

# Importing / Migrating data from Zephyr for Jira

Since v3.3, Xray provides a built-in importer for Zephyr Squad for Jira.



Xray built-in importer is only available for Zephyr Squad. Zephyr Scale (previously known as TM4J) is not supported by this migration utility.

All references to Zephyr in this documentation only apply to Zephyr Squad.

As of Xray v3.3, the importer only performs inline migration of data (i.e. Zephyr's Test issues are "moved" to Xray's Test issues).

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## Before using the Zephyr Import tool

Please check, beforehand, the below versions compatibility between the Import tool and Zephyr, the necessary requirements and also the existing features and its limitations.

### Versions compatibility

Xray Version	Supported Zephyr Squad Version
v3.3.0 - v3.6.X	v4.X.X
From v4.0.0	v4.0.0 - v5.5.X
From v4.2.0	v4.0.0 - v5.6.X
From v5.1.0	v4.0.0 - v6.2.X
From v6.5.0	v4.0.0- v9.2.0

### Requirements before proceeding

- Zephyr and Xray should be both installed
- Project, where migration is being done, must have Xray issue types (at least the Tests, Test Executions and Test Plans)
  - You may use the "Add Xray Issue Types" action shortcut available in the project settings page
- Requirement issue types used in Zephyr must be configured in Xray
  - All the different issue types that Zephyr Tests cover should be configured in Xray's [Issue Type Mapping settings](#)
- Defect issue types used in Zephyr must be configured in Xray
  - All the different issue types are being used as defects in Zephyr should be configured in Xray's [Issue Type Mapping settings](#).
- Create similar Test Statuses and Test Step Statuses in Xray; this is not mandatory but may ease the process, which will always ask you to make the mapping between Zephyr statuses and Xray counterparts
- Make sure Zephyr is using different issue links between Test<=>Defect and Test<=>Requirement, by going into Zephyr's configuration settings
- Do not change, create or delete any issue in the Project while the importation is running
- The only mandatory field in Xray's Test, Test Execution and Test Plan should be the issue Summary and issue Reporter
- Make sure that the Jira workflow states, that are being used by "Zephyr Test" issue type, are editable. Click here for the [official Jira documentation](#) on this subject.
- **We strongly recommend you to make a backup of your Jira instance before migrating the data**



#### Please note

The current process performs an inline migration, i.e. Tests and data is migrated to Xray and the original entities are "lost".

Thus, we recommend to backup your Jira instance before performing the migration.

Also, as the amount of data to migrate may be considerable large, we advise you to perform this on non-working hours. Please also make sure that users are not changing data on the project while the migration is being done.

## Features and Limitations

Below, please find a list of the support features and current limitations.

Most information will be migrated seamlessly but please check the following table in more detail.

Supported Features	Unsupported
Inline migration (not cloning) of: <ul style="list-style-type: none"><li>• Test and Test steps</li><li>• Test and Test step attachments</li><li>• Links between Tests and Defects/Requirements</li><li>• Cycle<ul style="list-style-type: none"><li>◦ including Cycle folders*</li></ul></li><li>• Executions<ul style="list-style-type: none"><li>◦ defects (global and step level)</li><li>◦ attachments (global and step level)</li><li>◦ result (global and step level)</li><li>◦ comments (global and step level)</li><li>◦ assignee</li></ul></li></ul>	<ul style="list-style-type: none"><li>• All Zephyr executions from the Ad-hoc cycle; only the last Execution is migrated</li><li>• Custom fields in Test steps and on the Execution</li><li>• Activity information</li><li>• Test Statuses and Test Step Statuses configurations</li><li>• Cycle folders as such*</li></ul>
(*) Cycle folders will be migrated to Test Executions, since the semantics on Xray are a bit different in terms of entities/organization.	

## How it works

Within this section you're able to find the exact mapping of entities from Zephyr to Xray.

## Mapping of information

Zephyr entity	Xray entity	Notes
Test <ul style="list-style-type: none"><li>• steps</li><li>• attachments</li></ul>	Test <ul style="list-style-type: none"><li>• steps</li><li>• attachments</li></ul>	<ul style="list-style-type: none"><li>• if empty, the "Step" column will be filled with "&lt;undefined&gt;"</li></ul>

Cycle	<p>Test Plan (optional)</p> <ul style="list-style-type: none"> <li>• <b>Summary:</b> &lt;version&gt; - &lt;cycle's name&gt;</li> <li>• <b>fixVersion:</b> version assigned to Cycle</li> </ul> <p>Test Execution, linked to the previous Test Plan</p> <ul style="list-style-type: none"> <li>• <b>Summary:</b> &lt;version&gt; - &lt;cycle's name&gt; Execution</li> <li>• <b>fixVersion:</b> version assigned to Cycle</li> </ul>	<p>The Test Execution created here will contain the Executions assigned directly to the Cycle, since in Zephyr you can have Executions at that level besides on each folder.</p> <p>Please note that...</p> <ul style="list-style-type: none"> <li>• if the Cycle contains multiple Executions for the same Test, only the last Execution will be migrated</li> </ul>
Cycle's folder	<p>Test Execution, linked to the Test Plan created earlier from the Cycle</p> <ul style="list-style-type: none"> <li>• <b>Summary:</b> &lt;version&gt; - &lt;cycle's name&gt; - &lt;folder name&gt; Execution</li> <li>• <b>fixVersion:</b> version assigned to Cycle</li> </ul>	
Ad-hoc Cycle	<p>Test Plan (optional)</p> <ul style="list-style-type: none"> <li>• <b>Summary:</b> &lt;version&gt; - Ah Hoc</li> <li>• <b>fixVersion:</b> version assigned to Cycle</li> </ul> <p>Test Execution, linked to the previous Test Plan</p> <ul style="list-style-type: none"> <li>• <b>Summary:</b> &lt;version&gt; - Ad Hoc Execution</li> <li>• <b>fixVersion:</b> version assigned to Cycle</li> </ul>	
Execution	<p>Test Run</p> <ul style="list-style-type: none"> <li>• global comment</li> <li>• global defects</li> <li>• global status</li> <li>• step results</li> <li>• step comments</li> <li>• step defects</li> <li>• step status</li> </ul>	



#### Please note

All issues will be created in the project where the migration is being performed.

## How to use

Performing the migration is easy; however, it is currently limited to Jira administrators.

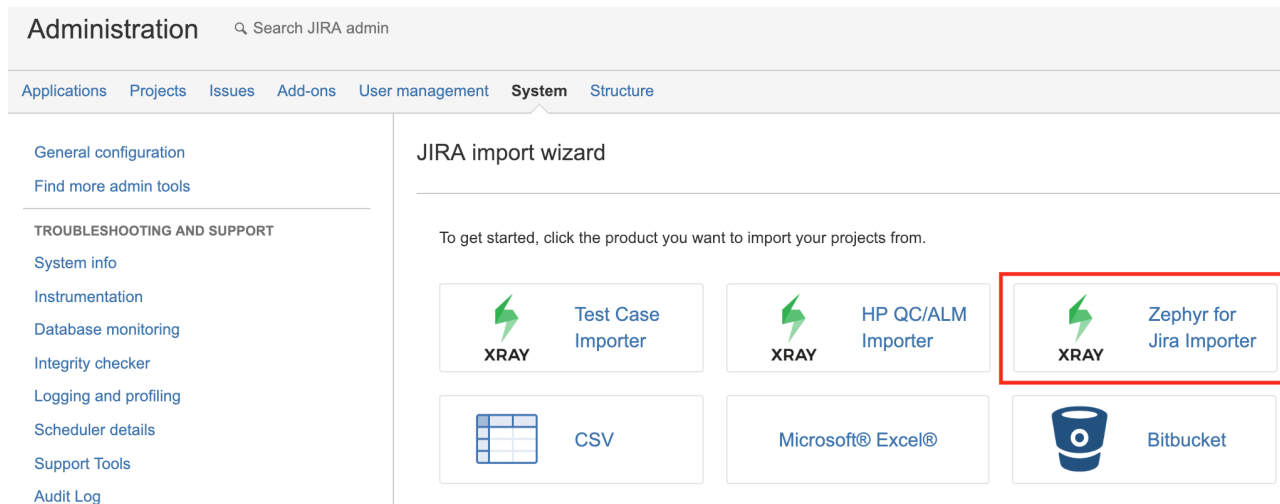
The migration follows a wizard like interface; after going through the steps, some additional tasks required to ensure consistency of data.

## Performing the migration

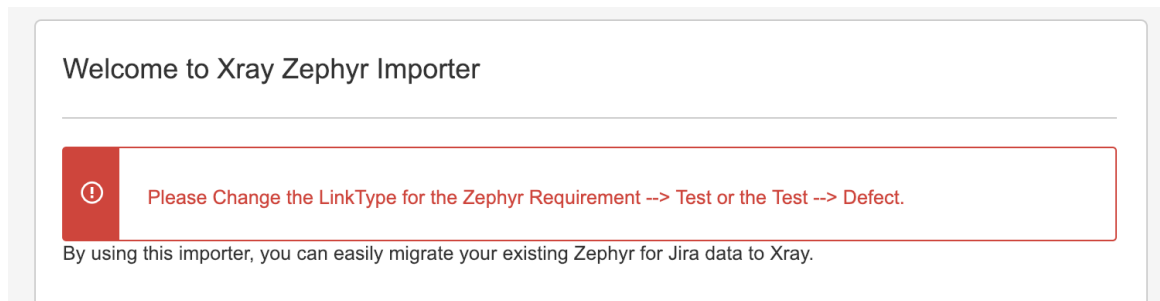
Suppose you have a project that you wish to migrate from Zephyr for Jira to Xray and that the requirements mentioned above are met.

To start the importation process:

1. Log in with an administrator account;
2. Go to System > Import and Export > External System Import;
3. Select Xray's **Zephyr for Jira Importer**.



If you see the following error message, then it's because Zephyr is using the same issue link types between Test<=>Defect and Requirement<=>Test.



Xray needs have different relations, so that is able to understand the different cases. Thus, you need to change the "Linktype for Test Relation" to something different from the value "LinkType for Requirement Test". For example, you can leave "LinkType for Requirement Test" with "Relates" and change the "Linktype for Test Relation" to "Defect".

These relations are configurable in Add-ons > Zephyr for Jira > General Configuration > Issue and Remote Links Configuration.

Settings

All changes will be saved automatically

General Configuration	Issue and Remote Links Configuration	Re-Index	Cleanup Cycles	Zephyr Test Menu	Execution Workflow
Link issues to tests on Execution Defect mapping		<input checked="" type="checkbox"/>			
Remote link issues to test executions on Execution Defect mapping		<input checked="" type="checkbox"/>			
Link issues to tests on Step Execution Defect mapping		<input type="checkbox"/>			
Remote link issues to test executions on Step Execution Defect mapping		<input type="checkbox"/>			
Inverse issue links directionality		<input type="checkbox"/>			
Configure LinkType for Test -> Defect relation		<div> <p>Note: This may take a while as all links must be recreated.</p> </div> <div> <div>Defect</div> <div>↕</div> <div>Reset</div> </div> <div>Issue Links are recreated successfully in 0 seconds</div>			
Configure LinkType for Requirement -> Test		<div> <p>Note: Issue Link Relation used when Zephyr Tests are created from within the Requirements. This change will only reflect future relation for Requirement -&gt; Test.</p> </div> <div> <div>Relates</div> <div> Requirement ResultSet Initiative Capability </div> </div>			

After ensuring that the link types are configured with distinct values, you may proceed once again with the migration process.

The importer will show you some brief information, that we advise you to read carefully.

## Xray Zephyr (for Jira) Importer

Welcome to Xray Zephyr Importer
Project
Test Statuses Mapping
Test Step Statuses Mapping
Confirmation

### Welcome to Xray Zephyr Importer

By using this importer, you can easily migrate your existing Zephyr for Jira data to Xray.

Data that can be migrated:

- Test cases specification, including their steps and attachments
- Cycles and related Executions

Data that will not be migrated:

- Test Step and Execution custom fields
- Reports related information
- Test Cycle folders

This migration will be performed in runtime without rollback. Before proceeding with the use of this importer, we advise you to:

- Perform a backup of this Jira instance
- Click [here](#) for more details regarding recommendations, features and limitations.

Begin Import
Back

Then, you need to choose the project where to perform the migration; this will be same where the Xray entities will be created in.

You may fine-tune the process by (un)checking some flags:

- **Links between requirements and tests to respective Xray Issue Link Type used for requirement coverage:** creates the link Xray uses for tracking coverage between Tests and requirements; by default Xray used the "tests" issue link type
- **Zephyr Cycles to Xray Test Plans:** creates Test Plans based on Zephyr Cycles
- **Zephyr Ad Hoc Cycles to Xray Test Plans:** creates Test Plans based on Zephyr Ad Hoc Cycles

If **Zephyr Cycles to Xray Test Plans** and **Zephyr Ad Hoc Cycles to Xray Test Plans** are unchecked then no Test Plans will be created; nevertheless, Test Executions will always be created if Zephyr Executions exist.

Map projects

Welcome to Xray  
Zephyr Importer

Project

Test Statuses  
Mapping

Test Step  
Statuses  
Mapping

Confirmation

Project

Import to Project<sup>\*</sup>

Calculator

Associate elements

☒ Links between requirements and tests to respective Xray issue Link Type used for requirement coverage

☒ Zephyr Cycles to Xray Test Plans

☒ Zephyr Ad Hoc Cycles to Xray Test Plans

Next

Back

You need to map Zephyr's Test Statuses to Xray counterparts.

Map Statuses

Welcome to Xray  
Zephyr Importer

Project

Test Statuses  
Mapping

Test Step  
Statuses  
Mapping

Confirmation

Test Statuses Mapping

Zephyr Test Statuses

→

Xray Test Statuses

<div>PASS</div> <div>Test was executed and passed successfully.</div>	<div>PASS</div> <div>The test run has passed</div>
<div>FAIL</div> <div>Test was executed and failed.</div>	<div>FAIL</div> <div>The test run has failed</div>
<div>WIP</div> <div>Test execution is a work-in-progress.</div>	<div>EXECUTING</div> <div>The test run is currently being executed</div>
<div>BLOCKED</div> <div>The test execution of this test was blocked for some reason.</div>	<div>ABORTED</div> <div>The test run was aborted</div>
<div>UNEXECUTED</div> <div>The test has not yet been executed.</div>	<div>TODO</div> <div>The test run has not started</div>

Next

Back

Likewise, you also need to map Zephyr's Test Step Statuses.

Map Step  
Statuses

Welcome to Xray  
Zephyr Importer

Project

Test Statuses  
Mapping

Test Step  
Statuses  
Mapping

Confirmation

Test Step Statuses Mapping

Zephyr Test Step Statuses

PASS

Test step was executed and passed successfully

FAIL

Test step was executed and failed.

WIP

Test step execution is a work-in-progress.

BLOCKED

The Test step execution of this test was blocked for some reason.

UNEXECUTED

The Test step has not yet been executed.

→

Xray Test Step Statuses

PASS

The test step has passed

FAIL

The test step has failed

EXECUTING

The test step is currently being executed

TODO

The test step has not started

TODO

The test step has not started

Next

Back

A final confirmation dialog presents information about the total number of Xray entities that will be created.

Confirmation

Welcome to Xray  
Zephyr Importer

Project

Test Statuses  
Mapping

Test Step  
Statuses  
Mapping

Confirmation

Confirmation

This import will convert 7 Zephyr Test issues to Xray Test issues and will create 11 Test Plans and 14 Test Executions.

Begin Import

Back

At the end, a brief summary is shown mentioning the total number of Xray issues created and any warnings that occurred during the process.

## Summary

✓ Zephyr for Jira data were successfully imported to project "ZTP" with the following results:

- 5 Test Plan(s).
- 7 Test Execution(s).
- 4 Test issues.
- 1 Zephyr Executions.

Elapsed: 2 seconds

### We recommend you to:

- Recalculate the TestRunStatus custom field of the imported Tests issues using a bulk operation
- Recalculate the coverage for the affected requirements
  - Make a filter with the imported Test issues
  - Use the *testRequirements* JQL with the created filter to find the affected requirements
  - Recalculate the Requirement Status custom field for these issues using a bulk operation

[Import another project](#)

Please have a look at the following section for some additional steps before concluding the migration process.

## After doing the migration

After migrating data from Zephyr to Xray you will need to perform some additional operations to recalculate the status of Tests and the coverage of the related requirements.

1. reset the "TestRunStatus" custom field of the migrated Tests
  - a. you can use the link provided in the final screen mentioned earlier for quickly obtaining the created Tests; you will be redirected to the Issues search page

The screenshot shows the Jira Issues search page. The search bar contains the filter: `labels = zephyr_importation_60048 and issuetype = Test`. Below the search bar, the results are displayed in a table. The table has columns: T, Key, Summary, Assignee, Reporter, P, Status, Resolution, Created, Updated, Due, and Development. The first row shows a test issue with key TP-123, summary test SF, assignee Unassigned, reporter Bruce Wayne, status TO DO, resolution Unresolved, created 21/Dec/18, and updated 21/Dec/18.

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due	Development
1	TP-123	test SF	Unassigned	Bruce Wayne	↓	TO DO	Unresolved	21/Dec/18	21/Dec/18		

b. save this search as a filter (you will need it afterwards)

Search Save as

labels = zephyr\_importation\_60048 and issuetype = Test

1-1 of 1

T	Key	Summary	Assignee	Reporter	P	Status	Reso
TP-123	test SF		Unassigned	Bruce Wayne	↓	TO DO	Unre

1-1 of 1

Save filter

You can save a copy of this filter but you cannot modify the original.

Filter Name

Enter a name for this Filter

Save Cancel

c. do a bulk change operation on the Test issues

Search ? Tools

Share Export Bulk Change:

Search Basic all 1 issue(s)

Columns ▼

Created	Updated	Due	Development
21/Dec/18	21/Dec/18		

d. reset the TestRunStatus custom field

Bulk Operation

- Choose Issues  
Selected 1 issues from 1 project(s)
- Choose Operation  
Operation Details  
Confirmation

Step 2 of 4: Choose Operation

Choose the operation you wish to perform on the selected 1 issue(s).

<input type="radio"/> Edit Issues	Edit field values of issues
<input type="radio"/> Move Issues	Move issues to new projects and issue types
<input type="radio"/> Transition Issues	Transition issues through workflow
<input type="radio"/> Delete Issues	Permanently delete issues from Jira
<input type="radio"/> Watch Issues	Watch all the selected issues. You will receive notifications when any of these issues are updated.
<input type="radio"/> Stop Watching Issues	Stop watching all the selected issues. You will no longer receive notifications when any of these issues are updated.
N/A	Export Notebook of Tests
<input checked="" type="radio"/> Reset Xray Test Run Status Custom Fields	Recalculates the Xray Test Run Status custom fields for all selected Test issues

**NOTE:** You cannot export the selected issues because the Xporter app is not enabled or installed.

2. reset the "Requirement Status" custom field of the requirements linked to the migrated Tests

a. use the testRequirements JQL function using use the name of the previously saved filter as argument

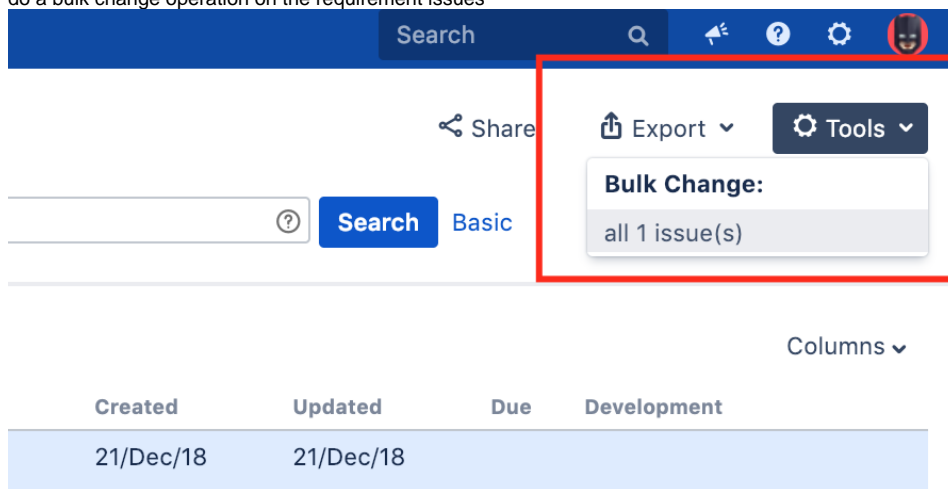
migrated\_tests — Edited Save Details ★

issue in testRequirements("migrated\_tests")

1-1 of 1

T	Key	Summary	P	Status	Created	Comp
CALC-3091	As a user, I can calculate the sum of two numbers	↑	OPEN	08/Jan/19		

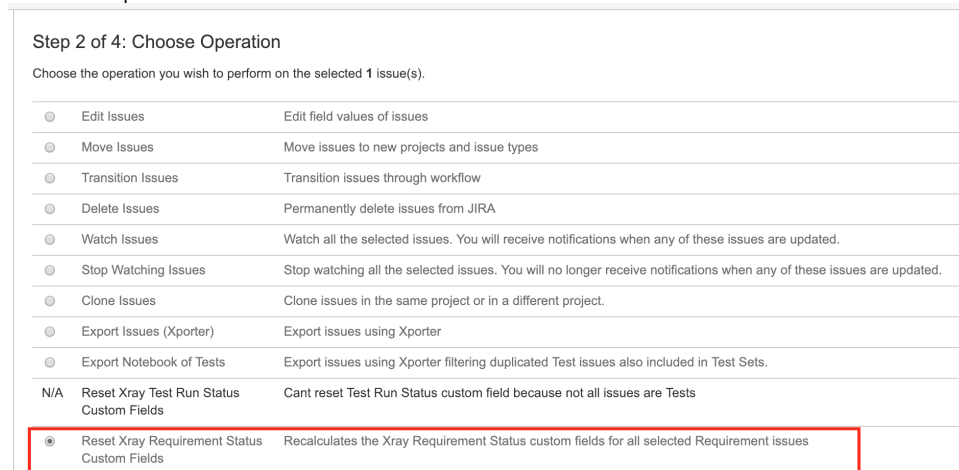
b. do a bulk change operation on the requirement issues



The screenshot shows the Jira interface with a blue header bar containing a search bar, a megaphone icon, a help icon, a settings icon, and a user profile icon. Below the header, there is a 'Share' button and a 'Search' button. A red box highlights the 'Export' and 'Tools' buttons. The 'Tools' dropdown menu is open, showing 'Bulk Change:' and 'all 1 issue(s)'. Below the red box, there is a 'Columns' dropdown menu. The table below has columns for 'Created', 'Updated', 'Due', and 'Development'. The 'Created' and 'Updated' columns show the date '21/Dec/18'.

Created	Updated	Due	Development
21/Dec/18	21/Dec/18		

c. reset the Requirement Status custom field



The screenshot shows the 'Step 2 of 4: Choose Operation' dialog in Jira. It prompts the user to 'Choose the operation you wish to perform on the selected 1 issue(s)'. A list of operations is shown, each with a radio button and a description. The 'Reset Xray Requirement Status Custom Fields' option is selected and highlighted with a red box.

Operation	Description
<input type="radio"/> Edit Issues	Edit field values of issues
<input type="radio"/> Move Issues	Move issues to new projects and issue types
<input type="radio"/> Transition Issues	Transition issues through workflow
<input type="radio"/> Delete Issues	Permanently delete issues from JIRA
<input type="radio"/> Watch Issues	Watch all the selected issues. You will receive notifications when any of these issues are updated.
<input type="radio"/> Stop Watching Issues	Stop watching all the selected issues. You will no longer receive notifications when any of these issues are updated.
<input type="radio"/> Clone Issues	Clone issues in the same project or in a different project.
<input type="radio"/> Export Issues (Xporter)	Export issues using Xporter
<input type="radio"/> Export Notebook of Tests	Export issues using Xporter filtering duplicated Test issues also included in Test Sets.
N/A Reset Xray Test Run Status Custom Fields	Cant reset Test Run Status custom field because not all issues are Tests
<input checked="" type="radio"/> Reset Xray Requirement Status Custom Fields	Recalculates the Xray Requirement Status custom fields for all selected Requirement issues