Preparing to Upgrade Confluence

Before you Start

1. Note that you need current software maintenance to perform the upgrade.
2. Confirm that your license support period is still valid before you try to upgrade.
3. If your current license has expired but you have a new license with you, please update your license in Confluence before performing the upgrade.
   - If you forget to do this and your license has expired, you will receive errors during the upgrade process. Refer to the instructions on upgrading beyond current license period.
4. Check the release notes for the new version of Confluence you are installing, plus the upgrade notes for any major versions you are skipping. It is important to read these upgrade notes as there might be specific changes between Confluence versions that could affect your Confluence instance. The upgrade notes pages for recent major versions of Confluence are accessible from the Upgrade Notes Overview page. (Each upgrade notes page is a 'child' of its respective release notes page.)
   - If you are upgrading from a version of Confluence prior to 2.5.5, the upgrade notes information is located under a heading on the release notes pages.
5. Make sure that your environment (e.g. the database system, the operating system, the application server and so on) still complies with the Confluence System Requirements. A newer version of Confluence may have different requirements than the previous version.
6. If you are using Confluence EAR-WAR edition, check Installing the Confluence EAR-WAR Edition to see if there is anything extra you will need to do to get Confluence running.
7. If you are using an external database, familiarise yourself with all known issues for your specific database. Also make sure the Confluence database connector principal (the database user login) has sufficient permissions to modify the database schema.
8. Note which plugins are installed/enabled on your current Confluence instance. Please verify whether a compatible version of the plugin is available in the version of Confluence you are upgrading to. This information is available on the respective home pages for these plugins on the Atlassian Plugin Exchange. Once you have confirmed the availability of compatible versions, you should upgrade your plugins after successfully upgrading Confluence. This can be done via the 'Plugin Repository' in your Administration Console. Please test these first by applying them to the latest Confluence version in a test environment.
9. If you have made any customisations to Confluence, please verify their compatibility in the latest version. For example, if you have modified any layouts or are using your own custom theme, please test these first by applying them to the latest Confluence version in a test environment. You can see the customisations applied to your Confluence installation.

Backing Up

Before you begin the Confluence upgrade, you must back up the following:

1. Back up your Confluence Home directory.

The location of the Home directory is stored in a configuration file called confluence-init.properties, which is located inside the conf/luence/WEB-INF/classes directory in your Confluence Installation directory.

2. Back up your database. Perform a manual backup of your external database before proceeding with the upgrade, and double check that the backup was actually created properly. If you are not a database expert, or unfamiliar with the backup-restore facilities of your database, you should try to restore the backup to a different system to ensure the backup worked, before proceeding. This recommendation is not specific to Confluence usage but just common sense: Surprisingly many companies, even banks, get in trouble for broken database backups.
   - The 'embedded database' is the HSQLDB database supplied with Confluence for evaluation purposes, you don't need to back it up since it is stored in the home directory. But you should not use this database for production systems anyway, so if you happen to accidentally still use HSQLDB in a production system, please migrate to a proper database before the upgrade.
3. Back up your Confluence Installation directory (if you are using Confluence Standalone) or your Confluence webapp (if you are using Confluence EAR-WAR edition).

Testing the Upgrade in a Test Environment
Create a snapshot of your current production Confluence environment on a test server, as described in the page on Moving Confluence Between Servers.

Import an old xml backup file to a new version is not recommended. Please recreate your production instance in a Test Environment first.

1. Perform the upgrade on your cloned environment.
2. Test all your unsupported plugins and any customisations with the new version before proceeding on your production server. You can read more about supported and unsupported plugins.

RELATED TOPICS
Upgrading Confluence