Confluence and Jira User Migration Preparation

**Purpose:** This document was created to help Confluence and Jira users understand and prepare components of their spaces and pages pre- and post-migration.

* See pages 3-4 for Migration Actions Summary charts, or
* Select an item from the Table of Contents below to access more detailed instructions.

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# Confluence Migration Actions Summary Chart

|  |  |  |
| --- | --- | --- |
| Feature/Functionality | Pre-Migration Actions | Post-Migration Actions |
| Children Display Macro | N/A | Edit the macro and increase child depth of descendants by 1. Edit the macro and choose Alphabetical in the Sort Order field. |
| Cloud Editor - Errors when converting a legacy page to the new editor | N/A | Convert the migrated page a second time successfully applies the new Cloud editor. |
| Comala Boards | N/A | Recreate Comala boards in Cloud. |
| External links to Confluence | N/A | Manually reconfigure links to reference Cloud URLs. |
| Hyperlinks using the Web Link Option | System administrators are implementing a workaround. Nothing will need to be done by the end user. | |
| Jira Report Macro shows errors when displaying Jira issues | N/A | Edit the macro filter to remove double quotes and replace them with single quotes will display issues as expected. |
| Personal Avatars | N/A | Reassign personal avatars in Cloud |
| Personal Drafts | Publish any drafts you'd like to migrate. | N/A |
| Personal Spaces | N/A | Recreate personal spaces in Cloud. |
| Space Shortcuts | N/A | Recreate space shortcuts in Cloud. |
| Team Calendars | Export your team calendar. | Import your team calendar. |

# Jira Migration Actions Summary Chart

|  |  |  |
| --- | --- | --- |
| Feature/Functionality | Pre-Migration Actions | Post-Migration Actions |
| Automation (Group 2 only) | N/A | Recreate automation rules in Cloud. |
| Boards not connected to migrating projects | N/A | Recreate necessary Scrum and Kanban boards that are not migrated in Cloud. |
| Cross-Project Boards | N/A | Recreate cross-project boards in Cloud. |
| Dashboards | Ensure Filters are shared with a migrating Project. | Recreate Dashboards that are not migrated in Cloud. |
| Epic Link is required, but does not have an asterisk to indicate its requirement | N/A | If an Epic is not selected, an error will appear and let the user know to enter an Epic. |
| External links to Jira | N/A | Manually reconfigure links to reference Cloud URLs. |
| Filters on boards that are not migrated | Ensure Filters are shared with a migrating Project. | Recreate Filters that are not migrated in Cloud. |
| Images in Jira Text boxes do not appear when the issue is first opened | N/A | Reload the issue a few minutes later will load the images. |
| Issue Type Name does not display | System administrators are implementing a workaround. Nothing will need to be done by the end user. | |
| Links to issues or entities that are not migrated | No actions recommended. These will be available as read-only until October 2023. | |
| Links to Jira or Confluence in text fields | N/A | Reconfigure links in comments or details fields to the new Cloud URLs. |
| Personal Avatars | N/A | Reassign personal avatars in Cloud. |
| Priority Values are not filtered per Project | N/A | Priorities per Project are not yet available in Cloud. Atlassian is working on a suggested enhancement. |
| Project Avatars | N/A | Reassign project avatars in Cloud. |
| ProForma (Group 2 only) | N/A, not available in Cloud | The system administrators are researching alternatives. |
| Timesheet Gadgets | N/A | Re-add timesheet gadgets to dashboards following migration. |
| Jira Scheduler | | |
| Schedule Issue Templates are limited to 10 sub-tasks when converted in the Cloud Environment | N/A | Ticket submitted to vendor requesting increase threshold. Student Worker to assist with refactoring effort. |
| When selecting a date in the Project Calendar, the day before populates in its place | N/A | Saving the day, editing it, and choosing the date again is a work around. |
| The Project Calendar within the Scheduler did not convert | N/A | The Project Calendar will need to be recreated in the cloud environment. A Student Worker will assist with recreation. |
| Scheduled Templates can only have one trigger | N/A | Quarterly tasks converted as 4 separate templates instead of one. |

# Pre-Migration Instructions

## Confluence – Personal Drafts

Personal drafts are unpublished pages in Confluence. These do not migrate to the Atlassian Cloud.

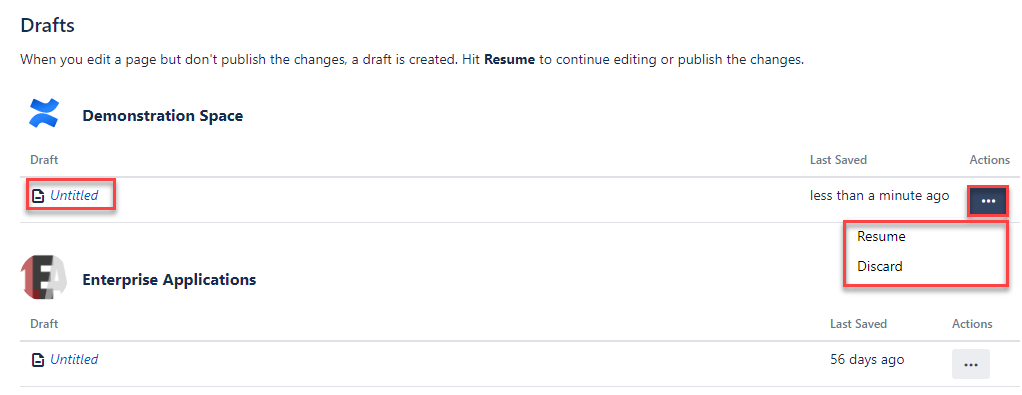
**Instructions**

1. Select your personal avatar in the top right corner of the Confluence screen, and then select **Drafts** from the dropdown menu.

Graphical user interface, application, Word

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1. Choose the Actions menu and choose to either **Resume** to open the page editor or **Discard**.



1. Be sure to publish any pages you wish to migrate.

# Post-Migration Instructions

## Confluence – Children Display Macro – Child Depth Descendants

This macro is used to display a list of pages from a specific part of the page hierarchy.

This issue will appear as missing content in the content section of a main space page.

**Instructions**

Edit the macro and increase “Child Depth Descendants” by 1.

1. Select the edit page icon or the keyboard shortcut “e”.
2. Select the Child Display macro and select **Edit** on the macro menu.

Graphical user interface, text, application, email

Description automatically generated

1. Increase the “Depth of Descendants” field number by 1 in the left pane menu and select **Save**. Then select **Publish** in the page editor to see the corrected list.

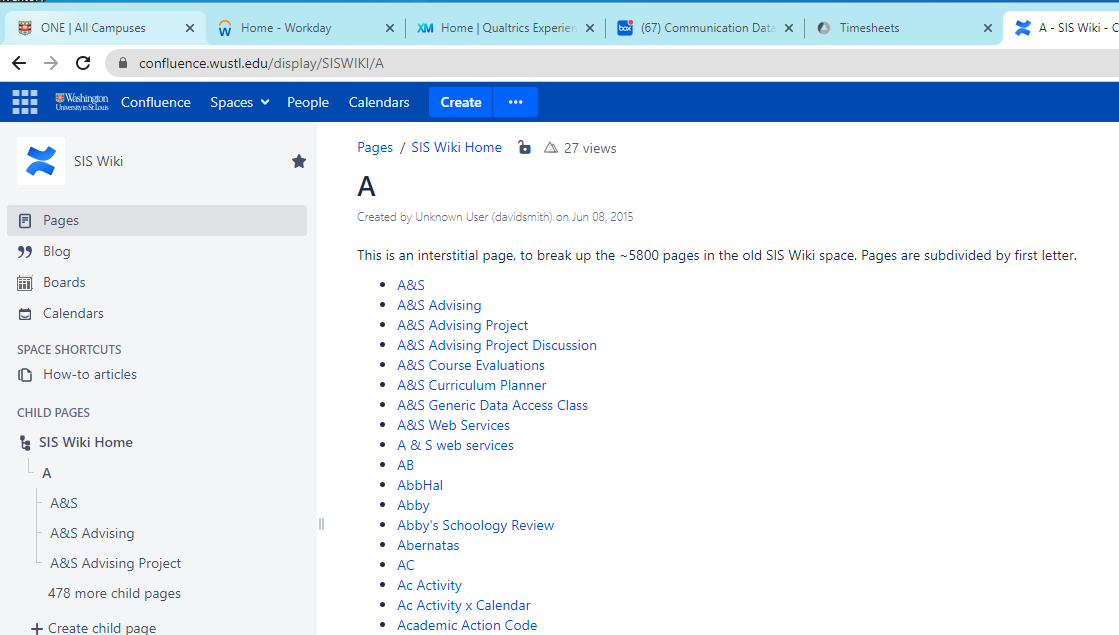
Graphical user interface, application, Word

Description automatically generated

## Confluence – Children Display Macro – Sort Order

This macro is used to display a list of pages from a specific part of the page hierarchy. The default sort order for Confluence child pages does not match the sort order in our legacy Confluence environment.

Below is an image of the child page sort order in our legacy environment. Special characters (i.e., &) are listed before alphabetic characters.



In the Atlassian Cloud, the default sort order lists special characters after alphabetic characters.

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**Instructions**

Edit the Child Display macro to sort by Title.

1. Select the edit page icon or the keyboard shortcut “e”.
2. Select the Child Display macro and select **Edit** on the macro menu.

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1. Scroll down through the left pane menu to find “Sort Children By” and select **title** from the drop-down menu and select **Save**. Then select **Publish** in the page editor to see the corrected list.

Graphical user interface, application

Description automatically generated

## Confluence - Cloud Editor Conversion

Some users are experiencing errors upon converting to the Cloud Editor. They are faced with this message: “Unable to locate JIRA server for this macro. It may be due to Application Link configuration.”

**Instructions**

Convert the page a second time.

These are [the instructions](https://wustl.box.com/s/mtjdkcbn7he1ecuko2bzncs2gkogyrfz) for converting to the Cloud editor.

## Confluence – Comala Boards

Comala boards are used as a visual method to brainstorming or managing your ideas using cards and linked pages. These do not migrate and will need to be recreated by users.

**Instructions**

Recreate Comala boards using [Comalatech’s User Guide](https://docs.comalatech.com/space/CBCCL/13906349248/Welcome+to+Comala+Boards+for+Confluence+Cloud).

## Confluence – External Links to Confluence Spaces and Pages

Space and Page URLs will change in the Atlassian Cloud. External links to Confluence Spaces and Pages will initially lead to the read-only legacy environment (eg. bookmarks, KnowledgeBase articles, etc.)

**Instructions**

Users will need to reconfigure external links to Confluence pages by replacing the legacy URL with the Cloud URL.

## Confluence - Jira Report Macro

The Jira Report Macro allows users to view a list of Jira issues based on a filter. An error may appear after Cloud conversion. (See the image below.)

Graphical user interface, text, application, email

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**Instructions**

Edit the Jira Macro filter to remove double quotes and replace them with single quotes to display issues as expected.

Graphical user interface, text, application

Description automatically generated

Corrected macro image below:

Graphical user interface, text, application, email

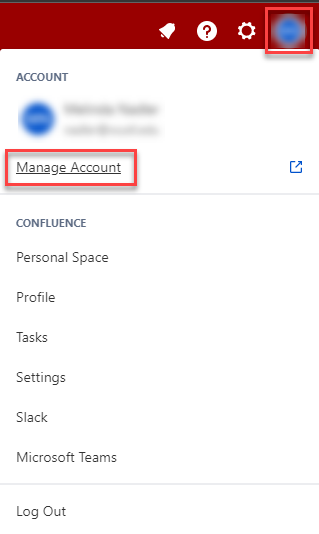
Description automatically generated

## Confluence – Personal Avatars

Personal avatars are an optional feature in Confluence, allowing the user to customize their appearance in Confluence. The default avatar uses the user’s initials. These avatars do not migrate and will need to be re-assigned in the Cloud instance.

**Instructions**

1. Select your user avatar (initials) in the top right corner of the screen in Confluence. Then select **Manage Account**.



1. The Profile and visibility screen will appear. Select the current avatar to open the avatar menu. Select **Add profile photo** and upload the avatar of your choice from your device.Graphical user interface, application, Teams

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## Confluence – Personal Spaces

A Personal Space serves a location to organize your notes and often serve as a dashboard for the user. Personal spaces do not migrate and will need to be recreated in Cloud by the user.

**Instructions**

Open both the legacy personal space and your new Cloud personal space in separate windows. Copy and paste relevant data to your new Cloud space.

Reference Atlassian’s [Customize your Personal Space](https://support.atlassian.com/confluence-cloud/docs/customize-your-personal-space/) support page as needed.

## Confluence – Space Shortcuts

Space shortcuts are links in the left pane menu to assist users of your space with navigation. Space shortcuts do not migrate to the Atlassian Cloud. Each space owner will need to recreate space shortcuts.

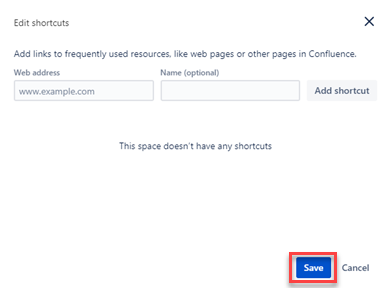
**Instructions**

1. From the left-pane menu of a Space, select **Add shortcut.**

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1. Complete the required fields in the “Edit shortcuts” menu and select **Save**.



## Confluence – Team Calendars

Team Calendars allows you to create calendars for yourself and your team, and view other calendars from your organization, all in one place. These do not migrate to the Atlassian Cloud and will need to be recreated or manually migrated by the user.

**Instructions**

To manually migrate the team calendar, users will need to export the team calendar as an .ics file and import that file to the Cloud instance. Refer to Atlassian’s [How to Migrate Team Calendars data from Server to Cloud](https://confluence.atlassian.com/confkb/how-to-migrate-team-calendars-data-from-server-to-cloud-1079350571.html) instructions for assistance.

## Jira – Automation

Automation allows users to automate actions within their projects based on user-defined criteria. Automation rules do not migrate from Server to Cloud and will need to be manually recreated by the user. This only affects Group 2.

**Instructions**

Project owners can recreate the rules in the Cloud Sandbox environment and export/import automation rules from Sandbox into Production Cloud site after project has been migrated to Production. Import/Export will be executed by Jira Admin. This pertains only to Group 2 migration.

Refer to Atlassian’s [Create and edit Jira automation rules](https://support.atlassian.com/cloud-automation/docs/create-and-edit-jira-automation-rules/) support page for assistance.

## Jira - Boards not connected to migrating projects

When filters, Scrum, and Kanban boards are not connected to a migrating project, they will not migrate to the Cloud.

**Instructions**

Recreate relevant Scrum and Kanban boards in Cloud. Use Atlassian’s [Learn how to create agile boards in Jira Software](https://www.atlassian.com/agile/tutorials/creating-your-agile-board) tutorial for assistance.

## Jira – Cross-Project Scrum and Kanban boards

Cross-Project boards are those that reference more than one project. These do not migrate to the Cloud and will need to be recreated in Cloud.

Image of a Cross-Project board:

Graphical user interface, text, application, email

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**Instructions**

Use Atlassian’s [Learn how to create agile boards in Jira Software](https://www.atlassian.com/agile/tutorials/creating-your-agile-board) tutorial for assistance.

## Jira – Dashboards

A dashboard is a display of gadgets used to help you organize your projects, assignments, and achievements in different charts. These do not migrate to the Atlassian Cloud.

**Instructions**

The system administrators are currently testing a workaround.

To recreate a dashboard in Cloud, refer to Atlassian’s [Create and edit dashboards](https://support.atlassian.com/jira-software-cloud/docs/create-and-edit-dashboards/) support page for assistance.

## Jira - Epic Link

In Cloud, sometimes an Epic Link is required, but does not have an asterisk to indicate its requirement. If an Epic is not selected but is required, an error message will appear and let the user know to enter an Epic.

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**Instructions**

Add the Epic Link when you receive the error message.

## Jira – External Links to Jira

Project and issue URLs will change in the Atlassian Cloud. External links to Jira entities will will initially lead to the read-only legacy environment (eg. bookmarks, KnowledgeBase articles, etc.)

**Instructions**

Users will need to reconfigure external links to Jira entities by replacing the legacy URL with the Cloud URL.

## Jira – Filters on non-migrating boards

Jira filters are saved searches that can be re-used. Filters connected only to non-migrating boards may not migrate depending on the permissions configuration.

**Instructions**

The project team is working to learn more.

Refer to Atlassian’s [Save your search as a filter](https://support.atlassian.com/jira-software-cloud/docs/save-your-search-as-a-filter/) support page to learn more about creating, running, and managing your filters in Jira.

## Jira – Images in Jira Text Boxes

In migrated projects, images in Jira text boxes do not appear when the issue is first opened. Caching issues are causing the images appear unavailable.

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**Instructions**

Reload the issue a few minutes later to load the images.

Graphical user interface, application, Teams

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## Jira – Links to non-migrating issues or entities

Any link in Jira referencing a non-migrating issue or entity will no longer work once the legacy instance of Jira is retired. These will be available as read-only until October 2023.

**Instructions**

There is no action necessary.

## Jira – Links to Jira or Confluence in text fields (details, comments, etc.)

Any link in a Jira text field, such as the Description field or a comment referencing another Jira issue or entity, or a Confluence page, will need to be reconfigured in the Cloud environment.

**Instructions**

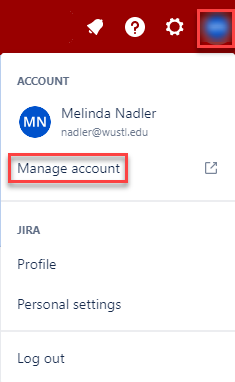
Users will need to manually replace relevant links in text fields.

## Jira – Personal Avatars

Personal avatars are an optional feature in Jira, allowing the user to customize their appearance in Jira. The default avatar uses the user’s initials. These avatars do not migrate and will need to be re-assigned in the Cloud instance.

**Instructions**

1. Select your user avatar (initials) in the top right corner of the screen in Jira. Then select **Manage Account**.



1. The Profile and visibility screen will appear. Select the current avatar to open the avatar menu. Select **Add profile photo** and upload the avatar of your choice from your device.

Graphical user interface, application, Teams

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## Jira – Project Avatars

Project avatars are a feature in Jira that helps distinguish projects from one another. These avatars do not migrate and will need to be re-assigned by Project owners in the Cloud instance.

**Instructions**

1. Select the **Project Settings** icon at the bottom of the left pane menu.

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1. Select **Upload Image**.Graphical user interface, application

   Description automatically generated
2. Upload or select an existing avatar and select **Close**.

Graphical user interface, application

Description automatically generated

1. Be sure to select **Save details** on the bottom of the Project Settings page to confirm your selection.

Graphical user interface, application

Description automatically generated

## Jira – Scrum and Kanban boards not connected to a migrating project

Scrum and Kanban boards not connected to migrating projects will not migrate and will need to be recreated by the project owner in Cloud.

**Instructions**

Use Atlassian’s [Learn how to create agile boards in Jira Software](https://www.atlassian.com/agile/tutorials/creating-your-agile-board) tutorial for assistance.

## Jira – Timesheet Gadgets

This time reporting captures time spent on every project flow in Jira. Timesheet Gadgets do not migrate and will need to be recreated by Project owners in the Atlassian Cloud.

**Instructions**

Re-add Timesheet Gadgets to dashboards after your project has migrated.

Refer to Tempo’s [Team Timesheet Gadget](https://help.tempo.io/cloud/en/tempo-timesheets/tempo-gadgets/tempo-teams-gadgets/team-timesheet-gadget.html) instructions for assistance.

# System Administrators Actions

## Confluence – Internal Links using the Weblink Option

Internal links are links within Confluence that refer to another Confluence page or space. There are three ways to insert a hyperlink in Confluence.

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Hyperlinks created using the Web link option will not work in the Cloud instance, but those using the Recent and Search options will migrate since they employ macros.

**Instructions**

There is a project team workaround. Nothing will need to be done by the end user.

## Jira – Issue Type Name

In migrated projects, the issue type name does not display.

**Instructions**

There is a project team work around. Nothing will need to be done by the end user.

## Jira – Priority Values

Post migration, Priority Values are not filtered per Project. Priorities per Project are not yet available in Cloud.

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**Instructions**

Atlassian, our vendor, is working on a suggested enhancement.

## Jira – ProForma

ProForma is used to create forms within Jira issues or requests. These do not exist in Jira Cloud and will not migrate. This only affects Group 2.

**Instructions**

The system administrators are researching alternative options for use in place of ProForma and consulting with affected users.