

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.

Know before you go: This checklist is designed to help you plan and complete your migration and to connect you to more detailed resources if you need them. For more information and migration resources, check out the [Atlassian Migration Program](#).

The focus of this checklist is on the assess, plan, prep, test, migrate, and launch phases. Looking for something else?

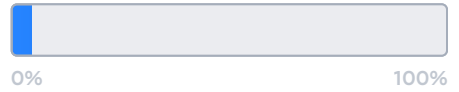
- If this checklist isn't enough detail, try diving into the [Cloud migration guide](#) in the Cloud Migration Center.
- If you're more of a visual learner or need a specific question answered, register for the [Cloud migration demo](#) that includes live Q&A with Atlassian's Cloud Migration Managers.
- If you're already in the midst of your migration and are wondering how to get your users onboarded, download the [Cloud adoption toolkit](#).

Have you thought about using a cloud-specialized solution partner? They can help walk you through your migration from beginning to end. Learn more about [finding a partner](#).

Phase 1: Assess

WHEN: 3-12 MONTHS BEFORE MIGRATION

PROGRESS:



Before you start a migration, it's important to understand the basics. When should you move to Cloud? What changes should you and your users expect? 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. For more info on the assessment phase, reference the [Assess your migration options](#) page available as part of the Atlassian Migration Program.



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

Because we know that Marketplace apps can be an important part of how your teams use Atlassian products, it's important to start identifying your app migration plan early early. Before you dive into planning, install the free Cloud Migration Assistants from the Atlassian Marketplace. Use the app assessment feature to understand which Jira, Confluence, and Bitbucket apps are installed on Server and what types of migration paths exist for those apps. You'll also want to start evaluating which apps you'll need in Cloud. You may have multiple apps that serve the same purpose or apps you no longer need as the functionality they offer is built natively into the Cloud products or platform.

In the Assess phase, we recommend completing the following before moving on:

- Understand the overall migration process
- Determine your migration timeline
- Assemble your migration project team
- Download the Cloud Migration Assistants for Jira, Confluence, and Bitbucket
- Start a free Cloud migration trial



Have you thought about using a cloud-specialized solution partner? They can help walk you through your migration from beginning to end. Learn more about [finding a partner](#).

If you have over 1000 users, Atlassian will help you in your assessment with the mnemonic device, MAGIC.

MAGIC stands for the following:

- M**igration strategy
- A**pps, integrations and customizations
- G**rowth & scalability
- I**ntity management
- C**ompliance & security

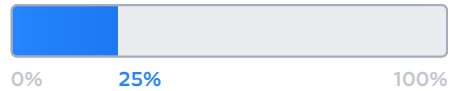
For more information on MAGIC, please see the Cloud Migration Guide or talk to your [Cloud Migration Manager](#).

Phase 2: Plan

WHEN:

2-3 MONTHS BEFORE MIGRATION

PROGRESS:



Now that you have a migration path and understand the scope of the project, it's time to assemble the necessary people, build out your migration plan that includes your migration method and timelines, and get ready to migrate.

Assemble your team

Like we've said before, migration is a team sport – so it's time to build your dream team to help your organization make the move. In most migrations, the roles outlined below are involved for end-to-end success, however, for smaller teams the same person may wear multiple hats. Remember, you can [lean on Atlassian](#) for support.

- **Project manager:** A dedicated person who puts together and presents the business case, manages the migration, tracks status and individual tasks, and acts as the main point of contact.
- **Systems admins:** Configured your systems in Server and knows the permissions and workflows that need to migrate. They may also perform the migration. If they don't have Cloud experience, they may also want to [engage a Solution Partner](#) to perform the actual migration.
- **Executive sponsor:** Handles budget approval, approves the business case, and may be the company's Atlassian champion.
- **Technical team and testers:** Dedicated team that performs the migration. Before the migration, you'll want to run a series of tests to make sure teams can complete important tasks. Testers should come from a variety of teams who'll be using your systems in different ways and should test for their most important tasks.
- **Security, legal and compliance:** Someone from security and legal involved early in the project to make sure the migration plan meets all security and compliance standards (and keeps these requirements from being a blocker later in the process).
- **Product champions:** Migration will change the way teams work, which means teams will need training, troubleshooting, and possibly workflow brainstorming help. This may be taken on by a point person or may be a group effort.



- 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**.

Build your Migration plan

Treat this project like any other strategic company initiative. Delegate a project manager and set up regular meetings to make decisions and ensure forward progress. Create a Jira Software project to track tasks and a Confluence space to document decisions.

You should also create a high-level timeline that includes timing for migration preparations, testing, the production migration date, and timeline for 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 that the timeline may fluctuate as you prepare and begin testing.

You can expect to see the following lengths depending on how many users you have:

- 0-5k users: 4 months
- 5k-10k users: 6 months
- 10k+ users: 6+ months

Migration method

Atlassian recommends a lift and shift method for all teams over 10,000 users. See the [Cloud Migration Guide](#) for more information on how to perform a lift and shift migration.



Based on your assessments, you may find that your apps, users, business requirements, or instances make a lift and shift migration unfeasible. If you are unable to migrate in this manner, please [contact us](#) or a [cloud-specialized solution partner](#) to determine another method that works best for your organization.

We also recommend getting a solution partner for any teams migration over 1000 users.

For the majority of customers, we strongly urge you to use our Cloud Migration Assistant Applications, free applications that we built to help you migrate. They are available from our marketplace or depending on your instance version, already installed. Check out the links below to learn more about the apps and how they can help get you to cloud faster.

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.

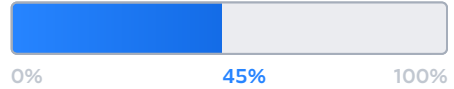


- Manage the migration project in your current application, not in the new Cloud application. More migration methods are available when Cloud applications don't contain existing data.
- Link the Jira project to its companion Confluence space for added collaboration capabilities.

Phase 3: Prep

WHEN: 1-2 MONTHS BEFORE MIGRATION

PROGRESS:



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.

Complete pre-migration items

Review the [Jira](#), [Confluence](#), and [Bitbucket](#) pre-migration documentation. 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. (e.g. Recreating a webhook, installing a custom user macro, etc.)

Create a runbook

Make a copy of our [runbook template](#) and use it 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 the Cloud Migration Assistant apps and upgrade your Atlassian products if needed

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.

For the best migration experience, we also recommend upgrading your Atlassian products to the minimum versions required before the migration, if possible. As best practice, we recommend that versions are at or above 7.13.1 for Jira Software, 3.0.0 for Jira Service Management, and 5.10 for Confluence.



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 User Acceptance Testing use 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 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. Prepare all test case details now so they are ready to execute in the next phase.



- 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

Using the communication templates included in this toolkit, prepare messaging for stakeholders, testers, and users that prepare them for the migration. Share the high-level timeline for the migration and who to contact with questions. We recommend creating 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

Using [Atlassian's Cloud adoption toolkit](#), gather resources that will help users understand the differences they can expect after the migration.

Phase 4: Test

WHEN: 1 MONTH BEFORE MIGRATION

PROGRESS:



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.

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.

i Download the Cloud backup .zip file and store it in a safe location. The backup file is automatically deleted from Jira and Confluence after seven 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.

Conduct User Acceptance Testing


Ask the test team to complete the test cases developed in the previous phase. Monitor the cases for problems or new findings to address.

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. If you're migrating more than 1,000 users, inform your Cloud Migration Manager of your production migration date at least one month in advance.

 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.

 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:



After careful testing, the production migration should just be a matter of repeating the migration process for the final time. Remember to use your runbook so you don't miss a critical step.

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.

Conduct User Acceptance Testing

Ask the test team to complete the test cases developed in the previous phase. Monitor the cases for problems or new findings to address.

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:



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.

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

Using the resources provided in [Atlassian's Cloud adoption toolkit](#), help users understand the differences they can expect on Cloud. Share 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:



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.

