ATLASSIAN

Cloud Migration Checklist

A migration is a significant effort that requires proper planning, preparation, and testing. Use this checklist to inform migration decisions and guide you on your journey to cloud.

Phase 1: Assess

WHEN: **3-12 MONTHS BEFORE MIGRATION** **PROGRESS:**

0%   100%

Before you start a migration, it's important to understand the basics. Should you move to cloud? What will you gain or lose? It's also important to understand the scope of the overall effort. How many products will you migrate? How many apps are installed? How many users do you have? Answer these questions to determine the scope and complexity of your migration.

ⓘ Organizations with three or fewer products, six or fewer apps, and fewer than 750 users can likely expect a straight-forward and simple migration. Organizations with many products, many apps, customizations, and more than 750 users should prepare for a more complex migration which requires additional upfront planning.

For a simple migration, start the assessment process 3-6 months before the desired migration date. For a complex migration, allow 6-12 months. Assessment is the most important step in migration planning. Diligence in the early project phases will ensure a successful result. Review all the documentation, make sure you thoroughly understand the differences in cloud products, and form a project team to help you research and analyze the effort.

Expect to spend 25% of your time in this phase.

☐ **Understand migration basics**

Start learning about the migration process with the resources in the Cloud Migration Center. This documentation includes instructions, best practices, and tools to help you every step of the way. For simple migrations, use the server to cloud migration guide to help you through this phase and others. For complex migrations, consider the dedicated support options from Atlassian's network of Solution Partners. Also read answers to the most frequently asked questions. Join the online Atlassian Community Cloud Migration group to engage with peers.

☐ **Review product and deployment differences**

Compare the differences between cloud, server, and Data Center products. Review the biggest difference between server and cloud and what's new in Atlassian's cloud platform and products. Review specific product differences in Jira, Jira Service Management, Confluence, and Bitbucket. Record the major feature, terminology, and interface differences to share with end users in the "Test" and "Launch" phases.

Next, understand user management differences and determine whether to use Atlassian Access to manage all cloud users in one location. Review the cloud roadmap to identify any potential migration blockers, prepare for upcoming features, and align your migration timing with feature launches. Check the roadmap often as we're always making improvements to our cloud platform and products.

Finally, use the cloud savings calculator to compare the total cost of ownership on server and cloud. Remember to compare cloud pricing with self-managed deployment costs like hardware and downtime.

☐ **Start a free cloud migration trial**

Activate a free cloud migration trial to explore and evaluate cloud for the remaining duration of your existing server license, up to 12 months. Use the trial to compare differences between Standard and Premium cloud plans, test drive new features, and plan a test migration.

ℹ️ Sign up with the URL you'll use for production after the migration is complete.

Next, set up your organization and verify a domain. If you have a firewall or proxy server, allow IP ranges and domains so products can reach necessary services. Configure new cloud application settings to match current settings. Example: Select the same default language, time zone, date format, and other default options.

Finally, if you're using multiple products, connect them using application links. Use the version matrix to verify connection compatibility.

☐ **Select a cloud plan**

Compare pricing and features of the different cloud plans. Choose between Free, Standard, Premium, or Enterprise depending on your organization's user count, data storage, and support needs.

☐ **Assemble a project team**

Determine the end users and business areas most impacted by the migration. Assemble a team of internal stakeholders to help determine project scope, assess needs, review pricing, and make decisions. Designate specific users to test the result of the migration. Involve the team in all major decisions.

Have a security team member review product security, reliability, and privacy information in the Trust Center. Have a legal team member review the Cloud Terms of Service. Download documents from the Cloud Security Alliance to complete security self-assessments.

> ℹ️ Have more than 1,000 users? An Atlassian advocate can assist with completing a security questionnaire.

Finally, determine whether to engage an Atlassian Solution Partner for additional migration support and expertise. Atlassian teams are also available to provide support or help address blockers if they arise.

☐ **Assess apps**

Determine how many products to migrate. For each product, determine how many apps are installed and which are widely used. Are there any apps that serve similar purposes? Are there any that duplicate native functionality in cloud products? Are there any with expired licenses? Install the free Cloud Migration Assistants from the Atlassian Marketplace. Use the app assessment feature to understand which apps are installed, estimate their usage, and determine cloud compatibility. Review the list of compatible apps and available migration paths. Determine whether you can migrate app configurations and data. Also record any customizations, connections, or integrations with other software.
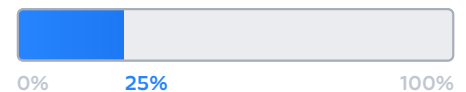
> ℹ️
> - Decide how to handle each app, customization, connection, and integration individually.
> - When a compatible app exists, compare the features as differences are common.
> - For compatibility issues, contact the creator. A compatible version may be available in the future.

Phase 2: Plan

WHEN: 2-3 MONTHS BEFORE MIGRATION   **PROGRESS:**

0%   **25%**   100%

Now that you have a migration path and understand the scope of the project, it's time to choose a migration method, initiate basic project management, and determine a timeline to complete the remaining steps.

Expect to spend 20% of your time in this phase.

☐ **Assess current applications**

Assess the size and complexity of your data. Record the number of users in each product. Make sure all users have unique email addresses. In Jira, record the number of projects and settings like issue types, workflows, custom fields, etc. In Confluence, record the number of global spaces, personal spaces, and pages. In Bitbucket, record the number of projects and repositories.

> ℹ️
> - In Jira Server or Data Center, get the count of all configuration elements in the "Database Statistics" section of the "System info" admin page. Visit: **Admin > System > System info**.
> - In Confluence Server or Data Center, get counts by visiting **Admin > General configuration > System information**.

Are there data, settings, inactive users, or apps that don't need to migrate? Evaluate all data so you don't migrate settings you don't need. Determine how to archive or exclude unneeded information. Clean up any unnecessary settings.

> ℹ️ Decreasing the amount of data needed to migrate makes the migration easier and makes future maintenance easier as well.

Finally, determine whether you need to upgrade products, apps, or fix known problems before migration.

☐ **Determine migration strategy**

Review the migration strategy options. Determine whether you'll migrate all data, selected data, or start fresh in an empty application.

Once you've determined the scope of data, determine whether to migrate in phases or all at once. Consider how much downtime might be required and how much is acceptable.

> ℹ️ If certain teams or information aren't ready to migrate, consider a phased approach. While the entire migration process will take longer to complete, a phased approach allows you to make forward progress while working around dependencies and other company priorities.

☐ **Compare migration methods**

There are multiple migration methods and the method that's right for you will depend on your unique situation. Start by comparing each method's benefits, requirements, and limitations. Determine whether to use a Cloud Migration Assistant, native site import (backup and restore functionality), CSV or XML import/export utilities, custom scripts, or a combination of multiple methods. Take the time to review each option to make sure it meets your needs.

> ℹ️ • Evaluate migration methods for each product individually. For example, you might want to use the Cloud Migration Assistant for Jira and the site import method for Confluence.
> • The Bitbucket Cloud Migration Assistant is currently in development. To sign up for updates, visit the Bitbucket Cloud Migration Assistant page.

☐ **Plan the project**

Treat this project like any other strategic company initiative. Delegate a project manager to plan and oversee the overall effort. Set up regular meetings to make decisions or checkpoints to ensure forward progress. Create a Jira project to track tasks and a Confluence space to document decisions. Create a dedicated chat room for the migration team and/or to address user questions.

> ℹ️ • Manage the migration project in your current application, not in the new cloud application. More migration methods are available when cloud applications don't contain existing data.
> • Link the Jira project to its companion Confluence space for added collaboration capabilities.
> • Connect the chat program to the project and space too.

☐ **Establish a timeline**

Create a high-level timeline that includes any remaining research or decisions to be made, preparations to complete, testing, the migration target date, and post-launch support. Build in more time than you think is necessary, especially in the testing phase. Determine when to complete any needed maintenance like upgrades, cleanup, archival, backup, etc. Expect the timeline may fluctuate as you prepare for the migration, uncover any challenges, and work around other company projects.

Phase 3: Prep

WHEN: 1–2 MONTHS BEFORE MIGRATION **PROGRESS:**

0%   45%   100%
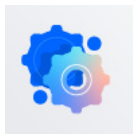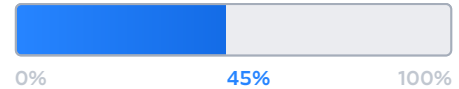
This is the final preparation phase before the migration. Use this time to confirm all details of the migration plan and path. Have all decisions been made and approved? Are there remaining questions to research or action items to complete? Next, create test cases, a communication plan, and training materials so all are ready to use during and after the migration event. By the end of this phase, make sure the migration team feels confident and prepared to proceed with a test migration.

Expect to spend 15% of your time in this phase.

☐ **Complete pre-migration items**

Review the Jira, Confluence, and Bitbucket pre-migration documentation. Verify all items marked "mandatory" are complete. Also address as many items marked "recommended" as possible. Verify there is a plan to handle all types of information including data, app data, users, groups, attachments, customizations, connections, integrations, scripts, or other settings. Determine information that requires additional manual steps. (Ex: Recreating a webhook, installing a custom user macro, etc.)

☐ **Create a runbook**

Use our runbook template to record the specific set of actions required to start and complete the migration. Document the preparation steps taken, the duration of each, and any notes or reminders for completing the action. Record any necessary downtime. Add new items to the runbook as they occur and keep the list updated until the very end of the migration process.

☐ **Install migration apps**

If your plan includes Atlassian or third-party migration apps, make sure their latest versions are installed and ready to use. To install apps, visit the "Find new apps" admin page, search for the desired app, and click the "Install" button. To upgrade apps, visit the "Manage apps" page.

> ⓘ After installation, find the Jira or Confluence Cloud Migration Assistant in the "System" admin area. In the left sidebar, look for a "Migrate to cloud" link under the "Import and export" header.

☐ **Create test cases**

Write test cases, enter them in the current Jira application, and assign them to project team members. Write specific cases to verify all data was migrated and functions as expected. Consider cases for application admins, project admins, and regular users. Consider cases for verifying major functions, common daily activities, installed apps, and customizations. Test scenarios for permissions and roles to make sure the right users see the right information. Determine whether test accounts are needed to execute the test cases. Prepare all test case details now so they are ready to execute in the next phase.

> ℹ️ • Add a test case to verify anonymous access. Make sure data isn't publicly available when it shouldn't be.
> • Add test cases to verify the amount of data migrated. Ex: The expected number of apps, attachments, projects, boards, schemes, spaces, pages, user macros, etc. are present after the migration.

☐ **Create a communication plan**

Prepare detailed messaging for stakeholders and testers. Prepare general messaging for end users. Share the purpose of the migration, the expected impacts, the high-level timeline, and who to contact for questions or concerns. Create an FAQ page in Confluence to share answers to common questions. Use announcement banner functionality to share migration status information with users.

☐ **Prepare training materials**

Create documentation to help users understand differences they can expect after the migration. Show a side-by-side comparison of the areas and features users access most. Provide links to product guides and training materials from Atlassian University. Include how to request help or additional support after the migration is complete.

Phase 4: Test

WHEN: 1 MONTH BEFORE MIGRATION   **PROGRESS:**

0%   60%   100%

It's time for an initial migration test. By now, your testers, data, and environment are ready to go. Ideally, you've already planned for and addressed all possible challenges, but don't be surprised if new issues arise. Be prepared to address them and run the test migration more than once if needed. Retry the migration until everything runs as expected.

Expect to spend 25% of your time in this phase.

☐ **Back up everything**

Back up the data, file system, and attachments in the current application. If data exists in the new cloud application, use the "Back up manager" function in Jira and Confluence to back it up too.

> ℹ️ Download the cloud backup .zip file and store it in a safe location. The backup file is automatically deleted from Jira and Confluence after 7 days.

☐ **Start a test migration**

Test the entire migration process using the steps you outlined in the runbook and Atlassian's testing guide. Add new steps to the runbook or edit durations listed as needed. Install or migrate apps. Move all data, users, and groups. Connect or integrate other applications. Run any needed scripts.

ℹ Note the duration of the test migration so you can prepare for future tests and the production migration.

If you're able to use one of the Cloud Migration Assistants, you can use it to connect to your cloud site and run test migrations. This will allow you to check for errors before running a production migration.

ℹ In a Cloud Migration Assistant, you can start the migration process, save it, and run the actual migration later. Include the date in your migration's name so you can differentiate between multiple migration plans or attempts.

☐ **Do a quick sanity check**

Before starting user acceptance testing, do a quick sanity check. Are you able to login to the application? Is new data present as expected? If you used a Cloud Migration Assistant, review the "Post-migration report" and the "Error log" on the final page of the migration assistant.

☐ **Conduct user acceptance testing**

Have the test team complete the test cases developed in the previous phase. Monitor the cases for problems or new findings to address. Once the test team is satisfied with the result, also engage end users. Ask users to test the features and information they use most, like favorite boards, pages, or recent commits.

☐ **Retry the migration** (if needed)

If the migration results aren't as desired, take a step back, address the problems, and retry the migration again. Redo this step as many times as you need. Now is the best time to address issues, warnings, and errors.

☐ **Finalize migration date**

Based on the test results, determine a final migration date. Ensure critical migration team members are available or on-call. If you're working with Atlassian or Solution Partners, make sure they are available if assistance is needed. Be sure to avoid dates that conflict with other company priorities.

ℹ Choose a migration date or window when there's the least amount of user activity. Allow additional time in case unexpected issues or delays arise.

☐ **Complete final preparations**

Communicate the date and your launch plan to all stakeholders. Alert support teams (Ex: the IT help desk) to expect additional requests during and immediately after the migration. Use announcement banner functionality to share migration plans. Ask users not to make changes in the current application during the migration. Delay creation of new user accounts and groups.

> ℹ️ Worried about data changes during the migration event? Temporally limit the ability to create data, modify data, and change configuration settings. Make the data "read only" or disable login access for a short period of time.

Phase 5: Migrate

WHEN: **MIGRATION DAY** **PROGRESS:**

0% **85%** 100%

If your test migration went as planned, you may not need this step! You may be able to accelerate your timeline and start using the new cloud application immediately. If time has passed since the test migration, new data was added to the current application, or if users aren't ready to use the new cloud application yet, repeat the migration process for the final time. Don't forget to leverage your runbook so you don't miss a critical step.

Expect to spend 5% of your time in this phase.

☐ **Back up everything (again)**

Back up the data, file system, and attachments in the current application. If data exists in the new cloud application, use the "Back up manager" function in Jira and Confluence to back it up too.

☐ **Start the final migration**

Install or migrate apps. Move all data, users, and groups. Connect or integrate other applications. Run any needed scripts. Complete all the steps in your plan.

☐ **Do a quick sanity check**

Just like in the test phase, take a quick look at the migration result before engaging the test team. Before starting user acceptance testing, do a quick sanity check. Are you able to login to the application? Is new data present as expected? If you used a Cloud Migration Assistant, review the "Post-migration report" and the "Error log" on the final page of the migration assistant.

☐ **Conduct user acceptance testing**

Have the test team complete the previously planned test cases. Monitor the cases for problems or new findings to address. Once the test team is satisfied with the result, also engage end users. Ask users to test the features and information they use most, like favorite boards, pages, or recent commits.

☐ **Decommission previous application**

Prevent users from making changes in the previous application and direct them to use the new cloud application instead. Encourage users to update URLs and bookmarks.


ⓘ Ways to decommission:
- Make projects and spaces read only by modifying permissions.
- Add an announcement banner with a link to the new cloud application.
- Disable the ability to login.
- Redirect the old URL to the new URL.
- Sever connections and integrations with other applications.
- Take the previous application offline.

Phase 6: Launch

WHEN: 1-4 WEEKS AFTER MIGRATION   **PROGRESS:**

0%   90% 100%
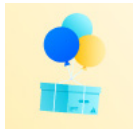
In the days and weeks after the migration, be prepared to answer questions and help users through their transition to the new cloud application. Also use this time to increase your knowledge of cloud administration.

Expect to spend 10% of your time in this phase.

☐ **Monitor support channels**

Proactively monitor the Jira project, chat room, or other support channels to address user issues and questions. Check in with stakeholders and other support staff to collect any additional feedback or trouble reports. As new questions arise, add additional answers to the previously created FAQ page.

☐ **Train users**

Use the information you complied in a previous phase to help users understand application differences. Show a side-by-side comparison of the areas and features users access most. Provide links to product guides and training materials from Atlassian University. Include how to request help or additional support.

☐ **Follow cloud updates**

Regularly review the cloud roadmap to learn about upcoming features and improvements. Bookmark the Atlassian status page or subscribe to receive incident notifications in email, SMS, Slack, or RSS format.

☐ **Continue learning**

Take an Atlassian University training course or study for certification. The exam preparation process is a great way to learn more about cloud applications. Take a certification prep course, review sample questions, or complete a free skillbuilder on a technical topic. Join the online or local Atlassian Community to network with your peers, ask questions, and continue learning.

Migration Complete

WHEN: COMPLETION DAY

PROGRESS:

0%   100%

Congratulations – you did it! It's time to celebrate, thank the project team, and conduct a retrospective. If you tracked migration progress in Jira, don't forget to mark the tasks complete and log any outstanding issues to address. If you documented migration progress in Confluence, don't forget to update any old information and record lessons learned to help with future product administration and maintenance activities.

☐ **Complete project**

Close remaining Jira issues, update Confluence documentation, conduct a retrospective, and thank the migration team.

Resources

Use the documentation and information below for additional help planning your cloud migration.
The links are displayed in the order they appear in the checklist.

Phase 1: Assess

- Cloud Migration Center
- Server to cloud migration guide
- Enterprise migration support
- FAQs about migrating to Jira or Confluence Cloud
- Atlassian Community Cloud Migration Group
- The biggest difference between server and cloud
- What's new and better in Atlassian Cloud? (whitepaper)
- What are the differences between Jira Cloud and Jira Server?
- Compare Jira Service Management cloud and server
- Functional differences in Confluence Cloud vs. Server
- Functional differences in Bitbucket Cloud
- User management differences in cloud and server
- Atlassian Access and cloud migrations
- Cloud Roadmap
- Cloud savings calculator
- Free cloud migration trial
- Claiming your Cloud Migration Trial (video)
- Maintain your Atlassian organization
- Verify a domain to manage accounts
- IP addresses and domains for Atlassian cloud products
- Use AppLinks to link to Atlassian products
- Application links version matrix
- Which Atlassian Cloud plan is right for you? (Work Life by Atlassian)
- Atlassian Trust Center
- Atlassian Cloud Terms of Service
- Cloud Services by Atlassian (Cloud Security Alliance)
- Contact a Partner for Migration Services
- Atlassian Support
- Support for cloud migrations
- Cloud Migration Assistants
- Assessing your Apps for Cloud Migration (video)
- Atlassian Marketplace apps that are available in cloud with migration paths

Phase 2: Plan

- Compare cloud migration methods
- Cloud Migration Assistants
- Migration Apps from the Atlassian Marketplace

Phase 3: Prep

- Jira pre-migration checklist
- Confluence pre-migration checklist
- Plan your Bitbucket Server to cloud migration
- Atlassian Documentation
- Atlassian University

Phase 4: Test

- Cloud Migration Assistants

Phase 5: Migrate

- Cloud Migration Assistants

Phase 6: Launch

- Atlassian Documentation
- Atlassian University
- Cloud Roadmap
- Atlassian Status
- Atlassian Training
- Atlassian Certification
- Atlassian Community
- Atlassian Community Events

When you're ready to migrate, Atlassian is ready to help you get there.
Check out our Cloud Migration Center.

ATLASSIAN