# THE MECHANICS OF AN ENTERPRISE ATLASSIAN CLOUD MIGRATION

Your organization has decided to move ahead with a full-scale migration to the cloud for your Atlassian tools stack. It's a significant undertaking, and you're concerned about data integrity, security, and whether or not the move is going to disrupt normal operations.

All excellent points to consider, especially for large enterprise migrations where thousands of users and millions of records are involved. That's why working with an experienced migration partner is highly recommended.

In a **previous white paper**, we followed the story of Mr. Gray, Jim, and Stacy.

JIM	STACY	MR. GRAY
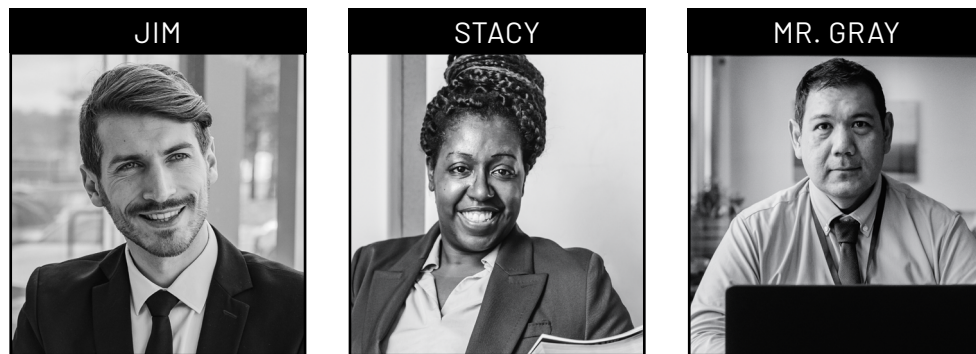
Mr. Gray is the CEO of Appropro, Jim is the VP of Engineering, and Stacy is a Migration Consultant from Cprime. Together, they discussed all the high-level questions surrounding a needed cloud migration:

- Why move your Atlassian tool stack to the cloud?
- How does the cloud compare to an on-prem server instance of Jira or Confluence?
- How does moving to the cloud affect costs, and how much does the migration cost?
- What is the timeline of a standard migration engagement?

We concluded with the impressive results Appropro Inc. saw from working with Cprime and making the move to Atlassian Cloud.

In this white paper, we're going to pick up a few years later. Jim, our intrepid VP of Engineering, has moved on to a much larger company—PrimaApp Inc., sporting nearly 20,000 active Jira and Confluence users, with millions of Jira issues and Confluence pages housed in their on-prem servers. Jim is again faced with the need to oversee a large Atlassian migration. Because of the great experience he had with Cprime during the Appropro migration, Jim doesn't hesitate to reach out to Stacy to explore the options.

Since Jim's already well versed in the higher-level concepts behind migration, we're now going to dive deeper into the actual mechanics of the migration process:

- The Assessment
- The Cleanup
- The Pre-migration Checklist
- The Migration Testing
- The Migration
- The Post-migration Testing and Optimization
- The Follow-up Support

This is a fictionalized narrative culled from numerous real client interactions we've had over the years. All names, companies, and situations are fictional, but the migration process that is outlined is real.

THE ENGAGEMENT BEGINS

Let's pick up with Jim and Stacy's first call after the initial Statement of Work (SOW) is signed.

The Zoom call begins with a quiet tone, and Stacy's' face appears on the screen. "Hello, Jim! How was your weekend?"

"As well as can be expected, Stacy. It's Monday again."
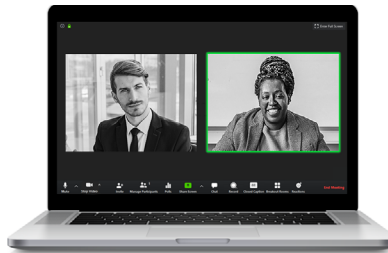
She laughs. "Yes, it is. So, we're ready to get started. It looks like all the paperwork is in order, and our initial team has been assembled, ready to get started on PrimaApp's migration engagement. Once our assessment is complete, we'll be able to allocate the optimal number of specialists to the project and get things started."

"Great. I think I have everyone we'll need as well. Let me just confirm with you. Tanya is our lead Project Manager (PM), so the two of you will be working closely together."

"Yes, we spoke on the phone yesterday," Stacy confirmed, "and I look forward to meeting her at the kickoff later this week."

"Good. Our Jira Administrators (JAs) are Larry and Bill. Larry will take point on the migration while Bill holds down the fort on the run-of-the-mill activity. And then, we have a four-person team selected from IT to cover whatever legwork you need from us, including one of our most experienced QA folks to help with testing on our end. Does that about cover it?"

"I'm assuming you'll be serving as our Executive Sponsor, Jim?"

"Absolutely," Jim said. "I'll email you with all their names and contact information, and I'll cc Tanya so you two can coordinate from there."

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.

Project Lead: 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: Configures 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: Get 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.

From - [The Atlassian Server to Cloud Migration Guide](#)

"That's perfect," Stacy said. "Our initial kickoff meeting is scheduled for this Wednesday at three. Is that still a good time?"

"Yes, that's good."

"Then we'll get the whole team together Wednesday and make arrangements for the assessment."

"Sounds good! I'm glad we're able to work together again. Cprime did such a great job with Appropro; I didn't think twice."

"Likewise. We'll do the same for PrimaApp. You have my word on that."

THE MIGRATION ASSESSMENT - THE LYNCHPIN OF SUCCESS

After Wednesday's kickoff meeting, everyone left with their marching orders. The JA and IT teams at PrimaApp assigned credentials to the Cprime migration specialists performing the assessment.

The purpose of this initial assessment is to clearly define every aspect of the migration as it pertains to the client's unique circumstances. This process can take anywhere from four weeks to three months, depending on the size and complexity of the existing server instance(s). Still, it's easily the most crucial phase of the engagement because it sets the stage for everything to follow. When the assessment is complete, everyone will know:

- Which Atlassian environment is best for the organization's needs, Cloud or Data Center (In some circumstances, Data Center is the better option, although most companies who wish to move to the cloud can do so.)
- How long the whole migration process will take
- How many people will be needed on the client's and Cprime's sides to complete the migration efficiently, and what their roles will be
- Which milestones the teams will need to meet, and when
- What system access the Cprime specialists will require to complete their tasks
- Necessary details regarding the existing data and environment, including (but not limited to):
  △ Number of users
  △ The number of records, pages, issues, attachments, etc.
  △ All add-ons or custom integrations and whether they need to be re-established in the new environment
  △ Existing security parameters and how that needs to translate after the migration
- Which aspects of the migration will be performed using Atlassian's migration tools and which will require manual migration by Cprime specialists
- How and when migration validation will happen
- How best to structure the migration to minimize downtime, manage change, and optimize post-migration work
- How Cprime may be able to help support success after the migration

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Assess the Size and Complexity of Your Data

Throughout the Assess phase, you've gathered information about your current landscape. Now it's time to understand the potential complexity of your migration by reviewing the amount of data and number of users you wish to migrate over to the Cloud. Your level of complexity can impact your timeline, the migration strategy you choose, and the level of support you may need. Factors that can affect your complexity include:

Size: The size of your data, as well as the number of users

Apps: The number of critical apps you have, whether they're available in the cloud (or have alternatives), and if they have migration pathways

Customization: Custom fields, non-Atlassian integrations, custom apps, and unusual data shapes

Number of Products: The more products you have to migrate, the more complex your migration will be. For example, a Jira Software only migration is simpler than migrating both Jira Software and Jira Service Management.

Consolidation and Federation: If you're consolidating multiple sites, rather than simply migrating into a new site, this will increase complexity as data, apps, and users need to be reconciled. Similarly, federating, or splitting, sites, or choosing to host data in both Cloud and Data Center instances can increase complexity in the migration process. Learn more about some of the use cases for single-instance and multi-instance models in Cloud.

User Management: The need for Atlassian Access, the number of anonymous users, the number of inactive users, and use of multiple identity providers

From - The Atlassian Server to Cloud Migration Guide

The initial assessment for PrimaApp took eight weeks to complete. The results were laid out in another team meeting with all the key stakeholders present. Afterward, Jim and Stacy discussed the results.

"So," Jim said, "everyone here was impressed with the results of the assessment. I can't imagine any pushback from our end. If you want to put together the full engagement SOW, I should be able to get official signoff within ten days."

"That sounds good, Jim. I just want to quickly go over the details to make sure we're all on the same page, then I'll have that SOW written up, and we can move forward."

"Sounds good."

Stacy went on to outline the key findings of the assessment and what they meant for the upcoming migration engagement:

- PrimaApp has 18,433 users on record, although approximately ten percent of that number is expected to be culled during consolidation and cleanup.

- They have three Jira instances and one Confluence instance that will need to be migrated.

- In total, the three Jira instances include 2,764 projects, over 2.1 million issues, 6.2 million comments, 1.7 million attachments, along with a host of groups, custom fields, issue types, and more.

- The Confluence instance included 4,472 spaces, more than 7.8 million pages, 11 million comments, and just under a million attachments.

- Cprime will be proceeding with a deeper dive assessment of all the add-ons and integrations PrimaApp utilizes and work with the PrimaApp team to determine which are required in the new environment, how to best duplicate functionality, and what will be needed to migrate the app data.

- During onboarding, the entire Cprime team is introduced to the client's team and provided with necessary access to PrimaApp's systems.

- During the cleanup phase, specialists will analyze the three Jira instances. All redundant and inactive users will be removed or archived as appropriate, as will all projects, issues, spaces, and pages that are not necessary for the production environment after the migration. A plan will be agreed upon for secure archiving of historical data and consolidation of all Jira data under one instance in the new environment unless otherwise required.

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"Then, we get into the pre-migration testing phase," Stacy said.

"I wanted to ask you about that. Do we need to pay for a second cloud instance to cover the pre- and post-migration testing? How is that handled?"

"No, actually Atlassian offers a generous free trial period on new Cloud environments for just that purpose. Currently, the trial can last up to twelve months, although of course, we won't need that much time to get you up and running."

"That's great news," Jim said. "So, I'm assuming once the pre-migration testing is complete, we're into the actual migration."

"Exactly. Based on the assessment, we expect our engineers to handle the migration in strategic phases over two weekends, which should eliminate downtime using the production environment. Of course, as the cleanup and testing progress, we may need to tweak the schedule."

"So, as the first migration phase gets closer, we're going to need to have teams identified on my end who are going to be trained and onboarded to transition to the new environment the next business day."

"Yes, and we'll help with that too," Stacy said. "User enablement begins before the first migration and carries on after the last one, so we can be sure everyone is where they need to be before the engagement ends. So, I think we have everything we need to get things started. As soon as you can get me the signed SOW, our engineers can jump into cleaning up the files."

"Sounds good." Jim closed down the Zoom call and immediately sent an email to each of the key decision-makers requesting approval on the SOW by the end of the week and made a reminder for himself to follow up until he had the signatures he needed.

Eight business days later, Cprime engineers could access the system and start culling through the data.

THE CLEANUP - PREPARING TO START FRESH

With three separate instances of Jira and so many issues, projects, spaces, and pages to review, the initial cleanup and consolidation process took about three weeks.

Throughout the migration, Cprime's solution architects and engineers worked closely with PrimaApp's Jira Administrator and IT team to confirm users' statuses, flag files and users for archiving or deletion, and start putting together a strategy for testing and migrating data in the safest, most efficient way. In conjunction with this cleanup effort, other Cprime experts were diving into the list of add-ons and integrations the company had accumulated over the years.

The main challenges they needed to consider include:

- **Custom Data Migration** - They needed to determine whether the Atlassian Migration Assistants could handle the cataloging and mapping necessary for all custom workflows, groups, user configurations, and more, or if they had to be handled manually.

- **Potential Application/Integration Challenges** - There aren't many at this point, but a few popular applications from the Atlassian App marketplace don't yet have equivalents that run on the cloud versions of Jira and Confluence. Workarounds exist but may require custom development or manual data mapping to ensure they migrate smoothly and function properly post-migration.

- **Transferring Integrations** - Similarly, some existing integrations may not function properly on the new platform or may need to be configured differently to function.

Clean Up Your Server Instance

The more data you migrate, the longer and more complex your migration is likely to be and could affect Cloud performance later on. Use your migration as an opportunity to clean up your Server instance before running your test migration.

Some things to look out for might be inactive apps or users, old product data such as projects, customizations, or workflows that can be simplified or left behind, and any duplicate data. Refer to our documentation for best practices on cleanup.

From - [The Atlassian Server to Cloud Migration Guide](#)

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Additionally, with the assessment concluding that PrimaApp's optimal platform was the cloud, an aggressive training and user enablement schedule needed to be set up to ensure the company's thousands of users were prepared for the migration that was right around the corner.

Certified trainers from Cprime supplied high-quality digital and in-person classes that lasted two hours per user, and the team from PrimaApp's internal training department sat in on the first day's lessons to supplement Cprime's schedule with classes of their own. Across four physical locations and thousands of remote home offices, the entire user base needed to be trained on using the new cloud platform in just eleven weeks.

Prepare Training Materials

A move to Cloud comes with some changes and benefits for your end users. Make sure you've understood and prepared for all the major changes such as how users will log in, new URLs, changes to apps, and user interface differences. Your User Acceptance Testing (UAT) from above should give a sense for what questions users will have and the training that might benefit them.

To successfully transition your team, think about creating a clear process for collecting feedback and answering end user questions about the move to Cloud, such as office hours or a chat room.

Communicate Your Plan

With final timelines and owners in place, communicate the official plan to your organization. Things to include in your communications are:

- *When will the migration occur?*
- *What downtime can users expect?*
- *Ask end users to avoid changing anything during the transition.*
- *What will happen to the old site after migrating? Will it still be accessible or readable?*
- *What will the new URL(s) be?*
- *How will they sign in?*
- *To whom do they reach out if they run into any issues or have trouble logging in?*
- *What onboarding material can they review to get acclimated to Cloud?*

Keep in mind that there may be issues that occur during the migration that you may need to troubleshoot, so call out an adjustment period to your end-users to get your site cleaned up and working as planned.

From - [The Atlassian Server to Cloud Migration Guide](#)

Stacy and Tanya were in constant contact throughout the process, using the findings to hone the migration strategy and timeline until they established a solid plan near the end of the first month of the engagement. The pre-migration testing phase could begin in earnest once the SAs confirmed the cleanup was complete. The PMs estimated the three overlapping phases of testing would take six weeks to complete.

THE PRE-MIGRATION TESTING - MITIGATING RISK FOR A SMOOTH TRANSITION

Sixteen weeks into the engagement, Jim called Tanya for a status update.

"Jim, everything's going very well so far. I mean, the assessment did identify a few minor integration issues that won't translate to the cloud, but Barry and Tina from Cprime were able to suggest some similar cloud-compatible apps that will fill the gap once we're migrated. And, they passed along some materials that will make training our folks on the new apps a breeze."

"Great. And how is testing going?"

"So far, so good," Tanya said. "It's a little bit of a slow process because the testing plan is comprehensive, but that's obviously the best way to go. We're nearly done with the initial test migration work, and validation testing began late early last week. We expect to move into user acceptance testing (UAT) no later than Monday."

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Jim glanced at the calendar on his screen. "So then we should be on target for the first phase of migration to occur on the fourteenth?"

"Yes, that's the target, and I don't see any reason we won't be ready."

"And training is running on schedule as well?"

"Yes. We're down to the last two waves, and they're scheduled to start next week, so they'll be done in plenty of time for the migration. The materials Cprime provided worked equally well in the classroom and remotely for our folks still working from home, and the trainers do an amazing job."

"Excellent. It sounds like everything is coming together."

Test Migration

Regardless of company size or migration complexity, we recommend all customers run through a test migration before executing a production migration. Make sure you've completed everything in the pre-migration checklist from the Prep phase before using our testing guide to walk through your test migration.

Use your free Cloud migration trial to test your migration, apps, and any configurations you may need. You can run as many test migrations as you need. See our documentation on how to reset your site to run multiple tests.

User Acceptance Testing

Part of the test migration is conducting User Acceptance Testing (UAT) so your end users can replicate common day-to-day tasks, and make sure they work as expected. Through this process, you can uncover any issues that will impact your end-users and help your teams prepare to work in Cloud. Review step 6 of the testing guide for details on conducting UAT.

After you've run your test migration and have an idea of how much time your migration will take, choose the date for production migration. If possible, schedule your migration at night, over a weekend, or another time when your team is less likely to need access to your self-managed instance or Cloud site to reduce the risk of disruption and data discrepancies. Don't forget to factor in some extra time for troubleshooting!

From - [The Atlassian Server to Cloud Migration Guide](#)

The first wave of training commenced on schedule, and UAT was completed on the eleventh of the month. Everyone had a few days to breathe and get ready for the Phase One migration.

THE MIGRATION - SURPRISINGLY SIMPLE BY DESIGN

After so much lead-up and preparation, the migration itself almost feels anti-climactic.

"That's it?" Jim said to Stacy on Monday, the sixteenth.
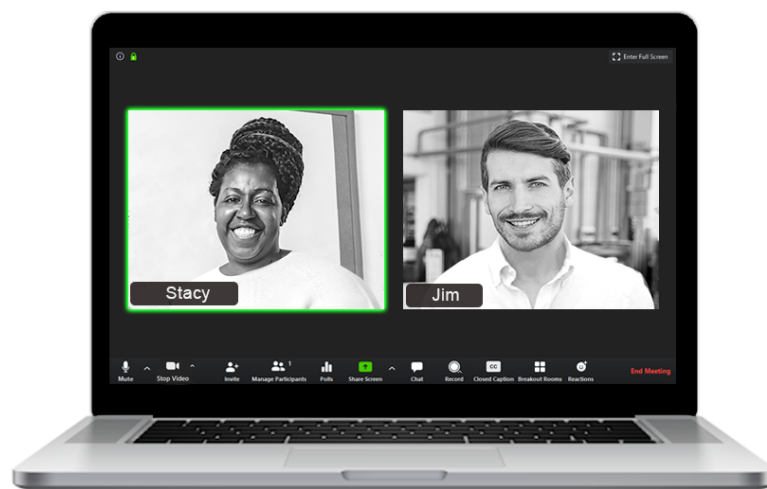
"That's it for Phase One, yes."

"Wow. And Tanya said everything went well."

"Yes, our whole team went through a retrospective this morning to review the weekend, and everyone agreed it was nearly flawless."

"Wait, nearly? Was there a problem?"

"We ran into a few little hiccups, but that's completely normal, Jim. Not to worry. The Cprime people I have working on your migration have a combined experience of over forty years. Most of them have been involved in over thirty successful migrations, and the Atlassian Migration Expert (AME) in charge has well over a hundred under his belt. We're like that insurance company on TV: 'We know a thing or two—'"

"'Because you've seen a thing or two,'" Jim finished with a smile. "Well, pass along my congratulations to the whole Cprime team, and I'm going to ping Tanya to do the same over here. Talk to you again next week after Phase Two."

Cprime engineers and PrimaApp's QA and IT teams spent the week testing the new cloud environment between migrations. At the same time, the trainers brought the last few waves of users up to speed in preparation for the final migration that weekend.

It went off without a hitch.
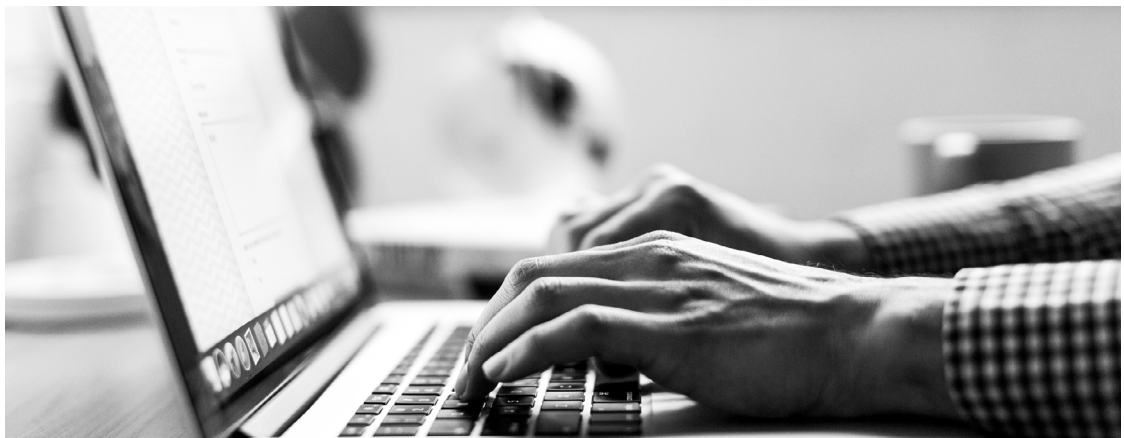
THE POST-MIGRATION TESTING AND OPTIMIZATION - VERIFYING SUCCESS

With such rigorous planning and testing before the migration, it may seem redundant to spend several more weeks in post-migration testing. But, the fact is, no amount of preparation can foresee every possible complication.

The post-migration testing period is augmented by an exercise in optimization. As users start getting used to the new environment and breaking it in, workflows can be tweaked and improved, processes tightened up, and change can be most effectively managed.

For PrimaApp, the post-migration testing phase lasted two weeks, during which specialists identified no serious issues.

QA Migrated Data

Check to see that your data migrated as expected and that everything is working properly and in order. Refer to Step 6 in our testing guide for tips on what to look out for when reviewing your data.

Adjust to Cloud

To help your team get adjusted, set aside some time to prioritize any post-migration issues, feedback, or questions. Add a few time slots for office hours in the first week after migration to your organization's calendars, and create a Slack chat room where end users can drop in to ask questions or provide feedback.

If you no longer plan on using your self-managed instance, back up your data for audit purposes if you haven't already, and feel free to let your maintenance expire.

From - The Atlassian Server to Cloud Migration Guide

Although the migration could very well be considered a resounding success at that point, the story's not over.

THE FOLLOW-UP SUPPORT - KEEPING YOUR TEAM HEADING IN THE RIGHT DIRECTION

Jim, Stacy, and Tanya got together on a Zoom call during the last projected week of post-migration testing.

"Well," Jim said, "I have to hand it to you, Stacy. Your team knocked it out of the park again."

"Thanks, Jim, but we didn't do it alone. Tanya and the rest of the PrimaApp people worked tirelessly to make this migration as successful as it was. And your user base has embraced the new environment, which is great to see. But, of course, we're not done yet."

"Yes," Tanya said, "we need to firm up details on the post-migration support. What's the best way to get a hold of someone?"

Stacy responded, "The current SOW provides you with a migration specialist on call for five weeks starting Monday. I'll forward you their contact information by Friday, but they'll be from the team you've already been working with, so the transition will be seamless. Of course, if you decide your teams need a little more support, we can always discuss training, coaching, or consulting options to meet your needs."

"I appreciate that, Stacy. Thanks very much for everything." Jim ended the Zoom call and started crafting his project summary email to the C-suite with a broad smile on his face.

Cprime is the Platinum Atlassian Solutions Partner with the most experience handling Atlassian migrations for companies of all sizes and requirements. It's also the only Atlassian Solutions Partner with a dedicated migration team filled with experienced migration specialists eager to focus their full attention on your company's migration needs.

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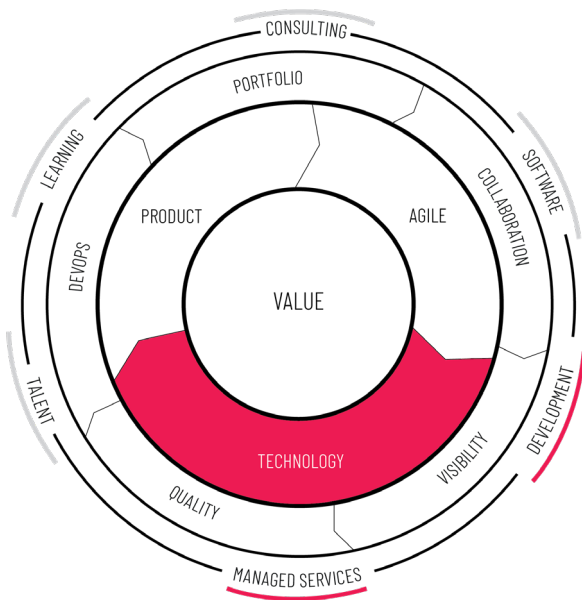Resources written by our experts about topics ranging from leadership to Agile to DevOps.

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