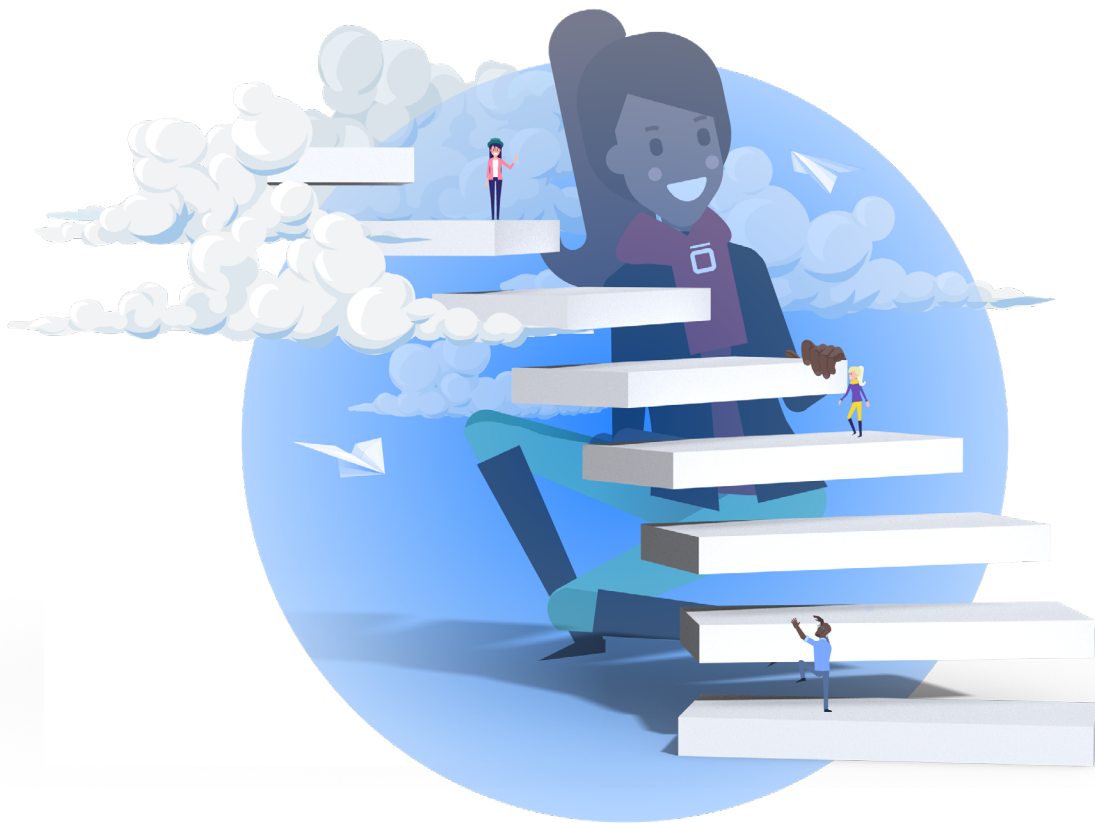


How to Migrate from Atlassian Data Center to **Atlassian Cloud** in 9 Steps



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Why Are You Here?

Organizations migrate from Atlassian Data Center to Atlassian Cloud for many reasons. Perhaps a CTO or CIO has mandated moving all enterprise tools to the cloud. Or, M&A activity may drive a need to scale up and down quickly and consolidate instances and users. In many cases, organizations are looking to experience the many benefits of Atlassian Cloud: flexibility, ease of use, and total cost of ownership.

This paper will first address common barriers and obstacles to migrating to Atlassian Cloud. It will help you understand whether it is the right solution for your organization and, if so, how complex it might be to make the move. Then, we will guide you through the high-level steps to plan for, prepare for, and migrate from Atlassian Data Center to Atlassian Cloud. As we walk through each step, we will explore common concerns, highlight points at which critical decisions must be made, and explain how an experienced Atlassian Partner can facilitate the process.

The value of an experienced Atlassian Partner when migrating to Cloud

Even a small company with limited users and instances can take time and effort to migrate to Atlassian Cloud. No organization, large or small, should have to undertake a migration independently. A migration is complete with risks and opportunities for missteps. It puts demands on resources well beyond business as usual. It is fraught with decisions that will impact an organization's long-term strategic success and daily operating procedures.

Cloud migration is a significant event. Throughout the process, hundreds of issues, large and small, will occur. An experienced Atlassian Partner will have also seen and resolved many common and uncommon challenges and be able to guide thoughtful decisions while avoiding expensive, time-consuming mistakes. In doing so, a partner spares you the burden of becoming migration experts and managing the minutiae involved. This tracks with one of the primary reasons organizations choose to migrate to Cloud by outsourcing: a set of demanding technical responsibilities that internal teams don't have to tackle themselves.

Beyond technical expertise, a migration also requires significant communication and coordination with Atlassian and many app vendors. Experienced Atlassian partners usually have established relationships with both and can leverage these and established communication channels to efficiently route, triage, and resolve issues that may arise.

The migration tools you use must also be chosen carefully. Simply put, there are too many variables in a migration for one-size-fits-all tooling. An experienced Atlassian partner will have access to many proprietary tools and knowledge of workarounds to help an organization achieve its desired end state with the least disruption to normal operations.

Finally, beyond deep expertise in Atlassian products, implementing them, optimizing them, upgrading them, and, yes, migrating them, an experienced Atlassian partner will be able to help visualize a desirable and realistic end state, know what is achievable within a given time frame, and advise on risk.

No migration is perfect, and no migration is seamless. It is a process that requires partnership and ongoing communication. There will be bumps in the road, but with the support of an experienced Atlassian partner, the journey will be infinitely smoother, more manageable, and less risky.

Step 1. Identifying and overcoming critical blockers



This step aims to determine if any significant obstacles like upgrading, data size and shape, or app dependency would impede your migration to Cloud at this time. Many organizations stay on Atlassian Data Center longer than they need to, held back by the belief that migrating to Cloud is, for whatever reason, not a realistic goal for them. However, there are trade-offs to be made by staying on Data Center relative to the long-term, strategic advantages of Cloud migration, especially in larger organizations with much to gain from streamlined user management, enhanced security, operational efficiencies, and scalability.



In reality, most obstacles can be overcome. But you need to do some legwork upfront, like cleaning up your data, upgrading, refining the way you work, transforming your data, etc., that extends the runway before the actual migration, increases the complexity of your migration, or requires that you migrate in phases.

Broadly speaking, obstacles fall into two categories. The first is obstacles that can be overcome. Still, it may significantly increase the complexity of the migration and trigger a process trajectory outside of what is discussed in this paper. The second are true blockers like security, compliance, or data residency issues, although many topics related to these can also be overcome. If you have a true blocker, remember that the Atlassian Cloud ecosystem is advancing quickly, and it may only be a matter of time before you can make the transition.

Organizational readiness

Ultimately, the success of your migration hinges on two things: change leadership and change management. Change leadership requires executive sponsorship and involvement to ensure you get the support you need throughout the transition. Budget and resources will need to be allocated, and decisions will need to be made that will affect how the teams work well into the future. You want to be sure that your end state meets your organization's long-term needs. If your organization does not have leadership buy-in and support, you may need to do some up-front legwork to get it.



Change management is necessary to ensure that users' needs are met and they have the training and resources they need to succeed in the new environment. Your Atlassian partner can help you understand what a healthy set of change management processes would look like for your organization. These can be self-directed or built into the overall migration plan, with your Atlassian partner supporting them. Often, the most successful efforts are a combination of the two.

The way your team works and communicates

If you are considering migrating from Atlassian Data Center to Cloud, it is essential to understand that these are two completely different solutions. The user interface is essentially the same, and the fundamental processes you can do in each one are similar, but how they are built is entirely different. In some cases, how teams work or interact with their Atlassian Data Center stack isn't possible in Cloud. These could be high-level practices that necessitate business transformation or day-to-day activities that require more minor shifts in how you work. It's one of the reasons change leadership and change management are so important. These can also add a layer of complexity to the migration process.

For example, your organization uses a plugin that allows teams to have custom, team-managed contexts per project. First, why is this necessary? Would the company benefit from greater standardization? That's a process problem that impacts the day-to-day. From a migration complexity standpoint, such a feature can be replaced with team-managed projects; however, this would increase complexity: you have to migrate them as company-managed projects, create and prepare new team-managed projects in Cloud, and then convert them back to team-managed projects.

Upgrades

The need to upgrade is a standard driver for Cloud migration. It's understandable. Organizations that have postponed upgrades, often due to resource constraints, and are running older versions of Atlassian tools may want to "rip the BAND-AID® off" all at once—upgrade, migrate, and never have to upgrade again.



The changes from upgrades and migrations are significant enough that an organization is not well served by making both transitions simultaneously. Even when working with an experienced Atlassian partner, upgrades and migrations are complex undertakings that require resources otherwise committed to business as usual and involve organizational and process changes. By scoping both projects together, an organization commits to a long haul that increases exposure and risk.

Further, Atlassian recommends upgrading to your Data Center's most recent long-term support release before migrating to Cloud.

Upgrades and Cloud migrations share a standard process of instance cleanup. Instance cleanup simplifies, cleanses, and reduces data and configuration. It involves tasks like consolidating user directories, deleting unnecessary data, cleaning out unneeded or peripheral schemes, removing unnecessary custom fields, and, most importantly, auditing/removing unneeded apps.

Instance cleanup at the upgrade stage will simplify the later Cloud migration process.

Data size and shape

For several reasons, data size and shape are primary drivers of complexity in Data Center to Cloud migrations. Data Center instances are often more significant, even enterprise-scale, highly customized, and have more integrations with third-party applications, including reporting tools. Data Center architecture allows for substantial customization, whereas in Cloud, you are more accountable to more prescriptive architecture, so it's common to find data structures that aren't supported in Cloud.



Many companies assume that migrating their data will be a 1:1 lift and shift, but that is seldom the case. A few things have to happen: you'll need to do some instance cleanup, decide what data is essential to bring over and what you can leave behind, and determine where to store data that isn't being migrated to remain accessible if needed. You will also need to remember that some sort of data transformation that entails mapping old data to the structure of the new instance will need to be done.

Further, there is often no straightforward migration path for data tied to third-party applications, so much of this data must be exported and imported manually or with the help of custom coding and proprietary solutions.

App dependency

In the first few years after Atlassian Cloud was launched, before the third-party app ecosystem had fully developed, we saw more instances of organizations postponing migrating because there was no Cloud counterpart or feature parity wasn't there. The Cloud solution and the app ecosystem have become so robust that this is far less of an issue. However, because the Data Center and cloud platforms are different, app makers must build from scratch, and the apps often do not work the same way. It's important to know that you may have to modify how you work regarding apps.

Better yet, rather than replicating your Data Center apps in Cloud, the best path forward may be to reassess and think through how to take advantage of native Cloud functionality and the broader app ecosystem to meet your needs.

Dependency on many apps and homegrown integrations should trigger conversations about and exploration of the following steps, but it is now seldom a deal breaker. An experienced Atlassian partner can audit your situation and recommend a reasonable path forward. In addition, we explore this issue in greater depth in Step 3 of this paper.

Security, compliance, and data residency

Security, compliance, and data residency are among the few remaining potential true blockers to migrating to Atlassian Cloud, although many issues related to these considerations can be overcome.



Because Atlassian is continuously strengthening its security posture, expanding its compliance certifications, and increasing its data residency options, the only way to say whether Cloud fits you right now is to evaluate your organization's requirements against the most current information in the [Atlassian Trust Center](#).

- **Security:** Many organizations must conduct a thorough vendor risk management assessment before migrating to Atlassian Cloud. The [Atlassian Trust Center](#) is the best place to start your exploration. You can find Atlassian's answers to the Cloud Security Alliance (CSA) [Consensus Assessment Initiative Questionnaires](#) (CAIQ) for each product.
- **Compliance:** Atlassian is constantly broadening its global and industry-specific compliance profile across leading security, third-party audits and certifications, documentation, and legal commitments. Search their [Compliance Resource Center](#) to determine if the company meets your industry or organizational compliance standards. They may very well be on the Cloud roadmap if they do not yet have all the certifications or meet the standards you require.
- **Data Residency:** At the time of this writing, data residency is available for Jira, Jira Service Management, Confluence, and Jira Product Discovery at Cloud at the Standard, Premium, and Enterprise levels. Data can be pinned to the following locations: U.S., EU, Australia, Germany, Singapore, Canada, UK, Japan, India, South Korea, and Switzerland. Data residency is also available for some Cloud applications. The Atlassian Cloud FAQ landing page is the best place for the most up-to-date [data residency information](#).

Step 2. Audit your Atlassian instances and users

This step aims to better understand your current state, including Atlassian tools, instances, versions, and users, and to create a vision for the desired future state and the optimal outcome of the migration. This information will inform the path from an organization's location to its desired future.

This exercise typically includes auditing your use of third-party applications and integrations, but in this paper, we cover that in Step 3.

Auditing Atlassian instances and users

All successful migrations to Atlassian Cloud begin with a thorough assessment of an organization's current situation and a plan outlining what steps must be undertaken to get that organization to its desired future state. To develop that plan, key points must be considered, and decisions must be made. The first step in the process is to assess the current situation. This can be a challenging task, and it's often helpful to work with an experienced Atlassian partner who can guide you through a set of foundational audits that will require you to answer the following questions and gather the following information:

What are your migration goals?

Many organizations have a clear vision for their future state and what they want their Atlassian toolset and user groups to look like when the migration is complete. Others may have a more general idea. The desired future state should be guided by strategic considerations, such as how a given organization will likely grow over the long term and more tactical practicalities around how teams interact with and use the tools daily.

Large organizations may consider whether they need a single instance to rule them all or if it is better served by a set of federated instances. And if you choose a federated approach, what regions, departments, teams, etc., will have access to each instance? The effort involved in migration is so significant that it is critical to ensure you get to where you want and need to be and that the desired future state will serve you in the long run.

It's also essential to think about how your teams work: who needs to work closely together, what processes need to be consistent, where you are open to change, and what type of reporting you need to do. How you set up your system determines what information you can get from it.

These goals and general vision of your desired future state will inform how the solution is architected, which, in turn, will tell how your data is mapped.



The goal of this step in the migration process is to determine what Atlassian Marketplace apps and integrations are in use, which divisions, departments, and user groups are using them, and how critical they are to the overall success of the business. Since apps and integrations add complexity to migration, we will walk you through the information needed to make thoughtful, strategic decisions about which apps and how much-associated data to migrate.

The difference between Data Center and Cloud apps

Before beginning an app audit, it's important to understand that the Data Center and Cloud versions of Atlassian tools are inherently different platforms with unique architectures that work differently. Vendors must completely reconstruct the Data Center versions of apps for Cloud. Consequently, it's not always possible to replicate functionality directly.

While in some cases, Cloud app functionality might not yet be as fulsome as Data Center versions, in other cases, Atlassian's "Cloud First" push might mean Cloud apps have improved functionality, especially in mobile versions. As your organization transitions from one deployment method to another, users may make natural shifts in their work. Some of the functionality an organization has previously used apps to resolve may be native in Cloud versions of Atlassian tools.

It is also worth noting that security is a critical consideration within the Atlassian app ecosystem. The ecosystem identifies Cloud Security Participants and Cloud Fortified apps, which adhere to more rigorous standards of security and reliability. Security and privacy requirements are per app and not guaranteed by Atlassian. You can read more about this in the [Atlassian Trust Center](#).

App and integration audit process overview

Organizations that rely on Atlassian Data Center tend to be larger, often enterprise-scale, and heavily rely on apps, integrations, and customizations, which makes migrations more complex. However, migration is also a good opportunity to streamline and consolidate apps, especially since the native functionality of Atlassian

Cloud is so robust. A big upside of migrating to the Cloud is no longer having to maintain and support all those apps and custom integrations, so it is well worth the effort.

In addition, even complex migrations are achievable with the right partner, process, and willingness to work differently and consolidate apps.

Here is a high-level overview of the audit steps:

- Create a master list of all apps and integrations, as well as:
 - The divisions, teams, and user groups using them
 - The total number of people using them
- Prioritize apps and integrations and determine which apps are:
 - Mission-critical to business success
 - Nice-to-haves
 - In limited use or of limited value
 - No longer in use or were installed only as tests
- Evaluate each app individually and determine the best path forward:
 - Phase out the app
 - Migrate the app to a Cloud version if available
 - Determine an alternative solution if the app is unavailable in Cloud
 - Analyze running production instances of each Atlassian application and validate internal evaluations to actual app usage
- Determine how much data to migrate for each app and if data import/export options exist

Not all Data Center apps support Cloud migration, and custom scripting or manual data migration is often necessary.

The case for consolidating apps before migration

Many organizations, even those that rely on large numbers of apps, use migration to Cloud as an opportunity to fine-tune processes and consolidate. The primary reasons for consolidating apps and



migrating only the most essential include reducing complexity, decreasing downtime, and minimizing risk. The more apps an organization has and the more data associated with those apps, the longer it will take to migrate them, resulting in greater risk.

There isn't always a straightforward path for migrating apps. Marketplace partners must provide an automated migration path for the Jira Cloud Migration Assistant, which we cover in Step 5, to migrate apps and app data. Since migrating app data is often manual, testing app migration is complex. As a result, you are more likely to encounter errors that ultimately result in unanticipated downtime.

While there is no magic number for an appropriate quantity of apps to migrate, less than ten is manageable, and more than 20 is too many. Anything between 10 and 20 can significantly increase complexity depending on the volume of data associated with each one.

Determining which apps make the cut

When evaluating how best to consolidate apps and which to migrate, it is important to bring senior strategic advisors who can balance overarching, company-wide business goals and representatives from key departments, teams, and user groups to ensure that all points of view are heard. For apps that are business critical and are used across multiple divisions, departments, and teams, it is also useful to include an experienced Atlassian partner who can provide insight into resolvable concerns, potential pitfalls, and ultimately good ways to problem-solve.

A word about homegrown apps and integrations

Migrating homegrown apps is the number one driver of migration complexity. Since the API is different in Cloud, homegrown apps written for Data Center instances must be rewritten. Integrations that are externally hosted and that use Atlassian's REST APIs will also need to be evaluated, but they are, as a rule, much easier to migrate to Cloud versions of each corresponding Atlassian app.

Step 4. Architect your Cloud blueprint and map your data

This step's goal is to determine what your Atlassian Cloud instance will look like and how it will function, to stand up an instance and populate it with the appropriate projects, workflows, fields, etc., and to map your data to the new instance so it can be migrated. All the work you did in Steps 1 to 3 was necessary to get to this point.

A single instance vs. multiple federated sites

Atlassian Cloud Enterprise provides the ability to stand up [multiple federated instances](#) with centralized user management. A primary advantage of doing this is allowing different regions, business units, industry verticals, etc., to work more autonomously and in the way that best serves them. Some organizations choose to do this for data compliance.

Standing up your target instance(s)

You will need to set up a target instance and populate it with the necessary projects, workflows, custom fields, workflows, etc. If you are transforming your processes in any way, you will need to create new workflows. You will also need to configure the native Cloud functionality and third-party apps you determined you needed as part of your app audit.

Addressing backup/recovery methodologies

Once your Atlassian Cloud instance is live, it must be backed up regularly. There are several different ways this can be done: manually, using a Marketplace app, using a restore-as-a-service provider, or using a custom solution. Your Atlassian partner can help you determine which solution is right for you, and you can also read more about it in our blog post: [If You're Not Backing Up Your Atlassian Cloud Instance, You Should Be](#).



Whatever solution you choose, this is the appropriate time to explore your options, make a decision, and implement a solution so you are prepared when your instance goes live.

Mapping your data

If you are undergoing some sort of transformation as part of the migration, anything more than a lift and shift, then you may not be able to carry over your data directly into the new instance. Instead, you must engage in the interactive exercise of fitting older data profiles and structures into newer structures. For example, if your migration requires you to consolidate custom field data or workflow configurations, you must identify which entities align with which new configurations.

Mapping your data will continue to a limited degree throughout the test migration phase. As you work through that process, things will inevitably break and data will not migrate as you anticipated it would. Typically, you and your Atlassian Partner will work together to resolve these issues until everything migrates cleanly. At that point, you can make the final cutover.

Step 5. Migration approach: A single push or multiple phases

This step in the migration process aims to determine what migration strategy best suits your needs and what methodologies or processes you will need to use to achieve your goals. We will address two different strategies: an all-at-once migration that takes place over a single weekend

and a phased approach in which cohorts of users related by projects, apps, and data are migrated in groups over time.

All at once vs. a phased approach

There is no typical migration, each is unique, and the process is highly customized. That said, an experienced Atlassian partner will have seen many common scenarios, will be able to offer both tried-and-true and novel solutions, and will be able to guide you through potential pitfalls. There is also no typical time for a migration, although there is a strong correlation between data profile size and the time it takes to plan and execute a migration. Anywhere from three to nine months is a reasonable expectation, with some enterprise migrations consisting of more than 10k users and complex data profiles sometimes taking a year or more.

Many organizations come to the table with the expectation that migration itself, the transfer of users, projects, apps, and associated data to Cloud, and the enablement of Cloud or “turning on the switch” will happen all at once, often over a weekend when downtime is less likely to impact business as usual. This is achievable for straightforward migrations that consist of a limited number of projects, apps, data, and users (in the hundreds to low thousands).

However, organizations with more extensive, complex migrations, including consolidating and migrating multiple products, thousands of users, and large data sets may be better served by a phased approach. A phased approach entails migrating Atlassian tool instances, projects, apps, data sets, and user groups in stages, perhaps over weeks or months. In this approach, organizations can leverage the information collected in Steps 1 to 3 to identify cohorts of users to migrate.



There are several advantages to a phased approach, including:

● Risk management

No migration to Cloud comes without risk, even with thorough planning and testing. We cannot stress enough how important test migrations are (test migration is covered in detail in Step 8). There is always a risk of encountering unanticipated errors, particularly for complex migrations with multiple apps and large quantities of associated data. A phased approach breaks the total migration into more achievable parts, allowing for more thorough testing over time, less downtime, and more troubleshooting time should an error occur.

● Downtime

Every migration comes with downtime. No matter how well-prepared you are, the data transfer can take many hours. The more complex the migration, the more data and downtime are required. Again, downtime is spread out over weeks or months by breaking the total migration into parts.

● App readiness

As mentioned in Step 2, the Atlassian Cloud app ecosystem is extremely dynamic. Apps that do not currently have a migration path or are not yet as fulsome as needed may become available over time. By aligning the phases of a migration to app readiness, an organization can begin realizing the strategic benefits of Cloud in at least some areas while waiting for business needs and the app ecosystem to become fully synced.

● Team readiness

A migration means doing things differently, and only some cohorts of users are ready to make a change simultaneously. Some user groups may be in their work cycle where it makes sense to make the transition. A phased migration better supports user groups in critical work stages where the change might be disruptive. Further, users who are resistant to change will have the opportunity to see Cloud successfully in action elsewhere, resulting in greater user acceptance overall.

● Training and support

Providing pre-migration training and post-migration support to users requires a fair amount of infrastructure. With a phased migration, users

can be trained in cohorts as their user groups are migrated so they can be better prepared on day one. Those same user groups can be better supported post-migration, further supporting user acceptance.



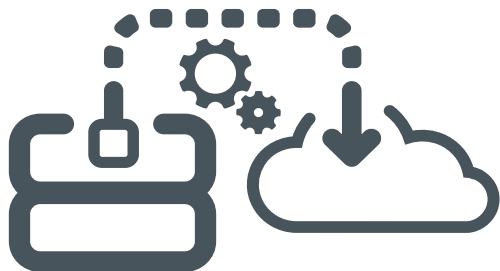
Dependencies and limitations in a phased approach

It is common for an experienced Atlassian partner to suggest a phased approach. However, an organization's specific technology and team dependencies will largely determine the content of each phase. Although team readiness is important, it should not override business practicalities and technical constraints. Some Atlassian tools, such as Jira Service Management, may allow for multiple phases, but extra cleanup will be necessary.

Based on an organization's inventory of Atlassian tools, apps, and user groups, an experienced Atlassian partner can guide whether a phased approach is possible or if an all-at-once migration is necessary. Further, they can advise on the strategy that informs a phased approach and how best to group related technology and teams for migration.



Step 6. Migration methods: Choosing the right tools for the job



This step in the migration process aims to determine what can be migrated using Atlassian's standard migration solution, the Jira Cloud Migration Assistant (JCMA), and what will require a custom solution or manual migration. While some small instances may be very straightforward to migrate with JCMA, many Data Center instances, which tend to be large and complex, will have outlying situations that require a custom or hands-on approach.

The Jira Cloud Migration Assistant

The [Jira Cloud Migration Assistant](#) is an Atlassian app created to help with migrations from Data Center to Cloud. It is pre-installed on Jira 8.14 and Jira Service Management 4.14 and later versions. You can install it manually on Jira Data Center 7.6 and Jira Service Management Data Center 3.9 or later. Although primarily designed to support data migration, it also comes with some assessment tools, including one for assessing and preparing Marketplace app data.

JCMA lets you choose what data you want to migrate within a given set of parameters. [You can find detailed information about what can and cannot be migrated using the Jira Cloud Migration Assistant here.](#)

As we've previously explained, migrating apps isn't always straightforward. Marketplace partners must provide an automated JCMA migration path to migrate apps and app data. If your organization's essential apps do not have this pathway, an Atlassian partner can help you understand migrating them.

Proprietary migration tools developed by an Atlassian partner

While an experienced Atlassian partner will use the Jira Cloud Migration Assistant whenever possible for more complex migrations, a secondary set of tools is necessary to complement these approaches. An Atlassian partner experienced in migrations will have written and tested proprietary migration tools to support migration processes and solve migration issues outside of what can be achieved with the Atlassian tools, or to support instances in which the Atlassian tools are unsuccessful.

Further, an Atlassian partner can help determine the best methodology for a given situation, including using a combination of partner-proprietary migration tools and Atlassian-developed migration tools.

Step 7. Addressing user management, authentication, and security practices with Atlassian Guard

This step addresses user management, authentication, and security practices, which are primarily handled through Atlassian Guard (formerly Atlassian Access), Atlassian's centralized, enterprise-level user management solution for Atlassian Cloud users and products. We'll also provide a high-level overview of what it does and how it's different from Atlassian Crowd, Atlassian's Data Center user management solution.



Guard



About Atlassian Guard

[Atlassian Guard](#) streamlines user management, simplifies user access across Atlassian and many other SaaS tools, and bolsters security. At the Premium level, it also has some advanced security features. Organizations of all sizes can use Guard to provision, manage, and scale users and user groups, and establish and implement consistent security best practices like enforced single sign-on (SSO), including for external vendors.

The following is a list of some of Atlassian Guard's key capabilities:

- **Enforced SSO (with MFA), authentication policy management (including external user management and API token controls), and SCIM automation user provisioning** help you control who is added to the org, how they access it, and what they can access. Enforced two-step verification helps ensure they are who they say they are.
- **Data security policies, data residency, and mobile app management** allow you to determine where data is controlled, manage how data can be interacted with on a product-by-product basis, and help you control how data is accessed on mobile devices.
- **Organizational insights, organizational audit logs, and product discovery** provide direct visibility into potential shadow IT, user actions and changes, and product usage.

Granular product access and in-product permissions

In Atlassian Guard, users across all your products are managed from a single, centralized location ([admin.atlassian.com](#)) rather than within individual products. Only certain admins can access the space. Within [admin.atlassian.com](#), you can set

up different organizations, each with its user base, including individual product access, user provisioning configuration, etc. Organizations can be further divided into sites that hold different products, which allows you to be granular about who has access to what.

At the product level (not in [admin.atlassian.com](#)), you can still manage permissions with a given product to limit user access to specific spaces.

Engaging security stakeholders

Implementing Atlassian Guard may mean changing organization-wide security administration practices and policies, including security parameters for other non-Atlassian SaaS tools. Since the person executing Guard may not have the authority to impose security parameters across the entire organization, we recommend adding senior security stakeholders with appropriate jurisdiction to any conversations around Guard as soon as possible. This will influence and improve security standards across the organization.

Security stakeholders typically see the value in Guard's ability to add security to Atlassian tools and other SaaS tools across the company. That said, security teams do need to thoroughly evaluate Guard and prepare for changes. It's not unusual for this to take several months, but it can be done concurrently with other steps in the migration process.

Setting up Atlassian Guard

Atlassian provides a detailed guide on its website called [Getting Started with Atlassian Guard](#) that covers how to set up Atlassian Guard. It requires connecting and configuring an internal identity provider managed by your organization. Due to security requirements, an internal resource at your organization with specific role-access permissions to the organization will likely have to configure this.



Step 8. Conducting test migrations

This step aims to help you understand why a test migration is necessary and what the process entails.

The test migration process: What to expect

A thorough test migration process is one of the most critical steps toward ensuring a successful production migration. A test migration helps identify issues that will require resolution, estimate the timing necessary for the production migration, and identify where users may need more pre-migration training and post-migration support.

Keep in mind that test migrations are iterative. As problems are encountered, they will need to be worked through. It's part of the ongoing data mapping process we covered in Step 4.

The test migration process overview

● Complete pre-migration tasks and data backup.

An Atlassian partner can guide you through pre-migration tasks and data backup to ensure permissions, firewall allowances, and public access settings are correctly configured. All data should also be backed up at this point, especially if there is existing data on the Cloud site being migrated to that will be overwritten.

● Run a test migration.

Run the Jira Cloud Migration Assistant and partner proprietary, automated migration tools identified in Step 5 and manually determine when and where to migrate if necessary. Once Jira is migrated, migrate or install any apps and associated data used in Cloud. Expect to encounter failures and issues, but know that your Atlassian partner can identify solutions and workarounds as they happen. This is an iterative process and will be repeated in whole or in part until all issues are resolved.

The Jira Cloud Migration Assistant has built-in functionality to identify issues and failures. Your Atlassian partner may also have proprietary testing tools, such as migration dashboards, that track when data has been successfully migrated and when there are issues. Tools like these that validate high-level information, like whether or not the correct number of projects or problems have been moved, can streamline a complicated set of processes, help hone in on issues quickly and result in a more efficient migration overall. These test migrations should occur to test sites or sandboxes. You can [create a sandbox](#) for your Jira, Jira Service Management, and Confluence products that are on Premium or Enterprise plans.

● Validate the results of the test migration.

Once the test migration is complete, it is necessary to validate the migration. Essentially, this means making sure all data has been successfully migrated and collecting issues where it has not. It is important to do both broad and deep validation of automated and manual migration processes to ensure all data has been migrated.

Validate that the correct number of projects were migrated and can be viewed and that they have the same number of versions and components as the source instance. Also, check to see that all issues and attachments were migrated and drill into the issues to make sure that all the associated data, including custom field values, comments, change history, and work logs, are present and in the correct order.

● Conduct user acceptance testing.

An experienced subset of users from each user group across the organization should test the new instance by replicating daily activities. They should ensure they have access to everything they need to work in, that information is appropriately linked, that the applications are working as they should, that the data is correct (matches the original instance) and complete, and that all integrations are working correctly.

Since the user interface, processes, and apps may differ in Atlassian Cloud, users should be careful to document any issues that need correction or processes that they anticipate the broader set of users might need additional training around.



Test migration timing: Things to think about

A test migration is an iterative process. As issues are identified and addressed, you will need to continue testing until an effective resolution has been implemented. The state of an organization's Atlassian tools, particularly its users and data, is dynamic. Because of this, it is important to compress the time between the Test and Production Migrations. If there is a lag time of even a few weeks, there may have been changes to the systems and data that result in unanticipated issues.

Step 9. Conduct the live migration

This step aims to leverage the preparation and hard work from the previous eight steps to complete the live migration and begin working in Atlassian Cloud.

The live migration process: What to expect

The live migration should occur overnight or on weekends when users cannot access the tools. Depending on the anticipated time to migrate, which was determined during the test migration, a whole weekend may be necessary. It is essential to let all users know when the migration is taking place, how much downtime to expect, and to advise against making changes in the tools during the transition. This will prevent any discrepancies in data between the old and new sites.

The live migration process follows much the same path as the test migration process:

- Run the production migration using the set of tools
- Install or migrate apps and app data
- Validate that all data was fully migrated
- Conduct final user acceptance testing
- Set browse permissions in Jira Data Center and apply to all projects*

- Distribute critical communication to end users:
 - Migration timing
 - New Atlassian Cloud account login information
 - Self-help resources and support processes
- Begin working in Atlassian Cloud

**This may only be appropriate for some organizations due to the sensitive nature of some data and its presence in cloud.*

A word about end-user communication

This paper needs to address the vast amount of end-user communication that has to transpire at every step outlined. The topic of communication and what needs to be communicated to whom and when is genuinely worthy of its own paper. While we have touched on bringing together stakeholders from across the company to inform choices around the migration, we have not discussed other instances when communication, often with large numbers of stakeholders, is essential. As the migration plan solidifies, every impacted user must be informed of changes. They will need to know when to freeze working in existing instances, when to begin working in new projects, and when to expect downtime. They will need to know how to access the new Cloud site and how to log in. They will need to participate in training, have access to self-help resources, and learn how to contact support should they need it.

Good communication, whether with strategic advisors, departmental and user group leads, end users, app vendors, and even Atlassian, is essential to the success of an Atlassian Cloud migration. As we have reinforced throughout this paper, an experienced Atlassian partner can help guide best practices for when, what, and with whom to communicate. You also have the right to expect leadership and good communication from that partner.



Final thoughts

The title of this paper is How to Migrate to Atlassian Cloud in 9 Steps, not How to Migrate to Atlassian Cloud in 9 Easy Steps. There is nothing easy about migrating to Atlassian Cloud. It is a significant, strategic decision that will impact how an organization functions and how every user works, whether in the thousands or dozens. There is undoubtedly much to be gained by migrating to Atlassian Cloud.

If you determine that migrating to Atlassian Cloud is unsuitable for your organization, keep in mind that the ecosystem changes daily. It may only be a matter of time.

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.

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