)
Triggers on updates on any of the following fields.

LifeCycle Status	▼	-
Q search...		
+		
Integration Custom Field		
Name		
Priority		
Agile Points		
Description		
Container		
Requester		
LifeCycle Status		
Item Type		
Percent Complete		
Use a Custom Value		
Clear Current Choice		

Continue

- 1.6. Go to your OneDesk account and update the LifeCycle Status of a work item. Come back to Zapier and click “Fetch & Continue”. If the test is successful you can click “Continue”. Otherwise please double-check that the account that performed the LifeCycle Status change in OneDesk is DIFFERENT from the user configured in Zapier.
- 1.7. Click on the plus sign and add a new action, pick OneDesk from the list of “your apps”, select “Find WorkItem” from the list of actions and select the same account you have configured for the updates trigger
- 1.8. Fill-Up the configuration form for the search for OneDesk WorkItem likes this:
- 1.8.1. Search By -> “Item Id”
 - 1.8.2. Search Operation -> “Is”



1.8.3. Search Criteria -> click on the “Item Id” and select “Item Updates” -> Item Id

Search for OneDesk Workitem

*** Search By (required)**

Search items by author, container or custom field

Item Id

*** Search Operation (required)**

Search operation (is / is not / is not empty).

Is

*** Search Criteria (optional)**

Search criteria(s) joined by OR.

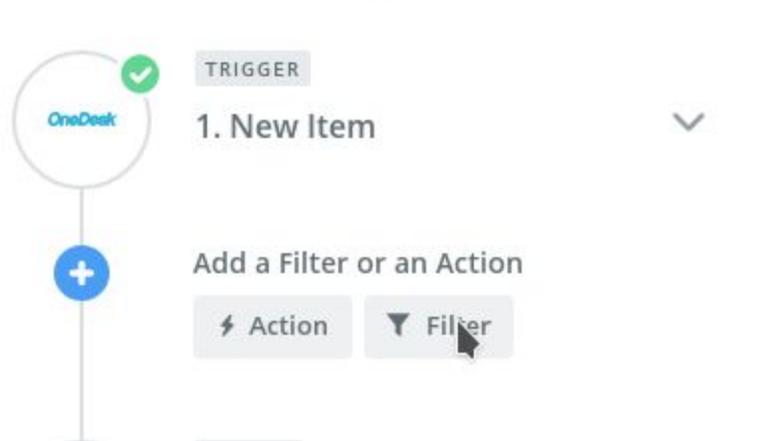
* Step 1 Item Id



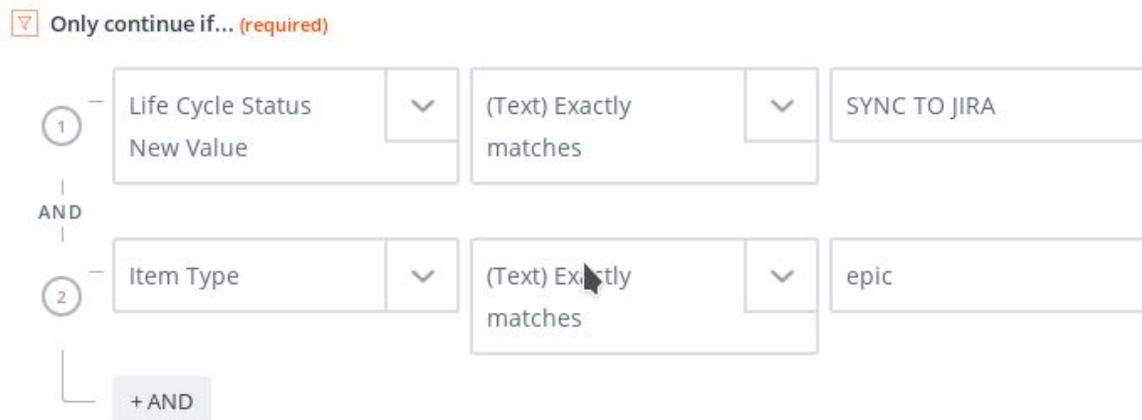
 Refresh Fields

Conti

- 1.9. Click on the (+) between “Trigger” and “Action” on the left side to add a Filter.



- 1.10. Select “Only continue if...” and add the following conditions:
- 1.10.1. **Type of the item (TEXT) Exactly matches “epic”** (or other type that you chose during the Optional Configuration step in your OneDesk account)
 - 1.10.2. **LifeCycle Status New Value (Text) Exactly matches “SYNC TO JIRA”** (or any other type that you chose during the Optional Configuration step in your OneDesk account)



- 1.11. Click on Continue, then test the filter. If it fails please double check that the item Type and the LifeCycle Status values are correctly entered.
- 1.12. Click Continue -> Click on the plus button to add an new action step
- 1.13. On the action step Type “JIRA”, or select it directly from the list of “your apps”.



- 1.14. Select “Create Issue” and click “Save + Continue”
- 1.15. Select an account and click “Save + Continue”. If you don’t have an account already added to Zapier please click “Connect a New Account” button.

1.16. Set up the JIRA Issue

- 1.16.1. Pick the project where you'd like the item to be created
- 1.16.2. Decide on the type of Issue that you want to be created (eg: Task)
- 1.16.3. Summary -> Step2 Item Name
- 1.16.4. Description -> Step2 Description
- 1.16.5. Priority -> "Use a Custom Value"
- 1.16.6. Custom Value for Priority -> Step2 Priority

 Project (required) 1 2 3

AD1234

 Issue Type (required) 1 2 3

Task

 Summary (required)

 Step 2 Item Name

 Description (optional)

 Step 2 Description

 Priority (optional)

Use a Custom Value

Custom Value for Priority (optional)

 Step 2 Priority

- 1.17. Continue -> "Create & Continue" and then click "Add Step" -> Select "OneDesk" from "Your Apps", click on "show less common options" -> pick "Update Item" -> click "Save + Continue", select the same account that you selected for the trigger -> "Save + Continue"
- 1.18. Set up OneDesk Item Update:
 - 1.18.1. For "Item Id" click "Use a Custom Value" and for the "Custom Value for Item Id ID" click on the Insert Fields button and select "Item Updates - Item Id"
 - 1.18.2. In the custom fields put "INTEGRATION_CUSTOM_FIELD" and Step4 Id
- 1.19. Click Continue -> Finish -> and name your ZAP and turn it on.

2. ZAP2 - New Issue in JIRA created a new issue in OneDesk

The purpose of this ZAP is to retrieve new issues in JIRA as new issues in OneDesk.

1. In your Zapier account click on “Make A ZAP” button -> Select “JIRA” -> pick “New Issue” -> Select your account .
2. On the setup options screen choose:
 - 2.1. The Project that this ZAP monitors
 - 2.2. Press Continue -> Connect & Continue
3. Login into your JIRA and add a new task in the project selected above -> Once the step succeeds click “Continue”
4. On the Action setup select “OneDesk” as the Action App -> “Create Item” -> Save + Continue
5. Select your OneDesk account -> Save+Continue
6. Setup the OneDesk Comment:
 - 6.1. Item Type -> “task”
 - 6.2. Item Name -> Step1 Fields Summary
 - 6.3. Item Description -> Step1 Fields Description
 - 6.4. Continue -> “Create & Continue”
7. “Finish” -> Name your Zap so that you recognize it -> Turn your ZAP on