JIRA CLOUD INTEGRATION WITH QUALIFY

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BERTIE 4

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SYNOPSIS

This document details the Atlassian Jira Cloud integration with Qualify and Qualify Web. Jira is often favoured by technical teams for their defect reporting and control. As Qualify can hold all the testing assets alongside issues and defects, it may be found that there is duplication in certain data held in Jira.

This integration and configuration will allow the defect to be created and owned by Jira, but allow Qualify to create, and display the Jira record in real-time.

Integration with a local Jira instance is also possible, this is covered independently from this document.

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CLOUD JIRA INTERGRATION

This integration will allow Qualify users to see and create Jira items via Qualify. This can be linked and seen as a Qualify item.

To set this up you will both need to have access to the Global settings within Qualify alongside permissions within the Cloud Jira instance, this would include the ability to create a new API within the Atlassian Cloud environment.

We have no control over the Atlassian framework, they may change their website and process's, we will endeavour to maintain this document with the latest Atlassian changes.

CREATING THE JIRA CLOUD API

1. Log on to Atlassian Developer via https://developer.atlassian.com/

2. Select the Developer console by selecting the account icon (orange with the user's initials)
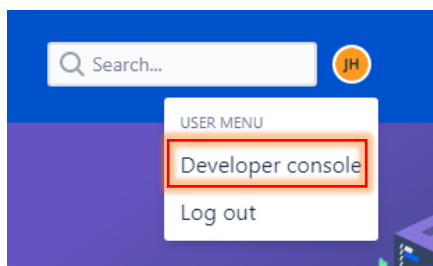
3. Create an OAuth 2.0 integration, give it a meaningful name and agree to any Atlassian conditions.
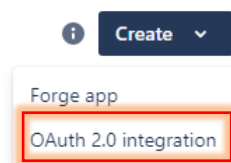
4. From the new integration select 'Authorization' and configure the new OAuth 2.0 (3LO)
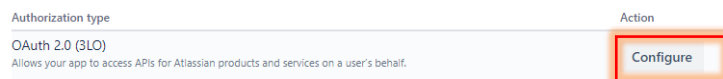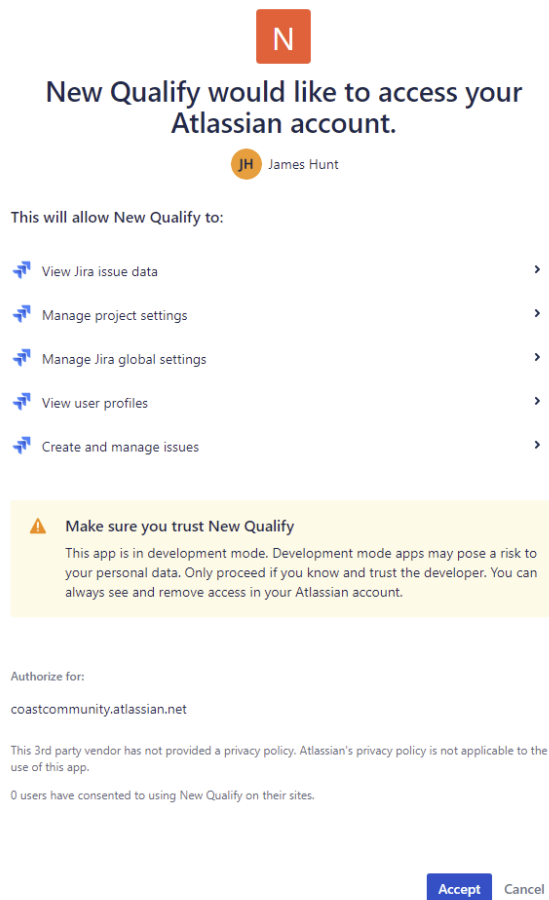

5. Within the 'Callback URL' enter: 'https//qualifycallback'

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6. Once saved a URL will be shown, copy this and paste into your browser. You should see a page requesting permissions for the API. There is no need to press 'Accept', we are simply testing the Client ID and secret.

7. From the menu select 'Permissions' and Add, and then Configure from 'Jira platform REST API'

8. Select 'Add' to the following:

   a. View Jira issue data.

   b. Manage project settings.

   c. Manage Jira global settings.

   d. View user profiles.

   e. Create and manage issues.

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scopes

View Jira issue data
Read Jira project and issue data, search for issues, and objects associated with issues like attachments and worklogs. Remove

Manage project settings
Create and edit project settings and create new project-level objects (e.g. versions and components). Remove

Manage Jira global settings
Take Jira administration actions (e.g. create projects and custom fields, view workflows, manage issue link types). Remove

View user profiles
View user information in Jira that the user has access to, including usernames, email addresses, and avatars. Remove

Create and manage issues
Create and edit issues in Jira, post comments as the user, create worklogs, and delete issues. Remove

Manage Jira webhooks
Register and manage Jira webhooks. Add

Manage development and release information for third parties in Jira
Manage development and release information for third parties in Jira. Add

9. Select 'Settings' from the menu, make a note of both the 'Client ID' and 'Secret'

Authentication details
Use the Client ID and Secret for authentication. Learn more about OAuth 2.0 integrations.

Client ID

ubC6RrsoAr0SXX1jDrHq0OyT3fxHCprY

Secret

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CONFIGURING QUALIFY GLOBAL SETTINGS

1. Login into Qualify as the administrator, or a user with administrator permissions.

2. Open the Global settings by selecting Management/Global

3. Within the Global administration window, select Plugins followed by Configuration(Add).
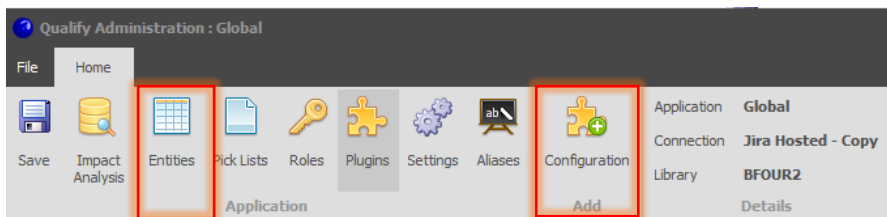
4. Give the Plugin a name and from the Plugin drop down menu, slect 'Jira Work Items'
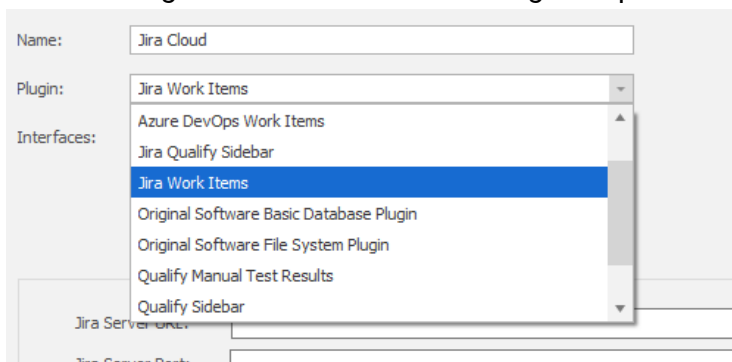
5. From the settings configure:

   a. Interfaces

      i. ExternalDataSource

      ii. UserInterfaceExtension

      iii. TestExecutionEngine

   b. Jira Server URL: This is the URL used to access the Cloud Jira instance from a web browser.

   c. Jira Server Port: Leave blank if you use the default port. Otherwise, enter the post number.

   d. OAuth Select this radio button.

      i. Client id: Populate with the Client id from the API

      ii. Client Secret: Populate with the Client Secret from the API

      iii. Callback Url

1. Qualify Client, https://qualifycallback

2. Qualify Web, this will be the URL to access Qualify Web

e. Select the Validate button, if this is configured correctly you will see a page requesting access to the API. You do not need to accept this, simply seeing the page is validation.

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ADDING HOSTED JIRA PLUG-IN TO THE APPLICATION

Once the Jira Plugin has been configured within the Global Settings, we are then able to add this to the application(s). This will allow us to place the Jira integration data logically within the Application.

1. Login into Qualify as the administrator, or a user with administrator permissions.

2. Edit the Application by selecting Management and then the name of the application.

3. From the top ribbon menu, select 'Entities' followed by add 'External'
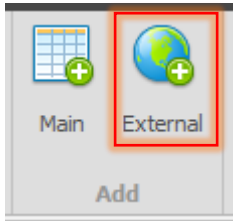
4. Selecting the 'Plug-ins' tab, populate the 'User Interface Plugin' with the newly created Plug-In.
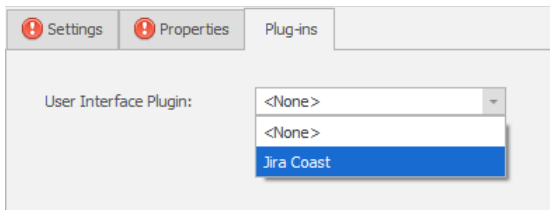
5. From the 'Properties' tab, populated the 'Data Source' filed with the same Plugin.
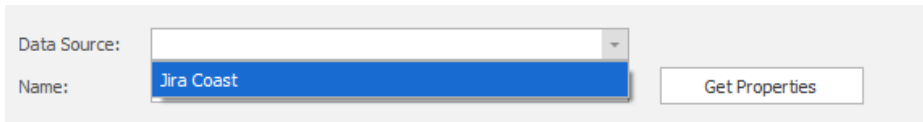
6. Within the 'Name' filed, enter the name of the 'Issue Type' you wish to retrieve. This should be spelt and with the same case as the Issue type within Jira. In this diagram, we can see the default Jira types within the project. We need to populate the name field exactly as it's displayed.

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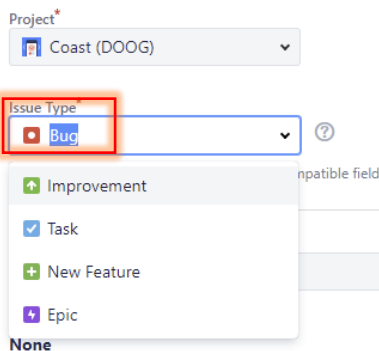
7. Press the 'Get Properties' button, this will connect to Jira and Open the Qualify Browser. Here you need to 'Accept' to allow Qualify to connect to your Jira Cloud instance. Once accepted Qualify will return all of the data available from that Issue type, this will include any custom fields created.

   a. By default, the 'pkey' column is selected as the Primary key on the table

   b. Select the record to be the 'Caption', populate the record in the 'Caption' column. The 'pkey' field is suggested if you have no preference.

   c. Select the record you wish to be searchable, this is not mandatory.

   d. In the 'hidden' column, Right Mouse click and select 'select all'. Then go through and unselect the columns you wish to be shown on the Qualify grid. This should be noted that this is only removing the view from the Jira grid within Qualify and not removing the data once the record is selected.

      This selection can be changed later, so fine-tuning the display is possible.

8. Under the 'Settings' tab, give the Entiry a name and choose an Icon.

9. From the top ribbon, menu select the 'Relationships' Icon

10. Create a 'Link' relationship to place the Jira Entity in the desired location within the model.

CONFIGURING MICROSOFT EDGE

The integration requires that the Microsoft Edge 'Evergreen Bootstrapper' is installed. Details and download information is available here:

https://developer.microsoft.com/en-us/microsoft-edge/webview2/

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