

# The Essential Guide to **Merging Instances** When Migrating to Atlassian Cloud



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# The Essential Guide to Merging Instances

## When Migrating to Atlassian Cloud

### Contents

- What is a Merge Migration in Atlassian Cloud and Why are they Necessary?
  - Why are merge migrations necessary?
  - The alternative to a merge migration: federated instances
- A Single Source of Truth: The Case for Merging Multiple Sites
  - Governance: a unified, consistent way of working
  - Streamlined administration and maintenance, plus reduced costs
  - Improved visibility, communication, and collaboration
- Key Areas of Consideration: Turning Obstacles into Opportunities
  - Streamlined administration and maintenance, plus reduced costs
  - Simplifying and consolidating schemes and scheme nomenclature
  - Simplifying standard fields and reconciling custom fields
  - Simplifying and consolidating apps
  - Reconciling classic vs. next-gen projects
- What to Expect from the Merge Migration Process
  - Discovery
  - Cleanup
  - Rehearsals and testing
  - Final cutover
- How an Experienced Atlassian Partner Can Streamline a Merge Migration
  - Strategic guidance and tactical know-how
  - Improved communication and coordination
  - Proprietary tools and innovative solutions

More organizations than ever before are exploring how to consolidate multiple instances of Atlassian tools and migrate them to a single, overarching instance in Atlassian Cloud. This is often a strategic decision that offers several benefits. A single source of truth:

- Strengthens governance and compliance
- Increases visibility, communications, and cross-functional collaboration
- Streamlines administration and tool management
- Improves scalability
- Reduces costs

Migrations alone are complex, but when they are combined with the merger of multiple instances, the complexity is even greater. Each instance is often tailored to meet the unique needs of the teams using it. The intricacies exist in developing and implementing overarching governance, as well as the technical challenges of reconciling these differences. Despite the incredible benefits that can be gained, it's enough to cause even the most forward-thinking organizations to delay the transition. Still, with careful planning and the help of an experienced Atlassian partner, the process can be streamlined, the risk can be minimized, and your organization can begin reaping the benefits that come from holistic governance of Atlassian tools, and Cloud deployment.

At Isos Technology, we have written extensively about migrating to Atlassian Cloud, highlighting [key considerations](#), advising on [how to choose the right plan](#), exploring the [true costs of migrating](#), providing a [detailed process roadmap](#), explaining

how to overcome both [organizational and tactical obstacles](#) to cloud migration, taking a deep dive into [all things app-related](#), and what to consider in terms of the financial impact. While the vast majority of this content is applicable across the board, some aspects are unique to combined merge migrations and merit additional attention.

This paper intends to serve as a foundational guidebook for any organization planning to merge multiple instances of Atlassian tools (primarily Jira Software, Jira Service Management, and Confluence) and migrate them to the cloud. In this paper, we will explore:

- Why do organizations choose to merge and migrate
- What a federated set of instances is and why companies might choose it instead
- Potential benefits of a merge migration
- Insight into areas that will require special attention
- What to expect from the merge migration process
- How an experienced Atlassian partner can support a successful merge migration

## What Is a Merge Migration in Atlassian Cloud and Why Are They Necessary?

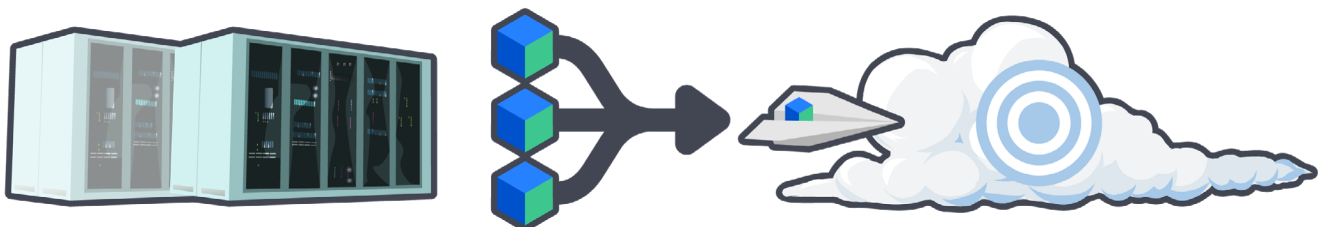
In this paper, a merge migration entails merging one or more existing Atlassian servers, Data Centers, or Cloud instances, called source instances, into a new or existing Cloud instance, called the target instance.

## Why are merge migrations necessary?

Organizations come to have multiple instances of Atlassian tools for several reasons, but in our work with clients, we often see that it is tied to growth. First, mergers and acquisitions often bring together disparate ITSM and engineering teams. Combined organizations that are seeking to exert greater governance over processes, better manage dependencies, and gain efficiencies and economies of scale—among other reasons—often seek to combine instances.

Second, as companies scale rapidly, they may purposefully choose to allow different regions, operational business units, departments, or teams to establish and administer their instances. However, over time, a situation similar to what happens in a merger and acquisition (M&A) environment arises. Organizations need to bring people together and create similar ways of working so they can collaborate more closely, get better organization-level metrics, see how they connect to portfolios of work, and have stronger controls over user access. There can often be financial benefits to bringing together instances, as well.

Third, are what we sometimes refer to as “under the desk” installations which are when the use of the Atlassian tools grows organically, and individual business units, departments, and teams, working in silos and unaware of pre-existing instances, have spun up instances on a local server<sup>1</sup>, using Data Center, or in Atlassian Cloud. At some point, it becomes cumbersome and inefficient to have disparate instances, so organizations launch initiatives to combine them. Because it is so straightforward and economical to spin up a Cloud instance of Jira Software, Jira Service Management, Confluence, and other Atlassian tools, we see an increasing number of organizations seeking to merge multiple Cloud instances, which have some special considerations, challenges, and solutions.



## The alternative to a merge migration: federated instances

As Atlassian has continued to invest in and advance its Cloud software, it has developed capabilities that support multiple, federated Jira Software Cloud Enterprise instances. Federated Jira Software Cloud instances function autonomously, but are connected and interoperable and can be a robust solution for certain companies in specific circumstances, as long as the instances are intentionally and thoughtfully architected. Organizations might opt for federated instances dedicated to regional locations, business units working on discrete or unrelated work that truly needs full administrative autonomy, or to support parts of the company that must meet distinct security, compliance, and data segregation parameters.

From an M&A viewpoint, the advantage of a federated model is that you can bring multiple instances together within your Atlassian organization and manage them centrally while allowing each organization to continue working autonomously for as long as necessary. This minimizes disruption in the short term and gives you time to think strategically about whether those instances need to be merged and logistically how you will do that. In the meantime, users can work across multiple instances with a single-user license. However, even in a federated environment, it is still optimal to have teams working on projects within the same portfolio.

An Atlassian Solution Partner can help you determine whether or not a merge migration or federated instances—or some combination of the two—is right for your organization.

To learn more about federated instances and whether or not they might be right for your organization, read our whitepaper: [Are Federated Jira Instances in Cloud Right for Your Organization?](#)

## A Single Source of Truth: The Case for Merging Multiple Sites

Given the complexity of merge migrations, it's understandable to weigh the value of the undertaking relative to the degree of difficulty. While there are dozens of compelling reasons to make the transition, reasons can generally be categorized into three overarching themes, all tied to: organization-wide governance over processes, streamlined tool administration and maintenance, and improved visibility, communication, and collaboration.

### Governance: a unified, consistent way of working

One of the strategic advantages of merging multiple Atlassian instances in Cloud is that once complete, organizations can exert greater governance over how the tools are used. Creating standards then makes it easier for teams to adopt the tools and for users to fully leverage them, so the organizations end up realizing the full value of their investment. With all teams working in a unified manner, it's much easier to refine and improve processes, as well as to identify and correct procedures that are not serving your organization's goals. This consistent foundation makes it easier to scale successful processes, which is relevant in organizations of all sizes, but essential for those on a journey to agile at scale. Strong governance also brings benefits related to security and compliance. It is more efficient to establish and adhere to security and compliance-related protocols and to track compliance-related information in a single system vs. multiple systems that some security and compliance teams may not be aware of.

<sup>1</sup> While we reference both Atlassian Server and Data Center deployment methods in this paper, note that support for Server ends on February 15, 2024. After that date, Atlassian will no longer offer technical support, security patches, or bug fixes for vulnerabilities.



## Streamlined administration and maintenance, plus reduced costs

Merging multiple Atlassian instances in Cloud can have a significant impact on the amount of time and resources needed to administer and maintain the tools, and there may be long-term financial benefits, as well. When an organization moves to Cloud, the IT staff no longer has to manage servers or update software, so they can redirect their focus toward other responsibilities. By consolidating instances, some of the tool administration can also be consolidated, freeing staff to focus on other tasks. From a financial perspective, rightsizing Atlassian tools and users may reduce license fees, while moving from Server or Data Center to Cloud may result in facility and physical hardware cost savings.

## Improved visibility, communication, and collaboration

Whether an M&A has brought teams together or it is simply time for greater governance within a single organization—development, operations, and ITSM teams are likely to have dependencies. As more organizations embrace DevOps, software releases are more frequent, necessitating automated change management processes. More frequent changes also bring more frequent issues. Meanwhile, customer expectations for quality and service are rising. In this increasingly complex engineering and ITSM environment, more teams than ever are required to mitigate and resolve issues or respond to major incidents. A centralized, integrated system functioning as a single source of truth breaks down silos and provides a platform for development, operations, and ITSM teams to work together.

This makes information readily accessible and visible to all stakeholders, and leverages automation that streamlines processes and eliminates time-consuming, manual tasks. As a result, teams can spend more time focused on higher-value work and resolve issues faster, resulting in greater customer value.

To learn more about how a single, integrated platform can improve collaboration between DevOps and ITSM teams, read our whitepaper, [How a Single Platform Can Improve DevOps and ITSM](#).

## Key Areas of Consideration: Turning Obstacles into Opportunities

Merging multiple Atlassian instances and migrating them to Cloud presents an incredible opportunity for an organization to envision how it would ideally like to work—its desired future state—and to create a roadmap for achieving that. However, there is some necessary upfront work to be done to create a roadmap—the path you will take to get to that end state. The process entails auditing existing instances, resolving conflicts and differences, simplifying processes, and consolidating information and apps, among other things. A roadmap represents a significant source of the labor involved in a merge migration. While several areas present challenges and harbor hidden pitfalls, an experienced Atlassian partner can increase the efficiency of the process, help avoid issues, and offer expertise and solutions—often in the form of proprietary tooling—to make the process a success.



Following are several key areas that will need to be addressed as part of **developing** and **implementing** your **merge migration roadmap**:

## Area #1:

### **Streamlined administration and maintenance, plus reduced costs**

A merge migration is a great opportunity for a company to reevaluate who is currently using its Atlassian tools and who will need to use them in the future, as well as to rightsize its licenses. With multiple instances, an organization may find that a single user is working in more than one instance, and it's also likely that there are users in the system who are no longer active and can be deleted. The instances may have user group management schemes. To merge/migrate, it will be necessary to understand how these groups relate to one another and align them to a central way of working.

A great way to start the audit is within the tools themselves. Both Jira Software and Confluence show user information and can serve as sources of truth. It may also be helpful to partner with an Active Directory service administrator to sort through the various groups.

A note about email addresses: With Server and Data Center deployment methods, a single email address can be tied to multiple usernames, but with Cloud, this is not the case: Each email address can be tied to only one username.

## Area #2:

### **Simplifying and consolidating schemes and scheme nomenclature**

A huge piece of the puzzle in a merge migration—and one that consumes a lot of effort—is auditing notification, permission, screen, and workflow schemes in your source instances, and consolidating them in the target instance. It is an opportunity to establish governance, but it comes with a lot of discussion and some compromise. An experienced Atlassian partner can help identify the commonalities and narrow down your schemes. For example, an Atlassian partner can help your team identify similar workflows driving towards the same goal. From there, the partner can assist in identifying the handful that will best serve your organization in the long run.

The effort is further complicated by nomenclature. You are likely to find schemes with the same name for completely different functions, and similar scheme functionality with completely different names. Be aware that you cannot have duplicate names in the target Atlassian Cloud instance. You will have to sort out nomenclature in advance of the merge migration to ensure there are no conflicts, that you do not lose data, and that data gets pulled into the right place.

Further, if your organization is using default schemes in its source instance, and you are merging or migrating to a target instance with custom schemes, be aware that the default scheme from the source will override the target. This means you have to be off of default schemes in your source instance before merging or migrating with the target instance.



## Area #3:

### Simplifying standard fields and reconciling custom fields

The ability to create custom fields in Jira is one of the things that makes it so powerful. It is essential to making Jira work well for your organization. In addition to the duplicate name issue, there are a couple of other issues related to custom fields of which to be aware. First, an overabundance of custom fields can significantly compromise performance by slowing down the system, so it is essential to get the balance right. When merging instances, most organizations will benefit from consolidating the number of customer fields. Second, Atlassian migration tools, as they exist today, do not support the migration of custom fields that allow you to select multiple users and options. However, Isos Technology has built a proprietary tool to support the migration of multi-user and multi-select custom fields that streamlines this process and prevents data loss.

## Area #4:

### Simplifying and consolidating apps

Most organizations make use of at least a handful of Atlassian and third-party apps on each of their instances, so it's necessary to take stock of what is in use (and why) before determining how best to move forward. Apps add significant complexity and risk to a migration, so it is important to consolidate them. It's likely that different instances use several apps to solve similar problems and do similar types of work, so consolidating those is a good place to start. Further, Server and Data Center versions of apps can function quite differently from their Cloud counterparts, so there will be some scoping of needs relative to solutions to determine the best path forward. Each app will have to be independently assessed to understand how functionality changes in its Cloud version.

A note about Cloud app security: It is very different from Server and Data Center security where the data is stored locally. Organizations will have to independently evaluate each app to ensure it meets security and data storage protocols. The sooner the IT security team is brought in to support this, the better.

To learn more about the differences between Server and Data Center apps and Cloud apps, including differences related to security, and what to expect from the process of migrating apps and app data, read our whitepaper, [Migrating to Cloud: Seven Decisions to Make about Apps](#).

## Area #5:

### Reconciling classic vs. next-gen projects

One of the advantages of Jira Software Cloud is next-gen projects, which are designed to reduce the administrative burden of setting up projects by providing a simplified, customized way for end users to set up projects. Next-gen projects do not use schemes, which runs counter to the notion of governance (all teams working in a unified, consistent manner) and next-gen projects can be problematic when merging multiple Atlassian Cloud instances. Since next-gen projects aren't part of Jira Software's global administration, there is no straightforward way of migrating them. When merging multiple Cloud instances, the current process entails migrating the Cloud instance to Server or Data Center, and then back to Cloud. Because next-gen projects do not exist in Server and Data Center, all next-gen projects must be converted to classic projects and then pushed through the merge migration process.



# What to Expect from the Merge Migration Process

While every merge migration is different, most follow the same basic process, which we have outlined below.

## Phase 1: Discovery

The discovery phase involves exploration of how your current systems are working and what your desired end state is, intending to develop a detailed migration plan. In addition to ongoing discussion, you will need to provide your Atlassian Solution Partner with access to each of your current instances so they can analyze it. Your Atlassian Solution Partner will be looking at how user management is set up; what apps you use; and how your projects, workflows, and custom fields are set up. The solution partner will also need to have an understanding of your data, including attachments, and will work with you to determine what from each instance needs to be migrated to the target instance.

## Phase 2: Cleanup

Bringing together multiple sites often necessitates some cleanup around deactivated users, unused or duplicate fields and apps, and old data. Cleaning up your instance before migrating is a critical part of the process as it will streamline the testing of the actual cutover. In addition, there is no point in bringing over clutter—it will simply slow your new instance down. If your internal team has the bandwidth and capabilities to take this on, then you may be able to do the bulk of the heavy lifting yourself. However, many companies choose to rely on their solution partner for this so internal teams can continue to focus on business as usual. Depending on your situation, in some cases, some cleanup can be done as part of the testing phase. Note that while this is sometimes necessary, it is not ideal—it will add a layer of complexity and risk and extend your testing phase.

## Phase 3: Rehearsals and testing

During the rehearsal and testing phase, your Atlassian Solution partner will first clone your source instances, and then practice moving everything over to a set of rehearsal sites. This is an iterative process, and as your solution partner identifies any issues and conflicts, they will remediate them. This may entail developing custom code for one-off situations for which there is no other migration path. Throughout the process, you will be asked to do user acceptance testing to validate the results, ensuring that all your data makes the trip as it should.

## Phase 4: Final cutover

To ensure minimal disruption to your regular operations, the final cutover process is typically scheduled over a weekend. However, depending on the scale of the migration and whether a phased approach is being implemented, it may require multiple weekends. During this process, all data and applications are transferred from the source instance to the target instance. Once this is completed, your merge migration is officially live and ready to go.

In addition to these phases, you may ask your Atlassian Solution Partner to help with related work such as establishing a board of governance, handling change management, training, and post-migration support.



# How an Experienced Atlassian Partner Can Streamline a Merge Migration

Migrating to Atlassian Cloud is a complex undertaking—merging multiple instances in Atlassian Cloud is even more complex. Choosing to work with an experienced Atlassian partner on a merge migration has a long-term strategic and tactical impact. An Atlassian Solution Partner can help an organization visualize a desirable and realistic end state, engage stakeholders, develop a roadmap, understand what is achievable within a given time frame, and implement the solution, all while minimizing risk and sidestepping potential pitfalls.

The following are three key ways an experienced Atlassian partner can streamline your merge migration:

## Strategic guidance and tactical know-how

An experienced Atlassian partner has deep knowledge of the process and what it takes to be successful. They can guide an organization in developing a strategic vision and a tactical roadmap. An Atlassian Solution Partner will have already experienced and resolved many challenges, both common and uncommon, and will be able to guide thoughtful decisions while avoiding expensive, time-consuming mistakes. Ultimately, this minimizes risk and speeds up time to completion.

## Improved communication and coordination

A merge migration also requires significant communication and coordination between Atlassian and app vendors, as well as within the organization, among its many stakeholders. An experienced Atlassian partner has established relationships within Atlassian and with many app vendors. The partner can leverage these relationships, as well as established communication channels, to efficiently route, triage, and resolve issues that may arise. Further, an Atlassian partner can make sure the organization brings the correct stakeholders to the table at the right time, ensuring appropriate input and supporting buy-in, training, and adoption.

## Proprietary tools and innovative solutions

While Atlassian offers a valuable set of migration tools, every merge migration is different, and there are simply too many variables for the tools to cover every scenario. An experienced Atlassian partner will have access to many proprietary tools and scripts, as well as knowledge of workarounds to help an organization achieve its desired end state with the least disruption to normal operations.

While there is no understating of the complexity of merging multiple Atlassian instances into a single Atlassian Cloud instance, with careful planning and the help of an experienced Atlassian partner, the process can be simplified, the risk can be minimized, and any organization can soon begin experiencing the benefits that come from a fully integrated set of Atlassian tools, as well as from an Atlassian Cloud deployment.



# About Isos Technology

Isos Technology is a world-class consulting services provider that helps organizations become the best version of themselves through technology, people, and practices. As an Atlassian Platinum Solution Partner with ITSM, Cloud, and Agile at Scale specializations, we thrive on solving your toughest business agility, service management, and Atlassian lifecycle challenges, while accelerating business transformation and outcomes. Founded in 2005, Isos became a portfolio company of The Acacia Group in 2022, with the original founders continuing to drive the mission and strategy for Isos going forward. Isos has since cemented its status as one of the largest Platinum Solution Partners in the Atlassian ecosystem. Headquartered in Tempe, Arizona, and with offices across the U.S., Isos has been recognized as an Atlassian Partner of the Year in the ITSM, Enterprise, and Services categories for the last six out of seven years, an Inc. 5000 Fastest-Growing Private Company, and a CIOReview Most Promising Agile Consulting Company.

For more information, visit [isostech.com](https://isostech.com).



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