

Oracle® Cloud

Create Jira Issues for Project Tasks in Oracle NetSuite



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Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

Topics:

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Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at <http://cloud.oracle.com>.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

About This Recipe

Use this recipe to create Jira issues for project tasks in Oracle NetSuite.



Note:

This recipe is available as **Oracle NetSuite — Jira | Create Issues for Project Tasks** in the Integration Store. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

Overview

This recipe creates issues in Jira for project tasks in Oracle NetSuite as per a schedule specified in Oracle Integration. For the project tasks to be picked by the recipe, they must be associated with a company and must not already be mapped to a Jira issue ID.

To use the recipe, you must install the recipe and configure the connections and other resources within it. Subsequently, you can activate and run the integration flow of the recipe manually or specify an execution schedule for it. When triggered, the integration flow reads all the project tasks meeting the criteria from the Oracle NetSuite instance and, in turn, creates corresponding issues on your Jira instance. Additionally, the recipe updates the Jira issue IDs in the corresponding project tasks in Oracle NetSuite.

Basic data associated with Jira issues, such as issue type, summary, priority, description, status, and comments are synchronized between the two platforms.

System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 (210129.2200.39462) or higher
- Oracle NetSuite
- Atlassian
- An account on Oracle NetSuite with the Administrator role
- An account on Atlassian with the Administrator role
- At least one Jira project on your Atlassian account. The project(s) can be in any of the Jira products, for example, Jira Work Management or Jira Software
- An Oracle NetSuite project with at least one project task on your Oracle NetSuite account

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Before You Install the Recipe

You must perform the following configuration tasks on your Oracle NetSuite and Atlassian instances in order to successfully connect to these external systems using Oracle Integration and create Jira issues for project tasks in Oracle NetSuite.

Configure Jira

To access Jira from Oracle Integration, you must perform the following configuration tasks:

1. Create an app, configure the OAuth 2.0 authorization code, and assign the scopes. See Prerequisites to Use the Authorization Code Credentials Security Policy.
2. Create a custom field in Jira to store the Oracle NetSuite project task ID. See [Create a new custom field](#). Specify the name of the field as `NetSuiteProjectTaskId`.
3. Obtain the project key of the Jira project in which you want the issues to be created. On your Jira instance:
 - a. Click **Projects**, and then **View All Projects**. A list of all projects you have access to is displayed. Select the project from the list.
 - b. Click **Summary** to view the Activity page. Note the **Key** displayed on the right pane.

Configure Oracle NetSuite

To successfully connect to Oracle NetSuite using Oracle Integration and create project tasks, you must perform certain general configurations on your Oracle NetSuite instance and some configurations specific to the security policy you'll use to access. In this recipe, you'll use the token-based authentication (TBA) security policy. In addition, create a custom field to store the Jira issue ID.

Log in to your Oracle NetSuite instance as an **Administrator** and execute the following tasks.

1. Perform the general configurations necessary to connect to Oracle NetSuite. See Enable Features on Oracle NetSuite and Assemble the Oracle NetSuite WSDL URL.
2. Perform the TBA-related configuration tasks. See Prerequisites for the Token-Based Authentication Security Policy.

Grant the following permissions to the role you'll create in this step.

Tab Name	Permission	Level
Transactions	Adjust Inventory	Full
Transactions	Cash Sale	Full
Transactions	Cash Sale Refund	Full
Transactions	Customer Deposit	Full
Transactions	Customer Payment	Full


Tab Name	Permission	Level
Transactions	Customer Refund	Full
Transactions	Fulfill Orders	Full
Transactions	Invoice	Full
Transactions	Item Shipment	Full
Transactions	Sales Order	Full
Transactions	View Payment Events	Full
Reports	Integration	View
Reports	Inventory	View
Reports	Sales	View
Lists	Accounts	Full
Lists	Cases	Full
Lists	Companies	Full
Lists	Contacts	Full
Lists	Custom Record Entries	Full
Lists	Customers	Full
Lists	Employees	Full
Lists	Items	Full
Lists	Perform Search	Full
Setup	REST Web Services	Full
Setup	SOAP Web Services	Full
Setup	User Access Tokens	Full

3. Obtain the internal ID of the project from which the recipe must read project tasks. From your home page, select **Lists**, then **Relationships**, and then **Projects**. Select the project and note the internal ID.
4. Create a custom field in your Oracle NetSuite instance to store the Jira issue ID. See [Creating Custom CRM Fields](#). While creating a custom field:
 - a. Specify the value for **Label** as `JiraTaskId` and **ID** as `_jirataskid`.
 - b. Check the **PROJECT TASK** box in the **Applies To** section.

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Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, in the **Use a recipe/accelerator** section, click **View all**.
2. Find the recipe you want to install, then click **Get**.
A message confirms that the recipe was successfully installed, and the recipe card shows **In use**.
3. Click **Configure**  on the recipe to configure its resources.
The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.


Configure the Oracle Jira Connection

Use the following steps to configure the **ORCL-BRT-JIRA_TASKSYNC_CONNECTION** connection.

1. In the Connections section, click the connection name.
2. In the Properties section, enter the Atlassian host name.
3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select Authorization Code Credentials .
Client ID	Enter the integration key of the OAuth application created in Jira. See Configure Jira .
Client Secret	Enter the client secret of the OAuth application created in Jira.
Scope	Enter <code>read:jira-work, manage:jira-project, write:jira-work, manage:jira-configuration, read:jira-user</code> .

4. Click **Save**. If prompted, click **Save** again.
5. Click **Provide Consent**.
6. In the resulting Sign in dialog, enter your Oracle Integration user name and password, and click **Sign in**.
You'll now be redirected to the Jira login page.
7. Enter your Jira account credentials and click **Continue** to log in.
You are now displayed a page that prompts you to authorize the connection to the Jira application created previously.

8. On the Jira web page, click **ACCEPT**.
You're informed that access to Jira is allowed. You can now switch back to the Jira Connection window of Oracle Integration to test your connection.
9. In the Oracle Jira Connection window, click **Test** to ensure that your connection is successfully configured.
A message confirms if your test is successful.
10. To return to the project workspace, click **Go back** .

Configure the Oracle NetSuite Connection

Use the following steps to configure the **ORCL-BRT-NS_TASKSYNC_CONNECTION** connection.

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:

Field	Information to Enter
WSDL URL	Enter the Oracle NetSuite WSDL URL; for example, <code>https://webservices.netsuite.com/wsd1/v2022_1_0/netsuite.wsd1</code> . See Configure Oracle NetSuite .


3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select Token Based Authentication .
Consumer Key	Enter the consumer key of the integration record in Oracle NetSuite. See Configure Oracle NetSuite .
Consumer Secret	Enter the consumer secret of the integration record in Oracle NetSuite.
Token	Enter the token ID provided by Oracle NetSuite.
Token Secret	Enter the token secret provided by Oracle NetSuite.
Account ID	Enter your Oracle NetSuite account identifier.



Note:

You must enter this information in capital letters.

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.
A message confirms if your test is successful.
6. To return to the project workspace, click **Go back** .

Update Integration Properties

You have to update the integration property values so that the Jira issues are created in the right project.

1. In the Integrations section, click **Actions** . . . on the integration flow, then select **Update property values**.
2. In the Update Property Values dialog, update the integration properties with appropriate values.
 - a. **NetSuiteProjectInternalId**: This integration property holds the internal ID of the Oracle NetSuite project with the project tasks. Enter the internal ID you obtained earlier. See [Configure Oracle NetSuite](#).
 - b. **FromAddress**: This integration property holds the email address from which run-time exception emails are sent. Enter an email address of your choice.
 - c. **ToAddress**: This integration property holds the email address to which run-time exception emails are sent. Enter an email address of your choice.
 - d. **JiraProjectKey**: This integration property holds the key of the Jira project in which the issues are created. Enter the key you obtained earlier. See [Configure Jira](#).
3. Click **Submit**.

You get a confirmation message that the integration properties have been updated successfully.


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Activate and Run the Recipe

After you've configured the connections and other resources, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project deployment selected, choose an appropriate tracing option, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

2. Run the recipe.
 - a. In the Integrations section of the project workspace, click **Actions**  on the integration flow, then select **Run**.
 - b. On the Configure and run page, click **Run**.

You've now successfully submitted the integration for execution.

Note:

You can also schedule this integration to run at a date, time, and frequency of your choosing. See [Define the Integration Schedule](#).

3. Monitor the running of the integration flow in Oracle Integration.
 - a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.

The recipe creates corresponding issues in Jira for the project tasks in Oracle NetSuite. Further, it updates Jira issue IDs in Oracle NetSuite.
 - b. To manage errors in your project, see [Manage Errors in a Project](#).
4. Log in to your Jira instance and check for new issues.
 - a. Click **Projects**, and then **View All Projects**. A list of all projects you have access to is displayed. Select the configured project from the list.
 - b. From your project's sidebar, select **Issues and filters**.
 - c. Select **All issues** to view all issues in the project.
5. Log in to your Oracle NetSuite instance and check if the Jira issue IDs are updated in the project tasks. From your home page, select **Lists**, then **Relationships**, and then **Projects**. Select the project and verify the value of the **JiraTaskId** field.

Related Documentation

- [Using the Oracle NetSuite Adapter with Oracle Integration 3](#)
- [Using the Jira Adapter with Oracle Integration 3](#)