



Migration Playbook:

Cherwell Service Management to Jira Service Management

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Table of Contents

Welcome to Our Cherwell Service Management to Jira Service Management Migration Playbook. Below you'll find the different phases of our Migration process.

Phase 1: Assess	4
Phase 2: Plan	5
Phase 3: Prepare	6
Phase 4: Test	7
Phase 5: Migrate	8
Phase 6: Launch	9

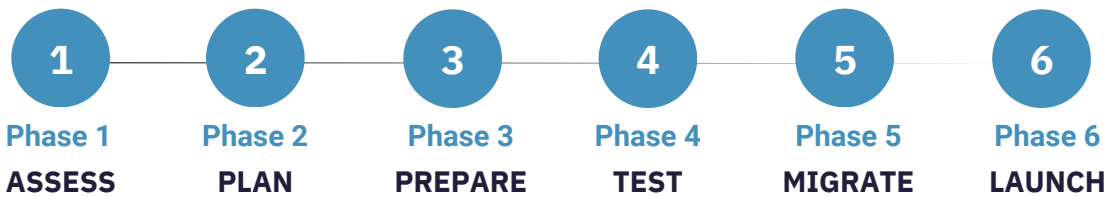
After reading this playbook, you will have a clear understanding of how we can work together with your team for a successful migration to Jira Service Management.



Making A Successful Move

Platform migrations require a great partnership between all team members - from your organization to E7 Solutions to Atlassian. We operate as a united team to lift all higher and prepare your organization for Jira Service Management. In this playbook, you will see the process that we take all of our Platform Migration clients through. This is the step-by-step process your team will complete with E7 Solutions to ensure a successful and smooth transition. Let's Jump In!

How We Do It



Phase 1: Assess

The first step to our migration process is understanding your current landscape and where you're headed. In this phase, you'll work with E7 to evaluate if moving to JSM is right for your organization and to learn what you can expect to change and gain as a result.

Here are the items we will complete together in this phase:

- Technical Discovery for all your existing Cherwell Applications.
- Assess functionality of existing Apps and determine if the functionality is included in JSM out-of-the-box or if a third-party app is available.
- Determine the complexity of your migration to the cloud and recommend a high-level migration path.
- Review and outline your security and compliance needs.
- Evaluate your user management needs and determine if you need Atlassian Guard and at what level.
- Document and plan application configuration from Cherwell to JSM.



Phase 2: Plan

Once the assessment of your instance is complete and you decide to move your organization to Jira Service Management, then it's time to make a solid plan. In this plan, we will work with your team to outline the steps that must be taken to move to JSM and what your migration strategy should be.

Our goals for Phase 2 are as follows:

- Assess the size and complexity of your migration by taking a deeper dive into determining the migration paths.
- Start a cloud site for your test instance.
- Set up your organization.
- Assemble your internal team.
- Create your customized Migration Runbook specific to your organization's needs and requirements.
- Develop User Acceptance Testing plan.
- Create a mapping doc to ensure integrity between the Cherwell and JSM Migration.



Phase 3: Prepare

As part of your migration preparation, we work together to repair and improve your organization, data, and environments. There are a number of items included in this:

- Ensure you are running supported versions of all products migrating.
- Review your anonymous access settings.
- Ensure your JSM site has the right user tier.
- Choose a user migration strategy.
- Double-check Atlassian Guard user provisioning is covered in the plan.
- Review your Migration Runbook with the team for Test Execution.
- Determine the timing for the test migration.
- Communicate UAT plan to team members.



Phase 4: Test

During the Test phase, we will complete a test execution of the Migration Runbook from start to finish, determine the time it will take, and address any issues that arise.

For complex migrations, we encourage an extended testing time to ensure everything is correct. Large data sets require additional time for testing.

Here are some of the tasks we'll need to complete:

- Back up your data prior to testing.
- Run the test migration.
- Confirm integration with 1st and 3rd party applications to ensure functionality and integrity.
- Conduct User Acceptance Testing.
- Resolve any issues identified in Test.
- Determine production migration window.
- Prepare training materials for cloud admins and end-users.
- Communicate your migration timeline and plan to end-users.



Phase 5: Migrate

Now that all of our ducks are in a row, the 5th phase is to actually migrate your production instance. Here is a list of items that E7 Solutions will help you complete as you migrate your instance.

- Fine-tune Migration Runbook for Production with lessons learned from Testing.
- Complete Pre-Prod preparation.
- Data and users are moved to JSM.
- Run the production migration.
- Install and configure integration with 1st and 3rd party applications.
- Validate migrated data.
- Complete UAT in Prod.
- Any post-migration issues are resolved.
- Create project/site configurations in production JSM prior to migration.



Phase 6: Launch

Get out the champagne bottles and welcome your organization to Jira Service Management! It takes a lot of work to get to this point, but the guidance of a great Atlassian Solution Partner, like E7 Solutions, can make your migration simple. In this final step, we would:

- Provide training for your users.
- Help users get set up in the cloud, develop your skills as a JSM admin/agent, and retire your Cherwell instance.

If you would like to go into more detail on the items outlined in this migration playbook, then we encourage you to request a consultation to complete a migration complexity assessment with our team. Regardless of how complicated a migration may be, our proven six-step process guarantees success.



Get Started
TODAY!

