eazyBI Migration Guide

Atlassian Data Center → Atlassian Cloud

For Jira Administrators & Solution Partners

KEY CONCEPTS TO UNDERSTAND

Concept	Description
Same Application	eazyBI DC and Cloud are the same core application — no major functional differences.
Metadata Only	Migration transfers accounts, users, report/dashboard definitions — **not report data**.
Re-import Required	After migration, you must manually import data into each account from Cloud Jira.
Test First	Always run test migrations before production to identify issues early.

PHASE 1: PREREQUISITES

☐ **Update eazyBI to latest version**
Ensure DC eazyBI is updated for migrator compatibility with Cloud.

☐ **Migrate Jira to Cloud first**
Complete Atlassian Jira migration before starting eazyBI migration.

☐ **Install third-party apps in Cloud**
Xray, Zephyr, or any apps used in reports must be installed in Cloud.

☐ **Install eazyBI in Cloud**
Leave advanced settings empty — they will be transferred from DC.

☐ **Verify network access**
DC instance must reach: your Atlassian Cloud URL + `eazybi.com` (check firewall rules).

> **TIP: IP Allowlist**
> Check the eazyBI documentation REST API page for the list of IP addresses to whitelist.

PHASE 2: PRE-MIGRATION PREPARATION

☐ **Create eazyBI database backup**
Use your database backup tool — the migration zip file is NOT a backup.

☐ **Test your backups**
Verify backups actually work before proceeding.

☐ **Document custom field mappings**
Record all custom field IDs and names — they often change during Jira migration.

☐ **Clean up unused content**
Remove unused fields, accounts, reports — less to migrate = fewer issues.

☐ **Run test migration**
Migrate to a test Cloud environment first to identify any issues.

☐ **Note Jira dashboard gadgets**
Document which eazyBI gadgets exist in Jira/Confluence dashboards (manual re-add required).

> **IMPORTANT**
> Template accounts must be migrated together with all their child accounts — do not separate them.

PHASE 3: MIGRATION PROCESS

☐ **Open Database Migrator in DC eazyBI**
Navigate to eazyBI → Settings → Database Migrator.

☐ **Select "From server to cloud" migration type**
Choose the Cloud migration option.

☐ **Enter Cloud Site URL**
Your Atlassian Cloud instance URL (e.g., `yoursite.atlassian.net`).

☐ **Enter user email**
Use an admin account email that exists in Cloud.

☐ **Generate and enter API token**
Cloud: Profile → Account Settings → Security → API Tokens → Create new token.

☐ **Select accounts to migrate**
Choose all accounts or specific ones (keep template accounts with children).

☐ **Click "Migrate" and wait for completion**
Process is fast — only metadata is transferred.

> **Quick Process**
> Since only metadata is migrated (not report data), the transfer typically completes in seconds to minutes.

PHASE 4: POST-MIGRATION STEPS

☐ **Review migration warnings**
Check for any warnings about users, fields, or accounts not found.

☐ **Verify advanced settings transferred**
Check that custom settings from DC appear in Cloud eazyBI.

☐ **Reset authorization if needed**
If user email differs between DC/Cloud: Source Data → Reset Authorization → Assign to current user.

☐ **Import data into each account**
Go to each account → Source Data → Import (this imports from Cloud Jira).

☐ **Update custom field IDs in advanced settings**
Replace old DC field IDs with new Cloud field IDs where needed.

☐ **Review source application import options**
Check that import settings are correct for Cloud environment.

☐ **Re-add Jira dashboard gadgets**
Manually add eazyBI report/dashboard gadgets to Jira dashboards.

☐ **Re-add Confluence gadgets**
Recreate any eazyBI gadgets in Confluence pages.

☐ **Check REST API data sources**
Ensure endpoints are publicly accessible from Cloud, update authorization if needed.

☐ **Check SQL data sources**
Internal databases need network exposure or migration to cloud-accessible location.

☐ **Test reports and dashboards**
Compare Cloud reports with DC to verify data accuracy.

COMMON ISSUES & SOLUTIONS

- **Custom field IDs changed:** Migrator auto-maps by name/type. If not found, manually update IDs in advanced settings and calculated fields.

- **User permission errors:** Users matched by email. Different emails = reset authorization to current Cloud user.

- **Field type mismatches:** Some fields may change type (integer → text). Re-select in import options and reconfigure if needed.

- **SQL/REST sources inaccessible:** Internal sources need public access or relocation. Consider Azure/AWS hosting for databases.

- **Third-party app field differences:** Xray, Zephyr may have different available fields in Cloud. Check app documentation.

- **Historical data differences:** If Jira data differs after migration, eazyBI reports will reflect Cloud data.

- **Zephyr incremental import unavailable:** REST API limitation in Cloud — each Zephyr import will be a full import (takes longer).

RESOURCES

- **eazyBI Documentation:** eazyBI database migration

- **Migration Webinar:** How to migrate eazyBI from DC to Cloud

- **Support Contact:** support@eazybi.com

- **Security Information:** eazyBI is SOC 2 certified. Data stored on Google Cloud Platform.