

JIRA Software upgrade checklist

Use this checklist as a guide to ensure you are set up for success for your JIRA Software Server upgrade. Looking for more detail? Check out the [upgrade best practices guide](https://confluence.atlassian.com/x/9RSnNw) document. Keep in mind that every instance is unique, and we encourage you to make edits and additions to suit your JIRA Software instance.

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|  | tick) Task | Notes | Status  https://confluence.atlassian.com/download/thumbnails/933696759/image2017-8-9%2016%3A48%3A36.png?version=1&modificationDate=1502322516397&api=v2https://confluence.atlassian.com/download/thumbnails/933696759/image2017-8-9%2016%3A48%3A36.png?version=1&modificationDate=1502322516397&api=v2https://confluence.atlassian.com/download/thumbnails/933696759/image2017-8-9%2016%3A48%3A36.png?version=1&modificationDate=1502322516397&api=v2 |
| Research & Decision | Decide which version to upgrade to | * Use the [JIRA Software upgrade matrix](https://confluence.atlassian.com/x/_RSnNw) to compare versions. * Check out version release notes (both [JIRA Platform](https://confluence.atlassian.com/display/AdminJIRA/JIRA+platform+releases) and [JIRA Software](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA+Software+release+notes)) and [upgrade notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA+Software+release+notes). |  |
| Determine your optimal upgrade method | * Choosing a JIRA upgrade method: * [Rapid upgrade method (with installer)](https://confluence.atlassian.com/display/AdminJIRAServer074/Upgrading+JIRA+applications+using+the+installer) * [Upgrading manually](https://confluence.atlassian.com/display/AdminJIRAServer074/Upgrading+JIRA+applications+manually) * [Upgrading with a fallback](https://confluence.atlassian.com/display/AdminJIRAServer074/Upgrading+JIRA+applications+with+a+fallback+method) * If you are starting from JIRA 6.4 or earlier, consult the [migration hub](https://confluence.atlassian.com/migration/jira-7/server_jira+agile_upgrade) |  |
| Preparation | Outline upgrade stakeholders (optional) | * List roles, responsibilities, and contact info. |  |
| Read relevant documentation | * [Upgrade notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA+Software+7.4.x+upgrade+notes) and [release notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA+Software+7.4.x+release+notes) * [Security Advisories](https://confluence.atlassian.com/display/JIRA/Security+Advisories) * [Scaling JIRA Software](https://confluence.atlassian.com/display/ENTERPRISE/JIRA+Sizing+Guide) |  |
| Check maintenance status | * Renew at [my.atlassian.com](http://my.atlassian.com/) if needed. |  |
| Check supported platforms | * Check the  [Supported Platforms](https://confluence.atlassian.com/display/AdminJIRAServer074/Supported+platforms)  page for details. |  |
| Set up your environment | * If necessary, adjust memory or reverse proxy settings based on the [upgrade notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA+Software+release+notes). * For resourcing guidelines, check out the [JIRA Sizing guide](https://confluence.atlassian.com/display/ENTERPRISE/JIRA+Sizing+Guide). |  |
| Run an instance health check | * This is embedded in the Support Tools Plugin. More detail [here](https://confluence.atlassian.com/display/Support/Instance+Health). |  |
| Check add-ons | * Check add-on compatibility with the [JIRA update check](https://confluence.atlassian.com/display/UPM/Checking+add-on+compatibility+with+application+updates). |  |
| Create an upgrade timeline (optional) | * Gather feedback from relevant stakeholders. * Don't forget to add buffer time! |  |
| Communicate to end-users | * Use the [JIRA Announcement Banner](https://confluence.atlassian.com/display/AdminJIRAServer071/Configuring+an+announcement+banner) to notify end-users. * Include timing, effects on JIRA Software usability, and contact info. * Go to the [upgrade best practices guide](https://confluence.atlassian.com/x/9RSnNw) for detailed messaging recommendations. |  |
| Testing | Set up your staging environment | * For more detail, check out [Establishing Staging Server Environments for JIRA Applications](https://confluence.atlassian.com/display/AdminJIRAServer073/Establishing+staging+server+environments+for+JIRA+applications). |  |
| Complete test upgrade in your staging environment | * Run into problems? See the Resources section below. |  |
| Re-apply any modifications | * If you're using the installer, it migrates a specified list of files. * Check the [upgrade best practices guide](https://confluence.atlassian.com/x/9RSnNw) for the full list or the [JIRA application installation directory.](https://confluence.atlassian.com/adminjiraserver074/jira-application-installation-directory-881684062.html) |  |
| Hold User Acceptance Testing (only if you’re passing a major version, ie. 7.0) | * Select a diverse sample group that utilizes different features of JIRA Software. |  |
| Document learnings (optional) | * Save or print these in an offline location so you are able to access them during the upgrade. * Update timeline and stakeholders if necessary. |  |
| Execution | Back up your instance data | * Choose between JIRA's XML backup utility and using native database backup tools. * Check out a detailed breakdown of the two processes [here](https://confluence.atlassian.com/display/AdminJIRAServer071/Backing+up+data). |  |
| Back up your directories | * Back up your instance and home directory. More detail [here](https://confluence.atlassian.com/display/AdminJIRAServer074/Important+directories+and+files). |  |
| Execute upgrade in production environment | * Follow these instructions according to your method of choice:   + [Upgrading with the installer](https://confluence.atlassian.com/adminjiraserver074/installing-jira-applications/upgrading-jira-applications/upgrading-jira-applications-using-the-installer)   + [Upgrading manually](https://confluence.atlassian.com/adminjiraserver074/installing-jira-applications/upgrading-jira-applications/upgrading-jira-applications-manually)   + [Upgrading with a fallback method](https://confluence.atlassian.com/adminjiraserver074/installing-jira-applications/upgrading-jira-applications/upgrading-jira-applications-with-a-fallback-method) |  |
| Re-apply any modifications | * The installer migrates a specified list of files. * Check the [Upgrade Guide](https://confluence.atlassian.com/pages/createpage.action?spaceKey=UG&title=Upgrading+JIRA+Software+Server%3A+A+walkthrough+for+admins&linkCreation=true&fromPageId=933696759) for the full list or the [JIRA application installation directory](https://confluence.atlassian.com/display/AdminJIRAServer074/JIRA+application+installation+directory). |  |
| Upgrade your plugins | * Do this under Settings > Manage add-ons |  |
| Post-Upgrade | Upgrade the database driver (if using Oracle or MySQL) | * Download the latest JDBC driver ([Oracle](http://www.oracle.com/technetwork/database/features/jdbc/index-091264.html) or[MySQL](https://dev.mysql.com/downloads/connector/j/)) * Place it in <JIRA-installation-directory>/lib. |  |
| Hold User Acceptance Testing (only if you are passing a major version, ie. 7.0) | * Use the same sample group as the test upgrade * Resolve any issues before marking the upgrade as complete |  |
| Communicate to end users | * Include major feature additions and contact information for questions |  |
| Complete an upgrade retrospective (optional) | * Document what went well, what didn't, and what to change for next time. * See example in the [upgrade best practices guide](https://confluence.atlassian.com/x/9RSnNw) for reference. |  |

Resources

Here are a few resources to consult if you have questions. We recommend proceeding in this order:

* Browse or search the [JIRA Software documentation](https://confluence.atlassian.com/jirasoftwareserver074) site and the [JIRA Software Server Knowledge Base](https://confluence.atlassian.com/display/JIRAKB/JIRA+knowledge+base). (Be sure to select the appropriate version in the dropdown)
* Search our [Atlassian Community site](https://community.atlassian.com/) for articles and discussions pertaining to your topic. Or, ask a question to tap into Community experts both inside and outside of Atlassian.
* Create an issue at our [support site](https://support.atlassian.com/) so that our support engineers can assist you
* If you purchased your license through an authorized Solution Partner, consult them to learn more about troubleshooting your instance.
* Looking for more assistance? We also offer Premier Support, which includes 24 x 7 support availability, health checks, dedicated senior support engineers, and more. Check out our [Premium Support offerings](https://confluence.atlassian.com/display/Support/Premier+Support+Offering+Details) for more information.