

Migration Guide Template

Use this guide to plan a migration, control cutover, verify the target, and recover if the acceptance criteria are not met. Record the source and target versions and keep each migration wave traceable to its checks.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Migration Overview

Define the migration boundary and the people affected. State the supported paths and distinguish a migration objective from the criteria used to accept its result.

Field	Complete with
Source and target	[Systems, workloads, platforms, versions, and environments]
Purpose and scope	[Reason for the migration, included items, exclusions, and affected users]
Supported paths	[Direct path or required intermediate versions and their source references]
Responsibilities	[Decision authority, execution roles, application owners, and communication route]

What Changes

Repeat the change record for breaking changes, removed features, and changed defaults. Link each change to the action required by an affected user or integration.

Field	Complete with
Change identifier	[Feature, setting, interface, or data behavior that changes]
Before and after	[Source behavior, target behavior, and applicable versions]
Impact and action	[Affected clients, data, users, and the change they must make]
Mapping and evidence	[Source-to-target mapping and authoritative compatibility reference]

Migration Plan

Plan waves around dependencies and verifiable outcomes. Keep go or no-go decisions, success criteria, and rollback criteria explicit.

Field	Complete with
Strategy and waves	[Method, wave membership, sequence, dependencies, and rationale]
Window and communications	[Approved timing or downtime, notices, and responsible roles]
Decision points	[Readiness, cutover, and acceptance decisions with required evidence]
Recovery plan	[Rollback triggers, decision authority, recovery path, and verified source state]

Pre Migration

Complete discovery and preparation before moving data or changing traffic. Keep the backup, target configuration, and readiness results linked to the wave they protect.

Field	Complete with
Discovery	[Inventory, compatibility assessment, dependencies, and unresolved issues]
Backup and recovery	[Protected data and configuration, backup reference, and restore verification]
Target readiness	[Provisioning, access, connectivity, configuration, and capacity checks]
Freeze and authorization	[Change freeze scope, final synchronization plan, and readiness approval]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Migration and Cutover

Repeat this procedure for each component or wave. Record progress checkpoints so an interrupted move can be reconciled before it is resumed.

Field	Complete with
Wave and starting state	[Items, source checkpoint, target readiness, and required authority]
Execution	[Transfer, transformation, synchronization, and traffic or user switch sequence]
Progress record	[Checkpoint, completed item, exception, timestamp, and evidence]
Failure response	[Stop condition, partial-state reconciliation, and recovery decision]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Validation

Verify data and functionality separately. Record counts, relationships, and user outcomes using criteria defined before migration.

Field	Complete with
Data integrity	[Object counts, checksums, relationships, transformed fields, and comparison method]
Functional checks	[Critical workflow, test input, expected outcome, and observed result]
Operational checks	[Access, monitoring, integrations, performance measures, and support readiness]
Acceptance decision	[Unresolved discrepancy, accepted exception, decision role, and evidence]

Rollback

Document how the source state can be restored and how changes made after cutover are handled. Use only the recovery path approved for this migration.

Field	Complete with
Trigger and authority	[Conditions requiring rollback and the role that decides]
Protected state	[Backup or checkpoint, dependencies, and expected restored state]
Reversal sequence	[Traffic, application, data, and configuration reversal actions]
Verification and communication	[Checks confirming recovery, affected users, and closure record]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Post Migration

Record the work that makes the target sustainable after acceptance. Keep source decommissioning separate from the initial cutover decision.

Field	Complete with
Stabilization	[Monitoring focus, observed issues, responsible role, and review point]
Dependent changes	[Integrations, client settings, documents, and operating procedures to update]
Source retirement	[Retention, archive, access removal, decommissioning approval, and evidence]
Handover	[Support ownership, training, remaining actions, and completion record]

Troubleshooting and Known Issues

Repeat this record for each migration symptom or known incompatibility. Link corrective actions to the affected wave or component.

Field	Complete with
Symptom	[Exact error or discrepancy and the phase where it appears]
Diagnosis	[Checks, evidence, likely causes, and relevant migration checkpoint]
Resolution	[Approved corrective action, resumption point, and validation]
Escalation	[Decision trigger, responsible role, and evidence required]

Migration Reference

Keep values and mappings used by several procedures in one place. State the version and environment to which each reference applies.

Field	Complete with
Compatibility	[Source and target version matrix and supported intermediate paths]
Settings and commands	[Exact values, units, syntax, purpose, and source reference]
Mappings	[Legacy identifier or field, target equivalent, and transformation rule]
Terminology and records	[Terms, retained evidence locations, and change history]