Integration: Service Desk

1.2.0+

Overview

You can connect **dynaBOARD** to JIRA Service Desk, to allow your customers to submit, view comment on tickets as well as initiate actions on them (e.g. escalate, close, cancel tickets). You need an active JIRA Service Desk license for your instance, and it works both for JIRA Server and JIRA Cloud.

For further information about the features and capabilities of Confluence please visit the Atlassian website.

> ⊗ **Importan notice**
>
> The JIRA Service Desk API still contains some experimental functions, which were needed for the integration in **dynaBOARD**. According to Atlassian, they should be almost final, so we do not expect any problems. We just want to let you know that in case you update your JIRA (server version) or if it gets updated by Atlassian (cloud), it might be possible that it breaks the integration at one point or the other.
>
> We will monitor this closely, and if it happens we will publish a hotfix to get it working again. We just felt you should know about this.

Features

The integration with **dynaBOARD** allows the following features:

- Assign customers in **dynaBOARD** to allow viewing of tickets for organizations in JIRA (see "Requirements" below)
- Customer users: view tickets by customer/organization (sortable and searchable)
- Customer users: create new tickets, including custom fields (see "Custom Fields" below)
- Customer users: actions on tickets (e.g. escalate, close, etc.)
- Automatic creation of new customer users in JIRA if they do not already exist

Requirements

Service Desk

You need an active JIRA Service Desk license (cloud or server) in your JIRA instance, else this feature will not work in **dynaBOARD**.

Access rights

In order to allow **dynaBOARD** to create new customer users it is necessary to grant the API user sufficient rights. If you use JIRA Cloud, this is already set up when you install/update the plugin. For JIRA Server, you need to give the API user the rights to create customers.

If the API user does not have these rights, it will not be possible for a customer user to create a new ticket if he is not already listed as a customer user in JIRA (and has access to the corresponding service desk).

Setup

Setup in JIRA

Organizations

As JIRA does not know which customer users in **dynaBOARD** belong to a single customer, we use the "Organization" object in JIRA to distinguish them. Otherwise all your customer users would see all tickets from all other customers - something you want to avoid. What you need to do before setting up Service Desk access in **dynaBOARD**:

- in JIRA: create an organization for every customer you give access to **dynaBOARD**. Just go to "Projects" > Your service desk name > Customers and click on "Add Organizations".

- in JIRA: if you already have customer users in your service desk (same page as above), click on the organization in the list (it is marked with a special icon in the user list, just look for the name), and click on "Add customers". Then add the customers by name.
- in JIRA: if you operate more than 1 service desk, and want to give certain customers access to multiple ones, make sure you add the organization there, too.
- in **dynaBOARD**: set up the customer in dynaBOARD with the organization name from JIRA (see below).

ⓘ **An example**

You have 3 customer companies, already set up in **dynaBOARD**:

- Company A with 3 users (1 already created a ticket in the past in JIRA Service Desk)
- Company B with 1 user (not in JIRA Service Desk)
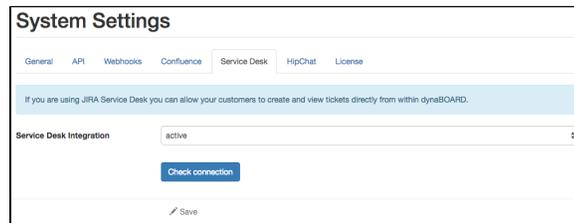- Company C with 5 users (every one of them already created a ticket in the past in JIRA Service Desk)

In JIRA, you create 3 Organizations, e.g. named "Company A", "Company B", "Company C". As Company A has 1 user already in JIRA Service Desk, you add this one to the "Company A" organization. If some of the others creates a ticket later in **dynaBOARD**, he/she will be created automatically in JIRA Service Desk by **dynaBOARD**.

For Company C you add all the 5 existing users to the Organization "Company C in JIRA.

Now you can edit the customer in dynaBOARD by assigning the organization to them. By this, all your Company A customer users will see all tickets for Company A, but none from the others.

Setup in dynaBOARD

Log in to **dynaBOARD** (with your partner user, not the admin user), and go to **Settings**. Then click on the tab **Service Desk**.

System Settings

| General | API | Webhooks | Confluence | Service Desk | HipChat | License |

If you are using JIRA Service Desk you can allow your customers to create and view tickets directly from within dynaBOARD.

Service Desk Integration   active

Check connection

✎ Save

Select "active" under **Service Desk Integration**. A button will then show up, labelled "Check connection". Click on it. If JIRA Service Desk is installed and has an active license, the check should succeed. If it fails, check the logs (for Server version), or contact our support (for Cloud version).

After that, click on **Save**.

Customer setup

Now you need to assign your customers in **dynaBOARD** to the organizations in JIRA. On the left menu, click on **Manage Customers**, then on **Edit** for the customer you want to set up the link. Then click on the tab **Service Desk**.

You will see a lot of information and some fields. Fill out the form as follows:

- **Organization**: select the organization from the drop down field which you created earlier in JIRA. The assignment to an organization allows the customer users to view all tickets for this organization in the ticket overview. If you do not already have an organization created for your customer in JIRA, please do so before selecting an organization here (see "Setup in JIRA", above).
- **Field ID for Organization**: this should be automatically determined by dynaBOARD. If you get an error message here, you need to find out and enter the field id manually - see below on how to do that.
- **Service Desk list**: here you can select the service desks (if you have more than one) to which the customer shall have access to. Make sure the organization you created in JIRA for this customer is added to the service desks you choose here.

After that, click on **Save**. If all works well, you should get a positive response.

Now log in as a customer and see if all works well - you should get a new menu item in the customer menu titles "Tickets".

Finding the field id manually

If you need to find the field id manually (in case auto-detection fails), proceed as follows:

- In your browser, log in to your JIRA instance
- open a new browser tab in the same browser, and enter the url https://url.to.jira.instance/rest/api /2/field (where "url.to.jira.instance" needs to be replaced with your JIRA url).
- You should get a wall of text, namely a JSON formatted output of your fields in JIRA. Look (e.g. press CTRL-F for find window) for the subject "sd-customer-organizations". Right after this you should see something like ""customId":11400". In this case, the id is 11400 (it will surely differ in your JIRA instance).

In case this does not work for you, or if you are having problems finding the id, please contact out support - we will be happy to help you.

Supported Custom Field Types

The following custom field types are currently supported by **dynaBOARD** for JIRA Service Desk - more will follow in future releases:

- url
- textarea
- float
- multiselect
- multicheckboxes
- radiobuttons
- select