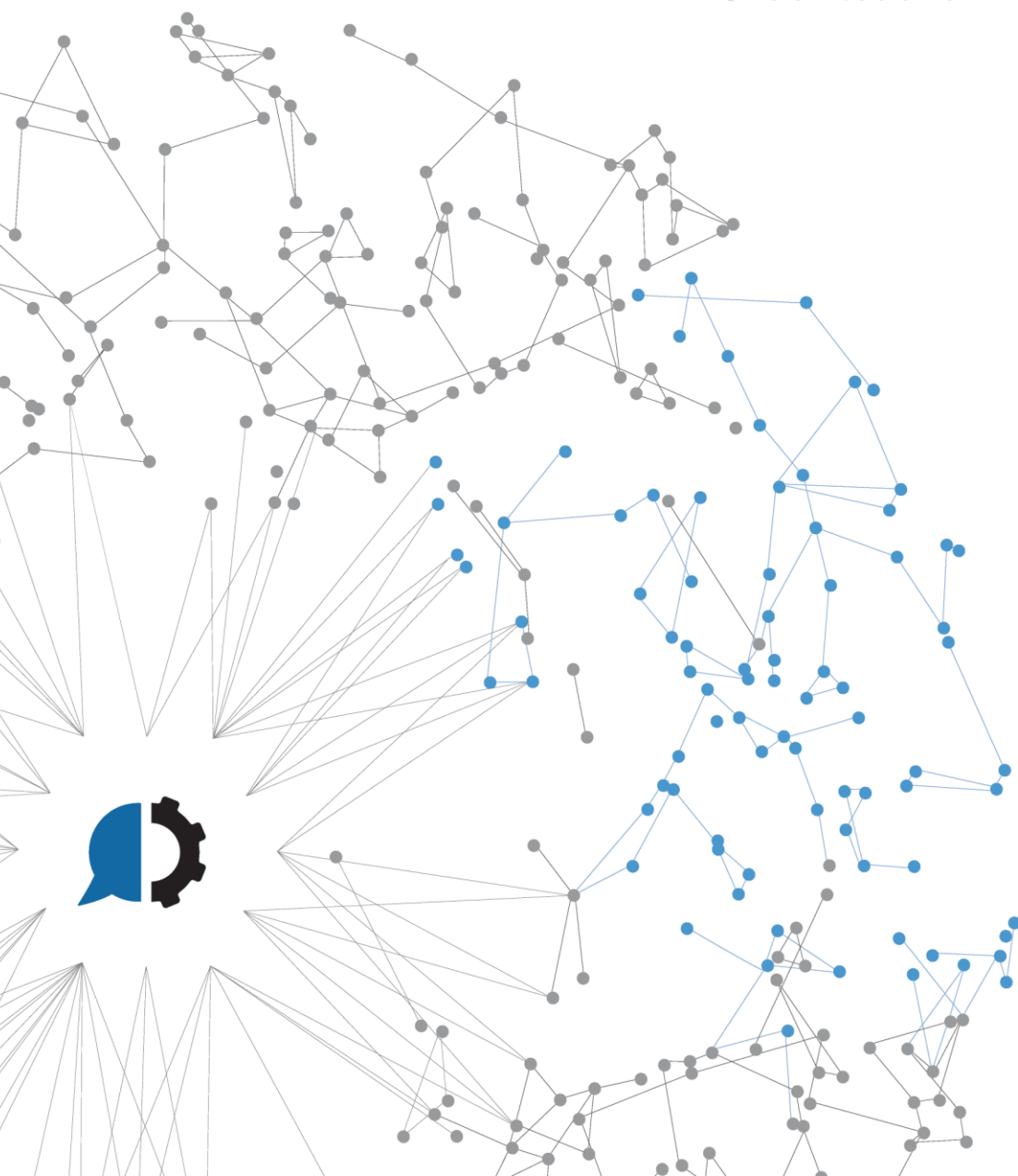




# JIRA CLOUD BOT

CLOSE ISSUES FROM EXCEL INPUT





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## OVERVIEW

This how to guide introduces the ***Jira Cloud Bot - Close Issues from Excel INPUT***. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. Automate can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are report generation, file movement, data import and export, and scheduling batch processing.

The ***Jira Cloud Bot - Close Issues from Excel INPUT*** is based in the Jira Cloud REST API. It ***closes/updates*** Issues in Jira Cloud by executing the “***transitions***” HTTP method, adds a comment to the issues, and updates the Input Excel file with the results. A transition is how the status is changed in Jira within Workflows; you will need the corresponding ID for the issue transition you need to execute. This bot uses the Basic API Token authentication method to avoid using username and password. Look over the [PREREQUISITES](#) and the [HOW TO GENERATE THE INPUT FILE](#) sections to get detailed information.



## PREREQUISITES

- **Automate:** The Jira Cloud bot depends on Automate software in order to work. The minimal supported versions are:
  - [Automate Ultimate 11.2](#)
  - [Automate Plus 11.2](#)
  - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our Jira Cloud bot task
- **Jira Cloud:** Our minimal requirements are:
  - **Jira Cloud account with proper permissions:** In order to be able to update Jira Cloud Issues from an Automate bot, you will need to create a new account or use an existing one with proper permissions to ***browse projects and transition issues for the project that the issue is in. If issue-level security is configured, you will need issue-level security permission to view the issue.*** You can get further information on how to manage project permissions in the next Jira Service Desk [Cloud link](#). If you don't have an administration role, you can ask your Jira Cloud administrator.
  - **Jira Cloud API Token:** The API Token will be associated to the user account that was assigned for the bot execution. You can find it in Jira Cloud by login with the assigned account, then going to your **Account Settings > Security > API Token** menu. There you will be able to create a new Token. You can check this [Jira link](#) to get further information on how to generate an API Token. Here's an example of the Token generation:

### Your new API token

You can make HTTP basic authentication requests with your email address as the username and this API token as the password.

You will not be able to view this token again once you close this window, so be sure to record it securely.

[View](#)

[Copy to clipboard](#) [Close](#)



- [Comment during a Transition](#): In order to be able to create a comment when executing the transition, you will have to activate it in your workflows, otherwise, the issue will be update without any comment. You can find the procedures to activate it in the next [Jira link](#).
- [Jira Cloud API Version](#): This bot was created using the “latest” identifier for the API version. This means that it will always execute the latest version.
- [Automate constants to be created to set the Jira Cloud connection values](#):
  - [const\\_JiraCloudURL](#): The Jira Cloud URL for your domain.
    - Example: *<https://SANDBOX.atlassian.net>*
  - [const\\_JiraCloudApiToken](#): Jira Cloud API Token associated with the account for the bot operation.
  - [const\\_JiraCloudUser](#): Jira Cloud User mail associated with the account for the bot.

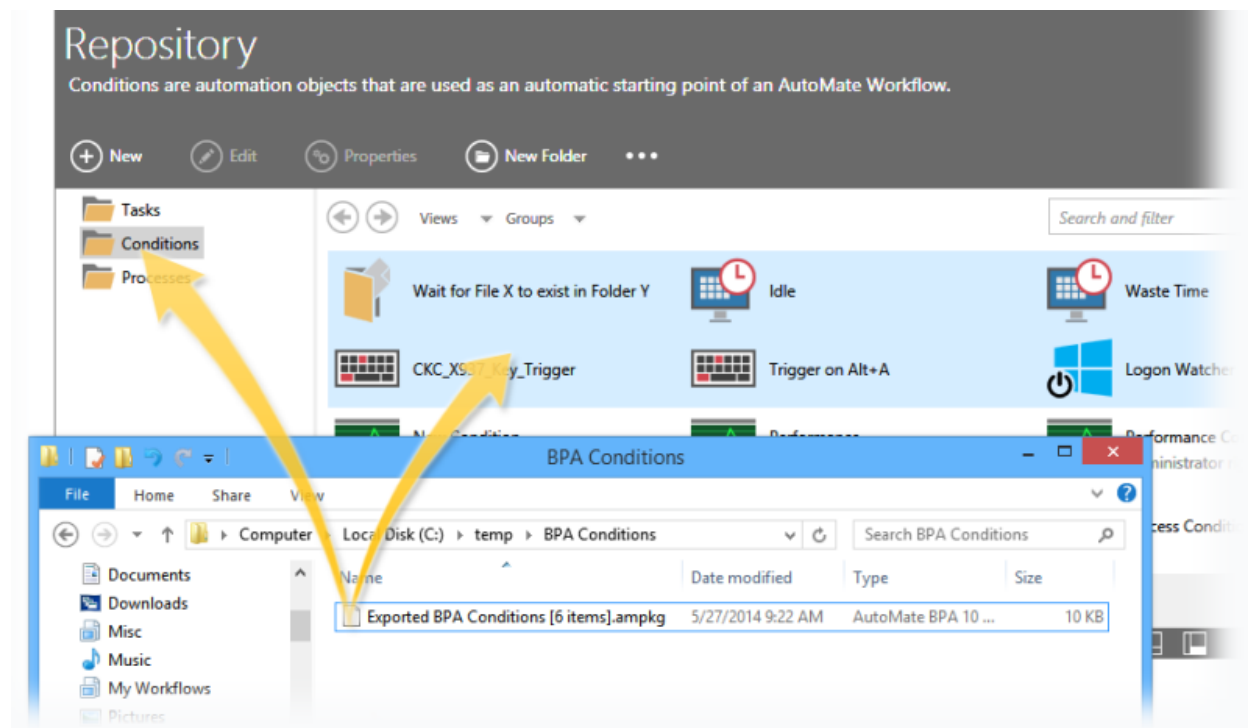


## HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Server Management Console](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [SMC](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.



## HOW TO GENERATE THE INPUT FILE



The input file “*Jira Cloud Bot - Close Issues INPUT.xlsx*” shipped with the Jira Cloud bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

### The Excel INPUT file

A	B	C	D	E	F
Jira Service Desk Issue Fields			Done?	Result Details	
Issue Key or ID	Transition ID	Comment	Yes/No	Date	Result Message

#### NOTES:

- **Red fields** are mandatory.
- Columns D to F in the INPUT file will be filled with the results. See [APPENDIX A](#) for an example of the results.
- Remember that to add the [Comment during a Transition](#) (see prerequisites) in order to be able to create the comment during the transition execution.

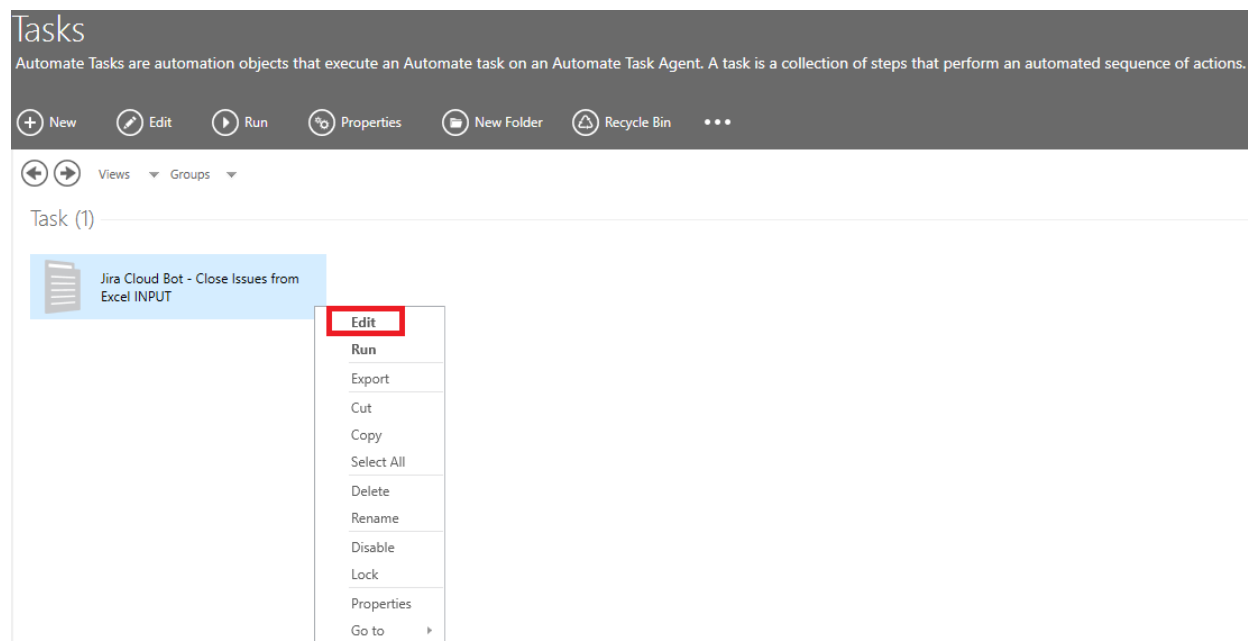


## HOW TO EXECUTE THE JIRA CLOUD BOT - CLOSE ISSUES FROM EXCEL INPUT

If this is the first time running this task, we will need to set some parameters

Open the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



From [step 2](#) edit the next variables according to your desired output:

- [var\\_ExcelInputFile](#): The complete path and filename of the Jira Cloud Bot - Close Issues INPUT.xlsx.

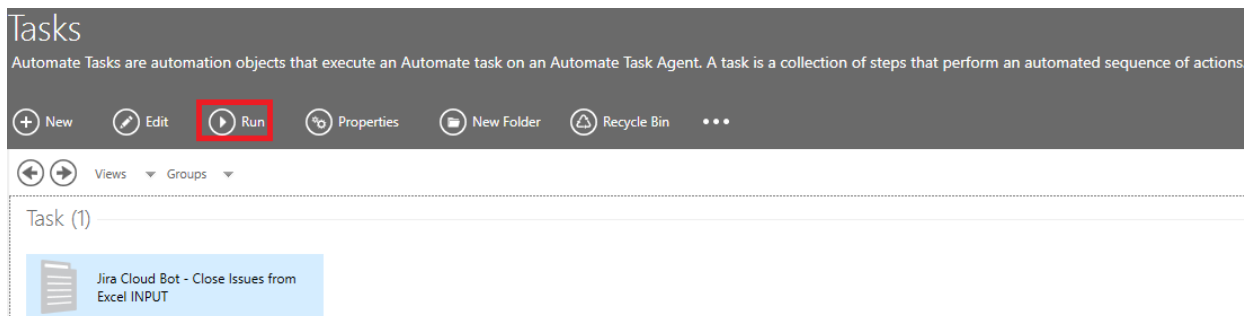
Example: ***"D:\Automate Jira Cloud Bot - Close Issues INPUT.xlsx"***

[Save and close](#) the task

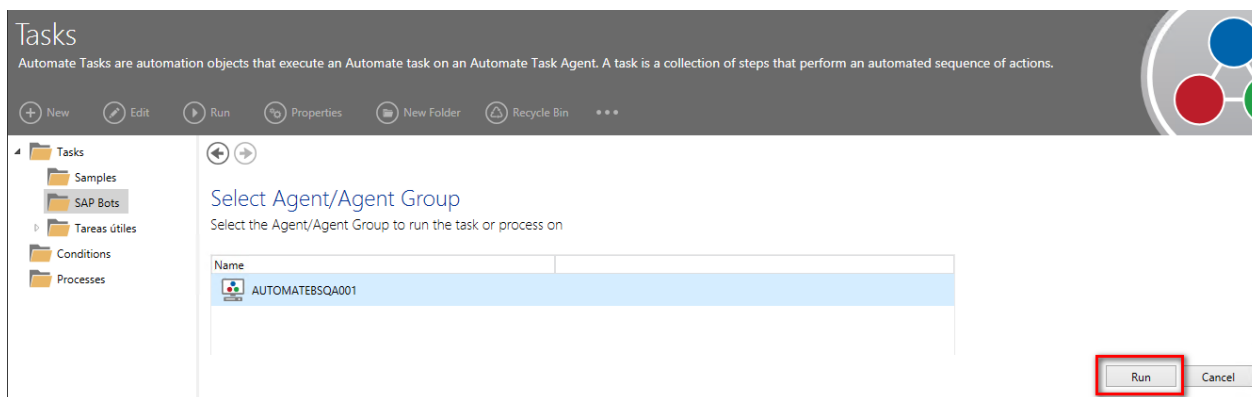




Select the task and click on [Run](#)



Select your [Agent](#) and click on [Run](#) again





## APPENDIX A – EXCEL OUTPUT AND JIRA CLOUD ISSUES VIEW EXAMPLE

### INPUT Excel file with results:

A	B	C	D	E	F
Jira Service Desk Issue Fields			Done?		Result Details
Issue Key or ID	Transition ID	Comment	Yes/No	Date	Result Message
10005	41	Closed by Automate Bot	YES	18/05/2020 12:18:02 PM	Issue 10005 was updated/closed.
10006	41	Closed by Automate Bot	YES	18/05/2020 12:18:04 PM	Issue 10006 was updated/closed.
AUT-8	41	Closed by Automate Bot	YES	18/05/2020 12:18:06 PM	Issue AUT-8 was updated/closed.

Note that the execution result is written from column D to F.

### Jira Cloud Issues view result:

Automate  
Classic software project

Back to project

Issues and filters

My open issues

Reported by me

All issues

Open issues

Done issues

Projects / Automate

Done issues

Order by Updated ↕

AUT-8

Automate issue 3

AUT-7

Automate issue 2

AUT-6

Automate issue 1

AUT-8

Automate issue 3

Edit Comment Assign To Do In Progress Workflow Admin

Type: Bug Status: **DONE** (View workflow)  
Done

Priority: Medium Resolution:

Labels: Incident

Description

This issue was created by AutoMate

Attachments

Drop files to attach, or browse.

Activity

All Comments Work log History Activity

added a comment - 5 hours ago

Closed by Automate Bot



## APPENDIX B - TROUBLESHOOTING

- **Logs:** Each iteration of our bot creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Jira Cloud Bot - Close Issues from Excel INPUT*.



### About HelpSystems

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