

Ready, set, migrate: Atlassian cloud migration checklist

Server to cloud migrations can be complex and time-consuming. Our checklist helps you understand how to plan your next steps and guide you on your migration journey →



Gold
Solution Partner

Phase 1:

Evaluate

The first step is to evaluate your current landscape and understand what to expect with moving to cloud. Migrating your Jira or Confluence instance to cloud is the biggest (and last) upgrade you'll ever have to make.



Audit your current cloud and server landscape

Understand what product(s) you have in cloud and server, and who's using them. You may have self-hosted instances or cloud sites you're unaware of, and knowing your full landscape will help you plan for a better migration strategy.

Also consider any apps you may have installed that you want to keep using — they will not automatically migrate when you move from server to cloud.



Review your security and compliance needs

Discuss with your security or procurement teams to ensure Atlassian cloud products meet your business requirements.

Learn more about Atlassian's compliance and security policies in their [Trust Centre](#).



Assess cloud pricing and compare plans

Luckily, Atlassian doesn't charge fees to move to cloud beyond the costs of your cloud subscriptions.

However, you will still want to assess your payment options and overall license costs.

As an [Atlassian Solution Partner](#), we are familiar with Atlassian's pricing and plans, and can ensure you pay only for what you need.



Determine what support or expertise you will need

Do you have internal resources to plan and execute your migration requirements?

If you do, will their workload permit them the focus and capacity to meet [Atlassian's end-of-server deadline](#)?

If you answered "No" to either of these questions, you will need support from an experienced Solution Partner to help with your migration journey.

Phase 2:

Plan

You've just reviewed and evaluated your current tech landscape and requirements. Now, it's time to figure out your migration strategy and next steps.



Set up your organisation on Atlassian

An organisation allows you to view all Atlassian cloud users at your company in one place, manage users' accounts, and set up security features like SAML SSO.

Organisations are helpful if your company manages more than one cloud site and wants insight into all your sites, products, and the users who can access them.

As part of our migration services at [Strategenics](#), we can create an organisation for you automatically, or we can transfer a site into an existing organisation.



Verify your domain and claim users' accounts

Verifying your domain will allow you to verify ownership of your company's domain, as well as to claim users' accounts with that domain.

This gives you more control over the Atlassian accounts on your company's domain, and the ability to apply security policies to your managed accounts so our [certified consultants](#) will help plan this early on to ensure a smooth transition.



Evaluate if you need Atlassian Access

Atlassian offers [Access](#), an enterprise-wide subscription for enhanced security and centralised administration across every Atlassian cloud product in your organisation.

If you plan to use SAML SSO, user provisioning, or sync groups from an external directory in cloud, you'll likely need to subscribe to Access. To get the most out of Access, you'll also need a supported cloud identity provider.

The size and complexity of your data matter.

How many projects or spaces do you have, and which ones do you want to migrate?

What data are you planning to remove or consolidate in the process?

The answers to these deceptively simple questions make a big difference to your migration process and timeline.

More data means more to migrate, which means more time and accuracy is needed.

As an [Atlassian Solution Partner](#) experienced in cloud migrations, we can review your self-hosted Atlassian instance and do a comprehensive analysis of exactly how much data you have, your user count, and even find opportunities to reduce your data size or complexity.

This means that regardless of how much data you intend to migrate across, we can expertly recommend the best Atlassian cloud plan and uphold end-to-end data integrity.



Phase 3:

Prepare

Next, it's time to get your people, data and environment prepared and ready for the migration.



Determine app migration pathways

After we've audited the 3rd-party apps and custom migrations you want to include in the migration, we can determine how to migrate those you'll be using in cloud.

We can also extract or port any migration data from server to cloud apps and maintain data integrity along the way.



Ensure you're on a supported server version

A crucial next step is finding out that you are on a supported server or data centre version compatible with the migration method.

If you are not on a supported version, would need to be upgraded before starting the migration.



Tidy up your self-hosted instance(s)

Review your self-hosted instance(s) to identify what you can clean up

prior to moving. You'll want to:

- ▶ Review groups and permissions.
- ▶ See how you can minimise customisations.
- ▶ Identify inactive projects or spaces.



Set up Single Sign-On (SSO)

If you plan to use SSO in your cloud site, set this up in advance so it continues working seamlessly for your users when you migrate.



Ensure your cloud site has the right user tier

If you have an annual subscription to Jira or Confluence Cloud, check that you have a user tier that supports all the users you plan to import.

To avoid import failures, we recommend keeping monthly subscriptions turned on during migration and switching to an annual subscription after the migration is complete.

Phase 4:

Test

Our support for basic and complex enterprise-level migrations ensures you have a production migration plan ready to help determine if the migration will work and how long it will take.



Back up your data

No matter which migration method is used, we strongly recommend backing up your self-hosted instance before migrating.

If data is present in your cloud site, back it up for safekeeping as well. For additional peace of mind, our cloud migration specialists will ensure your data is not lost and remains secure.



Run a test migration

Get familiar with the process and make sure everything works as expected by deploying a test migration. This also helps establish a clear timeline for your production migration.

We highly recommend this even if you are doing a small migration. This step helps you identify and work out issues in advance, which helps make sure your final migration will be successful.



Conduct user acceptance testing

User Acceptance Testing (UAT) is also highly important and recommended for this stage

Having a few end users replicate common day-to-day tasks using the test site helps you catch any unexpected issues as well as helps your team prepare for change.

Some important UAT steps include:

- ▶ Checking that apps work as expected.
- ▶ Checking that workflows work as intended.
- ▶ Checking that links to other content are working.
- ▶ Checking that attachments have imported correctly.
- ▶ Creating and using test data.
- ▶ Ensuring macros that rely on 3rd party apps are not broken.

UAT and change management best practices.

Get relevant testers.

Consider testing with members of a specific team, a combination of power-users and less frequent users, or an appointed member of each team that will be using the cloud version.

You should generally include every major user type/role that will be using the cloud site, and collect their experience and feedback from testing.

Know what to test for.

Make sure to test and review new features, changes in the user interface, the different apps, URL and link structures, and differences in administration.

Also be mindful of documenting test experiences and take note of issues each testing user faces. Include screenshots or video recordings to more easily communicate the details to the testing and migration team members.

Create a migration runbook.

Migration runbooks are a step-by-step guide which will help your production migration run smoothly.

Your runbook should include testing learnings, steps in the process, relevant instructions, and how long they're expected to take.



Phase 4:

Test



Communicate your plan

Migrating from server to cloud will significantly impact the work and user experience of all the stakeholders and final users in your organisation.

Ensuring you have a migration communication plan is vital, and should include helpful answers to questions like:

- ▶ Why is migration happening and what are the benefits?
- ▶ When will migration begin?
- ▶ When is migration expected to be completed?
- ▶ What downtime can team members expect?
- ▶ What should team members do or avoid prior to migration?
- ▶ Will the old server site be accessible or readable after migration?
- ▶ How will team members sign in to the new site?
- ▶ What internal or external support will be involved in the migration process?
- ▶ What internal or external support will be available after migration?

About Strategenics

We are a team of strategists, advisors, and tech junkies who are dedicated to bettering our world with the magic of cloud technology.

Whether you're just getting started or need help optimising existing workloads, we're here to help maximise your investment in the Atlassian product suite:

- ✓ Server and cloud migration
- ✓ Atlassian product training
- ✓ Atlassian managed services
- ✓ Atlassian product upgrades
- ✓ Atlassian product health checks
- ✓ Atlassian software licensing and renewals

We don't just deliver Atlassian solutions, we use them too. Our entire team uses Atlassian daily to seamlessly manage projects, internal operations and customer support – and we can't wait to show you how you can do the same for your team.

Contact us for a free consultation →



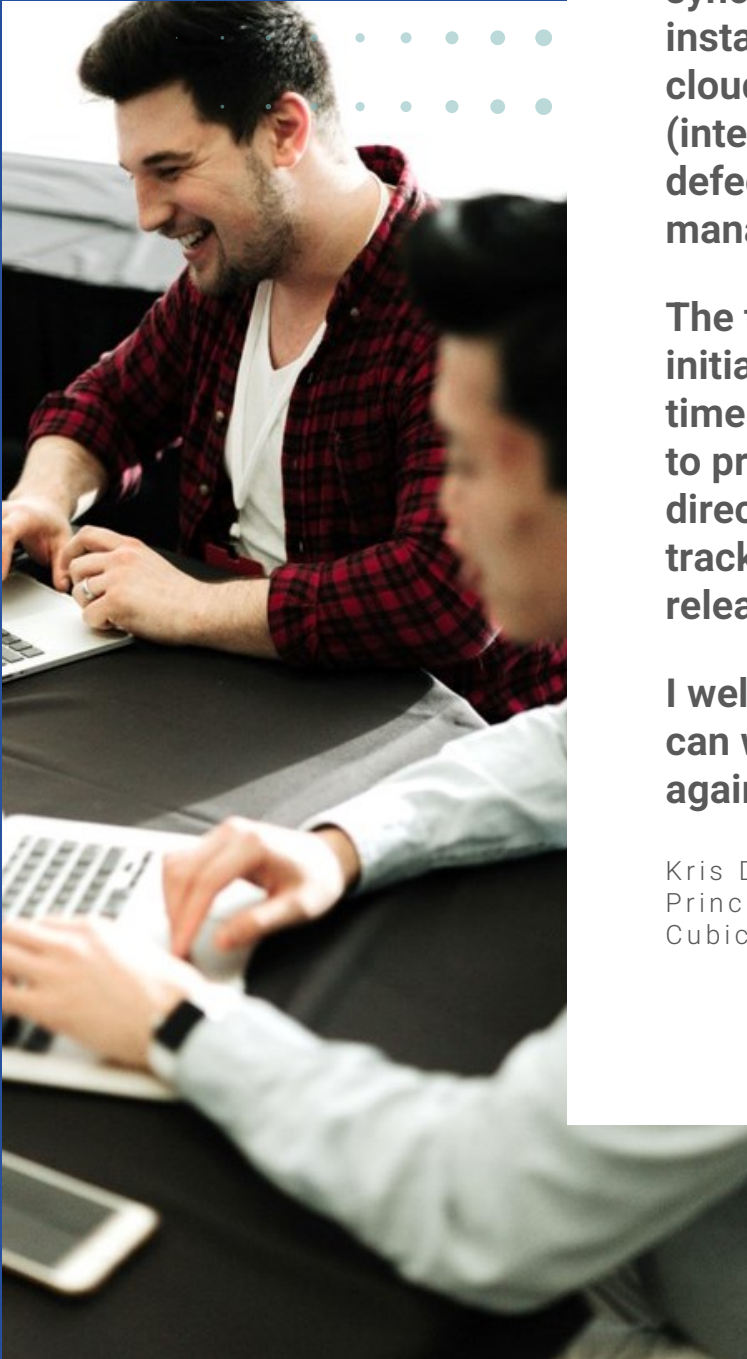
YOUR CLOUD JOURNEY SHOULD START **RIGHT NOW**

Atlassian is officially phasing out all server offerings and support by **February 15, 2024**.

This means no more new server licenses, no more server feature developments, no more new server apps, and no more server support.

From finding the right solution partner, to planning, to testing, to migration, to launch — it can take months to fully complete your cloud migration process.

Don't put off your cloud migration journey. **Talk to us** about your plans to migrate to Atlassian cloud, and we'll help you get on the right track and achieve the best results as soon as possible.



“The Strategenics team were set the challenge of improving our heavily manual process of synchronising multiple Jira instances (on-premise and cloud based) and boards (internal and external) used for defect triage and management.

The team went beyond the initial request of improving the time consuming manual tasks, to provide further advice and direction in streamlining the tracking defects to software release bundles.

I welcome the chance when I can work with Strategenics again on another project.”

Kris Downey,
Principal Systems Engineer,
Cubic Transportation Systems

Ready to start your Atlassian cloud migration?

Let's chat →

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