

TACBOT SYNC CONNECTOR FOR JIRA - USER GUIDE

1. Introduction

The Jira-Tacbot integration enables seamless synchronization between Jira issues and Tacbot cases. It allows Jira users to create and manage vendor-related issues while Tacbot maintains the centralized case lifecycle, communication history, SLA tracking, and vendor workflow management.

The integration supports controlled synchronization through a configurable Jira custom field and maintains linkage between both systems using external metadata mapping. It also synchronizes key entities such as issue descriptions, comments, attachments, priorities, and statuses by mapping Jira metadata to corresponding Tacbot fields.

This integration is designed to ensure consistent collaboration between operational teams working in Jira and workflows handled within Tacbot

2. Forge app

2.1 What is Atlassian Forge ?

Atlassian Forge is Atlassian's cloud-native app development platform that allows developers to build and deploy apps directly within the Atlassian ecosystem — including Jira Cloud, Confluence, and other Atlassian products.

The integration uses an Atlassian Forge app for Jira UI components and event listeners, while Tacbot synchronization and backend processing are handled through externally hosted APIs. This hybrid approach leverages Forge's security and Atlassian-managed infrastructure while enabling integration with external Tacbot services.

2.2 Why the Tacbot Integration Built on Forge ?

The Tacbot Jira integration is implemented as a Forge app for the following reasons:

- **Forge Invocation Tokens (FIT)** — Every event triggered by the Forge app (issue created, updated, comment added) includes a cryptographically signed JWT called a Forge Invocation Token.

The Tacbot backend validates this token against Atlassian's public JWKS before processing any webhook. This ensures that only legitimate Jira events from verified Forge app installations are accepted.

- **Forge Storage (KVS)** — The app uses Atlassian's built-in key-value storage to persist user profile data (name, email, account ID, site URL) per Jira user. This avoids the need for Tacbot to maintain a separate user registry for Jira identities.
- **Event Triggers** — Forge provides native lifecycle hooks for Jira events including issue created, issue updated, comment created, comment updated, and issue deleted. These are configured in the app manifest and fire automatically without any polling or webhook registration by the admin.
- **Global Page** — The Tacbot user profile form is rendered as a Forge Global Page — a full-page UI embedded inside Jira's navigation. Users access it from the Apps menu to register their email before creating synced issues.

2.3 Installation of the forge app

1. The Jira admin receives the Forge app installation link from Tacbot or navigates to the Atlassian Marketplace.
2. Admin clicks **Install** on the app listing page.
3. Jira prompts for permission review — the app requests:
 - Read/write access to issues
 - Read/write access to custom fields and screens
 - Read access to user profiles
4. Admin clicks **Accept** to complete installation.

2.4 Automatic Setup During Installation

Once installed, the app automatically performs the following without any manual action:

Step 1 — Field Check

- The app checks if a custom field with "tacbot" in the name already exists.
- If found, it reuses the existing field ID.
- If not found, it proceeds to create one.

Step 2 — Field Creation

The app creates a new custom field called '**SYNC WITH TACBOT**' which is of type multi-checkbox.

Step 3 — Option Addition

- The app fetches the field's context.
- Adds a single checkbox option with value **Yes**.

Step 4 — Screen Assignment

- The app fetches all screens in the Jira instance.
- For each screen and each tab within that screen:
 - Check if the field is already present.
 - If not, adds the field.
 - Moves the field to appear immediately after the **Summary** field.

Step 5 — Field Description

- The app sets the field's help text/description in all field configurations where it appears.

2.4.1 Sync with Tacbot Field — Specification

Field Properties

PROPERTY	VALUE
Field name	Sync with Tacbot
Field type	Multi-checkbox
Options	Yes
Position on screen	Below summary
Visible on	All screens and tabs

Field Description

Enable this option to create or update a Tacbot case for this Jira issue.

Summary format: <vendor_name> : <service_type> | Summary description

Note: <vendor_name> and <service_type> must match the values configured in Tacbot.

Example- Cisco : Connectivity | Unable to establish VPN connection

Cisco | Router not responding

2.4.2 Field Availability Across Projects and Screens

The Sync with Tacbot field uses a global field context. However, how it gets attached to a project's issue screens depends on the project type:

Company-managed projects: The field is automatically added to all screens via the project's screen scheme, and will appear on issue creation, edit, and view screens without any manual action.

Team-managed projects: Jira does not provide an API to automatically attach fields to team-managed project layouts. The field will be available/searchable in the project's field picker (since it has a global context), but a Jira admin must manually add it to each relevant work type. See Section 2.4.3 below.

Shared Screen Consideration: Screens in Jira can be shared across multiple projects. If a screen used by one of your JSM projects is also used by another project — JSM or otherwise — this field will become visible there as well. This does not cause any data to sync for that project; a Tacbot case is still only created when the checkbox is explicitly checked and vendor/service information is present.

Create Task

Required fields are marked with an asterisk *

Space *

TacBot ITSM (TI)

Work type *

Task

Request type *

No request type

Work items can't be shared with customers, and may not work as expected.

Use request type fields ⓘ

Summary *

Summary is required

Sync with Tacbot

Yes

Enable this option to create or update Tacbot case for this Jira issue,

Summary format: <vendor_name> : <service_type> | Summary description

Note: <vendor_name> and <service_type> should match the values configured in Tacbot.

Example: Cisco : Connectivity | Unable to establish VPN connection

Components

Select Component

Create another

Cancel Create

Note: If new JSM projects are created after installation, they will not automatically have the field attached. Rather than adding it manually via **Jira Settings** → **Screens**, open the Tacbot Sync Connector app from any project's sidebar and click "**Configure Sync With Tacbot Field**". This action is available only to Jira administrators.

Tacbot Sync Connector

Profile Complete

Name: John
Email: john@example.com
Just saved to Forge Storage

Issue creation will now include your details in the payload.

Edit Details

Check What's in Storage

Configure "Sync with Tacbot" Field

Synchronize the **"Sync with Tacbot"** across all Jira Service Management projects. Company managed projects are updated automatically. Team-managed projects require the field to be added manually after synchronization.

This automatically attaches the field to all company-managed JSM projects found on the site. Team-managed projects still require one manual step — see Section 2.4.3 below.

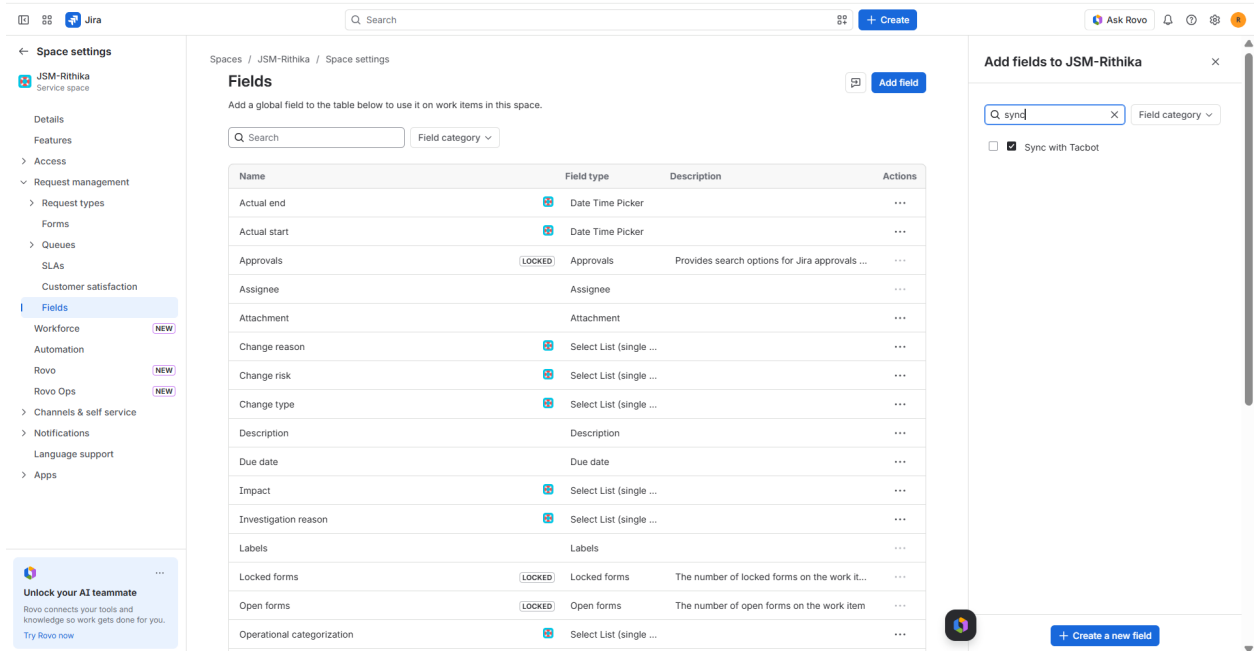
2.4.3 Team-Managed Projects — Manual Field Attachment Required

Jira Cloud has two project types: **company-managed** and **team-managed**. Team-managed projects manage their fields locally per work type, rather than through shared screens — this is a Jira platform design choice, not a limitation of the Tacbot app.

For team-managed JSM projects, the Jira admin must manually attach the field:

1. Open the team-managed project.
2. Go to **Space settings** → **Fields**.

3. Click **Add field**.
4. Search for **"Sync with Tacbot"** and add it
5. Go to the relevant work type's field layout and add the field there so it appears on issue creation.



The screenshot shows the Jira Space settings page for 'JSM-Rithika'. The 'Fields' section is active, displaying a table of fields. A sidebar on the right shows the 'Add fields to JSM-Rithika' dialog. The search bar in the dialog contains 'sync', and the 'Sync with Tacbot' checkbox is checked. The main table lists various fields with their names, types, descriptions, and actions.

Name	Field type	Description	Actions
Actual end	Date Time Picker		...
Actual start	Date Time Picker		...
Approvals	Approvals	Provides search options for Jira approvals ...	...
Assignee	Assignee		...
Attachment	Attachment		...
Change reason	Select List (single ...)		...
Change risk	Select List (single ...)		...
Change type	Select List (single ...)		...
Description	Description		...
Due date	Due date		...
Impact	Select List (single ...)		...
Investigation reason	Select List (single ...)		...
Labels	Labels		...
Locked forms	Locked forms	The number of locked forms on the work it...	...
Open forms	Open forms	The number of open forms on the work item	...
Operational categorization	Select List (single ...)		...

2.4.4 Re-Syncing the Field for New or Existing Projects

Since new JSM projects can be created after the app is installed, the app provides a manual **Sync** action so admins don't need to reinstall the app to pick up new projects.

Steps:

1. Open the Tacbot Sync Connector app from any project's sidebar.
2. On the "Profile Complete" screen, click **"Sync with Tacbot Field to JSM Projects."**
3. The app will:

- Confirm/create the field's global context.
- Automatically attach the field to screens for all company-managed JSM projects.
- Report which projects are team-managed and still need the manual step described in Section 2.4.3.

Tacbot Sync Connector

Profile Complete

Name: John

Email: john@example.com

Just saved to Forge Storage

Issue creation will now include your details in the payload.

Edit Details

Check What's in Storage

Configure "Sync with Tacbot" Field

Synchronize the "Sync with Tacbot" across all Jira Service Management projects. Company managed projects are updated automatically. Team-managed projects require the field to be added manually after synchronization.

Permissions: The **Configure Sync with Tacbot Field** button is visible **only to Jira administrators**. Non-admin users can access the Tacbot Sync Connector app to manage their profile, but they cannot view or use this configuration option.

Tacbot Sync Connector

Profile Complete

Name: John
Email: john@example.com
Just saved to Forge Storage

Issue creation will now include your details in the payload.

Edit Details

Check What's in Storage

Configure "Sync with Tacbot" Field

Synchronize the **"Sync with Tacbot"** across all Jira Service Management projects. Company managed projects are updated automatically. Team-managed projects require the field to be added manually after synchronization.

⚠️ "test-space(TM)" (TS) is a team-managed project. Add the field manually: go to that project → Project settings → Issue types → select the type → Fields → Add field → "Sync with Tacbot".

- ☒ "Demo service space" (DEMO) — field context and screens updated automatically.
- ☒ "JSM-Rithika" (JR) — field context and screens updated automatically.
- ☒ "TacBot ITSM" (TI) — field context and screens updated automatically.

2.4.5 Service Desk Projects — Request Type Configuration (Manual Step Required)

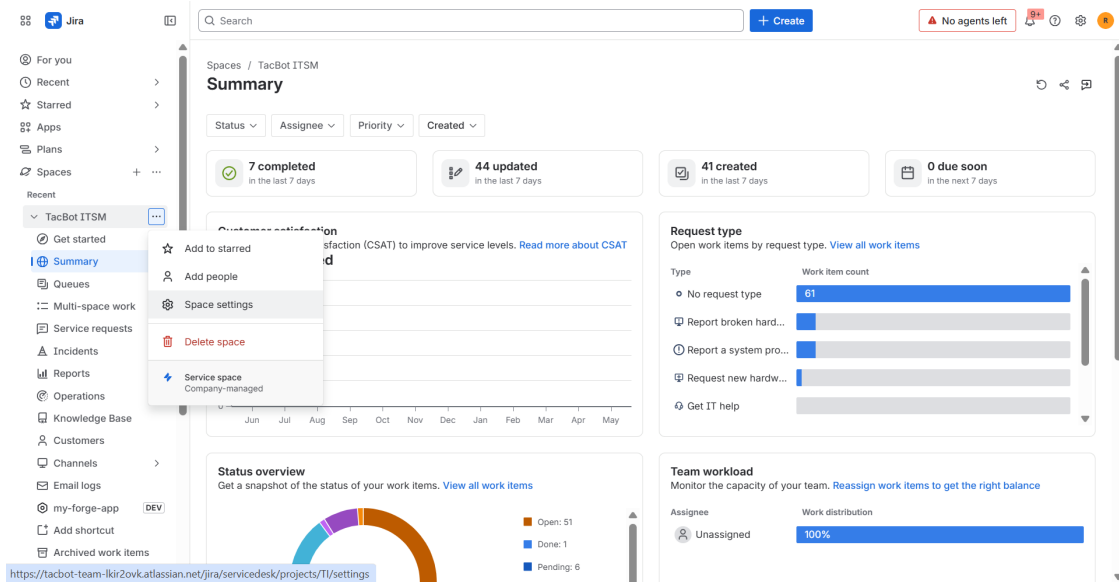
For Jira Service Management (Service Desk) projects, Jira uses Request Types to define what fields are visible to end users (customers) on the customer portal. Adding a field to a screen is not sufficient — the field must also be explicitly added to each relevant Request Type for it to appear on the portal form.

This step is not automated and must be performed manually by the Jira admin.

Steps to Add the Field to a Request Type :

1. Navigate to the Service Management project in Jira.

2. Go to **Project Settings** → **Request Types**.



Spaces / TacBot ITSM

Summary

Status ▾ Assignee ▾ Priority ▾ Created ▾

7 completed in the last 7 days

44 updated in the last 7 days

41 created in the last 7 days

0 due soon in the next 7 days

Request type
Open work items by request type. [View all work items](#)

Type	Work item count
No request type	61
Report broken hard...	
Report a system pro...	
Request new hardw...	
Get IT help	

Status overview
Get a snapshot of the status of your work items. [View all work items](#)

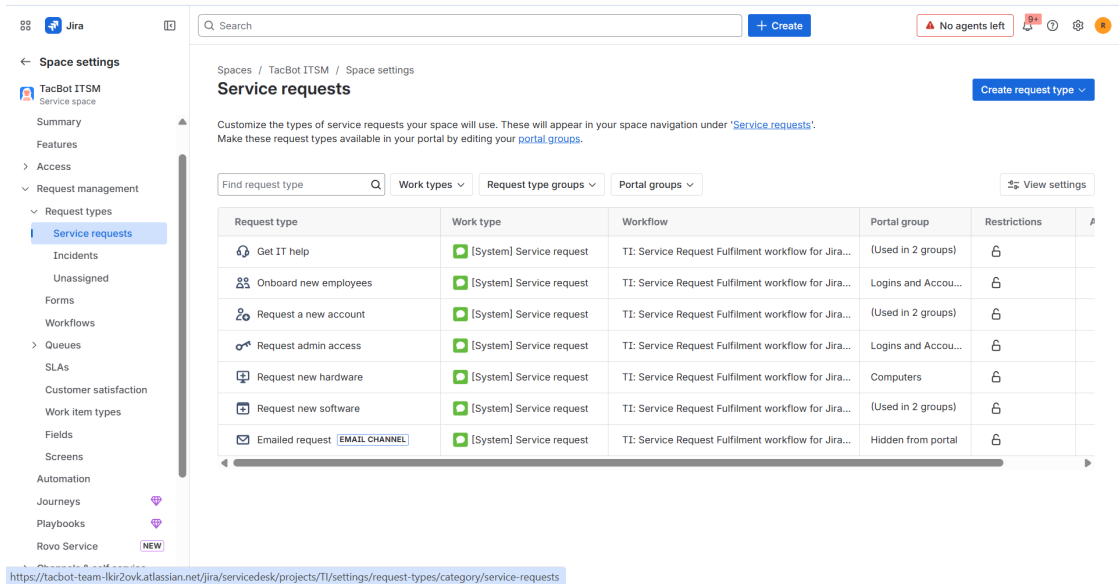
Open: 51
Done: 1
Pending: 6

Team workload
Monitor the capacity of your team. [Reassign work items to get the right balance](#)

Assignee Work distribution

Unassigned 100%

<https://tacbot-team-lkir2ovk.atlassian.net/jira/servicedesk/projects/TI/settings>



← Space settings

TacBot ITSM Service space

Summary Features

> Access

> Request management

> Service requests

Incidents Unassigned Forms Workflows SLAs > Queues Customer satisfaction Work item types Fields Screens Automation Journeys Playbooks Rovo Service NEW

Spaces / TacBot ITSM / Space settings

Service requests

Create request type ▾

Customize the types of service requests your space will use. These will appear in your space navigation under 'Service requests'. Make these request types available in your portal by editing your [portal groups](#).

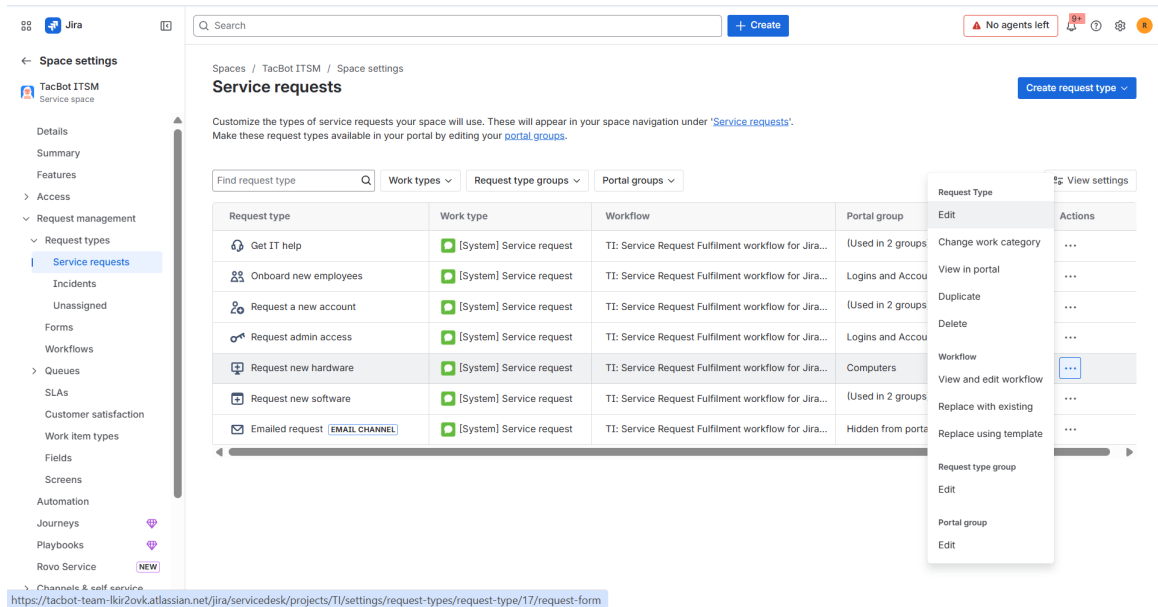
Find request type 🔍 Work types ▾ Request type groups ▾ Portal groups ▾ View settings ⚙️

Request type	Work type	Workflow	Portal group	Restrictions
Get IT help	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	(Used in 2 groups)	🔒
Onboard new employees	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Logins and Accou...	🔒
Request a new account	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	(Used in 2 groups)	🔒
Request admin access	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Logins and Accou...	🔒
Request new hardware	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Computers	🔒
Request new software	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	(Used in 2 groups)	🔒
Emailed request EMAIL CHANNEL	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Hidden from portal	🔒

<https://tacbot-team-lkir2ovk.atlassian.net/jira/servicedesk/projects/TI/settings/request-types/category/service-requests>

3. Select the Request Type where the **Sync with Tacbot** field should appear (e.g. *General Service Request*, *Bug Report*, *IT Help*).

4. Click **Edit fields** on the selected Request Type.



Spaces / TacBot ITSM / Space settings

Service requests

Customize the types of service requests your space will use. These will appear in your space navigation under 'Service requests'. Make these request types available in your portal by editing your [portal groups](#).

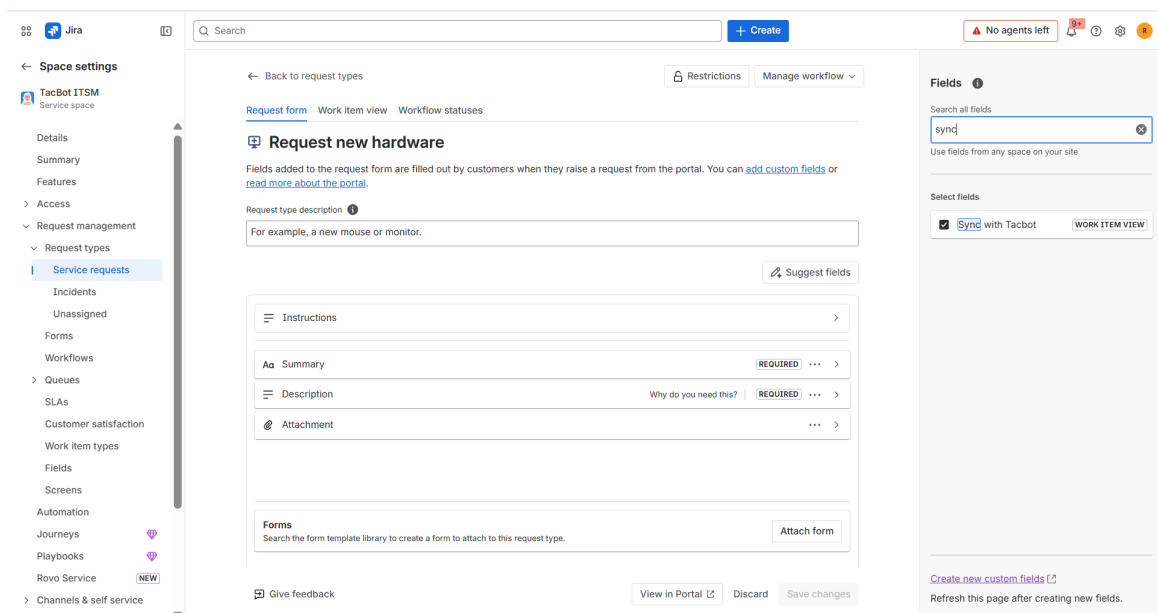
Find request type Work types Request type groups Portal groups

Request type	Work type	Workflow	Portal group	Request Type	Actions
Get IT help	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	(Used in 2 groups)	Change work category	...
Onboard new employees	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Logins and Accou...	View in portal	...
Request a new account	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	(Used in 2 groups)	Duplicate	...
Request admin access	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Logins and Accou...	Delete	...
Request new hardware	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Computers	Workflow	...
Request new software	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	(Used in 2 groups)	View and edit workflow	...
Emailed request EMAIL CHANNEL	[System] Service request	TI: Service Request Fulfilment workflow for Jira...	Hidden from porta...	Replace with existing	...
				Replace using template	...

Request type group
Edit
Portal group
Edit

<https://tacbot-team-ikiz2ovk.atlassian.net/jira/servicedesk/projects/TI/settings/request-types/request-type/17/request-form>

5. Search for **Sync with Tacbot** , drag and place it where it is needed.



← Back to request types Restrictions Manage workflow

[Request form](#) [Work item view](#) [Workflow statuses](#)

Request new hardware

Fields added to the request form are filled out by customers when they raise a request from the portal. You can [add custom fields](#) or [read more about the portal](#).

Request type description ⓘ
For example, a new mouse or monitor.

REQUIRED

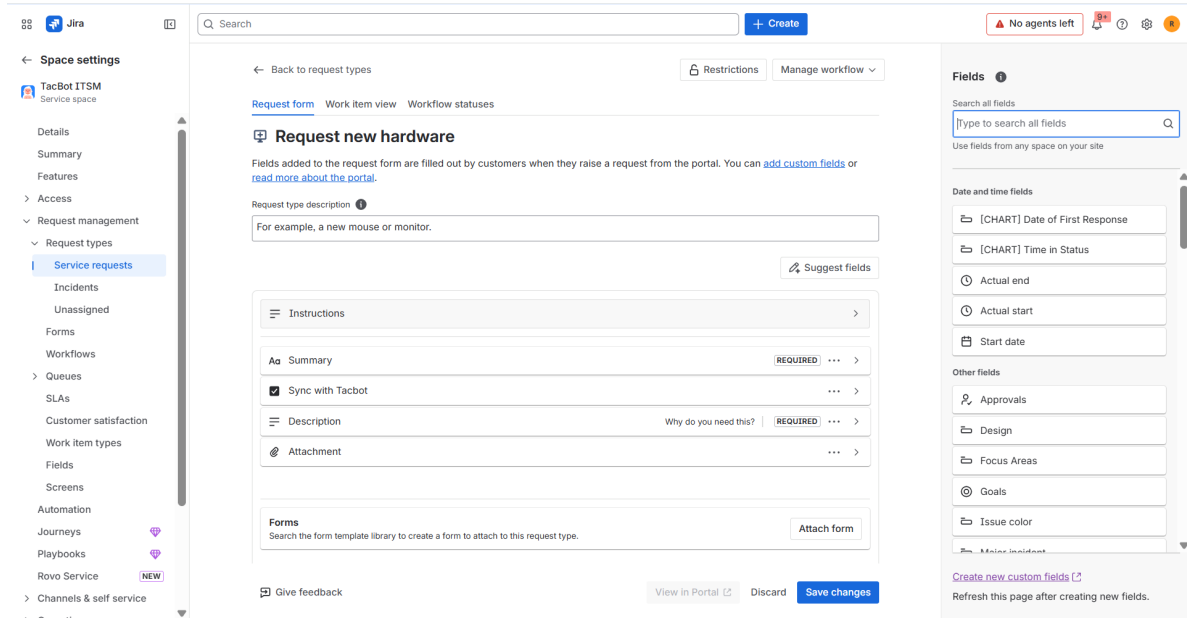
Why do you need this? REQUIRED

Search the form template library to create a form to attach to this request type.

Fields ⓘ
Search all fields
synd
Use fields from any space on your site

Select fields
☒ **Sync with Tacbot**

[Create new custom fields](#) ⓘ
Refresh this page after creating new fields.

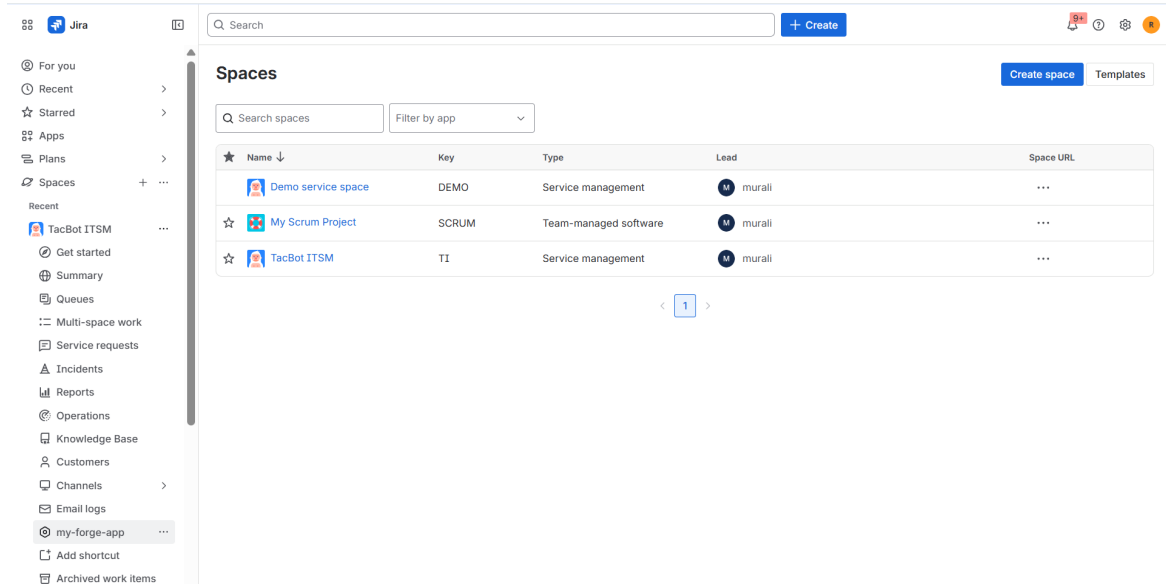


6. When the field is added to the request portal, Jira may remove the field description from the portal view. Edit the field in the portal configuration and manually re-add the description/help text if required.

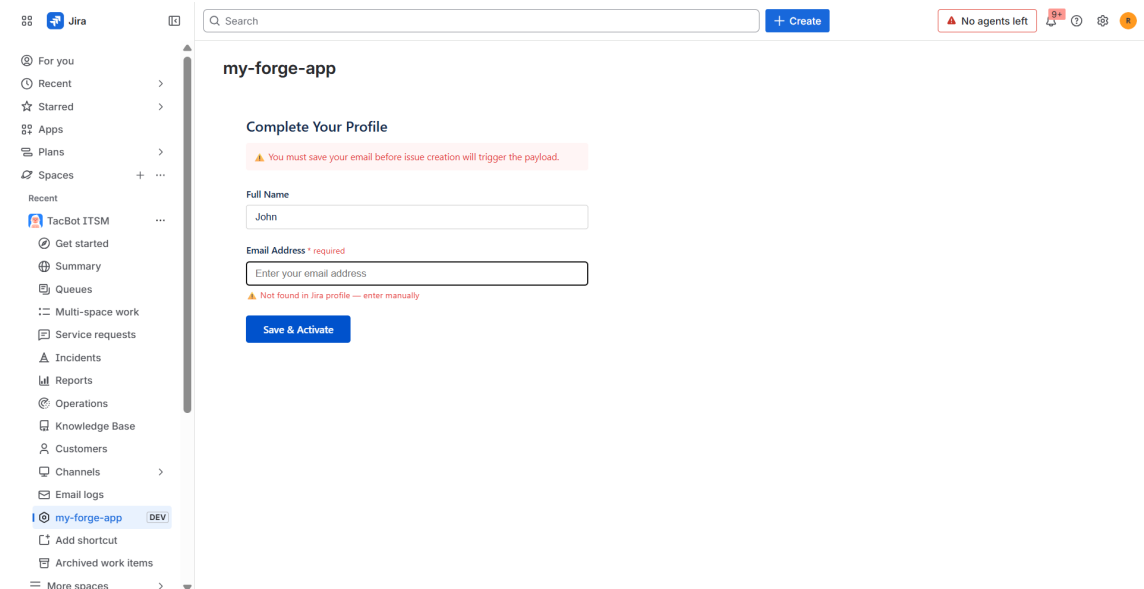
Add this description :

Enable this option to create or update Tacbot case for this Jira issue.\\
 \\Summary format: <vendor_name> : <service_type> | Summary
 description\\Note: <vendor_name> and <service_type> should match the
 values configured in Tacbot.\\ \\Example: Cisco : Connectivity | Unable to
 establish VPN connection

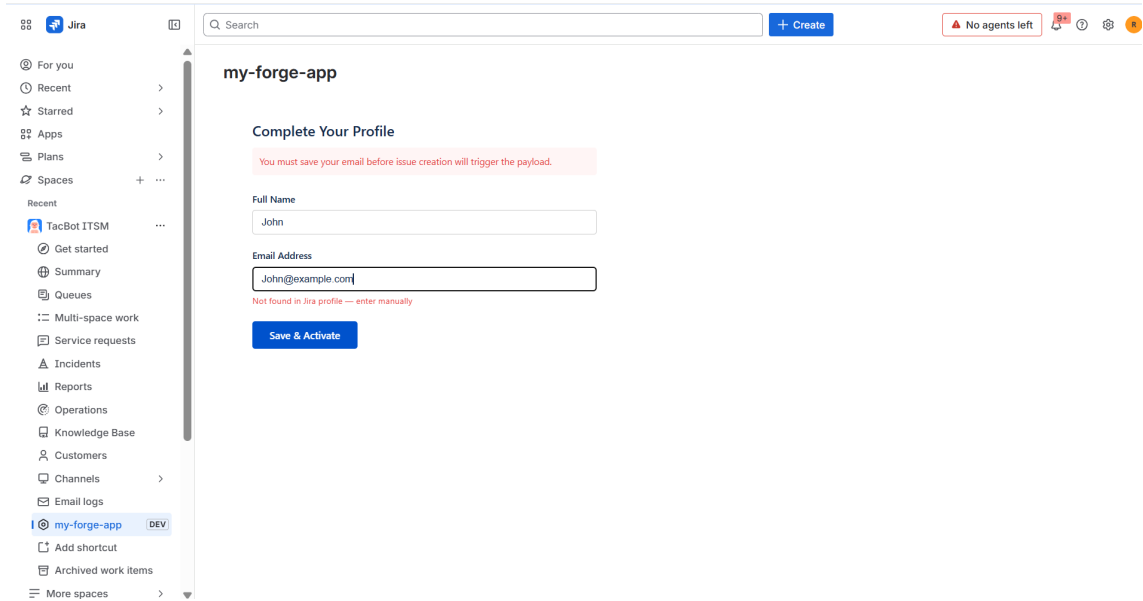
1. Open the Jira project sidebar and click on the forge app



2. The app screen opens showing **Complete Your Profile**.
3. The app tries to auto-fill **Full Name** and **Email address** from the Jira profile if available.



4. Enter or confirm the email address. Click **Save & Activate**.



my-forge-app

Complete Your Profile

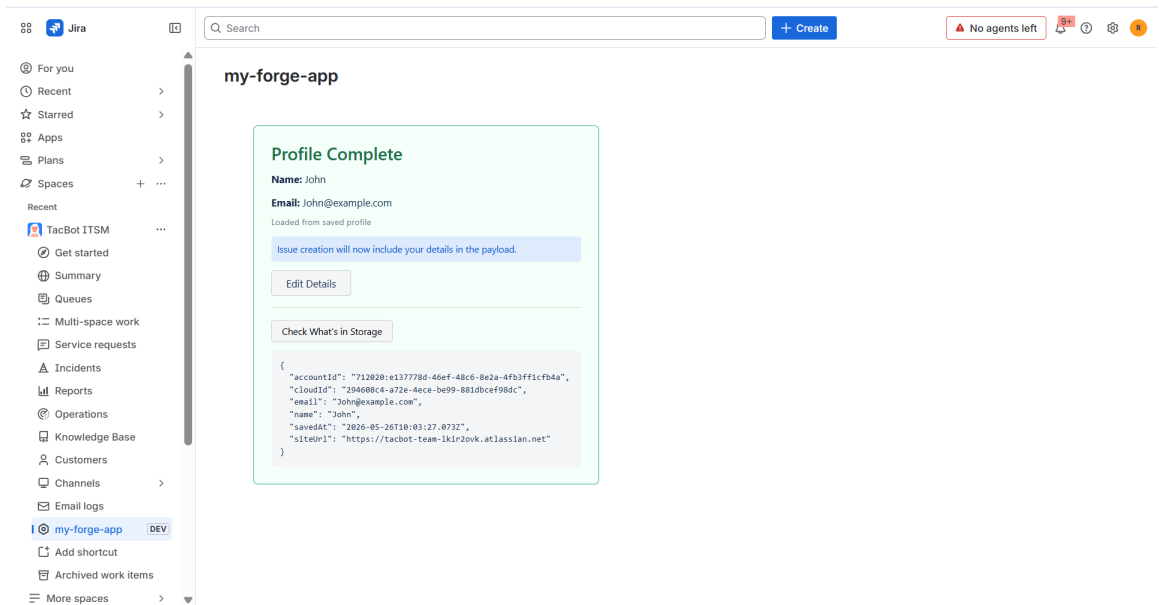
You must save your email before issue creation will trigger the payload.

Full Name
John

Email Address
John@example.com
Not found in Jira profile — enter manually

Save & Activate

5. Details are saved to Forge Storage with the user's Jira account ID.



my-forge-app

Profile Complete

Name: John
Email: John@example.com
Loaded from saved profile

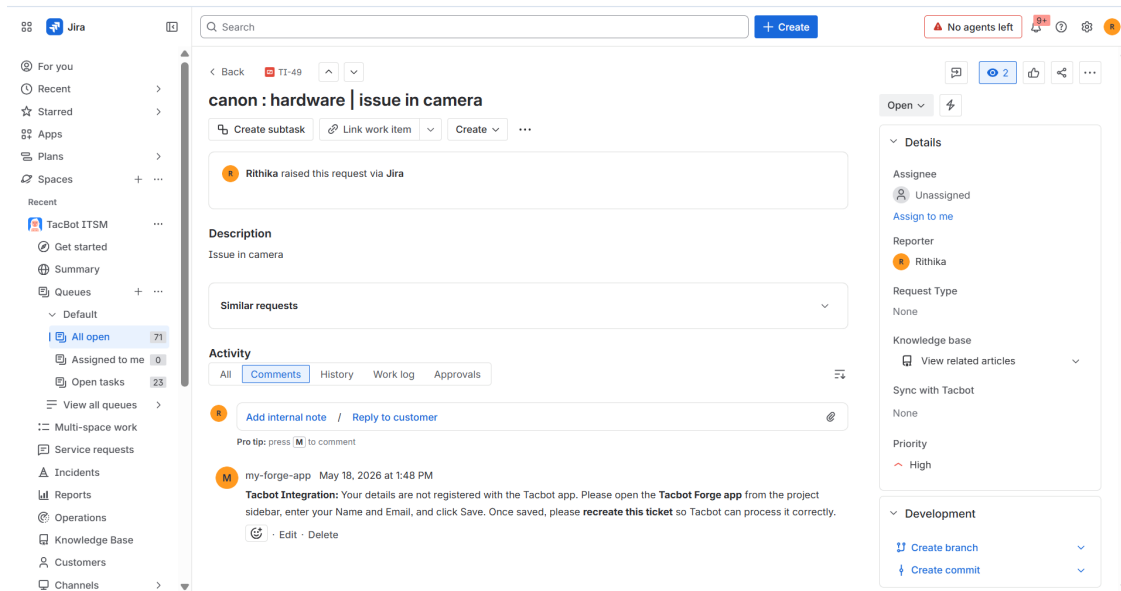
Issue creation will now include your details in the payload.

Edit Details

Check What's in Storage

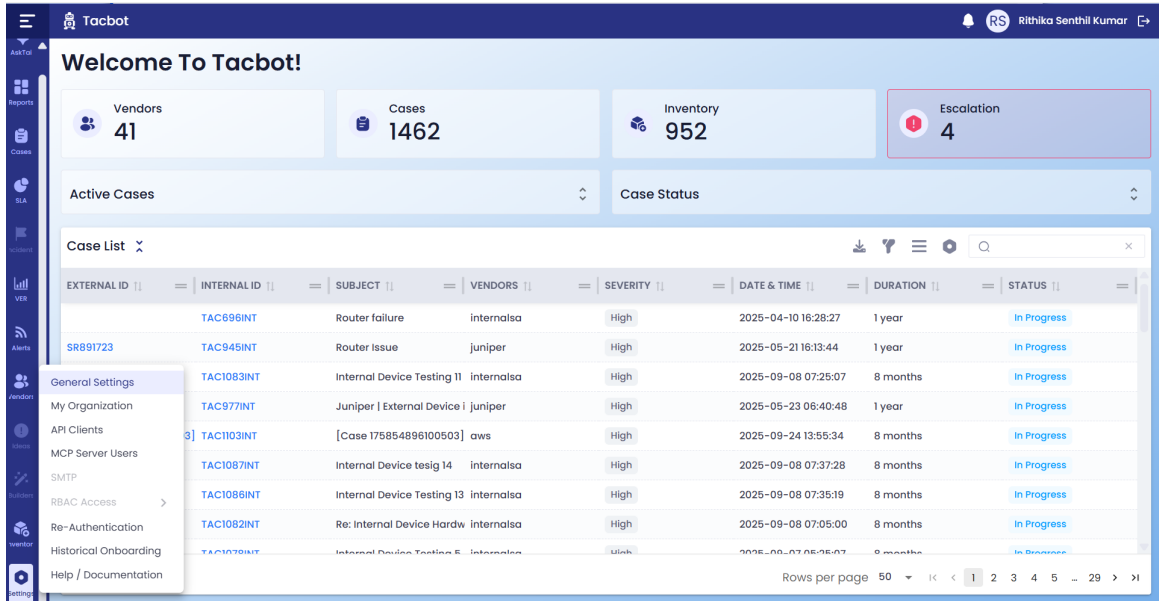
```
{
  "accountId": "712920:e13778d-46ef-48c6-8e2a-4fb3ff1cfb4a",
  "cloudId": "294688c4-a72e-4ece-be99-881dbcef98dc",
  "email": "John@example.com",
  "name": "John",
  "savedAt": "2026-05-26T18:03:27.073Z",
  "siteUrl": "https://tacbot-team-lki2ovk.atlassian.net"
}
```

6. **Note:** If a user creates a Jira issue without completing their profile, the app posts a comment on the issue instructing them to register and recreate the ticket.



2.6 Configure Jira integration settings in TacBot.

1. After the Forge app is installed, Configure the Jira integration from the Tacbot General Settings panel.



Welcome To Tacbot!

Vendors: 41 | Cases: 1462 | Inventory: 952 | Escalation: 4

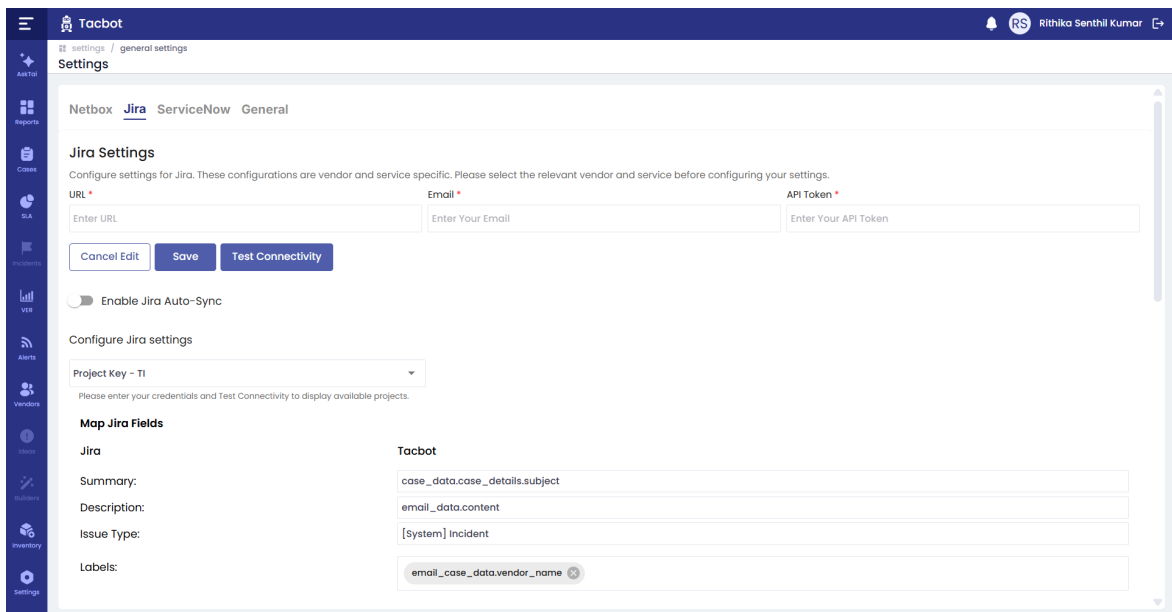
Active Cases | Case Status

Case List

EXTERNAL ID	INTERNAL ID	SUBJECT	VENDORS	SEVERITY	DATE & TIME	DURATION	STATUS
SR891723	TAC696INT	Router failure	Internalsa	High	2025-04-10 16:28:27	1 year	In Progress
	TAC945INT	Router Issue	Juniper	High	2025-05-21 16:13:44	1 year	In Progress
	TAC1083INT	Internal Device Testing 11	Internalsa	High	2025-09-08 07:25:07	8 months	In Progress
	TAC977INT	Juniper External Device i	Juniper	High	2025-05-23 06:40:48	1 year	In Progress
	TAC1103INT	[Case 175854896100503]	aws	High	2025-09-24 13:55:34	8 months	In Progress
	TAC1087INT	Internal Device tesig 14	Internalsa	High	2025-09-08 07:37:28	8 months	In Progress
	TAC1086INT	Internal Device Testing 13	Internalsa	High	2025-09-08 07:35:19	8 months	In Progress
	TAC1082INT	Re: Internal Device Hardw	Internalsa	High	2025-09-08 07:05:00	8 months	In Progress
	TAC1070INT	Internal Device Testin E	Internalsa	High	2025-09-07 06:36:07	8 months	In Progress

Rows per page: 50 | 1 2 3 4 5 ... 29 >

2. Configure the required fields:



Settings

Netbox | **Jira** | ServiceNow | General

Jira Settings

Configure settings for Jira. These configurations are vendor and service specific. Please select the relevant vendor and service before configuring your settings.

URL * | Email * | API Token *

Enter URL | Enter Your Email | Enter Your API Token

Cancel Edit | Save | Test Connectivity

☐ Enable Jira Auto-Sync

Configure Jira settings

Project Key - TI

Please enter your credentials and Test Connectivity to display available projects.

Map Jira Fields

Jira

Summary: | Description: | Issue Type: | Labels:

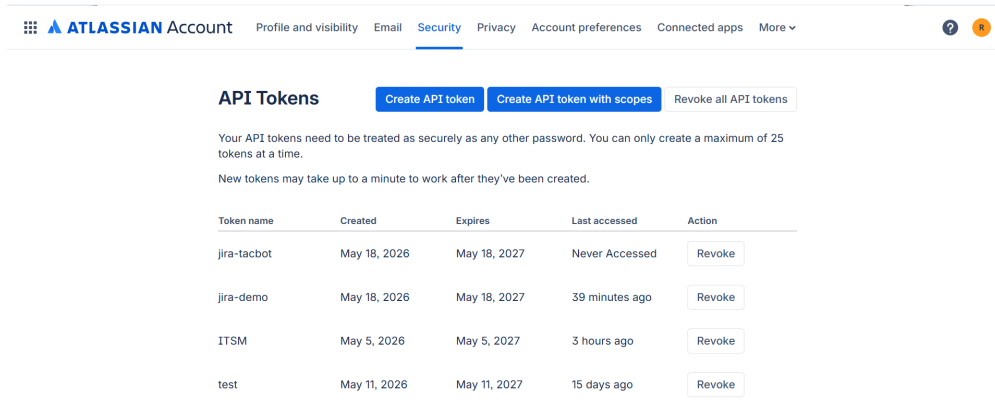
Tacbot

case_data.case_details.subject | email_data.content | [System] Incident | email_case_data.vendor_name

FIELD	DESCRIPTION
Jira Instance URL	Base URL of the Jira Cloud instance (e.g. https://yourcompany.atlassian.net)
Email	Admin email used to authenticate Jira API calls
API Token	API token generated from Atlassian account settings (<i>steps to create api token is given below</i>)
Project Key	The Jira project key to restrict case creation (e.g. TI)
Issue Type	Issue type to filter (e.g. Bug, Task, Story)
Close Case Status	StatusJira status name that should trigger Tacbot case closure (e.g. Done)

3. Steps to create Atlassian API token

- a. Log in to <https://id.atlassian.com/manage-profile/security/api-tokens>.



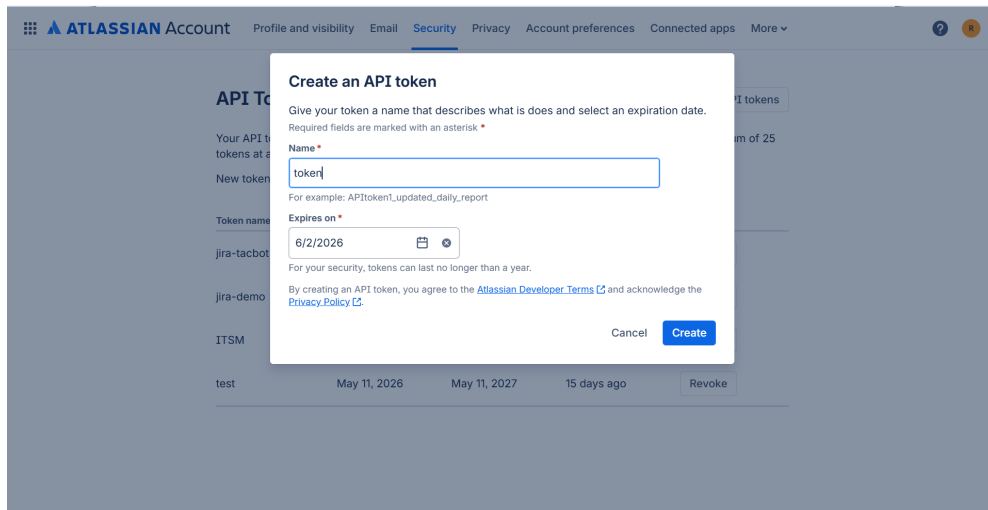
API Tokens [Create API token](#) [Create API token with scopes](#) [Revoke all API tokens](#)

Your API tokens need to be treated as securely as any other password. You can only create a maximum of 25 tokens at a time.

New tokens may take up to a minute to work after they've been created.

Token name	Created	Expires	Last accessed	Action
jira-tacbot	May 18, 2026	May 18, 2027	Never Accessed	Revoke
jira-demo	May 18, 2026	May 18, 2027	39 minutes ago	Revoke
ITSM	May 5, 2026	May 5, 2027	3 hours ago	Revoke
test	May 11, 2026	May 11, 2027	15 days ago	Revoke

- Select **Create API token**.
- Give your API token a name that describes its purpose.
- Select an expiration date for the API token.
 - Token expiration is 1 to 365 days.
- Select **Create**.



Create an API token

Give your token a name that describes what it does and select an expiration date. Required fields are marked with an asterisk *

Name *

token

For example: APITokenUpdatedDailyReport

Expires on *

6/2/2026

For your security, tokens can last no longer than a year.

By creating an API token, you agree to the [Atlassian Developer Terms](#) and acknowledge the [Privacy Policy](#).

[Cancel](#) [Create](#)

- Select **Copy to clipboard**, then paste the token to your script, or save it somewhere safe.
- Map the Jira priority levels to the Tacbot's priority levels.

Example:

Priority Mapping

Map Jira priority names to Tacbot priority levels. If no mapping is selected, the default priority will be used.

Jira Priority	→	Tacbot Priority	
Medium	→	Neutral	 
High	→	High Priority	 
Highest	→	Critical	 
Low	→	Low Priority	 
Lowest	→	Critical	  

5. Map the Jira status levels to the Tacbot's status levels.

Example:

Status Mapping

Map Jira status names to Tacbot statuses. If no mapping is selected, the default status will be used.

Jira Status	→	Tacbot Status	
Open	→	Created	 
Work In Progress	→	In Progress	 
Pending	→	On Hold	 
Completed	→	Closed	 
e.g. In Review, Blocked	→	Select status	  

When a Tacbot case is closed, which Jira workflow status should the related issue transition to?

Completed

Enter the Jira status name to use when a Tacbot case is closed.

6. Tacbot automatically detects and caches the **sync with tacbot** custom field from the jira instance. This is used to:

- Control bidirectional synchronization between Jira and Tacbot,
- Automatically enable the sync field when a Tacbot case is synced to Jira, ensuring subsequent Jira updates are synced back to the Tacbot case.

2.7 Uninstallation of forge app

When the Forge app is uninstalled from jira instance:

- The **Sync with Tacbot** custom field remains in Jira (Jira does not auto-delete custom fields on app uninstall).
- Forge Storage data (user profiles, sync-disabled timestamps) is cleared.
- Existing Tacbot cases are unaffected.
- New Jira issues will not trigger Tacbot webhooks.

To fully remove the field, a Jira admin must manually delete it from **Jira Settings** → **Custom Fields**.