

Workload Migration Checklist

This checklist provides an overview to help plan a datacenter migration project and ensure accountability throughout each step.

Consideration	Description
Application Grouping	<p>Track all the requirements for an application, including servers, ports, and communication. If an application splits across sites during this migration, ensure the proper communication ports are open and the network can handle the separation.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Application Information to capture: <ul style="list-style-type: none"> <input type="checkbox"/> Application server name(s) <input type="checkbox"/> Application server IP Addresses <input type="checkbox"/> Ports, networking protocols, and communication direction requirements <input type="checkbox"/> Application server site location dependencies <input type="checkbox"/> External dependencies required by the application or servers
Server Owners	<p>Document the server owner and whether or not the server owner is needed either during the migration or for post-migration testing. Document migration success criteria dictated by the server owner.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Server owner on call <input type="checkbox"/> Operating System owner on call <input type="checkbox"/> Operations owner on call <input type="checkbox"/> Successful test plan created
Application Owners	<p>Document the application owner and whether the application owner is needed either during the migration or for post-migration testing. Document migration success criteria dictated by the application owner.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Application owner on call <input type="checkbox"/> Application user acceptance testers on call <input type="checkbox"/> Successful test plan created
Confirm Destination Supportability	<p>Validate that your workloads are supported in the destination platform(s) or whether configuration changes are required.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Validate if all VMs OS's are supported on the destination <input type="checkbox"/> Validate if the VM's resource configuration (CPU/RAM/Disk Size/No. disks/NICs etc.) is available or whether this may need to change (if fixed instance types on destination)
Pre-Validation	<p>Test each server and application against success criteria prior to migration. Does everything work as expected even before anything has been touched or migrated?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Print every test plan to use as pre-migration test <input type="checkbox"/> Perform validation before making any changes

<p>Test in the Destination</p>	<p>Test the full migration before the actual migration takes place. Document additional steps not tested beforehand (such as external dependencies or networks).</p> <ul style="list-style-type: none"> <input type="checkbox"/> Copy virtual machines and data to destination site <input type="checkbox"/> Boot virtual machine in destination isolated/protected network to ensure no server conflicts <input type="checkbox"/> Test server and application functionality <input type="checkbox"/> Track everything that cannot be tested until live migration occurs
<p>Qualify the Planned Migration Schedule</p>	<p>Document conflicting project or event schedules. Departments or application owners tend to dictate the migration scheduling. Communicate the plan and adjust only when necessary.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Notify end-users, application owners, server owners, etc. about the migration schedule and planned downtime, giving time for valid rebuttals and rescheduling requests
<p>Migration Checklists and Spreadsheets</p>	<p>Create and maintain pre- and post-migration checklists and spreadsheets. This should contain all of the detail gathered.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create migration checklist for overall plan <input type="checkbox"/> Create migration checklist for complete step-by-step migration instructions; include screenshots when necessary <input type="checkbox"/> Track all collected data and progress in a master list such as a spreadsheet
<p>Validation Checklists</p>	<p>Create and maintain pre- and post-migration validation checklists to include full testing results and sign-off, including network, server, and application functionality.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create validation checklists with sign off for each step to ensure full completion and ease of progress pass-off <input type="checkbox"/> Use a checklist for every virtual machine, and update the overall checklist as necessary to cover additional steps and ensure application dependencies are addressed together
<p>Moving the Data</p>	<p>Understand how to move the data and expected downtime for each virtual machine or application.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Track each migration strategy for virtual machine migration, including how to move the data <input type="checkbox"/> Test data movement to scope estimated data migration time required <input type="checkbox"/> Test virtual machine and application downtime through the entire migration process and ensure this aligns with SLAs, maintenance windows, and data movement strategy
<p>Contingency Plans</p>	<p>Create a back out or failback plan. Have a plan of actions for different scenarios that can negatively affect or impede a successful migration. For example, understand how long testing can take place (unsuccessfully) before rolling back. If a server must be rolled back to be rescheduled, do other required virtual machines need to be rolled back as well? Is there a point when a virtual machine is unable to roll back?</p> <ul style="list-style-type: none"> <input type="checkbox"/> If a server migration is failing or having trouble, know the time needed to back out, and when to execute a back out plan <input type="checkbox"/> Track dependencies that will impact the ability to failback any of the servers related to the entire application migration <input type="checkbox"/> Document the party responsible for a decision on calling a back out or rollback

<p>Track Virtual Machine Changes</p>	<p>What changes must occur on each virtual machine or application for successful functionality in the destination location?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Track required post-migration server and application changes in the master spreadsheet and checklists <input type="checkbox"/> Track required post migration external dependency changes in the master spreadsheet and checklists
<p>Track Environmental Changes</p>	<p>Document environmental changes that must occur during the migration. Firewall changes and DNS records are typical changes to update and track. Do not prematurely clean anything up that is still being used and is needed for upcoming migrations.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Track additional post-migration steps required to ensure full site functionality
<p>Cleanup the Source Environment</p>	<p>Following the post-migration checklist, clean up the residual environment from the source location (i.e. delete virtual machines, clean up firewalls and networks, etc.). After an agreed upon time post-migration, clean up the source environment.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensure the proper agreed upon time has passed after a successful migration <input type="checkbox"/> Delete residual virtual machines and dependencies including clusters, folders, mappings, firewall rules, load balancers, other network services, etc. <input type="checkbox"/> Ensure all residual data and supplemental environment objects are clean
<p>Communication Plans</p>	<p>Maintain clear, and regular communication with everyone involved with the workload move, what to expect, when to expect it, what is needed, and when it is needed. Send frequent notices (but not too many).</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create migration announcement communication and schedule to send <input type="checkbox"/> Create server and application owner communications to ensure full involvement and participation early on <input type="checkbox"/> Create migration schedule announcements incrementally leading up to the actual scheduled migration dates <input type="checkbox"/> Create migration status communications for current progress and final statuses (failed and rescheduled dates, and successful completion)
<p>Unexpected Considerations</p>	<p>Consider additional items such as monthly or quarterly transactions that may introduce additional requirements that are not accounted for in daily activities.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensure proper communications and testing accounts for month-end and quarter- end projects and procession (for example, some process that occurs that make unexpected and unusual changes that can be missed during the migration procedures)

About Zerto

Zerto helps customers accelerate IT transformation by eliminating the risk and complexity of modernization and cloud adoption. By replacing multiple legacy solutions with a single IT Resilience Platform, Zerto is changing the way disaster recovery, data protection and cloud are managed. With enterprise scale, Zerto's software platform delivers continuous availability for an always-on customer experience while simplifying workload mobility to protect, recover and move applications freely across hybrid and multi-clouds. www.n3t.com/drass/zerto