ATLASSIAN

Ultimate guide to cloud migrations

What to expect when migrating your enterprise to Atlassian cloud

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Executive summary

There's no denying that software as a service (SaaS) provides numerous benefits to enterprises across the globe. Between better IT resource allocation, a modern infrastructure, and end-user features that keep teams productive at scale, organizations, like yours, are making the move.

More and more of you are migrating your self-managed products to Atlassian cloud. And while many of you are excited to unlock the innovation that Atlssian cloud can provide your organization, it isn't always clear how to make the move.

Most of you have done some type of migration. You've probably had some that have gone smoothly and others that were a bit bumpier. However, it's often the bumpy ones that we remember. And, as the people who are responsible for carrying out a successful migration, those experiences can impact your perception of what a migration might look like.

But no two migrations are the same. While there are important lessons that you can take from your past experiences, using them to guide your approach to an Atlassian cloud migration isn't always the best way forward. So, we've put together this comprehensive guide – to walk you through what you can expect when you make the move to cloud.

There are four phases to any cloud migration:

- **Assess and evaluate**
- **Plan your migration**
- **Prepare your migration**
- **Test and evaluate**

01

Assess and evaluate cloud

Assess and evaluate cloud

Succcess checklist

☐ Explore deployment differences

☐ Assess cloud plans and evaluate Access

☐ Understand the support Atalssian provides

You've been using your self-managed products for some time and you're all experts when it comes to administering your instances and supporting your teams at scale – while still maintaining workflows that are happening behind the scenes. But we built cloud from a different codebase, which has enabled us to provide a more streamlined administrative experience and end-user innovation to your teams.

That's why we recommend you take the time upfront to learn more about our cloud products.

Explore the differences between self-managed and cloud

Let's start by looking at how our self-managed and cloud products differ from an operational perspective.

Server is the standard edition of our self-managed products, which you host and run on your own hardware. Architecturally, when your teams are accessing their applications, their requests are sent directly to your server, which is why maintaining and optimizing the performance of your infrastructure is critical as your teams grow.

Data Center is our self-managed enterprise edition built to meet the complex needs of growing enterprises. Like server, you can host your products on your own hardware, or leverage a cloud provider. To help maintain the reliability and availability of your products, you can also choose to deploy them in a **clustered architecture** – adding additional infrastructure components to distribute your user traffic.

You've all seen value in our self-managed products because they enable you to maintain full control over your environment so you can meet your business requirements. But, it also means that you're responsible for servicing and maintaining the infrastructure needed to support your products at scale. This, of course, can lead to increased IT overhead and resource consumption.

Atlassian cloud is our SaaS offering. Unlike self-managed where you manage the infrastructure yourself, Atlassian hosts and maintains the performance, availability, and reliability of your products. In short, we take on the infrastructure aspect of your product administration so that you can focus on keeping your teams productive.

Cloud architecture

Our robust cloud infrastructure enables your products to scale and perform in ways that aren't possible in self-managed environments.

Built on AWS

Our cloud products are built on AWS, so not only are they dependable and performant, they also have redundancy and failover options. We currently run out of AWS presences in the United States (US East and West), European Union (Dublin and Frankfurt), and Asia-Pacific (Sydney and Singapore).

Located where users are

Your data is located where the majority of your users are to ensure the optimal performance for your teams, which means your data can move as your global usage changes. However, we know that some of you may require that your data stay in a particular realm, so we do offer data residency.
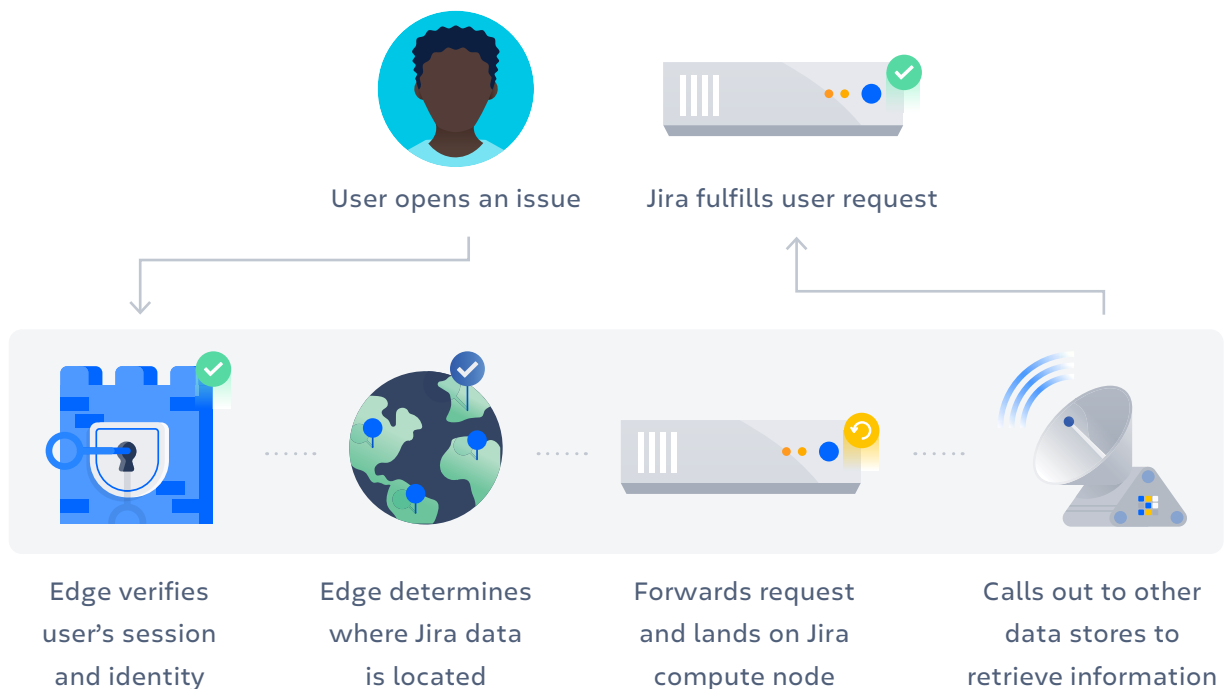
Relies on shared Atlassian accounts

By design, our cloud architecture relies on shared Atlassian accounts. With one account, users can easily access any of their Atlassian products. This model also makes authentication easier and more secure, as you have more control over how to authenticate users and what content they have access to.

Multi-tenant cloud architecture

Unlike a single tenant architecture where one organization has access to the application and database, with multi-tenancy, the supporting architecture for a single instance might serve multiple organizations. Resources are shared through what we call a shard. A shard is allocated to each tenant and contains the services, relational databases (RDS), and EC2 instances required to run our cloud products. So, while the compute node and database are shared, each tenant's data is isolated and inaccessible to other tenants.

Your data is safeguarded through something that we call an edge – virtual walls that we build around our software. When a request comes in, it is sent to the nearest edge. Through a series of validations, the request is either allowed or denied.

User opens an issue

Jira fulfills user request

Edge verifies user's session and identity

Edge determines where Jira data is located

Forwards request and lands on Jira compute node

Calls out to other data stores to retrieve information

It's important to note that we do not offer single tenant architecture for our cloud products.

Because the computing services required to process these requests are decoupled, our cloud products can respond quickly to increased user data or loads to provide consistent performance and better scalability.

This architecture also allows us to make most upgrades with zero downtime. Upgrades that do cause downtime typically take less than 5 minutes (usually performed during the maintenance window of 1:00 a.m. to 3:00 a.m. in your time zone). Ultimately, this means the system is constantly available for our cloud users.

To further optimize the performance of our products and better support teams across multiple regions, we also leverage:

- **Dedicated internal networks:** Our systems connect your users to the Atlassian cloud via the private, dedicated internal network nearest to them—even if the content being requested lives in another region. This speeds up connections and keeps the user experience running smoothly.

- **Content Delivery Networks (CDNs) and caching:** Frequently accessed content is automatically cached and a system of distributed servers (a CDN) quickly delivers static assets that are common across all user requests. This speeds up performance because users are closer to the distributed servers.

Cloud apps

Apps enable teams to extend the use of their Atlassian products even further. While apps will continue to do that with your cloud products, there are some differences between how our server and cloud apps are built. The biggest differences are that the control, connectivity and security is different between our server and cloud apps.

Understanding the differences between Atlassian's deployments is an important part of the migration process, but it's also important that you understand what cloud plan is right for you, as each plan offers specific capabilities designed to meet your business requirements, and can impact your migration strategy.

Assess cloud plans

We offer a number of different plans to address the complex demands that organizations are required to meet as they continue to grow.

Here's a list of the top differences between our Standard, Premium, and Enterprise plans.

	Standard	Premium	Enterprise
User limit	Up to 20,000 Up to 5,000 agents	Up to 20,000 Up to 5,000 agents	Up to 20,000 Up to 5,000 agents
Site limit	One	One	Unlimited
Atlassian Access	Subscription required	Subscription required	Included
Admin insights	–	✓	✓
Sandboxes	–	✓	✓
Release tracks	–	✓	✓
Encryption in transit and at rest	✓	✓	✓
Disaster recovery and business continuity	✓	✓	✓
Audit logs	✓	✓	✓
IP allowlisting	–	✓	✓

Cloud plans continued

	Standard	Premium	Enterprise
Data residency	✓	✓	✓
Storage	250 GB file storage	Unlimited	Unlimited
Support	Local business hours	24/7 Premium support	24/7 Enterprise support
Guaranteed uptime SLA	–	99.9%	99.95%
Centralized per-user licensing	–	–	✓

⚡ For more information on features or to learn more about the innovation that we're building in our cloud products, check out our whitepaper – **Server to cloud: why make the move**

As you're considering what plan makes the most sense for your organization, consider the following questions:

- What level of product support do you need guaranteed?

- What storage capacity do you need?

- Do you need to scale with unlimited sites?

- Do you require an isolated sandbox to test apps and previous changes to your cloud instance?

- Do you need to test new features before rolling them out on production?

For enterprises, both the Premium and Enterprise cloud plans offer enterprise-grade capabilities. However, we recommend Enterprise cloud if your organization:

1. Has, or plans to, standardize their Atlassian products across the organization

2. Is supporting globally distributed teams and has centralized governance and compliance needs

The reason: our Enterprise cloud plan gives you access to unlimited sites and Atlassian Access, which aren't available in Premium. To help you better understand how these features could be used, let's dive into each in a bit more detail.

Unlimited sites

With most of our cloud plans, a subscription grants you access to one instance of your products. This is similar to what you have on server or Data Center today – your instances operate independently of each other and require you to pay per user per instance. But as more organizations are shifting to the cloud, they're seeing a lot of value in being able to centralize or decentralize their administration depending on their business needs.

In self-managed environments, administering multiple instances of your products is challenging. Whether they were created as part of an acquisition, a merger, or a team who wasn't aware of your supported tech stack, because each product operates independently of each other, there is no unified way of administering all of your instances at one time.

Enterprise cloud removes those limitations. With unlimited sites, you can have as many sites as your organization needs to meet your needs. Here are some common examples of multi-sites in action.

Top use cases for multi-sites

Separate departments or teams	Grant teams autonomy by creating sites for each of your business units (BUs). This enables teams to customize their sites, such as applying customized workflows and apps, without impacting other teams.
Security	Some of your teams have access to sensitive or proprietary data. You can create separate sites for those teams and limit access in order to maintain the right level of security.
Data isolation	Create separate sites to maintain your data privacy requirements. For example, if you have certain data that needs to stay within a specific region, you can create a separate site and pin your in-scope data to that specified location.
Mergers and acquisitions	Through mergers or acquisition, new teams may join your organization and you may want to continue to administer those teams separately. You can give those teams their own site and still administer them in a central location.
Geography	Many organizations have globally distributed teams, so you can create different sites for specific geos.

If you plan on adopting a multi-site strategy as part of your migration, we recommend that you map out which users you'll want to associate with each of your sites. Creating new sites is simple, but by completing this tenant mapping beforehand, you can ensure a much smoother transition for you and your teams.

Within each of your sites you can have up to 20,000 users, enabling larger teams to embrace cloud while making more strategic choices on product and data architecture. This also grants teams the autonomy to choose apps that are specific to their roles.

> ⚡ To learn more about administering multiple sites or other parts of cloud administration, check out **Becoming an Atlassian cloud admin**.

Evaluate Atlassian Access

Security is built into the platform of our cloud products, but you may have additional security needs that require you to put safeguards in place. Often, this takes the shape of strong user management processes and practices.

You can think of Atlassian Access as the tool that bridges the gap between your Atlassian products and your identity management providers (IdPs). It gives you a single place to view and manage all of your users and product instances and enforce your company's security policies (including SSO).

Access is an enterprise-wide subscription that covers all of the cloud-based Atlassian products used by your organization. It works by identifying users through their email address domain. You can claim as many domains as your users might use. As you claim a domain, you gain control of all users that use that domain in their email address. You can then enforce security on this group of managed users like SSO and user provisioning. Note, Bitbucket currently doesn't include user provisioning or SCIM capability.

> For those of you using Opsgenie, Access works on Opsgenie instances that are on an Atlassian account. Because these users are typically associated with some of your other Atlassian products, such as Jira Software or Jira Service Management, they're already counted as users within Access.

Access features and capabilities

SAML / SSO	Enables your teams to log into their cloud products using a company username and password

Our SAML API enables us to support nearly all SAML providers, but we offer more streamlined integrations with:

- **Okta**
- **OneLogin**
- **Microsoft Azure AD**
- **Microsoft ADFS**

- **Idaptive (previously Centrify)**
- **Google Cloud Identity**
- **PingFederate**

We also offer the ability to create a custom SAML integration that you can use to manually integrate with any provider. If you have a partner, they can help you build this.

For those using Google Workspace, there is an option that forces your teams to use the social login button.

User provisioning User lifecycle management SCIM	Allows you to grant access to an entire group of users at one time. This streamlines and derisks onboarding and offboarding teams because access is granted to all the relevant systems in one place – reducing time and effort while upholding security.

We support nearly all cloud identity providers through our customer SCIM API. However, the integration is more streamlined with:

- **Okta**
- **OneLogin**

- **Microsoft Azure AD**
- **PingFederate**

You can also create a custom SCIM integration that allows you to integrate with nearly any provider manually.

For Google Workspace, you can sync users from selected groups, revoke site access, and deactivate Atlassian accounts if a user has been deleted or suspended from your workspace.

Authentication policies	Create multiple authentication policies for different users, which allows you to set the right level of security and exclude any managed users.

With Access, you can configure authentication policies through:

- **single sign-on (SSO)**
- **enforced two-step verification (2SV)**

- **password policies (password strength, password expiry)**
- **session duration**

You also have the flexibility to set these for your entire organization or for specific groups and users.

Auditing logging Organization insights CASB integrations	Track events that occur within your organization and across your sites to maintain your compliance position, along with user activity and license consumption.

Audit logs provide a digital record of everything that's happening within your instance. Because cloud is more interconnected, these audit logs are pulled at the organization level, which means that you can see what's happening across all of your sites and instances.

You can also leverage the McAfee MVISION Cloud and Atlassian Access integration for greater protection of your important data and increased protection from threats through activity monitoring.

Enforce security policies	Assign your company's security policies, such as two factor authentication or password strength requirements.
API token controls	Manage the users within your organization who have API access

Your teams can create an API token to authenticate a script or process from their Atlassian account.

To ensure that your security needs are met, you can see exactly what API tokens a user has created and manage them directly from their user account.

> 66 With the use of Atlassian Access (almost) everything is now automated and the admins only have to intervene in a few cases.
>
> **PETER GRUBE**
> Software Engineer, Homegate AG

With Atlassian Access, you can ensure that your user management needs are met.

Understand migration support and tools

Once you've assessed the differences between our cloud plans and identified if you need Access, it's now time to understand what migration support and tools you have available to you.

You may be using multiple Atlassian products as part of your tech stack. While we do provide a number of resources and tools to help you migrate your products to cloud, the type of support we provide does vary by product.

Meet the A(tlassian) team

As we say, migrating is a team sport. To make it easier for enterprises to make the move, we provide an A-list team of Atlassian's to help them along the way.

First, you'll have a dedicated cloud migration manager (CMM). Once you've committed to planning your migration by submitting a MOVE ticket, your CMM will be with you throughout the entire migration. They help:

- Review your current set-up
- Assess cloud plan considerations
- Create a production timeline for your migration
- Keep your teams operating smoothly during the migration

In short, they're the person that keeps your migration on track and ensures that you've picked the right options to meet your needs.

If your organization has a **technical account manager (TAM)**, they'll be working alongside the CMM to answer any technical questions and help you define your overall strategy.

And for those that don't have a TAM, a sales engineer (SE) may be brought in to help you assess your needs, answer any technical questions that you may have surrounding your migration, and ensure that the right technical solutions are in place so that your needs are met.

To help you execute the migration, you'll have a migration support engineer by your side to help you test your migration before you roll it out on production. They'll be helping you run your pre-migration testing. If there are areas that require additional technical support during the planning and prep stages of your migration, your CMM may bring them in to provide a consultation.

> **ⓘ Note**
>
> This dedicated team is focused on migrating Jira Software and Confluence. If you have other products that you want to migrate to cloud, such as Bitbucket or Jira Align, you'll need to work with additional teams at Atlassian for migration support. Your team can help you open a support ticket to get in touch with these other teams, or you can create one yourself through the Support portal.

Migration tooling

Your dedicated team of Atlassians will help you on the road to success, but migrating data and identifying the apps that you want to take with you can be a manual process without the right tools. We've all been there and want to make this process as smooth as possible for you, which is why we built our migration assistants.

The Jira Software and Confluence migration assistants help you migrate multiple projects, spaces, and users from your self-managed products to cloud all at once. And if that wasn't enough, they provide visibility into the migration process by walking you through each step along the way.

📖 Coming soon

We're always iterating on these so that they can migrate more of your data. Currently we're working on building migration support for:

- Advanced Roadmaps
- Jira Service Management

In Confluence, we're working on:

- Team Calendars
- Questions

For all you Bitbucket users out there, the Bitbucket Cloud migration assistant is in the works. Keep an eye on our roadmap for the latest.

Apps are an important part of your Atlassian ecosystem, so we've made assessing your apps easier. Through the migration assistants, you have a complete view of all the apps that are currently being used within your instance, if there is a cloud equivalent, the number of users, and the migration path.

This view enables you to see what apps have a corresponding cloud equivalent and identify if there are other options available to you. As you continue through planning, you'll use this information to help inform how you approach the following phases of your migration.

While your migration team can also help you finalize the app assessment, they don't have visibility into your app data, which means that you'll need to work with your app vendors to understand what the migration path looks like. However, we're working in collaboration with our Marketplace partners to add the ability to migrate app data using our migration assistant tools.

⚡ We are continuously working with app vendors to make the app migration process easier for you. **Read our post** to learn more about the time frames in which we're rolling these out.

Take stock of your Atlassian footprint

Now that you've seen what migration support and services are provided, you need to compare them to your current Atlassian footprint.

Work with your IT team to take stock of all the Atlassian products – and by extension the instances – that you have. You'll want to be able to answer the following questions:

- Are they all self-managed, or do you already have some cloud products?

- How many employees are using each product and for what purpose?

- How often are they being used?

- Are there any instances you weren't previously aware of? If so, do you plan on keeping them alongside your cloud site, or archiving them?

- What version of Atlassian products are you running?

- Have you built customizations into Atlassian products? How often do you or your team maintain workflows and custom fields in your instances?

Product discovery – available in Atlassian Access – enables you to identify all Atlassian cloud instances that were created by people within your domain. As you're taking stock of your Atlassian products, download a **trial** to help you discover any cloud instances that may already exist.

You'll also want to use this as an opportunity to look critically at your app usage. While we've continued to add more and more apps to our ecosystem, not every app has a cloud equivalent today. So, there may be some apps that you don't want to migrate, or different apps that you'll want to leverage as part of your migration.

At this stage, interviewing your teams will be extremely useful because cloud migrations don't just impact IT. We're all creatures of habit and change can be hard. Getting buy-in from your teams is what's going to make your cloud migration truly successful. It's the pivotal – what's in it for me – moment.

Using the data that you collected in your audit, interview your teams to understand how they're using them. Ask your teams to share how they're using the products day-to-day, if they have any pain points that they're experiencing, or if there are certain features that are important to them. The team innovation we've built in cloud may already address these concerns or be on the roadmap, so you can get them excited about what's on the horizon.
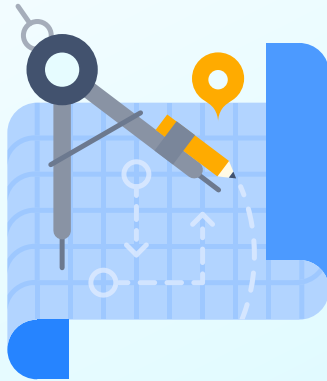
02

Plan your migration

Plan your migration

Now that you're caught up to speed on cloud and some of the fundamentals, it's time for you to do some pre-migration homework. While you can't plan for everything, taking stock of where you are today and how this will impact your future state can help to mitigate issues later in the process.

Succcess checklist

☐ Review how cloud meets your enterprise needs

☐ Evaluate your data requirements

☐ Set-up your cloud instance and claim your domains

Review your enterprise needs

Our deployment comparison highlighted some of the differences between our self-managed and cloud products, but chances are, you've already been comparing cloud to your current scenario to see if it meets your needs even before you sat down to read this. However, there's a lot of value in formally identifying what your requirements are and if and how they're met in cloud.

Your team of Atlassians will help you through this assessment, but you might be curious what types of questions they'll ask. We've pulled together this handy list, along with some resources that you can use to further investigate.

Example enterprise requirements questionnaire

User count and products

What products do you plan on migrating to cloud?

How many users do you need to license per product?

Based on the number of users you have and business requirements, do you need Enterprise cloud so that you can federate your instances?

Are you planning on consolidating any of your instances into one site?

Security, Legal, Compliance/Regulatory, Privacy

What are your compliance requirements? Do you have any regulatory needs for your data?

- Because Atlassian is managing your instances, it's our responsibility that you remain in compliance. Review the Trust site and **compliance reports** to ensure that your compliance requirements are met.
- Note, while we do meet most requirements today, our cloud products do not meet PCI or HIPAA requirements. If you're storing this type of data in your products, you would not want to migrate this instance to cloud. Read our **blog** to learn more about administering between multiple platforms.

What are your security needs and do you need to complete a security review?

- We know that many of you have vendor risk assessments that you need to complete. You can **submit your questions** and our support engineers will help you answer them, or leverage our **pre-filled questionnaires** with answers to the most common security questions.

What are your privacy requirements?

- We know that you want to protect your sensitive data and have control over how it's used. We've outlined this in our **privacy policy**. Additionally, we offer our cloud customers with a separate **Data Processing Addendum (DPA)** which addresses EU data protection and processing concerns.

Learn more how to approach security and compliance – specifically from a GDPR perspective – in our **webinar**.

Once you've filled out the previous section of the questionnaire, you'll want to work with your legal team to review our Cloud Terms of Service.

Apps and customizations

How many apps are you currently using today?

Of these apps, how many of them are critical to your organization?

Do you have any customizations that you've built on server or Data Center?

Do you need all of these customizations?

- The app assessment will help you identify what apps have a cloud equivalent and what migration path you need to take. While apps are an important part of your Atlassian ecosystem, some of you may have built your own apps and customizations. On cloud, we offer **Forge** – our app development platform – which you can use to rebuild those customizations and something that you should consider as you're planning your migration.

User Management

Are you using a SAML IdP?

Are you part of the organization that manages all of your company's users?

Do you use multiple IDPs?

How are you currently managing users/groups on-prem?

Data locality

Are there constraints on where the data will be located?

- As we mentioned above, our cloud architecture is designed to not limit data movement. However, some of you may have requirements on where your data can be located. If this is your organization, then you'll require **data residency**.

Understand your data requirements

Data requirements are one of the reasons people shy away from moving to the cloud or think it isn't possible. However, a move to cloud isn't necessarily out of the question if you have strict data privacy requirements.

Ultimately, it comes down to whether all of your instances have these data requirements or just some of them. For example, your legal team may use a separate Confluence instance and the data in that instance might need to be fully under your control for privacy reasons. Although it might be impossible for you to move that team's Atlassian instance to cloud, it may be possible for you to move other teams over to cloud – especially those who don't have the same strict data privacy requirements.

For organizations that are considering leveraging both self-managed and cloud deployments, we're optimizing the experience so that you can more easily administer them together, thus keeping control of your sensitive data.

At this stage, we recommend doing a tenant mapping exercise. As we mentioned above, you will want to look critically at your setup and decide how you want to structure your cloud sites and what data and users you will be keeping on your self-managed instances. This will allow you to make sure that you plan what data is going to be migrated where, what users will need to be licensed for those sites, and ultimately how to best safeguard your data with the right practices.

Setup your cloud instance

Before moving on to the next phase, you need to set-up a cloud site so that it's ready for when you migrate. While this step isn't a requirement, it is a prerequisite for Atlassian Access.

There are two parts to this: setting up your organization and claiming your domain.

To set-up your organization, we recommend that you use our **free cloud migration trial**. Each trial lasts up to 12 months and matches the remaining duration and user tier of your current self-managed license. It's designed specifically to help you explore, evaluate, test, and migrate your instances over time – without disrupting your teams.

The cloud migration trial automatically generates an organization alongside your site. You'll be able to access your organization at **admin.atlassian.com**. Moving forward, this is where you will view and manage all of your Atlassian cloud users and setup security features like SSO. We strongly recommend signing up with a URL you plan to keep as your new production site once your migration is complete. You can find more information on how to change the name **here**.

Once you have your organization in place, you need to **verify your company's domain** to claim your managed user accounts. You can do this by either uploading an HTML file to the root folder of your domain's website (HTTPS), or you can copy a TXT record to your domain name system (DNS). You'll then see all of your managed accounts within your organization's admin console.

03

Prepare your migration

Prepare your migration

Succcess checklist

- ☐ Assemble your team
- ☐ Build a migration timeline
- ☐ Choose a migration strategy and method

It's time for you to prepare for your migration. In the previous phase, you reviewed all of your requirements and set-up your organization. In this next phase, you'll be focused on:

- Assembling the rest of your migration team
- Choosing a migration strategy and method
- Building a migration timeline

Assemble your team

Migrating to cloud is a team sport, so on top of the Atlassian team who will help you with your migration, you'll want to make sure that you have the right people seeing you through to the end. We showcased the Atlassian team members you'll have access to earlier, but you'll also want to have people within your organization that are dedicated to the migration.

Solutions partners are your friends

Even if moving to cloud is a top-down ask from your leadership team, migrations take time – something that is hard to come by with your other responsibilities. On top of that, IT teams often operate lean (one of the reasons

you may want to move to cloud in the first place). This makes it difficult to build up a team of people solely dedicated to your migration. That's why we recommend **leveraging a partner** to help you get across the finish line.

They are right alongside your Atlassian migration team throughout the entire process. That means that they're helping us work with you to do the planning

> **66** I can't stress enough the importance of having a good quality partner. Building a relationship with our partners is what got us over the line.
>
> **AFTERPAY**

Build your migration timeline

With your team assembled, it's time to pick a date. Now, you don't want this to be based on what you want it to be, but the date that you're ready to move forward with a migration. For some teams, this date can be a hard deadline that your executive leadership has set out. For others, you may be aiming for a soft launch – you might have a certain date in mind, but you have the flexibility to adjust the timeline.

With a deadline in mind, your CMM will work backwards from that date you've provided, factor in the support you have, and build out your full timeline.

Enterprise migration timelines also factor in:

- Enterprise requirements, such as security and privacy
- Amount of existing data and if it's optimized pre-migration
- Apps and customizations
- Migration strategy and method
- Team size and if you are leveraging a partner

Don't forget to consider renewal dates and the end of server support, as you will want to optimize where possible to ensure there is no disruption in your service.
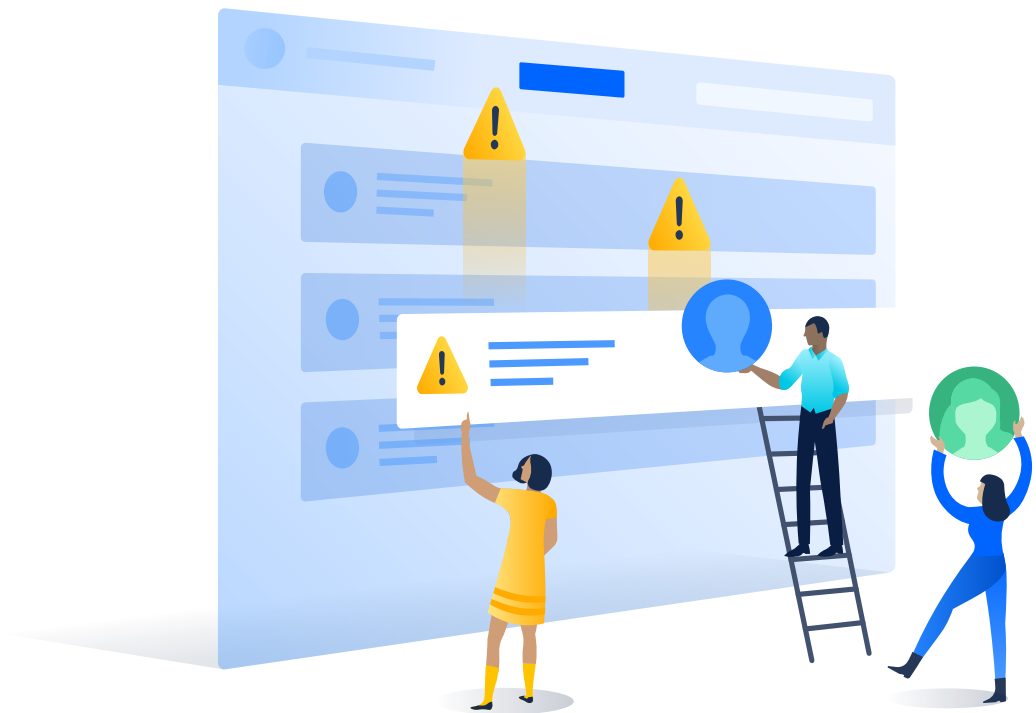
Migration strategy and method

Throughout this guide, we've outlined tools and people that you can leverage as part of your migration. However, every migration requires its own strategy, or the guiding principle you use to move your data from one instance to another.

Your team at Atlassian will help you decide what strategy will work best based on your timeline and requirements, but this is a breakdown of the strategies that you can use as part of your cloud migration.

These strategies apply at the instance level.

Optimize and shift (recommended)

How this method works	You migrate an instance all at once during the migration window. Prior to migrating, you clean-up your self-managed instance, remove old or unused data and inactive users.
Pros	• Everything in your instance is migrated all at once • You're only migrating what you need • Easier navigation for your team once in cloud • A more streamlined migration timeline and better use of resources • Your self-managed instance is still available if you need to roll back your migration
Cons	• Your teams need to be onboarded simultaneously • Requires one significant window of downtime for teams • Requires additional planning and work to determine what areas you need to optimize
Migration method	Migration Assistant or site import
Timeframe	3-9 months

This option might be right for you if...

Your organization has the time and resources to clean up your instance prior to your migration. Most organizations are carrying around a lot of enterprise baggage – the data and users that just never got removed from the instance. Moving to cloud is your opportunity to start over and get rid of the baggage that may be bogging you down.

> **ⓘ Pro tip**
>
> Data Center offers a number of clean-up capabilities across each of the products. Check out our **clean-up guides** for more information.

Lift and shift

How this method works	You migrate an instance all at once during the migration window, but you don't clean-up your instance before you migrate.
Pros	• Everything in your instance is migrated all at once • More streamlined migration timeline and better resource allocation • Your server or Data Center instance is still available if you need to roll back your migration
Cons	• Your teams need to be onboarded simultaneously • Downtime may be increased depending on data size • May be moving unused data or users, which could add to cost • There is a longer testing period before the migration (multiple tests and UAT need to be done to ensure all details have been covered) • You may have to clean-up your data post-migration
Migration method	Migration Assistant or site import
Timeframe	1-6 months

This option might be right for you if...

Your organization is looking to move to the cloud and you don't want to spend time upfront cleaning up your instance, this option will enable you to migrate at a faster rate.

Phased

How this method works	Taking your instance and breaking it into 2 - 4 batches for a cloud migration. These batches are broken down based on value, such as separate servers, products, or active vs inactive instances.
Pros	• Phased user onboarding and change management • Reduced migration downtime • You can clean-up and optimize your instance over time • Collect feedback from your teams to apply to future phases of migration
Cons	• Working across two platforms makes it difficult to roll back if you needed to • Longer migration timelines, include several more rounds of testing • Requires careful planning and mapping of dependencies • You may need certain IPs to be allowed listed to establish a link between your server and cloud instances, which could raise security concerns • You may experience configuration drift, which will then require you to perform extra pre or post migration cleanup steps.
Migration method	You can choose to migrate using either the migration assistant or site import initially, but you'll want to use the migration tool for the additional batches you migrate. If you choose to migrate your data using site import, we still recommend that you migrate your users with the migration assistant, or they can be synced through Access if you have a subscription.
Timeframe	6-12 months

This option might be right for you if...

Your organization has business requirements that won't enable you to have long periods of downtime, or you have complex, large data shapes that can't be migrated during one single migration window.

Start fresh start whenever you want

How this method works	Leave your data behind in your self-managed instance and only bring users and workflows.
Pros	• There is little to no migration downtime • You can keep your data around for achieving purposes if you have a server license
Cons	• Your teams can't access their old data
Migration method	Migration Assistant or site import
Timeframe	As soon as you create your cloud site

This option might be right for you if…

You don't need access to your existing server data, you're spinning up a brand new team, or you're expediting your move to cloud. This option can also enable teams to streamline their cloud footprint and implement new ways of work.

Align with leadership

Ideally, you've been working with leadership and internal stakeholders throughout this entire process, but it's important that you fully align with leadership before moving into the testing stage of your migration.
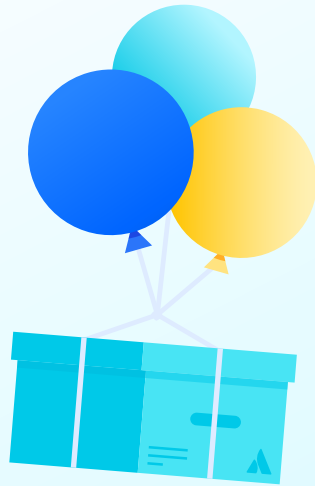
04

Test and migrate

Test and migrate

Succcess checklist

☐ Create, update, and review your runbook

You're ready to get testing and ultimately migrate your production instances to cloud. Remember that migration support engineer that we mentioned before – this is where they shine. They'll be working with you through this phase to build a runbook and ensure that you've done the right testing before your final production migration.

Create, update, and review your runbook

Testing is one of the most important steps in any migration. So, our migration support engineer will help you build a runbook. But don't worry, you can use your own runbook template if your organization has one that they prefer.

First, you'll work together to complete a pre-migration checklist. This includes activities such as ensuring that you've defined your migration strategy and set-up your cloud instance.

Next, you'll work together to draft your test strategy. There are some tests that we know you'll need to run depending on the migration strategy, but we'll also add tests based on your setup and requirements.

At this time, you'll also need to provide a ZIP file that contains your instance data. On our end, we'll run through checks to mitigate any issues during the actual migration process. While we can't run all the checks on our end, our support engineers will provide comments and feedback to help identify any outstanding checks that you need to do on your end. This will all be documented in your runbook.

> **ℹ Note**
>
> Your runbook should be your source of truth. Your support engineer will be adding resources providing details while you do the same. This will provide your IT team with the full migration picture.

The last step is to execute your test migration. Work with your support engineer to align on the date and time you're running your test. As you're going through each of the tasks, you'll want to enter the amount of time that it took (we'll do the same on our end). Don't forget to document challenges and roadblocks, as they will be extremely helpful for your production runbook.

With this final bit of information in hand, fine tune your production migration plans and you're off to the races.

05
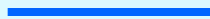
What does a cloud
migration look like in action?

What does a cloud migration look like in action?

Cando is one of the leading shoe distributors in the US – providing a wide selection of options that range from sneakers to heels. What originally started as a small business has now turned into a large scale enterprise operation. Maggie, the current CEO, has big plans of expanding their global presence.

For the past five years, Cando has used Jira Software Server to track the software development work that they do for their website and Confluence Server for all of their internal collaboration. Over the past five years, the organization has gone from 250 team members to 15,000. Gaby and Alyssa, the company's senior admins, have spent considerable people hours and budget building an infrastructure that can remain performant at scale, but Cando's organizational growth isn't inline with what their existing on-prem infrastructure can handle and their teams are starting to suffer.

With Atlassian announcing their end of server support, Maggie has reached out to Gaby and Alyssa to understand their options. While they know they can continue to run on-prem with Data Center, they're also aware that Atlassian is building more innovation in cloud. And while Maggie has also expressed interest in adopting a cloud first strategy moving forward, Cando has specific data requirements that must be taken into account as they make their decision.

Phase 1: Assess and evaluate

The first thing that Gaby and Alyssa need to do is get a better understanding of Atlassian cloud products.

Once they've done their research, they now want to understand what a migration might look like, so they start by going to the Atlassian Migration Center.

After reading through the site and some additional resources, they still aren't sure if cloud is right for them. They decide to fill out the contact form to get more information from Atlassian. Jacob – an enterprise advocate (EA) – reaches out to them.

To kick off the conversation, Jacob walks them through the investments that Atlassian is making for both teams and admins – and specifically how Atlassian is meeting their enterprise requirements. After hearing more about cloud, Gaby and Alyssa both feel like it's the right move for their organization. Now, Maggie needs to ensure that this works within their budget.

Jacob schedules a call with Gaby, Alyssa, and Maggie where he walks them through the total cost of ownership (TCO) and what their return on investment (ROI) could be by making the move to the cloud. While the initial investment seems high, Maggie can see that over time, infrastructure costs and licensing fees make cloud a much better option for Cando.

While Maggie is keen to move forward with the migration, Alyssa and Gaby still have more questions about the migration process, such as what plan they need, how does user management work, and if they will need to make changes to their current setup before migration to cloud. To address these questions, Jacob brings in Abby, the sales engineer (SE).

Based on their specific requirements, Abby recommends taking a decentralized approach and leveraging multi-site because they want to continue using their external directory and SSO. So, Abby and Alyssa decide that the Enterprise cloud plan makes the most sense.

Before they give their final recommendation to Maggie, Gaby and Alyssa want to understand what support and tools they need to execute their move. Jacob walks them through what Atlassian provides them, including a CMM and migration support engineer.

He also uses this opportunity to talk more about the Jira Cloud Migration Assistant (JCMA) and the Confluence Cloud Migration Assistant (CCMA), which they could leverage to migrate their data from server to cloud. He also mentions that site import is another option available, but the CMM assigned to our MOVE ticket will be able to help them decide on what tools and overall strategy make the most sense for their organization.

While they're both happy with the support that they're getting, they're also aware that this migration could take some time and they're the only two admins dedicated to the migration of their data. They decide that getting a partner makes the most sense.

So, they reach out to Cloud Movers, who assigns Jess to work with them. Throughout their initial call, Gaby and Alyssa have the opportunity to get a sense of how Jess will work with them and Atlassian to help migrate their data, but they require a statement of work that they can share with Maggie. Jess works on drafting this up so that Cando can move forward.

After gathering all of this information, Gaby and Alyssa can go to Maggie to move forward with the migration. Jacob stays with them throughout the purchase process to ensure that Cando's needs are met.
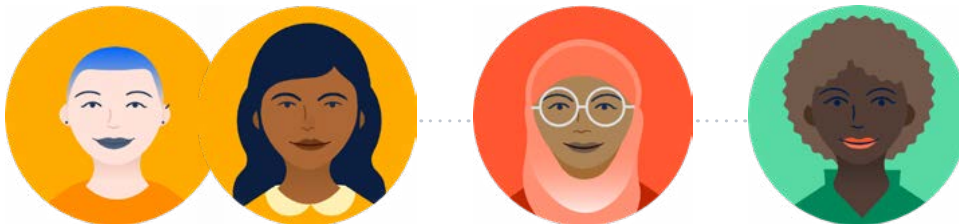
Phase 2: Plan

They're now ready to move forward and begin working with Atlassian to plan their migration. They submit a MOVE request, which is sent to the CMMs.

Hosana is officially assigned to Cando's migration and schedules a kick off with Alyssa, Gaby, and Jess. She walks them through the overall process and describes how she will be working with them at each stage of the journey

Gaby and Alyssa know that they need to do an official security audit. They submit a copy of their questions to Atlassian to respond. They promptly send responses back and they're satisfied that cloud meets their security requirements.

The next step is to figure out how running multiple sites will impact their migration and how to better prepare. Hosana recommends completing the tenant mapping exercise to plot out what users will go to each site. In the end, Alyssa and Gaby decide that they need a site for their development team, sales, and marketing.

With the final pieces in play, they download their free migration trial and claim their domains. They now see all of their users and are ready to grant them access once they've officially migrated.

Phase 3: Prepare your migration

Because they've already engaged a partner – Jess – they're now ready to decide on what their migration strategy should be and what method they can use.

Hosana recommends that they leverage JCMA and CCMA for their migration and that they use a lift and shift strategy, where they migrate their entire Jira Software instance at one time and then move their Confluence instance shortly after.

Based on the strategy, method, and their partner, they feel comfortable migrating their Jira Software instance over Memorial Day weekend and Confluence will be two weeks after that over the weekend.

Last, but not least, they align with Maggie one more time to review the timeline and confirm that they are good to move forward.
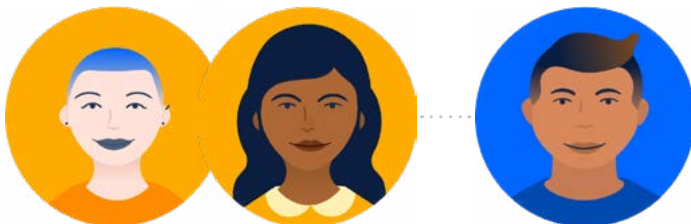
Phase 4: Test and migrate

Brian is the technical support engineer assigned to their migration. With the plan and strategy outlined, Brian works with Gaby and Alyssa to complete

the pre-migration checklist. He then works with them to outline their testing strategy and indicates what tests they will need to run and what he will be running on his end.

They provide Brian with a ZIP file containing their data, which Brian uses to run through the migration checks before the official move. He gives some feedback on what they can do to optimize their data pre-migration and documents everything in the runbook.

The last thing that Alyssa and Gaby need to do is test their migration. They run through the entire process and document the time it takes and highlight any challenges they experience. This data is sent back to Brian to use as part of the official migration.

With data optimized, they migrate their data without any hitches.

We've officially walked you through the ins-and-outs of an enterprise migration

Ready to plan your move?

Schedule a migration consultation today.