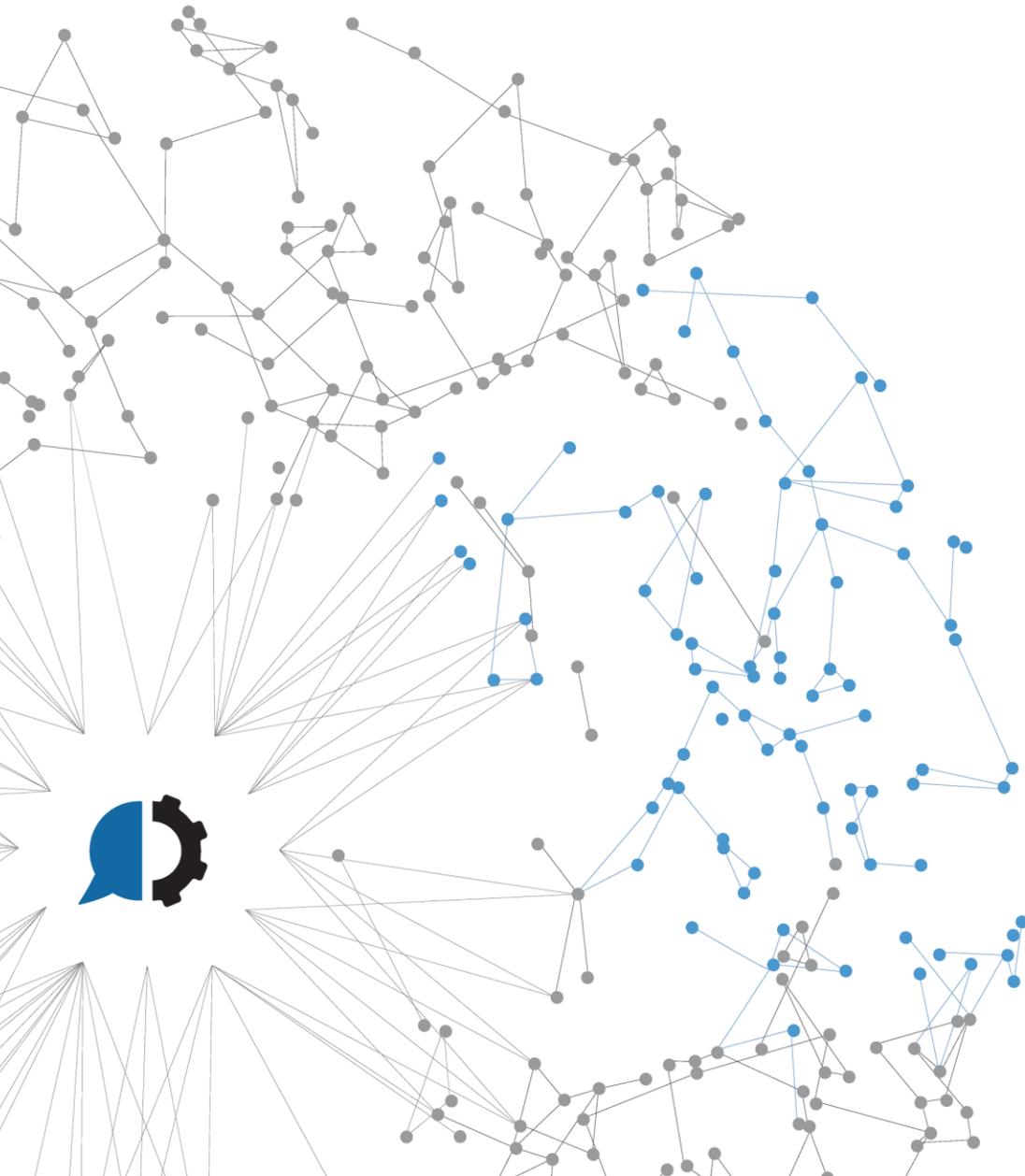




helpsystems

JIRA CLOUD BOT

CREATE ISSUES FROM EXCEL INPUT





Content

OVERVIEW	3
PREREQUISITES	4
HOW TO IMPORT AN AUTOMATE TASK	6
HOW TO GENERATE THE INPUT FILE	7
HOW TO EXECUTE THE JIRA CLOUD BOT - CREATE ISSUES FROM EXCEL INPUT	8
APPENDIX A – EXCEL OUTPUT AND JIRA CLOUD ISSUES VIEW EXAMPLE	10
APPENDIX B - TROUBLESHOOTING	11



OVERVIEW

This how to guide introduces the ***Jira Cloud Bot - Create 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 - Create Issues from Excel INPUT*** is based in the Jira Cloud REST API. It creates Issues in Jira Cloud by executing the “***Issue***” HTTP method and updates the Input Excel file with the results. 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 create and 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 Create issues project permissions for the project in which the issue or subtask is created***. 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 executions. 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](#)



- [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.

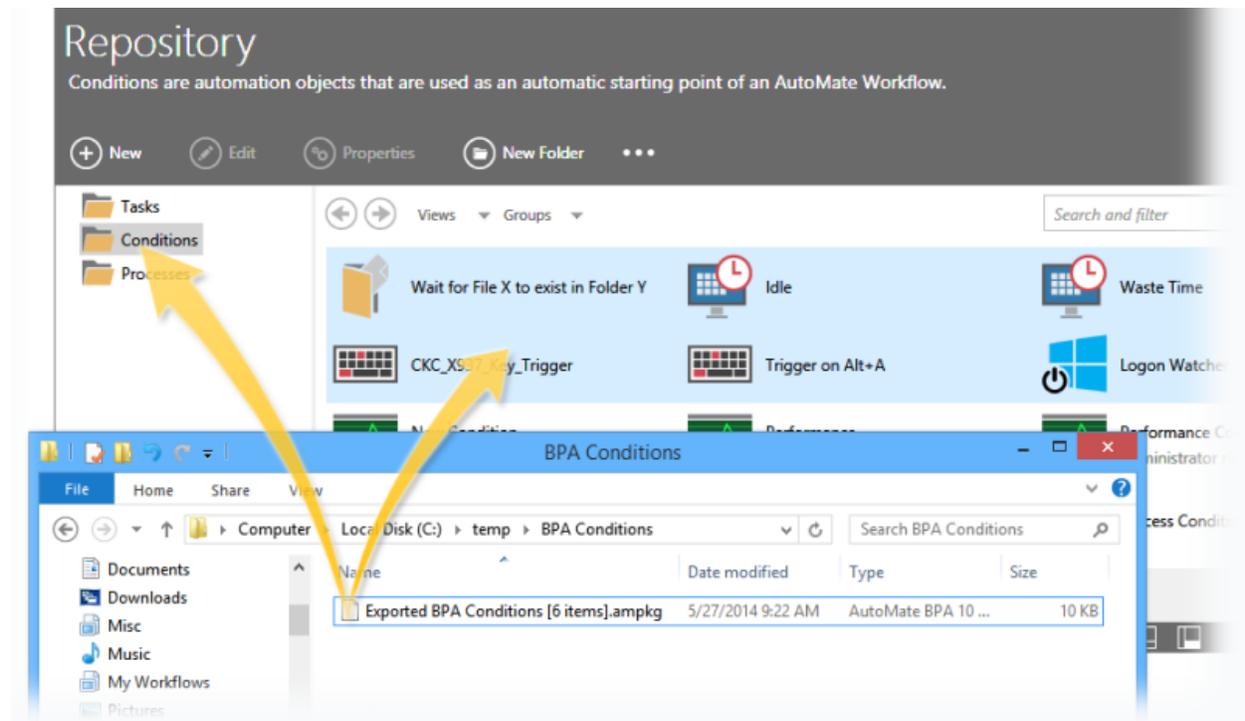


HOW TO IMPORT AN AUTOMATE TASK

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 Create Issues INPUT.xlsx”* shipped with the Jira Cloud bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

The Jira Cloud create Issue screen:

The screenshot shows the 'Create issue' interface in Jira Cloud. At the top right, there are buttons for 'Import issues' and 'Configure fields'. The main form contains the following fields and options:

- Project:** A dropdown menu with 'Automate (AUT)' selected.
- Issue Type:** A dropdown menu with 'Bug' selected. Below it, a note states: 'Some issue types are unavailable due to incompatible field configuration and/or workflow associations.'
- Summary:** A text input field.
- Components:** A section with 'None' selected.
- Description:** A rich text editor with a toolbar containing options like Bold, Italic, Underline, Text Color, Background Color, Link, Unlink, Bulleted List, Numbered List, Attachments, and Mentions.
- Reporter:** A text input field with a note: 'Start typing to get a list of possible matches.'
- Buttons:** At the bottom right, there is a checkbox 'Create another', a blue 'Create' button, and a 'Cancel' button.

The Excel INPUT file

A	B	C	D	E	F	G	H	I	J	K
Jira Service Desk Issue Fields										
Project Key	Issue Type	Summary	Description	Priority	Label <small>Only one is supported</small>	Due Date <small>Days from today (It can be Blank)</small>	Assignee ID <small>(It can be Blank)</small>			
								Done?	Result Details	
								Yes/No	Date	Issue Key, ID and URL / Result Message

NOTES:

- **Red fields** are mandatory.
- Columns I to K in the INPUT file will be filled with the results, the Issue ID, the issue Key, and the Issue URL. See [APPENDIX A](#) for an example of the results.

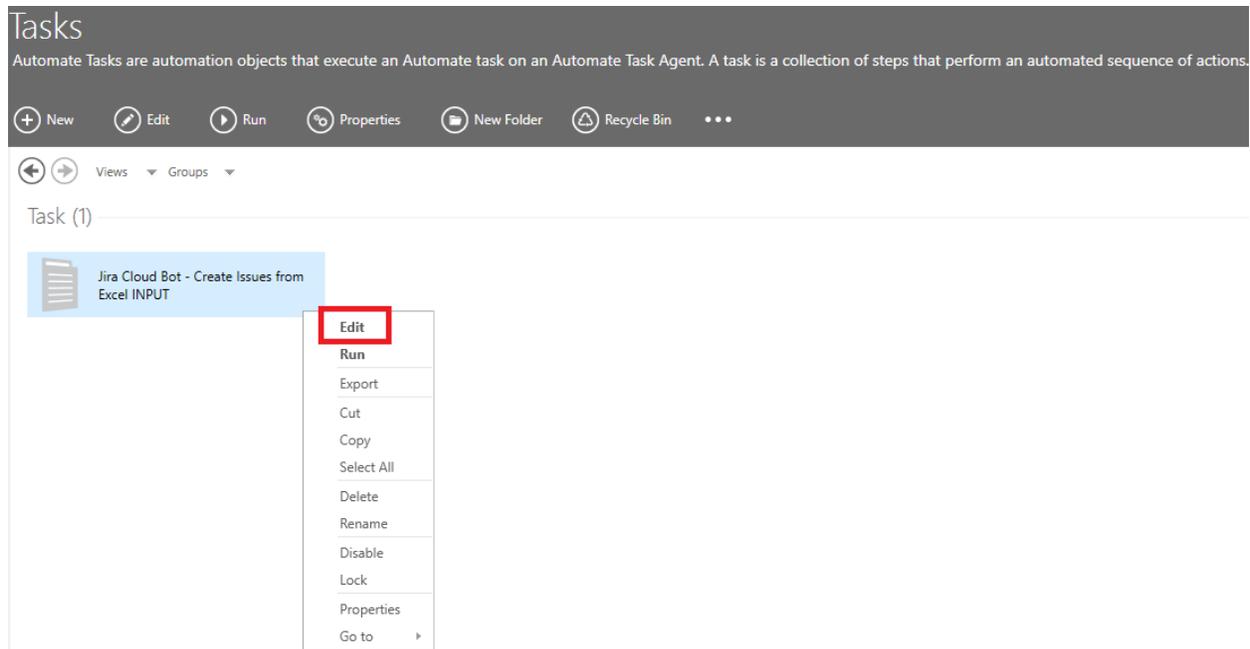


HOW TO EXECUTE THE JIRA CLOUD BOT - CREATE ISSUES FROM EXCEL INPUT

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 Create Issues INPUT.xlsx.

Example: ***"D:\Automate\Jira Cloud Create Issues INPUT.xlsx"***

[Save and close](#) the task



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

Tasks
Automate Tasks are automation objects that execute an Automate task on an Automate Task Agent. A task is a collection of steps that perform an automated sequence of actions.

+ New Edit **Run** Properties New Folder Recycle Bin ...

Views Groups

Task (1)

- Jira Cloud Bot - Create Issues from Excel INPUT

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

Tasks
Automate Tasks are automation objects that execute an Automate task on an Automate Task Agent. A task is a collection of steps that perform an automated sequence of actions.

+ New Edit Run Properties New Folder Recycle Bin ...

- Tasks
 - Samples
 - SAP Bots
 - Tareas útiles
 - Conditions
 - Processes

Select Agent/Agent Group
Select the Agent/Agent Group to run the task or process on

Name
AUTOMATEBSQA001

Run Cancel



APPENDIX A – EXCEL OUTPUT AND JIRA CLOUD ISSUES VIEW EXAMPLE

INPUT Excel file with results:

Jira Service Desk Issue Fields							
Project Key	Issue Type	Summary	Description	Priority	Label Only one is supported	Due Date Days from today (It can be Blank)	Assignee ID (It can be Blank)
AUT	10002	Automate issue 1	This issue was created by AutoMate	3	Question		
AUT	10005	Automate issue 2	This issue was created by AutoMate	4	Request	2	
AUT	10005	Automate issue 3	This issue was created by AutoMate	3	Incident	2	5ebae4496c84140b9eb4f807

Result Details		
Created?	Date	Issue Key, ID and URL / Result Message
Yes/No		
YES	15/05/2020 4:00:01 PM	IssueKey: AUT-6, IssueID: 10005, IssueURL: https://hssandbox.atlassian.net/rest/api/latest/issue/10005.
YES	15/05/2020 4:00:03 PM	IssueKey: AUT-7, IssueID: 10006, IssueURL: https://hssandbox.atlassian.net/rest/api/latest/issue/10006.
YES	15/05/2020 4:00:05 PM	IssueKey: AUT-8, IssueID: 10007, IssueURL: https://hssandbox.atlassian.net/rest/api/latest/issue/10007.

Note that the execution result is written from column I to K. Column K will have the Issue ID, issue Key and Issue URL of the Issue created in Jira Cloud.

Jira Cloud Issues view result:



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 - Create Issues from Excel INPUT*.



www.helpsystems.com

About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and automate processes, encrypt and secure data, and provide easy access to the information people