Planning your migration to Atlassian cloud: A step-by-step checklist

Migrating your Atlassian instance to the cloud is a large undertaking for any organization. With end-user productivity driving innovation on the line, planning and execution of the migration must be flawless.

Refer to the checklist below to understand exactly what an organization would need to do to effectively and flawlessly execute their migration to Atlassian cloud.

Assess

The first step is to understand your current landscape, evaluate if moving to cloud is right for you and what you can expect to change as a result. 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 and apps

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 apps you may have installed - they aren't automatically migrated when you move from server to cloud.

Our consultants have years of expertise working with on-premise and cloud-hosted Atlassian products. Whether you're looking to migrate third-party apps or figuring out how to consolidate multiple Atlassian instances, we can help guide you.

Review your security and compliance needs

Discuss with your procurement or security teams to ensure Atlassian cloud products meet your requirements. To learn more about Atlassian's compliance and security policies for cloud products visit **Atlassian Trust Center**.

Assess cloud pricing and compare plans

Luckily, Atlassian doesn't charge fees to move to cloud beyond the costs of your cloud subscription(s). However, you'll still want to assess your payment options and overall license costs. As an Atlassian Solution Partner, we can help ensure you pay for what you need and nothing extra. Making your migration to cloud headache-free with minimal disruption.

Plan

Now that you've decided to move, it's time to figure out what steps you'll need to take to get there and what your strategy should be. As an Atlassian Solution Partner, we can help provide a full audit and outline different options that work best for you.

Set up your organization

An organization 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. Organizations 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 service, we can create an organization for you automatically, or we can transfer a site into an existing organization.

Evaluate if you need Access

Atlassian offers Access, an enterprise-wide subscription for enhanced security and centralized administration across every Atlassian cloud product in your organization. If you plan to use SAML SSO, user provisioning, or to sync groups from an external directory in cloud, you'll likely need to subscribe to Access. To get the most out of your Access subscription, you'll also need a supported cloud identity provider.

Not sure where to start? Contact a Solution Partner for a full evaluation to determine what's best for your business needs.

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.

Assess the size and complexity of your data

What projects or spaces do you want to move? Do you wish to consolidate in cloud or data center?

As an Atlassian Solution Partner, we can review your self-hosted Atlassian instance to do a comprehensive analysis of how much data you have, your user count, and if there are opportunities to reduce data size or complexity. Depending on how much data you're bringing over, we can recommend the best Atlassian cloud plan and ensure end-to-end data integrity.

Prep

It's time to get your people, data, and environments ready to migrate.

Determine app migration pathways

After we've audited your third-party apps and custom integrations, we can help determine how to migrate those you'll be using in cloud, 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

Next step is to check that you're on a supported server or Data Center version for your migration method and that you won't need to upgrade before migrating.

Review your anonymous access settings

Jira and Confluence can be configured to allow anonymous or public access – allowing anyone to access your site regardless of whether they're logged in. Before moving to cloud, check that your anonymous access settings match what you would want in cloud.

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. Before setting up SSO, you'll need to verify a domain for your organization.

Clean up your self-hosted instance

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 minimize customizations, and identify inactive projects (Jira) or spaces (Confluence).

Don't have time to get into the weeds? Contact a Atlassian Solution partner to set up an appointment for a full assessment to determine how much cleanup you need.

> **Note:** SSO requires a subscription to Atlassian Access. Contact us if you're interested in a free trial.

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. For example, if you plan to import 125 users, you'll need the annual user tier for 101 - 200 users or above for the import to succeed. This only applies if you're on an annual payment schedule with Atlassian. To avoid import failures, we recommend keeping monthly subscriptions turned on during migration and switching to an annual subscription after completing your migration.

Test

It's almost the end of the finish line! Our support for basic and complex enterprise-level migrations ensures you have a production migration checklist ready to help determine if the migration will work, how long it will take, etc.

Back up your data

No matter which migration method you're using, we recommend backing up your self-hosted instance of Jira or Confluence before migrating. If data is present in your cloud site, back it up for safekeeping as well. For peace of mind with this step, you can rely on our team of cloud migration specialists to ensure data fidelity and that no data is lost.

Communicate your plan

Migrating from server to cloud will impact your users' experience, workflows, and various stakeholders in your organization. We can assist with a migration communication plan to help go over questions like:

- When will the migration will occur?
- What downtime can users expect?
- Should you avoid changing anything during the transition?
- What will happen to the old site after migrating? Will it still be accessible or readable?
- What will be the new URL(s)?
- How they will sign in?

Install or migrate apps

As part of testing, you'll want to make sure to install or migrate any apps you plan on using in cloud. As part of our services, we test the functionality of apps and ensure they're working as expected.

Run a test migration

Test your migration to get familiar with the process and make sure everything works expected and establish a clear timeline for your production migration.

> Atlassian strongly encourages this step even for small migrations. This is the best way to make sure your production migration will be successful, determine expected downtime, and work out any potential issues in advance. This will be all reviewed in our original assessment to ensure minimal disruption and that you're paying for what you need.

Conduct user acceptance testing

Atlassian also advises conducting a User Acceptance Testing (UAT) i.e. having some end users replicate common day to day tasks using the test site. This will not only help you catch any unexpected issues but can help your organization prepare for change.

We can help conduct UAT testing and prepare the necessary training materials to share with your users.

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