# Importing / Migrating Data from Zephyr for Jira

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# Introduction

Since v3.3, Xray has provided a built-in importer for Zephyr Essential for Jira.

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

references to Zephyr in this documentation only apply to Zephyr Essential.

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

# Before Using the Zephyr Import Tool

Please check beforehand whether the below versions are compatible with the Import tool and Zephyr, whether they meet the necessary requirements, and whether they have any existing features or limitations.

## Versions Compatibility

Xray Version	Supported Zephyr Essential 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
From v7.9.0	v4.0.0 - v9.6.2
From v7.12.3.0	v4.0.0 - v10.1.1

# Requirements Before Proceeding with the Migration

We strongly recommend you create a backup of your Jira instance before migrating the data.

- Zephyr and Xray must be installed.
- The Project, where migration is being done, must have Xray issue types (at least the Tests, Test Executions, and Test Plans): you may use the Ad d Xray Issue Types action shortcut, which is available on the Project settings screen.
- 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 that are being used as defects in Zephyr must 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 fields in Xray's Test, Test Execution, and Test Plan must be the Issue Summary and Issue Reporter.
- Make sure that the Jira workflow states that are being used by the Zephyr Test Issue Type are editable.

The current process performs an inline migration, i.e. Tests and data, are migrated to Xray, and the original entities are lost. Thus, we (i) recommend backing up your Jira instance before performing the migration.

Also, as the amount of data to migrate may be considerably large, we advise you to perform this migration during 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 there's a list of the supported features and current limitations.

Most information will be migrated seamlessly, but please check the following table.

Supported Features	Unsupported
Inline migration (not cloning) of:  Test and Test Steps. Test and Test Step attachments. Links between Tests and Defects/Requirements. Cycle (including Cycle folders*). Executions: Defects (Global and Step level). Attachments (Global and Step level). Result (Global and step level). Comments (global and step level). Assignee. Custom fields in the Test Steps and on the Execution.	<ul> <li>All Zephyr executions from the Ad-hoc cycle; only the last Execution is migrated Activity information.</li> <li>Test Statuses and Test Step Statuses configurations.</li> <li>Cycle folders as such*.</li> </ul>

# Operations

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

# Mapping Information

Zephyr Entity	Xray Entity	Notes
Test: • Steps. • Attach ments.	Test: • Steps. • Attachments.	If empty, the <i>Step</i> column will be filled with <i><undefined></undefined></i>
Cycle	<ul> <li>Test Plan (optional):</li> <li>Summary: <version> - <cycle's name=""></cycle's></version></li> <li>fixVersion: version assigned to Cycle</li> <li>Test Execution (linked to the previous Test Plan):</li> <li>Summary: <version> - <cycle's name=""> Execution</cycle's></version></li> <li>fixVersion: version assigned to Cycle</li> </ul>	<ul> <li>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.</li> <li>Please note that if the Cycle contains multiple Executions for the same Test, only the last Execution will be migrated.</li> </ul>
Cycle's folder	Test Execution, linked to the Test Plan created earlier from the Cycle	N/A

	<ul> <li>Summary: <version> - <cycle's name&gt; - <folder name=""> Execution</folder></cycle's </version></li> <li>fixVersion: version assigned to Cycle</li> </ul>	
Ad-hoc Cycle	<ul> <li>Test Plan (optional)</li> <li>Summary: <version> - Ah Hoc</version></li> <li>fixVersion: version assigned to Cycle</li> <li>Test Execution, linked to the previous Test Plan</li> <li>Summary: <version> - Ad Hoc Execution</version></li> <li>fixVersion: version assigned to Cycle</li> </ul>	N/A
Execution: • Globa I comm ent. • Globa I defect s. • Globa I status. • Step result s. • Step comm ents. • Step defect s. • Step comm ent. • Step comm ents. • Step comm ents. • Step comm ents. • Step comm ents. • Step comm ents. • Step status.	Test Run: • Global comment. • Global status. • Step results. • Step comments. • Step defects. • Step status.	N/A

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

## Migrating the Zephyr Test Set and Execution Custom Fields

When importing a project, Xray performs a detailed check of the possibility of migrating custom fields. This verification follows the criteria and steps described below:

- 1. Recreation and Reuse of Fields:
  - Xray will recreate the migrated custom fields, keeping the same name, Type, and options where applicable.
  - If the custom field to be migrated already exists in Xray with the same name and Type, it will be reused, avoiding duplications.
- 2. Recreating Fields with the Same Name and Different Types:
  - If a custom field with the same name already exists in Xray but with a different type, Xray creates a new custom field by prefixing it with Z phr\_Xray\_<field\_name>
  - This process is recursive. For example, when migrating the *cf\_1* field (a toggle in Xray), and if a single-line text type *cf\_1* already exists in Xray, Xray will attempt to create *Zphr\_Xray\_cf\_1*. If *Zphr\_Xray\_cf\_1* already exists as a number type field, the system will continue applying the prefix (*Zphr\_Xray\_cf\_1*) until it can create a field with the desired name and type.
- 3. Field Type Conversion: during migration, *Zephyr Checkbox* Type fields will be converted to *Multiselect*. All other field types are matched directly, retaining their original Type.
- Treatment of Options in Existing Fields: when a Zephyr field has options and this field already exists in Xray, the system will add the missing options to the existing options list in Xray, without overwriting the current options.
- 5. Warning in Case of Excessive Fields (only applied to Test Set Custom fields): if the sum of existing custom fields in Xray and new Zephyr fields exceeds the maximum allowed limit (6), Xray will cancel the migration process and notify the user of the exceeded limit.

# Performing the Migration

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 are required to ensure the consistency of data. 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:

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On your Jira Data Center instance, click the gear icon (Figure 1 - 1) and then select System (Figure 1 - 2).

Jira Software Das	hboards × Projects × Issues × Boards × Plans × DBTerminal × <b>Create</b>	Q Search
Administration Q See	arch Jira admin	JIRA AD
Administration		Applica
Applications Projects Issues	Manage apps User management Latest upgrade report System ScriptRunner	Project
		Issues
General configuration	Jira import wizard	Manag
Find more admin tools		User m
Jira mobile app	To get started, click the product you want to import your projects from.	Latest
SYSTEM SUPPORT		2 System
System info	For Test Case FIP QC/ALM Sephyr for	ScriptR
Instrumentation	XRAY Importer Jira Importer XRAY Jira Importer	
JMX Monitoring		
Database monitoring		
Integrity checker	CSV < SN	
Logging and profiling		
Scheduler details	You are using version 10.0.10. For help with this plugin please contact JIRA support.	
Troubleshooting and support tools	All registered trademarks or trademarks are property of their respective owners. Nothing on this page means that any third parties endorse the use of Atlassian products.	
Clean up		
Audit log		
Clustering		
SECURITY		
Project roles		
Global permissions		
Password Policy		

### Figure 1 - Access

2

A menu will appear on the left side of the screen. There, click *External System Import* (Figure 2 - 1). On the Jira import wizard screen, select the *Zephyr for Jira Importer* option (Figure 1 - 3).

Default user preferences	4
System dashboard	
Look and feel	
Announcement banner	
Rich text editor	
Terminology	
IMPORT AND EXPORT	
Backup system	
Restore system	
Project import	
External System Import	
Migrate to cloud	
Migrate to cloud	
MAIL	
Global Mail Settings	
Outgoing Mail	
Incoming Mail	
Mail queue	
Send email	
Batching email notificati	ons
Email templates	
ADMIN HELPER	
Permission helper	
Notification helper	
SHARED ITEMS	

Figure 2 - Access

3

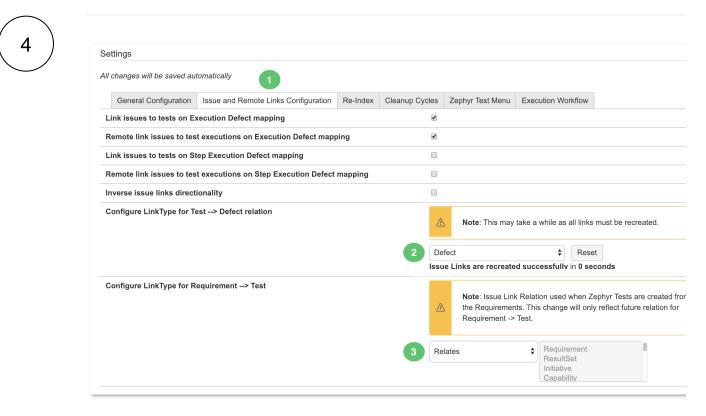
If you see the following error message (Figure 3), it's because Zephyr is using the same Issue Link Types between Test<=>Defect and Requirement<=>Test.

## Welcome to Xray Zephyr Importer

Please Change the LinkType for the Zephyr Requirement --> Test or the Test --> Defect.

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

### Figure 3 - Message



#### Figure 4 - Settings

Xray needs to have different relations so that it can understand the different cases. Thus, you need to change the *Linktype for Test* Defect relation to something different from the value *LinkType for Requirement Test*. For example, you can leave *LinkType for* Requirement Test with Relates (Figure 4 - 3) and change the *Linktype for Test Relation* to Defect (Figure 4 - 2).

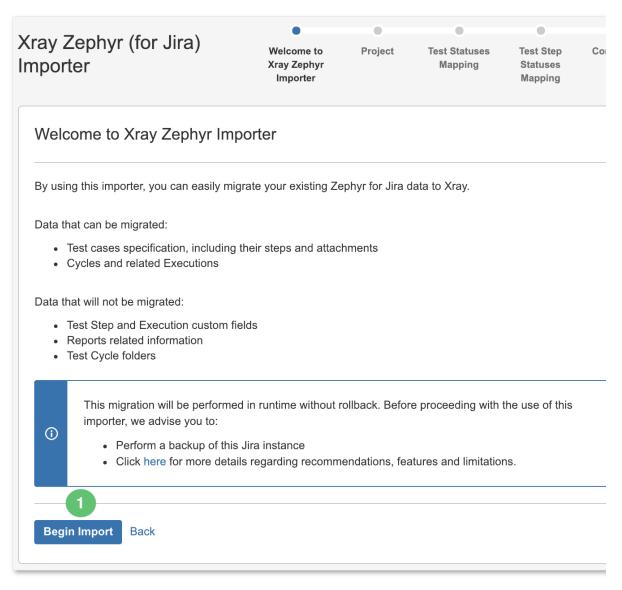
These relations are configurable in Add-ons > Zephyr for Jira > General Configuration > Issue and Remote Links Configuration (Figure 4 - 1).



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

The importer modal (Figure 5) will show you some brief information that we advise you to read carefully.

Once you're ready, click Being Import (Figure 5 - 1).



#### Figure 5 - Import



Choose the project where to perform the migration (Figure 6 - 1). This will be the project where the Xray entities will be created.

You may refine the process by (un)checking some boxes:

- Links between requirements and tests to respective Xray Issue Link Type used for requirement coverage (Figure 6 2): creates the link Xray uses for tracking coverage between Tests and requirements; by default, Xray uses the Tests Issue Link Type.
- Zephyr Cycles to Xray Test Plans (Figure 6 3): creates Test Plans based on Zephyr Cycles.
- Zephyr Ad Hoc Cycles to Xray Test Plans (Figure 6 4): creates Test Plans based on Zephyr Ad Hoc Cycles.

If the Zephyr Cycles to Xray Test Plans (Figure 6 - 3) and Zephyr Ad Hoc Cycles to Xray Test Plans (Figure 6 - 4) options are unchecked then no Test Plans will be created; nevertheless, Test Executions will always be created if Zephyr Executions exist.

Once you're finished, click Next (Figure 6 - 5).

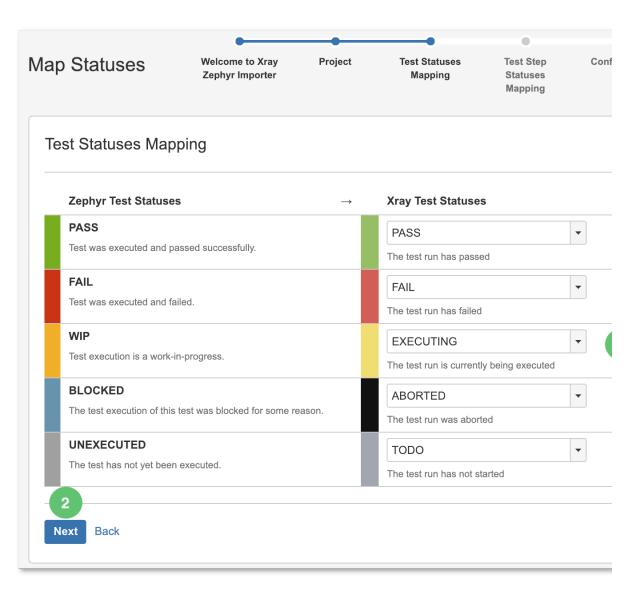
	•		•	•	
Map projects	Welcome to Xray Zephyr Importer	Project	Test Statuses Mapping	Test Step Statuses Mapping	Confi
Project					
Import to Project*	Calculator	•			
Associate elements	<ul> <li>Links between requirem coverage</li> </ul>	ents and tests to	o respective Xray issue	e Link Type used	for require
3	Zephyr Cycles to Xray T	est Plans			
4	Zephyr Ad Hoc Cycles to	o Xray Test Plan	S		
5	Next Back				

## Figure 6 - Project

7

Map Zephyr's Test Statuses to Xray counterparts using the dropdown menus (Figure 7 - 1).

Once you're finished, click Next (Figure 7 - 2).

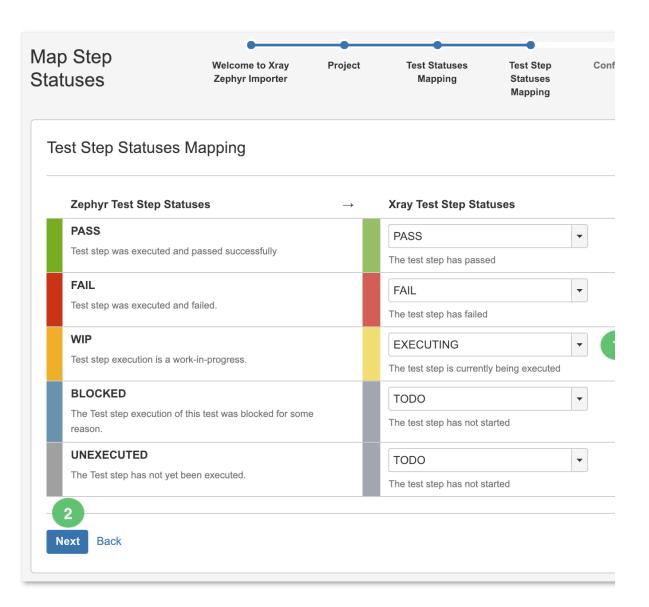




8

Map Zephyr's Test Step Statuses using the dropdown menus (Figure 8 - 1).

Once you're finished, click Next (Figure 8 - 2).



### Figure 8 - Mapping

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A final confirmation dialog presents information about the total number of Xray entities that will be created (Figure 9 - 1). Once you're ready, click Begin Import (Figure 9 - 2).

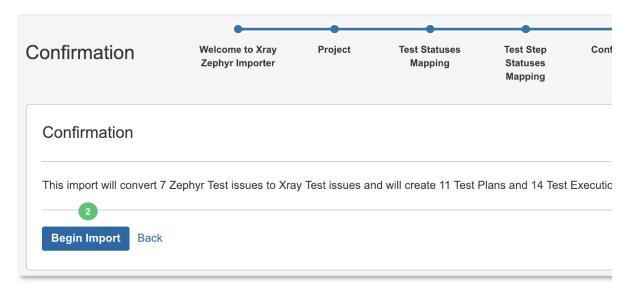


Figure 9 - Confirmation

Once the migration process ends, a brief summary is shown mentioning the total number of Xray Issues created and any warnings that occurred during the process (Figure 10 - 1).

You can immediately start a new importing process by clicking Import another project (Figure 10 - 2).

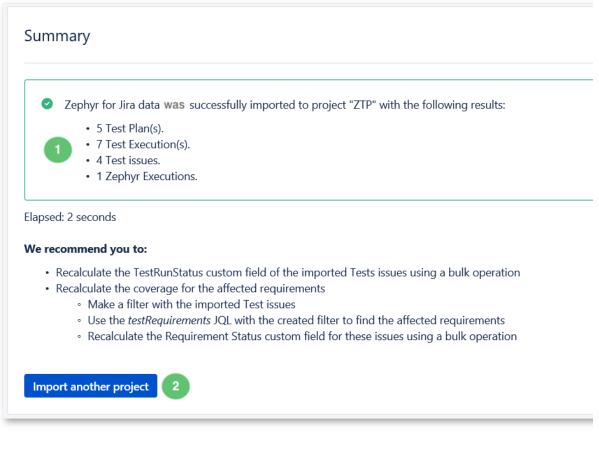


Figure 10 - Concluded

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

10

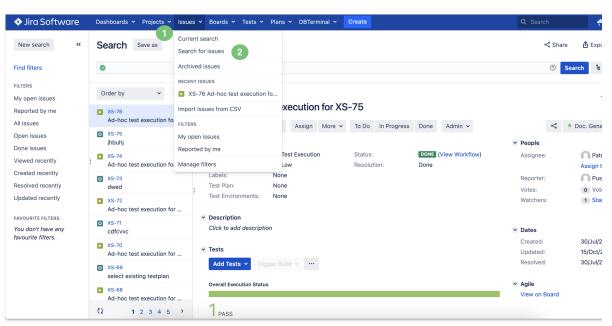
(1)

# After the Migration Concludes

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

On the top menu of your Jira Data Center instance, click Issues (Figure 11 - 1) and then select Search for issues (Figure 11 - 2).



#### Figure 11 - Search

2

Search for the importation using the search bar (Figure 12 - 1).

Reset the *TestRunStatus* custom field of the migrated Tests (Figure 12 - 1). You can use the link provided on the final screen mentioned earlier to quickly obtain the created Tests.

You will be redirected to the Issues search page.

ashboards 🛩	Projects 🗸	Issues 🗸	Boards 🛩	Tests 🛩	DbConsole	Tests 🛩	Create						Sea
Search	Save as												
Iabels = z	ephyr_impor	tation_6004	18 and issue	type = Tes	st 1								③ Search
1–1 of 1रे													
T Key	Summary					As	signee	Reporter	Р	Status	Resolution	Created	Updated
<b>O</b> TP-123	test SF					Un	assigned	Bruce Wayne	¥	TO DO	Unresolved	21/Dec/18	21/Dec/18

Figure 12 - Reset



Click the Save as button (Figure 13 - 1) to save this search as a filter (you will need it afterwards).

A modal opens (Figure 13). Enter a filter name (Figure 13 - 2) and click Save when you're finished (Figure 13 - 3).

Search Save as 1				
Iabels = zephyr_importation_60048 and issuetype = Test				
1–1 of 1ζ				
T Key Summary		Assignee	Reporter	P
TP-123 test SF		Unassigned	Bruce Wayne	$\checkmark$
1–1 of 1ℓ2	Save filter			
	You can save a co	opy of this filter but	you cannot modify	the origin
	2 Filter Nam	e <sup>*</sup> migrated_tests		
		Enter a name for th	nis Filter	
			3	Save

Figure 13 - Modal

4 Click Tools (Figure 14 - 1) and select all 1 issue(s) (Figure 14 - 2) to perform a bulk change operation on the Test Issues.

	Sea	Q	<b>,</b> ▲£	?	0	
		Share	🖞 Exp	ort 🗸	<b>\$</b>	Tools
			Bulk (	Change	e:	
	⑦ Search	Basic	all 1 is	sue(s)		
					2	
					С	olumns
Created	Updated	Due	Develop	ment		
21/Dec/18	21/Dec/18					

Figure 14 - Bulk

The Bulk Operation screen will open (Figure 15). Select the Issue(s) and then Reset the *Test Run Status Custom fields* option (Figure 15 - 1).

5

Bulk Operation			
<ul> <li>Choose Issues</li> <li>Selected 1 issues from 1 project(s)</li> </ul>	•	2 of 4: Choose Operation e the operation you wish to perform on the	ne selected 1 issue(s).
Choose Operation		Edit Issues	Edit field values of issues
<ul><li>Operation Details</li><li>Confirmation</li></ul>		Move Issues	Move issues to new projects and issue types
	0	Transition Issues	Transition issues through workflow
		Delete Issues	Permanently delete issues from Jira
		Watch Issues	Watch all the selected issues. You will receive notifications when any of these issues are updated.
		Stop Watching Issues	Stop watching all the selected issues. You will no longer receive notifications when any of these iss
	N/A	Export Notebook of Tests	NOTE: You cannot export the selected issues because the Xporter app is not enabled or installed.
1	۲	Reset Xray Test Run Status Custom Fields	Recalculates the Xray Test Run Status custom fields for all selected Test issues

## Figure 15 - Reset

6

7

Reset the *Requirement Status* custom field of the requirements linked to the migrated Tests: use the testRequirements JQL function using the name of the previously saved filter as an argument (Figure 16 - 1).

mi	grated_t	ests – Edited Save – Details ★					
issue in testRequirements("migrated_tests")							
1–1	of <b>1</b> 🕞						
т	Key	Summary	Ρ	Status	Created		
0	CALC-3091	As a user, I can calculate the sum of two numbers	*	OPEN	08/Jan/19		

Figure 16 - Saved

Go back to your Data Center Jira instance screen click *Tools* (Figure 17 - 1), and *select all 1 issue(s)* (Figure 17 - 2) to perform a bulk change operation on the Requirement Issues.

	<b>0</b>
📽 Share 🏾 🖞 Export 🗸	C Tools
Bulk Change:	:
Image: Search         Basic         all 1 issue(s)	
2	
	Columns
Created Updated Due Development	
21/Dec/18 21/Dec/18	

Figure 17 - Bulk

8

The Bulk Operation screen will open (Figure 18). Select the Issue(s) and then Reset the *Requirement Status Custom fields* option (Figure 18 - 1).

## Step 2 of 4: Choose Operation

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

$\bigcirc$	Edit Issues	Edit field values of issues
$\bigcirc$	Move Issues	Move issues to new projects and issue types
$\bigcirc$	Transition Issues	Transition issues through workflow
$\bigcirc$	Delete Issues	Permanently delete issues from JIRA
$\bigcirc$	Watch Issues	Watch all the selected issues. You will receive notifications when any of these issues are updated.
$\bigcirc$	Stop Watching Issues	Stop watching all the selected issues. You will no longer receive notifications when any of these issues
$\bigcirc$	Clone Issues	Clone issues in the same project or in a different project.
$\bigcirc$	Export Issues (Xporter)	Export issues using Xporter
$\bigcirc$	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
۲	Reset Xray Requirement Status Custom Fields	Recalculates the Xray Requirement Status custom fields for all selected Requirement issues

### Figure 18 - Reset

If you have questions or technical issues, please contact the Support team via the Customer Portal (Jira service management) or send us a message using the in-app chat.