



Help Desk Migration

# JIRA SERVICE MANAGEMENT DATA MIGRATION CHECKLIST



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The data migration is undoubtedly far from being easy. So, to make it less complicated, we've put up a detailed data migration checklist exclusive to Jira Service Management. Let's read on!

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Before diving into the details, pay attention that our tool can't migrate such records as:

- CC users (migrate CC users into a custom field instead)
- Groups
- Inline images

If you still want to import the data listed above, request a customized migration. [Contact our team](#) to discuss the details.

**Note:** When importing your Knowledge base into Jira Service Management, its dates will change from the original ones to the dates of data migration itself.

## BEFORE YOU SET UP THE MIGRATION

Run through the steps given above to prepare for Jira Service Management import:

**Note:** During the Demo Migration and Full Data Migration the tickets and related data move similarly. If some data won't be migrated during the Demo Migration, it will not migrate during the Full Data Migration.

Once the Demo Migration is done, download reports for migrated/skipped/failed records and check if everything migrated as you expected. If something isn't clear, reach out to our support team.

### 1. DECIDE ON A DATE

You need enough time to thoroughly prepare for the transfer (by starting to close tickets and filter your data, for instance). So choose the day with the smallest amount of help desk related work.

### 2. INFORM YOUR TEAM

Ensure to inform your agents about Jira Service Management migration first, so they can start closing tickets before the data transfer date. Besides, agents can get enough time to get used to a new platform.



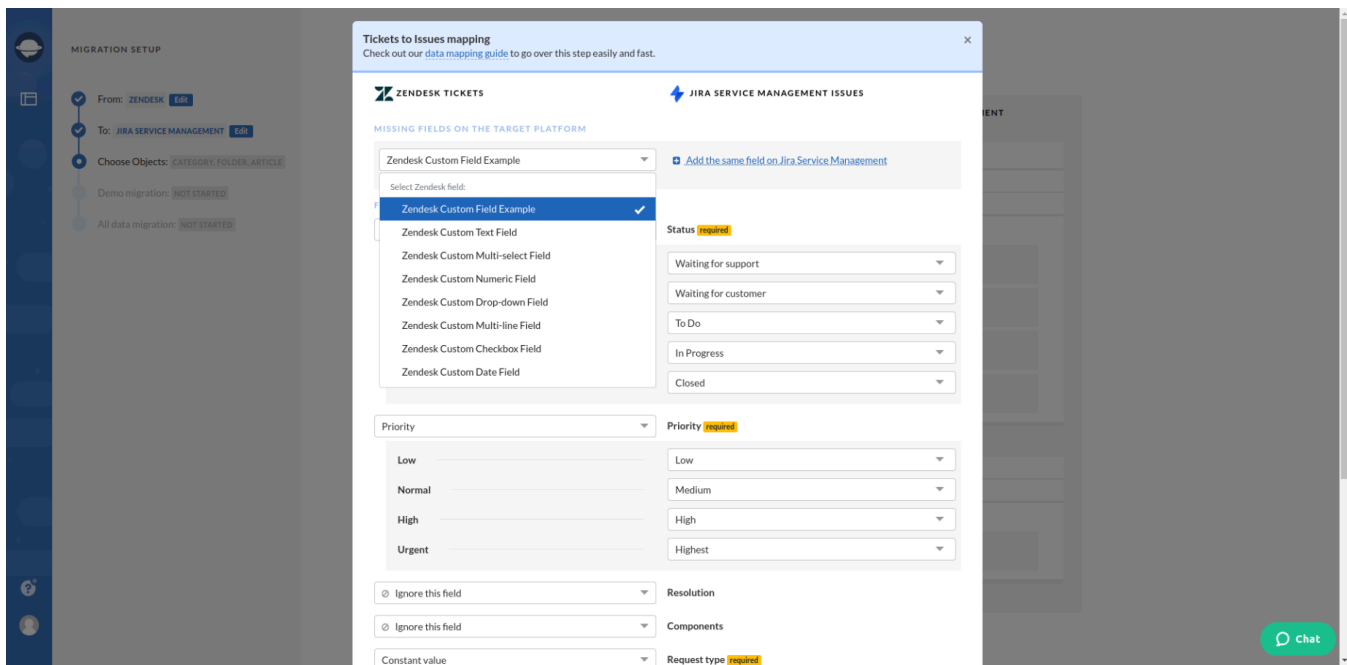
### 3. PREPARE JIRA SERVICE MANAGEMENT FOR THE IMPORT

Before setting up a data migration itself, run through the following steps:

1. Set up users manually. You need to add all users to the required project on Jira Service Management before data migration, and their emails should be visible to everyone. Read a detailed article on how to [add users to Jira Service Management](#) first.

2. Create matching custom fields. This way, you find the needed data easily after the **Full Data Migration**.

You can simply create them while mapping ticket fields in Migration Wizard. Just choose the needed field value and press **Add the same field on Jira Service Management** at the top. Once the field is created, map the values.



If you still want to create custom fields, follow the given steps:

Go to **Settings > Issues > Fields (Custom fields) > Create custom fields**.

iple ▾ Apps ▾ Create

Search

**Settings**

ATLASSIAN ADMIN

- User management**  
Add users, groups, and manage access requests.
- Billing**  
Update your billing details, manage your subscriptions and more.

JIRA SETTINGS

- System**  
Manage your general configuration, global permissions, look and feel and more.
- Products**  
Manage your Jira products' settings and integrations.
- Projects**  
Manage your project settings, categories, and more.
- ISSUES**  
Configure your issue types, workflows, screens, custom fields and more.
- Apps**  
Add and manage Jira Marketplace apps.

PERSONAL SETTINGS

- Atlassian account settings**  
Manage your language, time zone, and other profile information.
- Personal Jira settings**  
Manage your email notifications and other Jira settings.

Jira Your work Projects ▾ Filters ▾ Dashboards ▾ People ▾ Apps ▾ Create

Search

**Custom fields** You currently have 1 active custom fields [Create custom field](#)

Active Trashed

Filter by name or description

Name	Type	Screens and contexts	Last used
<b>Affected services</b> <b>LOCKED</b> Link services from the service registry to an issue.	? Unknown	1 context	Not tracked
<b>Approvals</b> <b>LOCKED</b> Provides search options for Jira Service Desk approvals information. This cust...	⚡ Approvals	1 context	Not tracked
<b>Approvers</b> Contains users needed for approval. This custom field was created by Jira Serv...	👤 User Picker (multiple users)	27 screens, 1 context	Aug 19, 2020
<b>CAB</b> Change Advisory Board members	👤 User Picker (multiple users)	6 screens, 1 context	No information
<b>Change completion date</b> Specify the completion time for the change request	🕒 Date Time Picker	6 screens, 1 context	No information
<b>Change managers</b> Contains the change managers for the change management process.	👤 User Picker (multiple users)	3 screens, 1 context	No information
<b>Change reason</b> Choose the reason for the change request	🗳 Select List (single choice)	6 screens, 1 context	No information
<b>Change risk</b>	🗳 Select List (single choice)	6 screens, 1 context	No information
<b>Change start date</b> Specify the time and date for the start of the change	🕒 Date Time Picker	6 screens, 1 context	No information
<b>Change type</b>	🗳 Select List (single choice)	6 screens, 1 context	No information
<b>[CHART] Date of First Response</b>	📊 Date of First Response	1 context	Not tracked



- Set the *Resolution field* on the mapping; otherwise, all the migrated cases will be unresolved.
- You can map the Status field to the *Status* and *Resolution* fields twice.
- Add custom fields to the *correct project screen* in Jira Service Management.

3. Increase the size limit of attachments users can add to requests. This way, you could import all attachments to Jira Service Management.

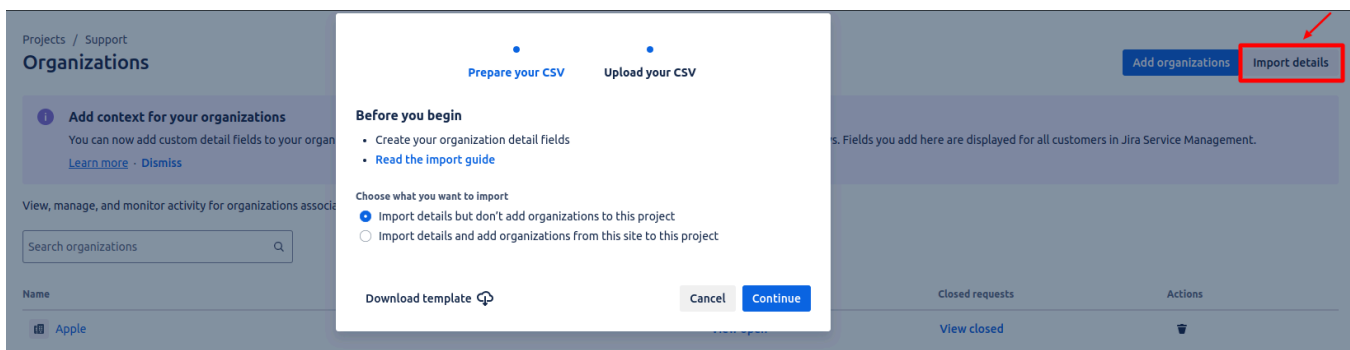
4. Enable the Public sign-up settings to migrate contacts. [Check out a detailed guide](#) or watch a video.

5. Ensure you have admin rights to the source help desk and Jira Service Management to run a data migration.

## 4. CONSIDER THE PECULIARITIES AND LIMITATIONS

When migrating to Jira Service Management, consider the following peculiarities:

- There are *two types of projects* in Jira – Classic and Next-gen. Our tool only migrates to the Classic projects. If you want to import data to a Next-gen project, check out [a guide with a video](#).
- By default, you can only set one issue type per migration applied to all issues. If you want to transfer multiple issue types, divide your data migration into parts and migrate tickets of each ticket type separately.
- You can move organizations to Jira Service Management by default, but they won't link to tickets.
- Jira's API doesn't support the import of custom fields for organizational entities directly. However, there's a workaround. However, you can migrate organizations in a separate data migration via CSV file. Jira will then automatically update the custom field data for the existing companies. For the companies not currently in the system, Jira will populate the custom fields with the data from your imported CSV file.



- Do not deactivate end-users because our tool won't migrate their cases.

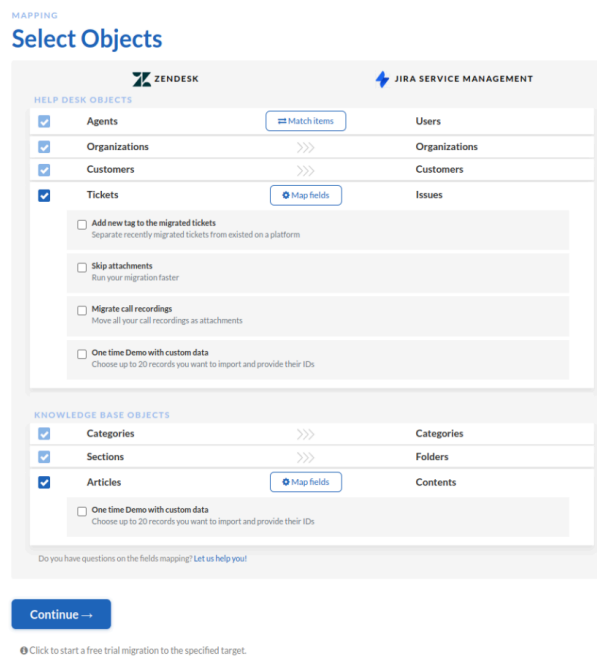
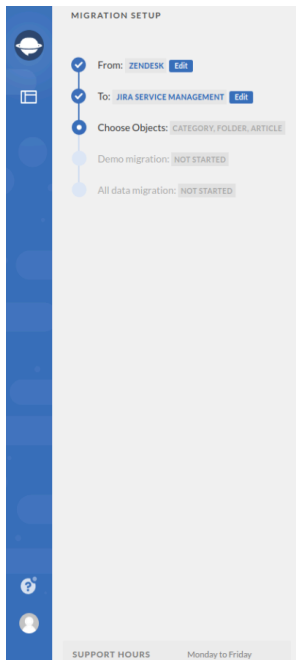
- If a contact has a private email in Jira SM, our tool automatically creates a new contact; Migration Wizard adds +1 to the original email address.
- If a contact is deleted in Jira Service Management, the Migration Wizards creates a new contact by adding +1 to the original email. Be aware that Jira Service Management reserves the original email for 30 days after deletion. During this period, our tool cannot set up a contact with the same email address.

**Note:** To configure the Jira Service Management connection, you need to pick up a Project where our tool will transfer your data. If you want to import records to multiple projects, you need to set up a data migration for each project.

## 5. SEE IF YOU NEED A CUSTOMIZATION

When migrating to Jira Service Management, you can apply some ready-made customizations:

- Add a tag to the migrated tickets
- Skip attachments
- Migrate call recordings (if only Zendesk is a source platform)
- One time Demo with custom data



When migrating to Jira Service Management, you can **add tags** to identify the migrated data. You can also **migrate inline images as attachments**. Note that this option can take longer to migrate data.

Besides, you can **migrate call recording** if your source help desk is Zendesk. Or **skip attachments** to speed up data migration. Finally, if you want to test our Migration Wizard with a specific set of data, choose **one time Demo with custom data** for both tickets and articles.

**Note:** Some [automated options](#) depend on your source help desk. Check out an article to find more details.

If you want to adjust you records transfer, request a Custom data migration. The popular customizations list includes:

- Migrate inline images
- Data filtering by different criteria (creation date, tags, custom fields, groups, organizations, assignees) migrate into different projects
- Change of the default migration process (migration of change and problem objects as tickets, migration of ticket events as private notes, migration of the information related to inactive users)
- Migration of the information from the integrations (migration of linked Jira task ID or URL)
- Adding information to the migrated data (marking tickets with extra tags, adding legacy ticket ID to the ticket subject)

## YOU'RE ALMOST READY

### 1. FIND ACCESS CREDENTIALS

When running a Demo Migration, you need to have access credentials to the source platform and Jira Service Management.

To connect Jira Service Management with our tool, you need:

1. **URL:** URL of your company's Jira Service Management account.
2. **Username:** Go to Icon > Profile; find your Username under the Contact.





3. **API Token:** Go to <https://id.atlassian.com/manage/api-tokens> > Create API token > press "Create" > Copy the token to the clipboard. Be sure to save the API Token because you can't see the Token later.
4. Then choose the project you are going to import data to or export records from.

**Note:** Only the admin should generate the API Token. The API's name should also correspond to the admin's username.

## 2. INITIATE THE DEMO MIGRATION

Run a Demo Migration to test out the possible outcome of the Full Data Migration. During the Free Demo, our tool migrates 20 random tickets and articles from your current solution to Jira Service Management. Run it as many times as you need.

Run through the steps below:

1. Sign in to your Migration Wizard or create an account.
2. Connect your source and target solutions.
3. Pick up a Project to connect Jira Service Management.
4. Select the data you want to import.
5. Match [agents](#).
6. Map tickets and articles route.
7. Pick up [automated options](#).
8. Run your Free Demo Migration.

## AFTER THE DEMO MIGRATION

### 1. CAREFULLY CHECK THE RESULTS IN JIRA SERVICE MANAGEMENT

After a Free Demo Migration, check out a table with four different columns or records:

- all available records
- migrated records



- failed records
- skipped records

Download reports on migrated, failed, and skipped records to study the results. As you check the migrated data, pay special attention to:

- all comments got migrated, and if the authors of the comments are the same
- the tickets are assigned to the correct agents
- all the custom fields got migrated
- the customers and companies are migrated correctly
- the attachments and labels are migrated (download attachments from your destination platform to see if everything was transferred correctly)

**Note:** if something hasn't migrated during Demo Migration, it won't transfer during the Full Data Migration.

Read [an exclusive guide](#) to check Jira Service Management migration results if you need more detailed information.

## 2. GET A CUSTOM DEMO

If the one-time custom Demo haven't meet your requirements, you can request the Custom Demo. [Contact our team](#) beforehand to discuss all the details.

# DURING THE FULL DATA MIGRATION

## 1. CHOOSE YOUR MIGRATION: DEFAULT OR WITH DELTA

If you need to use one of your help desks during the **Full Data Migration**, consider your options:

- Work with a source help desk during the Full Data Migration. However, note that the created or updated records won't migrate to Jira Service Management. So run the **Delta Migration** not to lose that data.
- Continue to running your work on your target help desk.



As the **Full Data Migration** runs in cloud, you can:

- Check how your data migration is going in Migration Wizard
- Wait for our support team to reach out to you

## 2. DON'T MAKE ANY LAST-MINUTE CHANGES

Any alteration can take more time to migrate your data or suspend your migration at all. If you identified duplicated or unnecessary data on the source help desk, let it go through. Better audit migrated records on Jira Service Management after the data migration.

If you have new tickets coming into your source help desk, you can opt for the [Delta migration](#) to migrate them to Jira Service Management.

**Note:** Delta migration is available in [Signature support package](#).

## 3. START FULL DATA MIGRATION

The Migration Wizard imports each record one by one to a chosen project. Depending on the number of entities you have, the process may take from 20 minutes to a few days.

The Full Data Migration starts if:

- **Your payment is confirmed.** It may take some time; that's why make a transaction in advance or schedule data migration.
- **You've agreed to the checklist.** Press on the corresponding checklist to open a mini-guide of the essential steps you need to do before transfer. Once you run through all steps, put a tick in a checkbox.

# AFTER THE IMPORT IS DONE

## 1. CHECK ONCE AGAIN

Your Full Data Migration is completed so start to study if everything migrated correctly. You have five days to check the results until Migration Wizard archives your data migration.

If you can't locate something ensure that search filters are set for all tickets and any period. If the problem still remains, [drop a line](#) to our support team.



## 2. UPDATE YOUR NEW PLATFORM

- If you migrated Knowledge Base articles, manually update internal links.
- Turn on all communication channels.
- Re-forward your emails to Jira Service Management.

## WHY MIGRATING WITH US



### It's much quicker compared to transferring your records on own

Take advantage of the rapid transferring process due to the full automation of the Migration Wizard software and the chance to instantly initiate the full data migration if you're transferring records between the backed platforms.



### Your data continues to be safe and sound throughout the moving process

Move your records around a safe connection and benefit from a regularly updated privacy policy that assures the security of your data both during and after the migration procedure.



### The customers of our service appreciate and approve it

Join thousands of happy customers who transmitted their data with the Help Desk Migration service and helped it to attain reputation and earn a variety of customer service-related rewards.



### Broad mapping opportunities will assist you to retain your records connected

Benefit from an opportunity to map both standard and custom fields while determining the route of your data and, thus,



### You can schedule the most convenient time for your data transfer

Migrate your entities at the most suitable time by booking your data migration for the time



### You can rely on the expert and assisting support team

Obtain the assistance of a team of data transfer specialists who have years of records moving experience behind their shoulders and you will be happy to help you out through the



adjust the migration of your records according to your individual wishes and sustain the relationships between your data.

that will work best for your team and your customers.

whole transferring process at any time (even on weekends).

## LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now



**Help-Desk-Migration.com**

[contact@help-desk-migration.com](mailto:contact@help-desk-migration.com)