

Oracle® Cloud

Create Project Tasks in Oracle NetSuite for Jira Issues



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Primary Author: Oracle Corporation

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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.

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About This Recipe

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



Note:

This recipe is available as **Jira — Oracle NetSuite | Create Project Tasks for Issues** 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 is an application-driven recipe that creates a project task in Oracle NetSuite whenever a task issue is created in Jira.

To use the recipe, you must install the recipe and configure the connections and other resources within it. When a new task issue is created in Jira, the integration flow of the recipe is triggered, and it creates a corresponding project task in the Oracle NetSuite instance. Basic data is synchronized between the two platforms.

System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 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
- At least one Oracle NetSuite project 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 Oracle NetSuite project tasks for task issues in Jira.

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`.

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.

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
Transactions	Customer Refund	Full
Transactions	Fulfill Orders	Full
Transactions	Invoice	Full
Transactions	Item Shipment	Full
Transactions	Sales Order	Full


Tab Name	Permission	Level
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. Create a project in your Oracle NetSuite instance. See [Creating a Project Record](#).
4. Create a custom field in your Oracle NetSuite instance. 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.wsdl</code> , where <code><NetSuite_application_version></code> is the version of the Oracle NetSuite application. For example, <code>v2015_1_0</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** .

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Activate and Run the Recipe

After you've configured the connections, 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.

Note:

The recipe's integration flow contains the following properties:

- **NetSuiteProjectInternalId**: This integration property holds the internal ID of the Oracle NetSuite project to which the new task issue will belong. Enter the internal ID of the project.
- **FromAddress**: This integration property holds the email address from which run-time exception emails are sent. Enter an email address of your choice.
- **ToAddress**: This integration property holds the email address to which run-time exception emails are sent. Enter an email address of your choice.

Optionally, you can add or update the value for these properties after the integration flow has been activated. For the procedure to update integration properties, see Steps 7 to 9 in *Override Design-Time Properties in an Integration*.

2. Run the recipe.
 - a. Create an issue in Jira. See [Create an issue](#).
 - b. While creating the issue, choose the issue type as Task.
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 now creates a corresponding project task in Oracle NetSuite for the new issue created in Jira.
 - b. To manage errors in your project, see *Manage Errors in a Project*.
4. Check for the new project task created in Oracle NetSuite. See [Task Views](#).

Related Documentation

- *Using the Oracle NetSuite Adapter with Oracle Integration 3*
- *Using the Jira Adapter with Oracle Integration 3*