Introduction to IntakeForms

The Raley IntakeForms add-on is an application that opens your JIRA for external users by allowing them to submit data into it. By "external user" we mean any person who doesn't have a JIRA account like people from non IT departments, your partners or customers.

One of the most common use cases that fall into this category is a corporate helpdesk that runs JIRA to facilitate its ticketing process but *initially* receives issues from a specialized website. This is quite similar to other JIRA add-ons that create JIRA tickets from incoming email, however, with IntakeForms, the ticket is created from a HTML-based web-form that is explicitly bound to your corporate JIRA to streamline the process.

To start using IntakeForms you need to:

1. Configure a web-form in your JIRA
2. Integrate it with a website or Confluence of your choice

The former is normally performed by a JIRA administrator while the latter can be done by anyone who has access to the website or Confluence where you need to publish the form. When creating a form you, as a JIRA administrator, have to decide on the following:

1. JIRA Project that the form is bound to
2. Issue type the form is bound to
3. JIRA Fields that you want to be populated by external users

Once you've chosen project and issue type, Raley will poll your JIRA to see what fields are available, their semantics, labels etc. You choose as many fields as you need and Raley will show automatically how the end web-form will look like. With every field you can customize labels, descriptions, HTML control bound to it and rules. When you are satisfied with the form look-n-feel you can save it and on the list of forms there will be a link to get integration code for specific web form. Copy-paste it and insert into the website of your choice.

Happy forming!