Jira Integration for Alchemer Workflow

Overview

Jira is a project and issue tracking platform used by teams to plan, track, and manage work. Organizations use Jira to create and manage issues such as tasks, bugs, and stories across projects.

The Alchemer integration with Jira enables organizations to send workflow data to Jira in real time. Teams can create, update, and upsert issues directly from workflow data, keeping Jira synchronized and automating issue management so teams can act on feedback faster and reduce manual data entry.

Common uses for the Alchemer Jira integration

- Create Jira issues from workflow data to automatically capture feedback, bugs, or requests.
- Update existing Jira issues with workflow data.
- Upsert issues to update a matching issue or create a new one when none is found.

What can the Alchemer Jira integration do?

- Upsert issue
- Update issue
- Create issue

You will need

- Jira authentication (sign in with your Jira account). See Jira authentication.
- Your Jira site, project, and issue type
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
    - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Jira integration in workflow

Jira | Upsert issue

Upsert an issue in Jira. If a single matching issue is found it is updated; if none is found a new issue is created.

You will need:

- Jira authentication
- Your Jira site, project, and issue type
- Workflow fields used to find the issue
- Workflow fields used to upsert the issue

Configure the action

1. Open your workflow in **Workflow builder**.

2. On the right side, drag and drop the Jira connection where you want the action to trigger.

3. In the connection box, click the pencil icon in the top right corner.

4. Select **Jira | Upsert issue**.

5. **Jira | Authentication:** Select an existing authentication or create a new one.

6. **Jira | Select site:** Select the Jira site you want to use from the dropdown.

7. **Jira | Select project:** Select the Jira project you want to use from the dropdown.

8. **Jira | Select issue type:** Select the Jira issue type you want to use from the dropdown.

9. **Jira | Find issue:** Select the fields in this workflow that contain the values you want to use to find the issue in Jira. Use the Data prep options to control how inputs are handled (for example, strip HTML tags from inputs).

10. **Jira | Upsert issue:** Select the fields in this workflow that contain the values you want to use to upsert the issue in Jira.
    - **New issue:** if no matching issue is found, your Find and Upsert field mappings are combined to create a new Jira issue.
    - **Existing issue:** if a single matching issue is found, only your Upsert fields are applied to it.
    - **Important:** if more than one matching issue is found, no update is made. Map fields that uniquely identify the issue so the search returns a single result.
    - **Note:** for any fields that may require an array, use a comma-separated list in your Alchemer field.

11. Save the action.

Status codes

- 200: Successfully upserted Jira issue
- 202: Multiple Jira issues were found. No issues were updated
- 400: The external integration returned an error

Jira | Update issue

Update an issue in Jira.

You will need:

- Jira authentication
- Your Jira site, project, and issue type
- Workflow fields used to find the issue
- Workflow fields used to update the issue

Configure the action

1. Open your workflow in **Workflow builder**.

2. On the right side, drag and drop the Jira connection where you want the action to trigger.

3. In the connection box, click the pencil icon in the top right corner.

4. Select **Jira | Update issue**.

5. **Jira | Authentication:** Select an existing authentication or create a new one.

6. **Jira | Select site:** Select the Jira site you want to use from the dropdown.

7. **Jira | Select project:** Select the Jira project you want to use from the dropdown.

8. **Jira | Select issue type:** Select the Jira issue type you want to use from the dropdown.

9. **Jira | Find issue:** Select the fields in this workflow that contain the values you want to use to find the issue in Jira. Use the Data prep options to control how inputs are handled (for example, strip HTML tags from inputs).

10. **Jira | Update issue:** Select the fields in this workflow that contain the values you want to use to update the issue in Jira.

11. Save the action.

Status codes

- 200: Successfully updated Jira issue
- 201: Query ran successfully, but no Jira issues were found
- 202: Multiple Jira issues were found. No issues were updated
- 400: The external integration returned an error

Jira | Create issue

Create an issue in Jira.

You will need:

- Jira authentication
- Your Jira site, project, and issue type
- Workflow fields used to create the issue

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Jira connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Jira | Create issue**.
5. **Jira | Authentication:** Select an existing authentication or create a new one.
6. **Jira | Select site:** Select the Jira site you want to use from the dropdown.
7. **Jira | Select project:** Select the Jira project you want to use from the dropdown.
8. **Jira | Select issue type:** Select the Jira issue type you want to use from the dropdown.
9. **Jira | Create issue:** Select the fields in this workflow that contain the values you want to use to create the issue in Jira.
10. Save the action.

Status codes

- 200: Successfully created Jira issue
- 400: The external integration returned an error

Testing and Validation

How to test

- Trigger the workflow and monitor individual runs in the Monitor tab in your workflow.
    - Click on individual workflow runs to see metadata outputs.
- Confirm the expected issue is created, updated, or upserted in Jira.
- Use metadata for verification and debugging.

How to verify results

- Check the impacted issue in Jira.
- Ensure created or updated values match expectations.

Monitoring Integration Activity

Where to find logs

- Go to **Results → Monitor**
- Select the integration step you want to inspect.

What logs display

- Input/Output

Troubleshooting

Authentication issues

- Incorrect or expired OAuth session
- User lacks permission to access or modify the Jira issue

Lookup failures

- Invalid identifier values
- No matching issues, or more than one match when a unique result is required

Mapping errors

- Unsupported or invalid fields
- Incorrect formatting (for array fields, use a comma-separated list)

API errors

- Validation issues
- Endpoint restrictions

FAQs

What permissions do I need?

Integration Manager in Alchemer and a Jira account with rights to view or edit the referenced issues.

When does the integration run?

When the workflow triggers and reaches the integration step.

Can I use multiple Jira actions in one workflow?

Yes. Actions can work independently or together.

Why isn’t my data updating?

Check the Monitor logs for lookup issues, mapping problems, or API errors.

What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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