

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 | Statushttps://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%2Bplatform%2Breleases) and [JIRA Software](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA%2BSoftware%2Brelease%2Bnotes)) and [upgrade notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA%2BSoftware%2Brelease%2Bnotes).
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| Determine your optimal upgrade method | * Choosing a JIRA upgrade method:
* [Rapid upgrade method (with installer)](https://confluence.atlassian.com/display/AdminJIRAServer074/Upgrading%2BJIRA%2Bapplications%2Busing%2Bthe%2Binstaller)
* [Upgrading manually](https://confluence.atlassian.com/display/AdminJIRAServer074/Upgrading%2BJIRA%2Bapplications%2Bmanually)
* [Upgrading with a fallback](https://confluence.atlassian.com/display/AdminJIRAServer074/Upgrading%2BJIRA%2Bapplications%2Bwith%2Ba%2Bfallback%2Bmethod)
* If you are starting from JIRA 6.4 or earlier, consult the [migration hub](https://confluence.atlassian.com/migration/jira-7/server_jira%2Bagile_upgrade)
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| Preparation | Outline upgrade stakeholders (optional) | * List roles, responsibilities, and contact info.
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| Read relevant documentation | * [Upgrade notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA%2BSoftware%2B7.4.x%2Bupgrade%2Bnotes) and [release notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA%2BSoftware%2B7.4.x%2Brelease%2Bnotes)
* [Security Advisories](https://confluence.atlassian.com/display/JIRA/Security%2BAdvisories)
* [Scaling JIRA Software](https://confluence.atlassian.com/display/ENTERPRISE/JIRA%2BSizing%2BGuide)
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| Check maintenance status | * Renew at [my.atlassian.com](http://my.atlassian.com/) if needed.
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| Check supported platforms | * Check the  [Supported Platforms](https://confluence.atlassian.com/display/AdminJIRAServer074/Supported%2Bplatforms)  page for details.
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| Set up your environment | * If necessary, adjust memory or reverse proxy settings based on the [upgrade notes](https://confluence.atlassian.com/display/JIRASOFTWARE/JIRA%2BSoftware%2Brelease%2Bnotes).
* For resourcing guidelines, check out the [JIRA Sizing guide](https://confluence.atlassian.com/display/ENTERPRISE/JIRA%2BSizing%2BGuide).
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| Run an instance health check | * This is embedded in the Support Tools Plugin. More detail [here](https://confluence.atlassian.com/display/Support/Instance%2BHealth).
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| Check add-ons | * Check add-on compatibility with the [JIRA update check](https://confluence.atlassian.com/display/UPM/Checking%2Badd-on%2Bcompatibility%2Bwith%2Bapplication%2Bupdates).
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| Create an upgrade timeline (optional) | * Gather feedback from relevant stakeholders.
* Don't forget to add buffer time!
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| Communicate to end-users | * Use the [JIRA Announcement Banner](https://confluence.atlassian.com/display/AdminJIRAServer071/Configuring%2Ban%2Bannouncement%2Bbanner) 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.
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| 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%2Bstaging%2Bserver%2Benvironments%2Bfor%2BJIRA%2Bapplications).
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| Complete test upgrade in your staging environment | * Run into problems? See the Resources section below.
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| 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)
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| 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.
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| 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.
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| 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%2Bup%2Bdata).
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| Back up your directories | * Back up your instance and home directory. More detail [here](https://confluence.atlassian.com/display/AdminJIRAServer074/Important%2Bdirectories%2Band%2Bfiles).
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| 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)
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| 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%2Bapplication%2Binstallation%2Bdirectory).
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| Upgrade your plugins | * Do this under Settings > Manage add-ons
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| 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.
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| 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
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| Communicate to end users | * Include major feature additions and contact information for questions
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| 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.
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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%2Bknowledge%2Bbase). (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%2BSupport%2BOffering%2BDetails) for more information.