

Jira Service Management Data Migration Checklist

Data migration can be challenging, but we've made it easier for you. We've created a comprehensive data migration checklist exclusive to Jira Service Management. Dive in and simplify your migration process!

• • •

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 above data, 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.

Help Desk Migration

How to Set up Jira Service Management Demo Migration

Data Migration Best Practices

MIGRATION NUMBER: 4FD197DC19815C

From: ZENDESK
☒ <https://domain.zendesk.com>

To: JIRA SERVICE MANAGEMENT

Choose Objects: NOT SELECTED

Demo migration: NOT STARTED

All data migration: NOT STARTED

SOURCE
Zendesk is connected

TARGET
Migrate to: Jira Service Management

URL: <https://domain.com/>

Username: name@example.com

API token: Enter your API token

Continue >

Fill in your credentials to connect Jira Service Management

We do not share your access credentials and guarantee the safety of your data

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, contact 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

Inform your agents about Jira Service Management migration first so they can start closing tickets before the data transfer date. This will give them 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

Before data migration, you need to add all users to the required project on Jira Service Management, 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 will help you quickly find the needed data after the **Full Data Migration**.

You can create them while mapping ticket fields in Migration Wizard. Choose the needed field value and press **Add the same field on Jira Service Management** at the top. To migrate contacts, enable the Public sign-up settings. [For a detailed guide, read it.](#)

Tickets to Issues mapping



Check out our [data mapping guide](#) to go over this step easily and fast.



MISSING FIELDS ON THE TARGET PLATFORM

Custom Field Example

+ [Add the same field on Jira Service Management](#)

FIELDS AVAILABLE FOR MAPPING

Subject Summary system

Tags Tags system

Organization Organizations system

Status

Status required

Use for default or empty values

Open

New

Open

Open

Work in progress

Pending

Reopened

On-hold

Pending

Solved

Done

Priority

Priority

Low

Low

Normal

Medium

High

High

Urgent

Highest

Reset Mapping

Save mapping >





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

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






Type
Classic service desk
Classic software
Classic software

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.

Custom fields

You currently have 0 active custom fields [Create custom field](#)

[Active](#) [Trashed](#)

Filter by name or description

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

To successfully import all attachments to Jira Service Management, make sure to adjust the size limits accordingly.

4. Enable the Public sign-up settings for contact migration

To migrate your contacts, you'll need to enable the Public sign-up settings. For step-by-step instructions, refer to our detailed guide or watch our easy-to-follow [video tutorial](#).

5. Verify admin rights before data migration

Before starting your data migration, ensure you have admin rights for the Source and Jira Service Management. This access is essential for a smooth and successful migration process.

6. Disable email notifications

To disable email notifications in Jira Service Management, follow these steps:

Go to Jira Service Management project > **Project Settings**.

Projects / Main Helpdesk / Queues

All open tickets

42 issues

Search for issues

Request Type	Key	Summary	Reporter	Assignee	Status	Created	Time to resolution ↑
<input type="checkbox"/>					WAITING FOR SUPPORT	17/Aug/24	
<input type="checkbox"/>					OPEN	15/Jun/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	01/Jan/23	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	21/Dec/22	
<input type="checkbox"/>					OPEN	20/Dec/22	
<input type="checkbox"/>					OPEN	15/Dec/22	
<input type="checkbox"/>					OPEN	16/Dec/22	

Left sidebar menu items: Queues, Service requests, Incidents, Problems, Changes, Post-incident reviews, OPERATIONS (Change calendar, Services, Alerts, On-call), KNOWLEDGE (Knowledge base, Reports), DIRECTORY (Channels, Customers, Invite agents), SHORTCUTS (Add shortcut, Project settings).

Scroll down and click on **"Notifications."** You will see the Notification Scheme linked to your project. Click **"Actions"**, then select **"Edit Notifications."**

Projects / Main Helpdesk / Project settings

Internal notifications

Notification email

domain.atlassian.com [Edit](#)

Scheme

Default Notification Scheme
SHARED BY 10 PROJECTS

Jira can notify the appropriate people of particular events in your project, e.g. "Issue Commented". You can choose specific people, groups, or roles to receive notifications. The notification scheme defines how the notifications are configured for this project. To change the notifications, you can select a different notification scheme, or modify the currently selected scheme.

Notification Type	Recipients
An issue is created	All Watchers Current Assignee Reporter
An issue is edited	All Watchers Current Assignee Reporter
You're assigned to an issue	All Watchers Current Assignee Reporter
An issue is resolved	All Watchers Current Assignee Reporter
An issue is closed	All Watchers Current Assignee Reporter
Someone made a comment	All Watchers Current Assignee Reporter
A comment is edited	All Watchers Current Assignee Reporter
A comment is deleted	All Watchers Current Assignee Reporter

Top right actions: **Actions** (dropdown), **Edit notifications**, **Use a different scheme**.

For each event, remove the recipient types (e.g., All Watchers, Reporter) to turn off notifications. The notifications remain configured, but no one will receive them. After removing recipients for all necessary events, save your changes.

Jira Your work ▾ Projects ▾ Filters ▾ Dashboards ▾ Teams ▾ Plans ▾ Assets Apps ▾ Create

Q Search

Issues

New issue search

ISSUE TYPES

Issue type hierarchy

Issue types

Issue type schemes

Sub-tasks

WORKFLOWS

Workflows

Workflow schemes

SCREENS

Screens

Screen schemes

Issue type screen schemes

FIELDS

Custom fields

Field configurations

Field configuration schemes

PRIORITIES

Priorities

Priority schemes

FORMS

Data connections

Issues

Search Jira admin

Edit Notifications — Default Notification Scheme

SHARED BY 10 PROJECTS

On this page you can edit the notifications for the "Default Notification Scheme" notification scheme.

- [Add notification](#)
- [View all notification schemes](#)

Notification Type	Recipients	Actions
An issue is created (System)	<ul style="list-style-type: none"> All Watchers () (Delete) Reporter () (Delete) Current Assignee () (Delete) 	Add
An issue is edited (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
You're assigned to an issue (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
An issue is resolved (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
An issue is closed (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
Someone made a comment (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
A comment is edited (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
A comment is deleted (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
An issue is reopened (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) Reporter () (Delete) All Watchers () (Delete) 	Add
An issue is deleted (System)	<ul style="list-style-type: none"> Current Assignee () (Delete) 	Add

To disable Customer notifications in Jira Service Management, follow these steps:

Navigate to Jira Service Management project > **Project Settings**.

Jira Your work ▾ Projects ▾ Filters ▾ Dashboards ▾ Teams ▾ Plans ▾ Assets Apps ▾ Create

Q Search

Main Help Desk
Service project

Queues

Service requests

Incidents

Problems

Changes

Post-incident reviews

OPERATIONS

Change calendar

Services

Alerts

On-call

KNOWLEDGE

Knowledge base

REPORTS

Reports

DIRECTORY

Channels

Customers

Invite agents

SHORTCUTS

Add shortcut

Project settings

Projects / Main Helpdesk / Queues

All open tickets

Search for issues

42 issues

Request Type	Key	Summary	Reporter	Assignee	Status	Created	Time to resolution ↑
<input type="checkbox"/>					WAITING FOR SUPPORT ▾	17/Aug/24	
<input type="checkbox"/>					OPEN	15/Jun/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	02/Jan/23	
<input type="checkbox"/>					OPEN	01/Jan/23	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	29/Dec/22	
<input type="checkbox"/>					OPEN	21/Dec/22	
<input type="checkbox"/>					OPEN	20/Dec/22	
<input type="checkbox"/>					OPEN	15/Dec/22	
<input type="checkbox"/>					OPEN	16/Dec/22	

Scroll down and select "**Customer notifications**". For each rule, turn off "**Enable**."

Jira Your work Projects Filters Dashboards Teams Plans Assets Apps Create

Q Search

Main Help Desk Service project

Back to project

Issue types

Request types

Forms

External resources

Change management

Incident management

Customer permissions

Language support

Portal settings

Email requests

Customer notifications

Widget

Chat

Virtual agent NEW

Satisfaction settings

Knowledge base

SLAs

Automation

Apps

Workflows

Screens

Projects / Main Helpdesk / Project settings

Customer notifications

Sender name

Configure how notifications sent from this service project display the email sender name.

[Learn more about custom sender name in customer notifications](#)

☒ Display the user's public name for user-generated messages. Otherwise, display the portal name.

☐ Always display the portal name of this service project. [Change portal settings](#)

Templates

Templates change the look and style of request-related and custom notifications. You can add logos and variables, change the subject line, and more.

[Edit templates](#)

Notifications

These are the notifications your service project sends to customers. You can change their recipients and content, or disable them.

Name	Type	Description	Enable	Action
Customer invited	Account	When a customer is invited to your service project portal, they are sent an email.	<input checked="" type="checkbox"/>	Edit
Request created	Request	When customers create requests in the portal or send an email to your email channel, your service project sends a confirmation that their request was received.	<input checked="" type="checkbox"/>	Edit
Public comment added	Request	When a comment that is visible to your customers is added to the request/issue, your service project sends all the customers involved on the request a notification.	<input checked="" type="checkbox"/>	Edit
Public comment edited	Request	When a comment that is visible to your customers is edited, your service project sends all the people involved on the request a notification.	<input checked="" type="checkbox"/>	Edit
Request resolved	Request	When a request resolution field is set, your service project notifies the reporter and all customers involved. This notification is sent to the reporter even if they have turned off notifications for a request.	<input checked="" type="checkbox"/>	Edit
Request reopened	Request	When a request's resolution field is cleared, your service project notifies all people involved.	<input checked="" type="checkbox"/>	Edit
Participant added	Request	When participants are added to a request, your service project notifies the new participants.	<input checked="" type="checkbox"/>	Edit
Organization added	Request	When a request is shared to an organization, your service project notifies the organization's members so they can opt-in to further updates.	<input checked="" type="checkbox"/>	Edit
Approval required	Request	When a request transitions to an approval stage of its workflow, your service project notifies approvers that they must act on the request.	<input checked="" type="checkbox"/>	Edit

To temporarily disable all **outgoing emails in Jira Service Management through Global settings**:

Go to the Jira Service Management administration dashboard. Click the gear icon (⚙️) in the upper-right corner to open the settings menu. From the dropdown menu, select **System** to access system settings.

Settings

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 SETTINGS

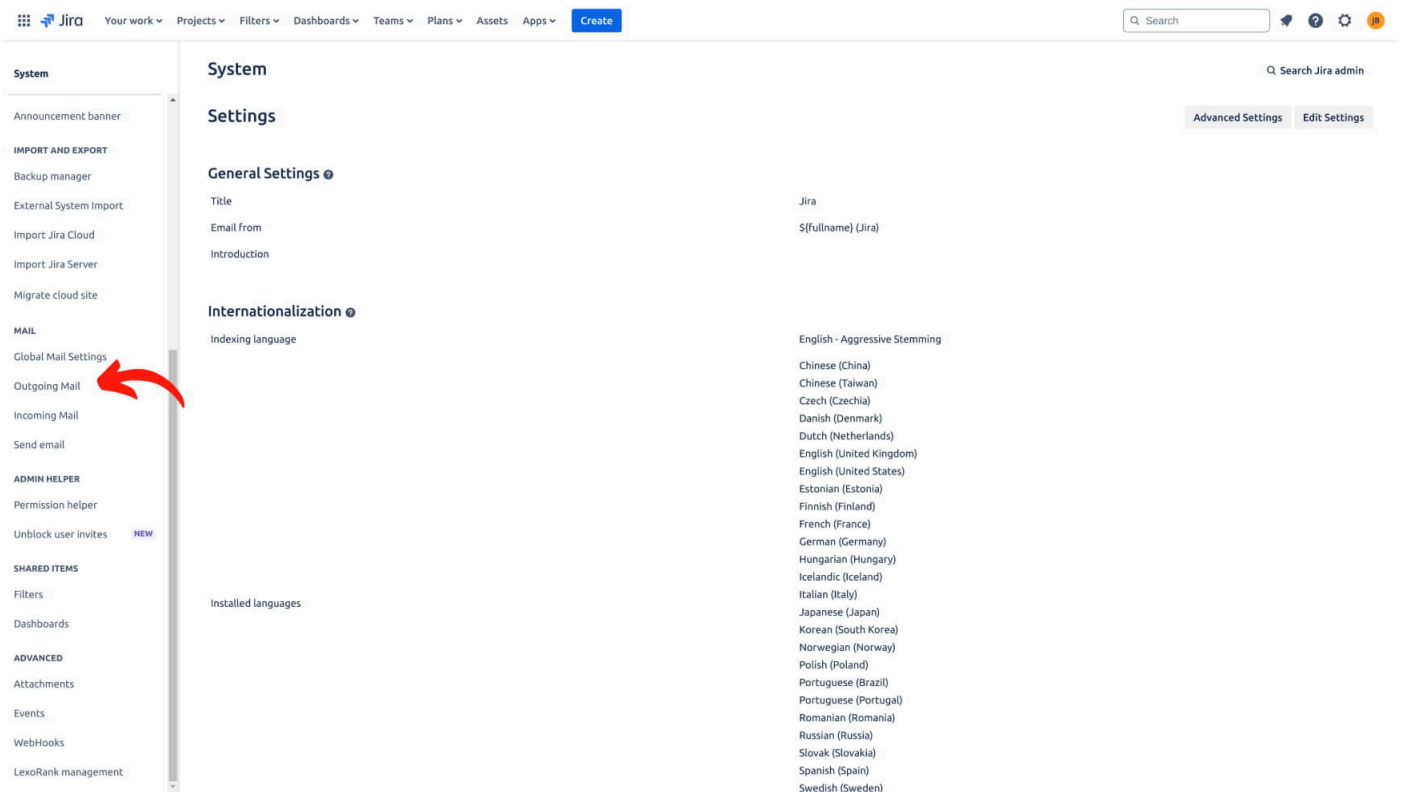
Tip: Try `Ctrl K` to search Jira settings

- 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.

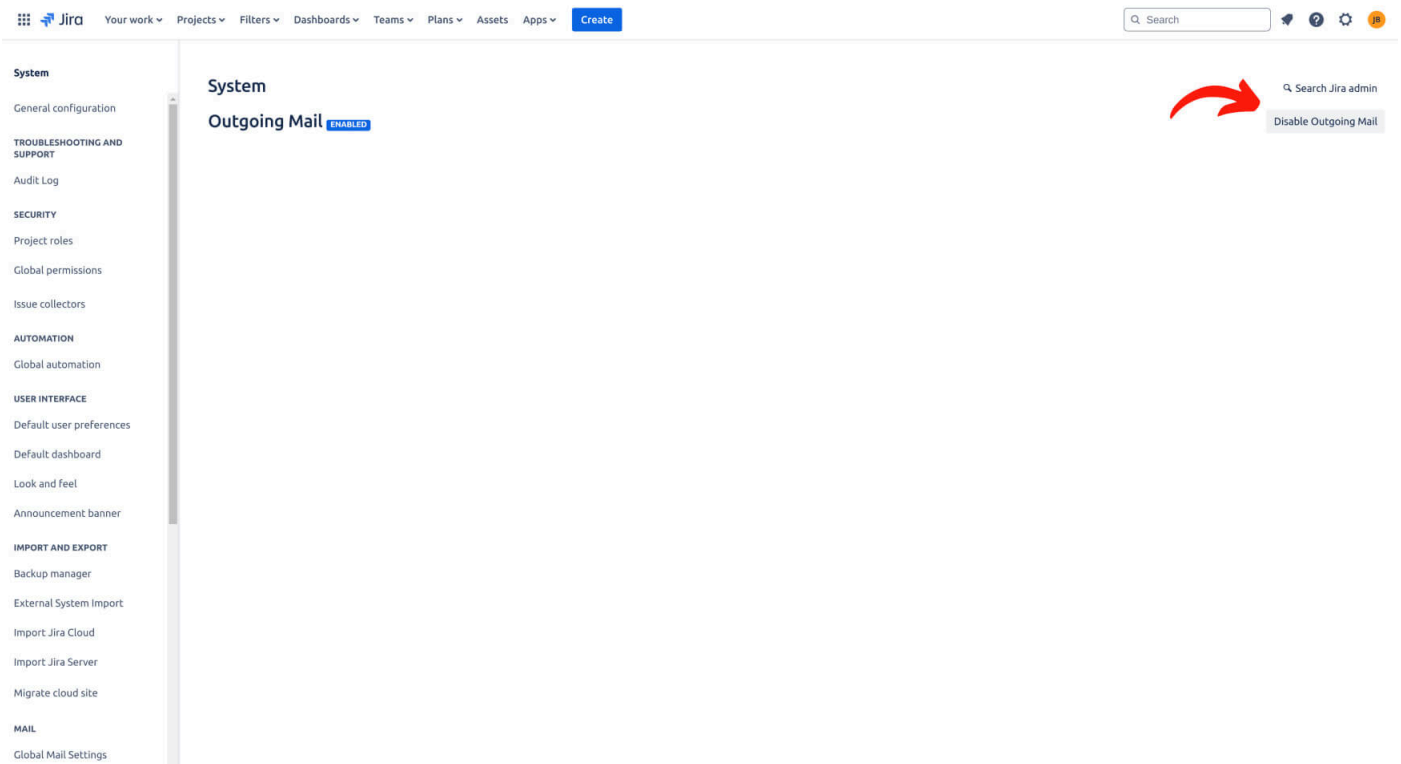
ATLASSIAN ADMIN

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

On the left-hand sidebar, scroll down to **"Outgoing Mail"** and click to access global email settings.



Click the "**Disable Outgoing Mail**" button. If a confirmation dialog appears, confirm the action. Once disabled, the status will change to "**Disabled**," indicating that no emails will be sent from Jira Service Management until this setting is re-enabled.



7. Disable automations

To disable all active automations in Jira Service Management, follow these steps:

Navigate to the **project** where you want to disable the automations. Click "**Project settings**," located in the lower-left corner.

Projects / Main Helpdesk / Queues

All open tickets

42 issues

Search for issues

Request Type	Key	Summary	Reporter	Assignee	Status	Created	Time to resolution ↑
					WAITING FOR SUPPORT	17/Aug/24	
					OPEN	15/Jun/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	02/Jan/23	
					OPEN	01/Jan/23	
					OPEN	29/Dec/22	
					OPEN	29/Dec/22	
					OPEN	29/Dec/22	
					OPEN	29/Dec/22	
					OPEN	21/Dec/22	
					OPEN	20/Dec/22	
					OPEN	15/Dec/22	
					OPEN	16/Dec/22	

Project settings

In the project settings menu, select "**Automation.**" You'll see a list of all automation rules associated with the project. Identify the rules that are currently active. For each active automation rule, toggle the status from "**Enabled**" to "**Disabled**." Confirm or save changes if prompted to ensure the automation rules are disabled.

Projects / Main Help Desk / Project settings

Automation

Global administration Create rule

Rules Audit log Templates Usage

Filter rules Scope: Project rules Action Label Edit labels

Name	Labels	Owner	Scope	Updated	Enabled	Actions
When a change management request is created -- then update change type and risk	Change management	John Doe	Main Help Desk	a week ago	Enabled	...
When a change request is created -- then attach the default change management form	System rule Change management	John Doe	Main Help Desk	a year ago	Enabled	...
When a comment is added -- update the status		John Doe	Main Help Desk	a week ago	Enabled	...
When a low risk change management request is in review -- then move request to approved	Change management	John Doe	Main Help Desk	a year ago	Enabled	...

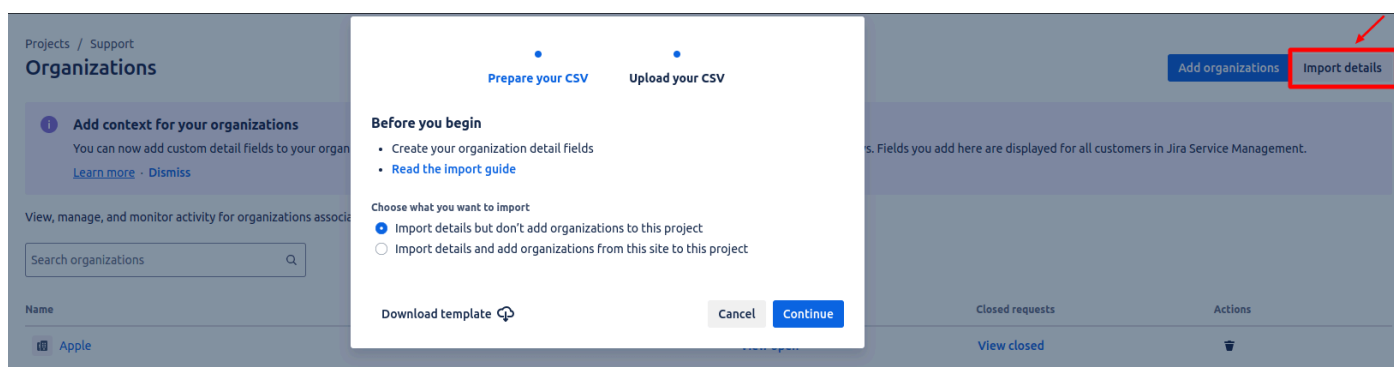
Automation

Repeat this process for all active rules and review the list to verify that no rules remain enabled.

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 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. Then migrate tickets of every 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. Notice 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 CUSTOMIZATION

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

- Add a tag to the migrated tickets
- Skip attachments
- Migrate ticket side conversations
- Migrate newest records first
- Migrate call recordings (if only Zendesk is a source platform)
- Demo with custom data

The screenshot displays the Jira Migration Wizard interface, divided into two main sections: 'MAPPING' and 'Select Objects'.

MAPPING Section:

- MIGRATION NUMBER:** 0A000A0AAA000A
- From:** ZENDESK (checked). URL: https://domain.zendesk.com
- To:** JIRA SERVICE MANAGEMENT (checked). URL: https://domain.atlassian.net. Service Desks: ITSM project. Issue types: Task.
- Choose Objects:** NOT SELECTED
- Demo migration:** NOT STARTED
- All data migration:** NOT STARTED

IMPORTANT MIGRATION NOTES:

Data transfer in the Full Migration will mirror the Demo process. Review the Demo results thoroughly to ensure everything is on track. If you need assistance, don't hesitate to reach out.

As we prepare for the Full Data Migration, here's a brief checklist to ensure a smooth process:

- **Custom field mapping:** Make sure you have created and properly mapped all the custom fields.
- **User setup:** All the users are created, added to a required project and accepted invites, and properly matched.
- **Resolution field setting:** The resolution field is mapped. If it isn't mapped, all the tickets will migrate as Unresolved.
- **Integrations off:** You have turned off all the integrations.

MAPPING Section: Select Objects

HELP DESK OBJECTS:

- ☒ **Agents** (Match items) → **Users**
- ☒ **Organizations** (Match items) → **Organizations**
- ☒ **Customers** (Match items) → **Customers**
- ☒ **Tickets** (Map fields) → **Issues**
 - ☒ **Migrate newest records first** (Records migrate chronologically, from newest to oldest. Applies only to Full Migration)
 - ☒ **Migrate side conversations** (Move all your side conversations)
 - ☐ **Demo with custom data** (Choose up to 20 records by IDs and import them to check how the data lands on a target. Contact support if you want to import more than 20 records.)
 - ☒ **Migrate call recordings** (Move all your call recordings as attachments)
 - ☐ **Skip attachments** (Keep ticket attachments, or leave them behind to save storage space or migrate faster)
 - ☒ **Migrate inline images as ticket attachments** (Keep embedded images even when your source is unavailable. It may increase the migration time)
 - ☒ **Add a new tag to tickets** (Mark the migrated tickets with tag(s) and sort them out easily on your destination platform)

Add tag and press comma

KNOWLEDGE BASE OBJECTS:

- ☒ **Categories** (Match items) → **Categories**
- ☒ **Sections** (Match items) → **Folders**
- ☒ **Articles** (Map fields) → **Contents**
 - ☐ **Demo with custom data** (Choose up to 20 records by IDs and import them to check how the data lands on a target. Contact support if you want to import more than 20 records.)

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, to test our Migration Wizard with a specific data set, choose **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 your 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)



MOVE TO A NEW CUSTOMER SERVICE

Benefit from a free Demo and see a test migration to a desired tool.

[Set up a Demo](#)

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:

- **URL:** URL of your company's Jira Service Management account.

- **Username:** Go to Icon > Profile; find your Username under the Contact.
- **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 it later.
- Then, choose the project you will 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. INITIARE 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 were 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 for more detailed information.

2. GET A CUSTOM DEMO

If the Custom Demo hasn't met 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, the created or updated records won't migrate to Jira Service Management. So, run the **Delta Migration** so as not to lose that data.
- Continue to run your work on your target help desk.

As the **Full Data Migration** runs in the 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 new tickets are 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 the [Signature support package](#).

3. START FULL DATA MIGRATION

The Migration Wizard imports each record one by one to a chosen project. Depending on your number of entities, 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, so 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 take before transfer. Once you have completed all the 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 to see 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.