

# Server migration checklist



# Migrating to a new hosting provider doesn't have to be stressful. Follow our migration checklist for a smooth, seamless transition.

## Set your game plan

The first step is to clarify the scope of the project upfront.

- Are you moving a single site or an entire server?
- Is your email environment moving as well?
- Do you have a disaster recovery solution or external database that's coming along?

Properly identifying and documenting all of the assets to be migrated gives you a blueprint to work from.

### PRO TIP

Document your work in a way that makes it easy to share and collaborate with others. A spreadsheet or Word doc works great; pen and paper do not.

## Identify outside partners or providers

Migrations are rarely self-contained. Outside services and providers are almost always present. For example, you'll need:

- Access to your domain registrar to update DNS records
- Access to your CDN provider to point domains or A records
- Knowledge of additional firewalls or security processes that have to be accounted for

### PRO TIP

Always keep logins and passwords for third-party services in a safe place.

## Properly size the new environment

Your new infrastructure solution should not be sized exactly like your existing solution. Why? Because migrations need a little extra room for unpacking and properly setting up data. Make sure your new environment is robust enough to support the assets you're migrating and handle future growth.

### PRO TIP

We recommend adding 20% disk space above and beyond what you think you need. You can always downsize after migration.

## Don't forget your email

While many organizations are moving to cloud-based email solutions like Microsoft Office 365 or Google G Suite for Business, make sure to confirm where your email presently resides and whether it also needs to be migrated. Email can add a layer of complexity to even the most modest migration, so it's important to include it in your plans.

### PRO TIP

Migrate email at a time when users are least likely to be in their inboxes, like the middle of the night.

## Prune the old to make way for the new

It's a good idea to archive data and media you don't need. Saving space on a server can lower costs and improve performance. A migration is a great time to go in and archive anything from the server that doesn't need to be transferred.

### PRO TIP

Old posts or files should be archived rather than deleted, even if only to an external hard drive. You never know when something from years ago might be needed.

## Identify your server access level

Whether you're migrating on your own or with a partner like Nexcess, it's crucial to know your server-level access before you start. Why? Because this is how you'll access your new infrastructure and ensure that you transition completely. Migrating at a site or file level is just asking for something to get left behind or misplaced.

### PRO TIP

Root access is ideal, but user-level SSH works well too. In a pinch, a control panel or FTP access can be very effective for a migration.

## Update your sites, then freeze

Although you can update sites and files and sync them during the migration process, we don't recommend it. Instead, stop work on sites and applications, perform the migration, then get back to it.

Migrations have a lot of moving parts as it is. Double-checking that you're using the most updated version of a site or file is a headache you should avoid.

If your server handles your email, ensure one of the following:  
a) set up an IMAP mailbox on a local computer or device before migration or b) cc or bcc yourself on all emails sent from the start of the freeze period until the new server is live. This will prevent you from losing access to emails that were sent during the transition.

### PRO TIP

Let all users and coworkers know a specific time to stop or "freeze" changes on sites and digital assets. That way, you can be sure no one is working on a site or application while you're trying to migrate it.

## Back up absolutely everything

You won't be shutting down your old server for a while, but it's still essential to create a full backup before starting your migration. Many hosting providers offer automatic backups, or you can likely create your own through a control panel. After initiating your content freeze but before starting the migration, create a complete backup of the servers you plan to migrate.

### PRO TIP

Once the backup is complete, store it somewhere completely separate from your production infrastructure. Another server, cloud storage appliance, or external drive is sufficient.

## Make a contact list

It's smart to find out who's participating in the migration and what services are involved. Create a contact list of all parties involved with your infrastructure, including your hosting provider and web developers, so you can reach them easily if needed. You don't want to scramble for a phone number or email address mid-migration.

### PRO TIP

Keep ticket numbers in the same place as your migration contact list. That way, you can easily reference support ticket numbers as soon as your host or migration partner responds.

## ☐ List and visualize

Your server is likely connected to some external services by its IP address, not its domain name. Some of them, like databases, backup destinations, and third-party software solutions, won't automatically reconnect after a DNS change.

Compile a list of these services so you can plan for reconnecting them once the migration is complete. Even better, diagram or draw the relationship between your servers and these services to better understand how they work together and how you can confirm they're all reconnected post-migration.

### 👤 PRO TIP

Let any external service providers know you have an upcoming migration. That way, if you need extra support post-migration, you won't have to explain why you're reaching out; they'll already be prepared.

## ☐ Confirm bandwidth for transfer

The most cumbersome part of any migration is the actual data transfer. The time the migration takes depends on the amount of data being transferred and the network conditions between your old server and your new server. Confirming how much bandwidth is available can help all parties understand how long a migration is likely to take.

### 👤 PRO TIP

Even with excellent bandwidth, it's best for traditional businesses to schedule a migration over a weekend. That way, if the transfer takes longer than expected, it'll create minimal disruption.

## Outline exactly how you'll test for success

All your hard work will be for nothing if you can't confirm that everything went smoothly when you're done. Before your migration, document what assets (by name and size) need to be moved so you can confirm they migrated in full. Items like testing connections to third-party services and website functionality should also be on your list.

### 👉 PRO TIP

Something not adding up or working properly? Don't panic. Retrace your steps to locate the specific issue and solve it. Don't try to redo your entire migration if only a small part went wrong.

## Final steps

What happens after the migration and testing are complete is fairly straightforward. Check that services continue to work properly, update your DNS, monitor closely, and create one final backup before shutting down old services.

### 👉 PRO TIP

Let your team members and colleagues know when the migration is complete, and ask them to report any issues they encounter. Having multiple people review your new infrastructure in the first few days is an excellent way to spot any issues that might pop up.

# About Nexcess

Nexcess is the global specialty cloud partner for mission-critical workloads, backing over 185,000 customers across a global footprint of 100,000 servers. Built for leaders who want their teams focused on execution rather than fighting complex environments, we filter cloud complexity to turn technical hurdles into opportunities for your business. By natively managing risk, ensuring economic predictability, and absorbing the friction of assembling tools, Nexcess delivers the simplicity to architect your vision and the performance to scale it. Cloud without compromise.

