

How to Sync Epics from Azure DevOps to Jira Cloud

Last Modified on 03/19/2024 11:54 am EDT

This article shows how to synchronize Epics from Azure DevOps to Jira Cloud.

To sync the epics from Azure to Jira Cloud it is required to follow the steps listed below:

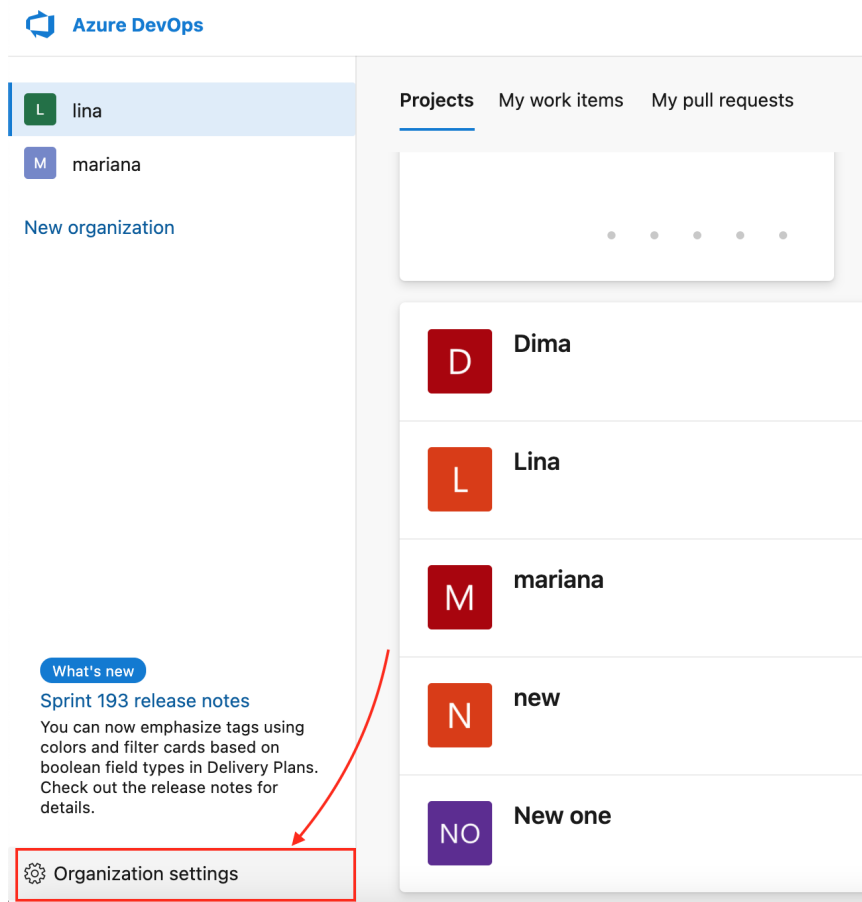
1. Initiate a Script connection from Azure to Jira Cloud
2. Navigate to the **Connections** tab in Exalate.

You can also access Exalate with this link:

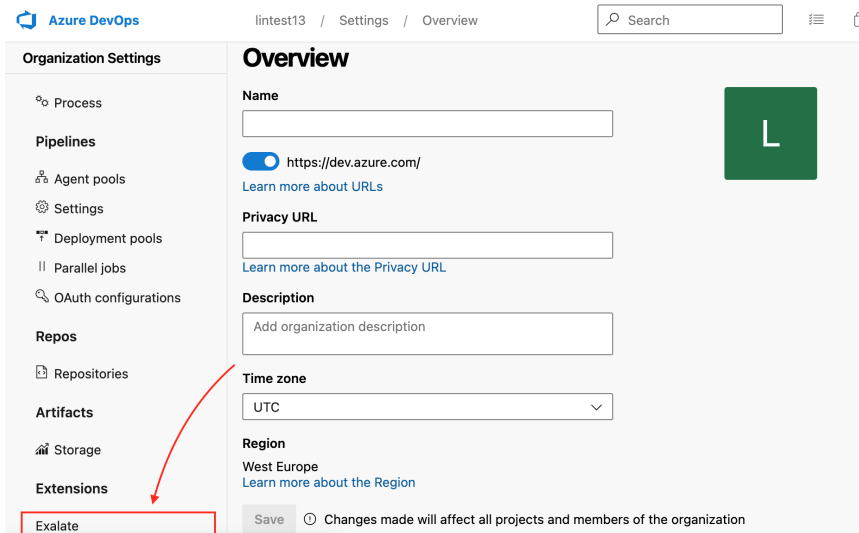
```
https://dev.azure.com/{your_organization_name}/_settings/idalko-tools.exalate.adnode
```

To navigate to the **Connections** tab:

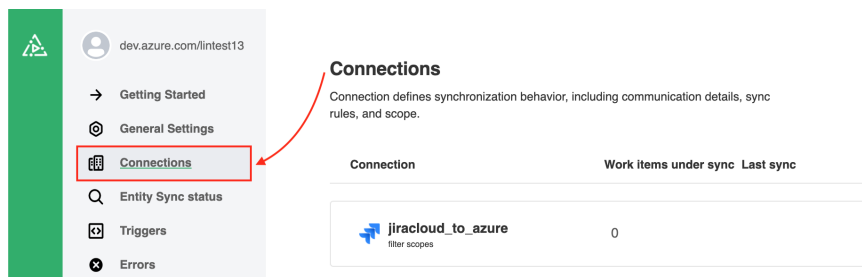
1. Click **Organization settings**.



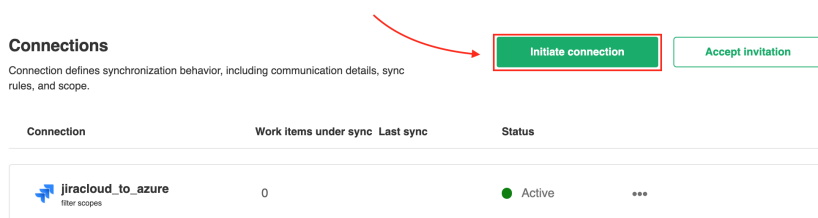
2. Click **Exalate** in the **Extensions** section.



3. Click **Connections**.



2. Click **Initiate connection**.



3. Enter the **Destination instance URL**.

The destination instance URL is a link to the other instance you want to set up a connection with. You can enter the link to the instance you are trying to connect, or the **Exalate URL** from [General Settings](#).

Exalate determines your instance type and suggest appropriate connection types.

If the destination instance is private, or you don't have a destination instance link, click **I don't have a URL**. You are able to create a [Script](#) connection in this case.

Initiate connection
✕

Destination instance URL ⓘ

I don't have a URL

Next

4. Select the **Script** connection.

Initiate connection
✕

Destination instance URL ⓘ

✓

I don't have a URL

Choose the configuration type

Basic

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Recommended for use cases of basic complexity

Visual

- Low-code, visual interface
- Configure both sides of the connection using a single interface
- Recommended for use cases of basic to intermediate complexity

Script

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next

5. Click **Next**.

Initiate connection
✕

Destination instance URL ⓘ

✓

I don't have a URL

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Next

6. Enter the **Connection information**.

Descriptions of fields

Field	Description
Destination instance URL	Link to the other instance you want to set up a connection with. You can enter the link to the instance you are trying to connect, or the Exalate URL
Local instance short name	Short name of your instance
Remote instance short name	Name of the destination instance
Connection name	Name of the connection. The connection name is limited to 255 characters.
Description	Description of the connection

Initiate connection ✕

Connection information

Local instance short name*

Remote instance short name*

Connection name*

Description

[< Previous](#) Next

7. Click **Next**.

Initiate connection

Connection information

Local instance short name*
azure

Remote instance short name*
jira

Connection name*
azure_to_jira

Description

< Previous Next >

8. Select a project where you would like to sync issues.

Initiate connection

Select a project for the incoming sync

Exalate generates default sync rules to synchronize basic work item fields. You can adapt the sync rules later. By default the following work item data will be synchronized: summary, description, comments, labels and attachments.

Please select the project where you want to create work items, received from the other side.*

Select Project

< Previous Initiate

9. Click **Initiate**.

Initiate connection

Select a project for the incoming sync

Exalate generates default sync rules to synchronize basic work item fields. You can adapt the sync rules later. By default the following work item data will be synchronized: summary, description, comments, labels and attachments.

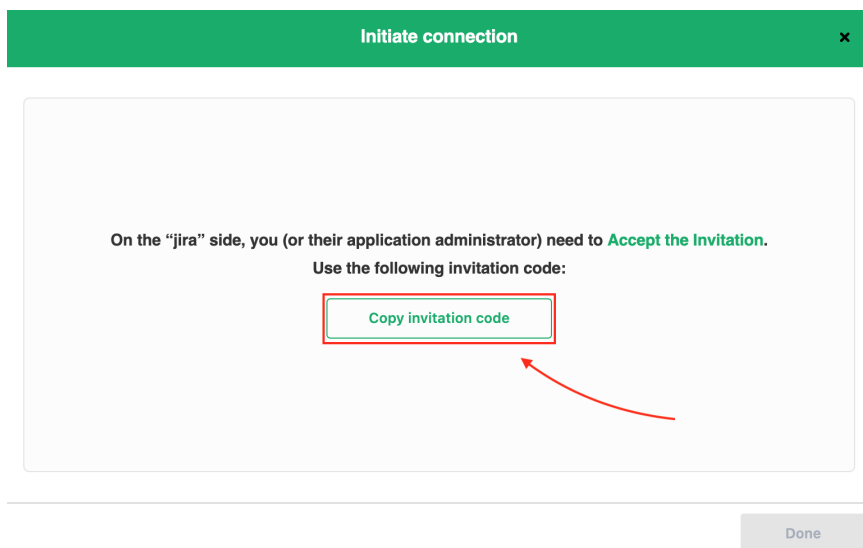
Please select the project where you want to create work items, received from the other side.*

mariana

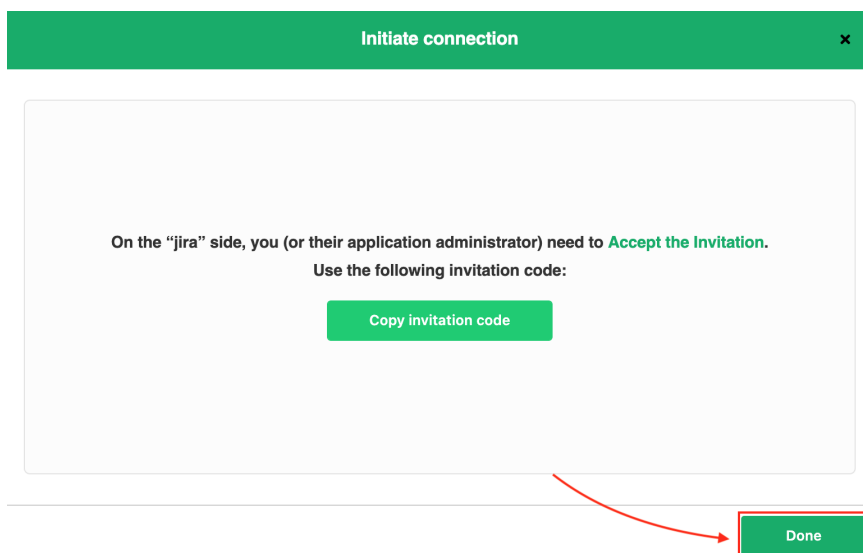
< Previous Initiate

10. Click **Copy invitation code**.

You can send the invitation code to the destination instance admin.



11. Click **Done**.

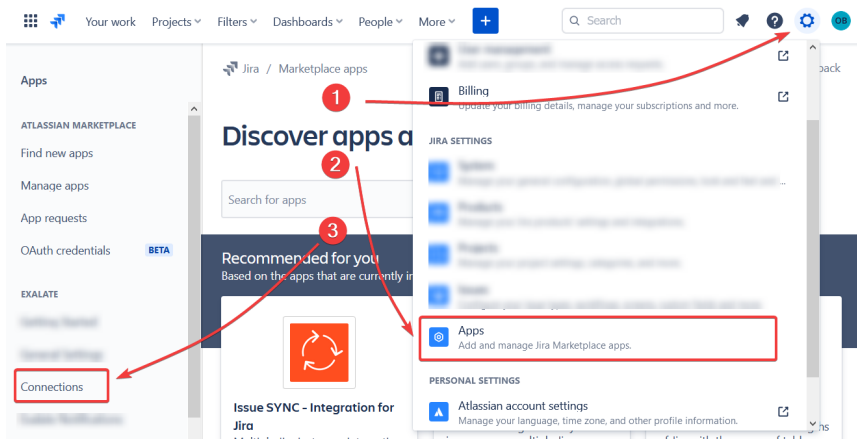


Accept a Script connection invitation in Exalate for Jira Cloud.

1. Navigate to the **Connections** tab in Exalate

To navigate to the **Connections** tab:

1. Navigate to **Settings** -> **Apps**







2. Click **Connections**

2. Click **Accept invitation**

Connections

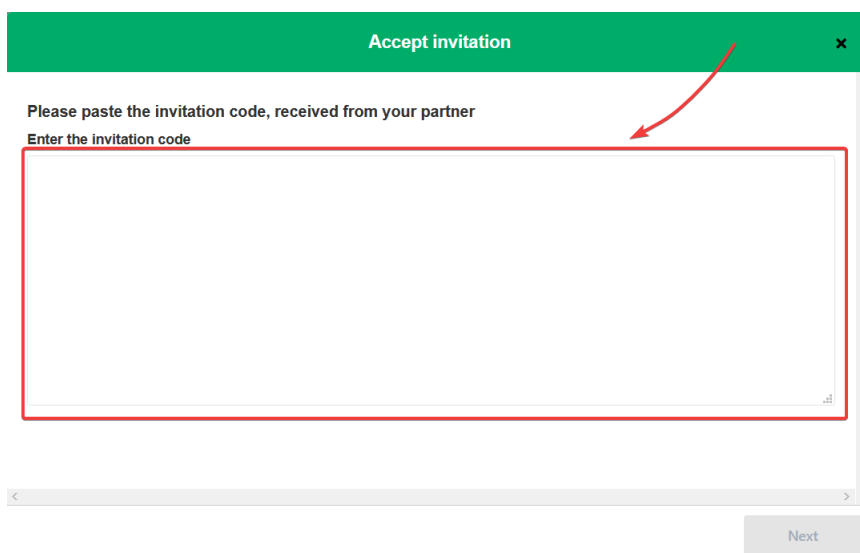
Connection defines synchronization behavior, including communication details, sync rules, and scope.



Connection	Issues under sync	Last sync	Status
 [Redacted]	0		Active   

3. Paste the invitation code

Paste the invitation code that you received from your partner.



4. Click **Next**

Accept invitation
✕

Please paste the invitation code, received from your partner

Enter the invitation code

```
UilslR5cGUiOnsia2V5JoiVNFUj9LcJvcGvYyXRvcnMioIt7lmtleSl6kItIn0seyJrZXkiOijU05PVCJ9XX0seyJxdWVyeWFibGUjOm
ZhbHNLcjsYwJlbC16lkR1ZSBkYXRliiwa2V5JoiRfVFlwidHlwZSI6eyJrZXkiOiJlEQVRFlIn0slm9wZXJhdG9ycyl6W119XSwiZmVhdH
VyZXMiOlt7lmtleSl6k9QVEIPTI9GSUVMRFRNFV0lUSF9TVFJFU1VQUE9SVCJ9LHsia2V5JoiRURJVE9Sx0NPTIRFWFRUFJPR1JFU1Mi
fsx7lmtleSl6ldJTERDQVJEX01BUFBjTkdTXORFRkFVTFQifV19LcJrYXNpY0Nvbm5lY3Rpb24lOnsiZmllbGRzljpbeyJrZXkiOiJlQUk9K
RUNUliwibGFiZWwiOjQcm9qZWNoIiwidHlwZSI6eyJrZXkiOiJlPUFRJT04ifSwib3BlcmF0b3JzljpbXX1dF0slmNvbm5lY3Rpb24lOn
sibmFtZSI6ImV4YWdyZWVucX3RvX3FhdGVhbTdfMjAyMS0wMy0xMCANtowND01OSlsm1vZGUlOjCCQVNJQyIsImRlc2NyaXB0
aW9uIjoilwic3luY111bGVzljp7InZlcnNpb24iOiIyIiwibGlua1R5cGUiOiJlTWU5DX1BBTkVlIiwiaWZmlbGRWYXN1ZXMiOnt9Sswi29t
bXVuaWNhdGlvbiil6eyJzW5kUjHvdG9jb2wiOiJESVJFQ1RfSFUUCiIsInJlY2VpdmVQcm90b2NvbC16kRjUkVDVf9IVFRQliwcmVt
b3RlVXJsIjoiaHR0cHM6Ly9qY2xvdWRub2RlLW1lbmctZGloZS1tYWwLXRvYWcuZXhhbGF0ZS5zZC1slmIzc3VlVHhY2tclVybC16Im
h0dHBzOi8vcWF0ZWFtNy5hdGxhc3NpYW4ubmV0In0slmXvY2FsW5zdGFuY2VOYW11IjoicWF0ZWFtNy5hdGxhc3NpYW4ubmV0In0slm
NlTmFTZSI6ImV4YWdyZWVuc19
```

Next

5. Select the project where you want to sync issues

Accept invitation
✕

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

Please select the project where you want to create issues, received from the other side.*

← Previous
Confirm

6. Click **Confirm**

Accept invitation
✕

Select a project for the incoming sync

After accepting an invitation for a Basic mode connection, Exalate will be able to sync basic issue fields. The sync rules cannot be updated. Exalate will sync the following issue data: summary, description, comments, and attachments.

Issue types are mirrored. This means that tasks will be synced as tasks, bugs as bugs, and improvements as improvements. If an issue type is not included in the basic set, it will be synced as a task.

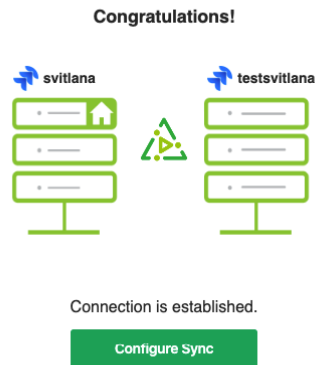
Please select the project where you want to create issues, received from the other side.*

← Previous
Confirm

Congratulations! The connection is set up. Now you can proceed to the configuration.

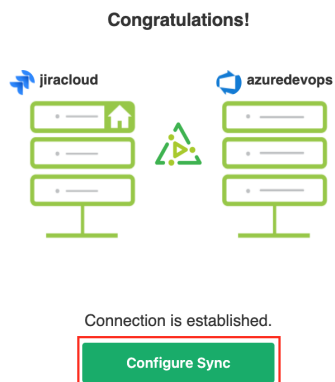
What's next?

After your connection is established, you can configure the sync rules for the connection.



1. Configure Incoming sync rules on the Jira Cloud side

Once the connection has been created and accepted from the Jira side, you need to configure specific sync rules. Click **Configure Sync** to modify the sync rules.



The first sync section of the Incoming script on the Jira side dictates how an epic needs to be created.

When you want to create Epics, make sure that the type name is set to "Epic".

Use the *replica.summary* variable to set an Epic summary from Azure Devops as an Epic name in Jira Cloud.

```

if (firstSync) {
  // If it's the first sync for an issue (local issue does not exist yet)
  // Set project key from source issue, if not found set a default
  issue.projectKey = nodeHelper.getProject(replica.project?.key)?.key?: "TS2"

  if (replica.type?.name == "Epic") {
    issue.typeName = "Epic"

    // set the epic name to the same as the issue summary
    issue.customFields."Epic Name".value = replica.summary
  } else {
    // Set type name from source issue, if not found set a default
    issue.typeName = nodeHelper.getIssueType(replica.typeName)?.name
  }
}
}

```

2. Check the Outgoing sync rules on Azure side

Default Outgoing sync rules for Azure DevOps already include the required variables such as project, summary, and type.

In case you have included other variables, make sure to add them to the Azure Outgoing sync rules.

▼ Outgoing sync ⓘ

```

1 replica.key = workItem.key
2 replica.assignee = workItem.assignee
3 replica.summary = workItem.summary
4 replica.description = nodeHelper.stripHtml(workItem.description)
5 replica.type = workItem.type
6 replica.status = workItem.status
7 replica.labels = workItem.labels
8 replica.priority = workItem.priority
9 replica.comments = nodeHelper.stripHtmlFromComments(workItem.comments)
10 replica.attachments = workItem.attachments
11 replica.project = workItem.project
12 replica.areaPath = workItem.areaPath
13 replica.iterationPath = workItem.iterationPath
14
15 //Send a Custom Field value
16 //replica.customFields."CF Name" = workItem.customFields."CF Name"

```

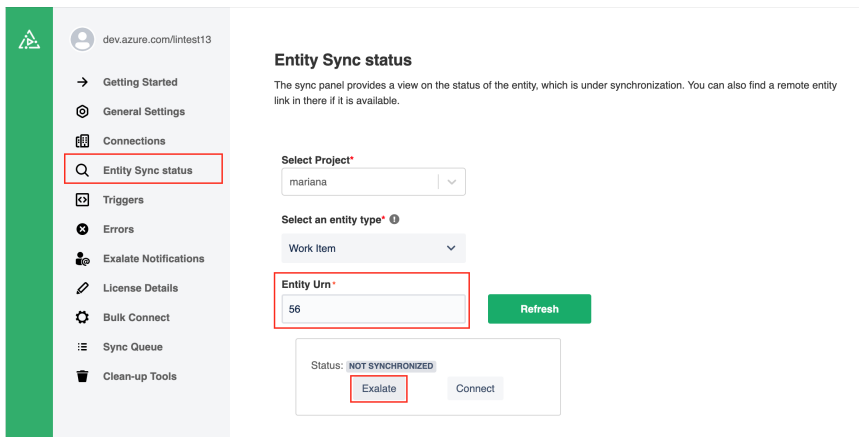
[Copy outgoing sync processor to clipboard](#)

3. Run the Epic sync

Once you define the sync rules, you can run the synchronization in several ways, such as creating a trigger or using the Exalate button from the Sync panel.

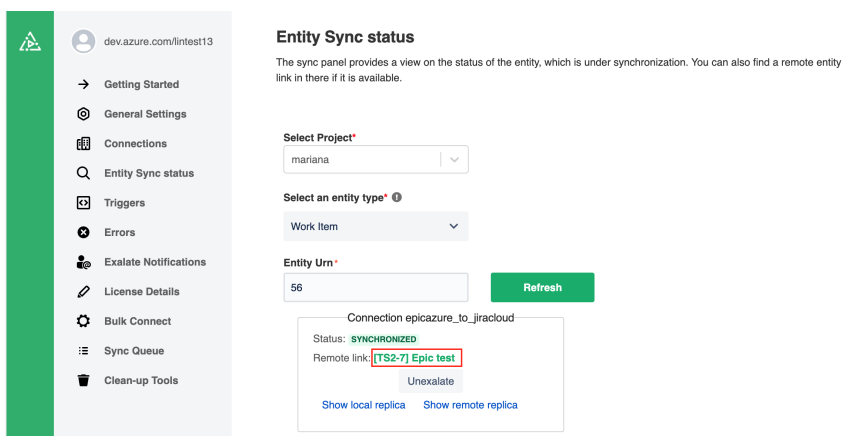
Another way to run a quick sync and check the sync rules is to use the Entity Sync status tab in Exalate:

1. Open the Entity Sync status tab in Azure DevOps
2. Select a project and Enter a Work Item ID
3. Click **Search**
4. Click **Exalate**



5. Select a connection

6. Check the newly created Epic on the Jira side



7. Check if all the fields were synced

