

DXP 7.4 Upgrade Preparedness Questionnaire

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Introduction

Liferay designed the Upgrade Preparedness Program to guide customers through the steps necessary to successfully upgrade their Liferay Portal or DXP based solution. The program helps measure complexity, reduces risks, educates customers on the available resources, and monitors progress during the upgrade

The Upgrade Preparedness Program begins with an Upgrade Preparedness Questionnaire. This questionnaire uses a series of detailed questions to gather information for the Liferay Customer Success Team. The responses will help the Customer Success Team provide guidance on upgrade pitfalls and also point you towards appropriate upgrade resources and tools to expedite your upgrade.

Once you have completed the questionnaire, your Liferay Customer Success Team member will review your responses and provide you with a tailored assessment that highlights high-risk areas. In addition, the assessment will provide pointers towards up to date documentation, white papers, knowledge base articles, and other resources that can help educate and prepare your team for the upgrade.

During the upgrade, your Liferay Customer Success Team member will schedule regular progress meetings to track your progress and help determine if your team may require further assistance.

Upgrade Preparedness Questionnaire

General Questions

1. Which version of Liferay are you upgrading from?
2. What are your upgrade delivery dates?
 - a. Development Complete (e.g. database and code upgraded, preparing to QA).
 - b. Upgraded Development environment + initial QA completed
 - c. Upgraded QA and/or UAT (additional environments)
 - d. Production Launch
3. Go live and having production down to upgrade the database:
 - a. How long is the maintenance window you will reserve for this task?
 - b. Will you execute this task during a low load time frame? Yes No
 - c. How long is the window you can reserve to facilitate this task keeping your current web site in read-only mode?

Feature Usage

1. Can you please attach your current portal-ext.properties and your OSGi configurations folder (Only for DXP 7.0 and above)?
2. Please, provide the size of your document library folder located by default in {LIFERAY_HOME}/data/document_library, or in the path set in the property rootDir for the selected file store.
3. Are you using NTLM, OpenID or Google SSO as the authentication method for single sign-on?

	NTLM	OpenID	Google SSO
--	------	--------	------------
4. Are you using Liferay staging currently?

	Yes	No
--	-----	----

 - a. If so, what kind of staging are you using?

	Local	Remote
--	-------	--------
5. Will users have personal pages?

	Yes	No
--	-----	----

 - a. Will users have their own public pages?

	Yes	No
--	-----	----
 - b. Will users have their own private pages?

	Yes	No
--	-----	----
6. If you are upgrading from Liferay 6.2 or previous versions, are you using Liferay Social Office in your current implementation?

	Yes	No
--	-----	----

 - a. If so, do you still need the social office data in Liferay 7.4?

	Yes	No
--	-----	----
7. Are you using Audience Targeting?

	Yes	No
--	-----	----

 - a. If yes, do you plan to continue using Audience Targeting in 7.4?

	Yes	No
--	-----	----
 - b. Do you need to migrate your current Audience Targeting data to the new version of Liferay?

	Yes	No
--	-----	----
8. Are you using Expando fields to extend Liferay entities?

	Yes	No
--	-----	----
9. Are you using Page Fragments in your current version of Liferay?

	Yes	No
--	-----	----

10. Are you using any of the following features in the product:

AlloyUI	Flash	Polls Widget
App Builder, App Builder Workflow	Friends	Portal Directory
Audience Targeting	Google Login/SSO	Private Messaging
Bookmarks	Google Maps	Quick Note
Bootstrap 3 & Bootstrap 4 compatibility layer	Group Statistics	Recent Downloads
Central Authentication Service	Image Editor (Soy-based)	Resources Importer
CMIS Store	Invitation	RSS Publisher
Commerce Account Widget	JAAS support code	Shopping Portlet
Commerce Categories Navigation widget	JCRStore	SOAP Web Services
Commerce Bill of Materials (BOM)	Legacy search portlet	Social Activity
Commerce Category Content widget	Liferay Mobile Device Detection Enterprise	Social Requests
Digest Authentication	Liferay Screens	Social Summary
Dynamic Data Lists	Liferay Sync	Solr Connector
EXT Plugins support	Live Users	Theme: Hello World
	Mail Reader	Twitter Integration
	Microblogs	User Group Pages
	Mobile SDK	Weather
	NTLM	Web Content Search widget
	OAuth 1.0a	Web Form
	Open Social	Web Proxy
	Password Generator	XSL Content

Infrastructure Upgrade

1. What is your current infrastructure, and what will be the infrastructure you will be using after the upgrade?

CURRENT

Database

Operating System

Application Server
(e.g. Tomcat 8 to Tomcat 9)

Java Virtual Machine
(e.g. Java 7 to Java 8)

Search Engine

Browser most used by your users

AFTER UPGRADE

Database

Operating System

Application Server
(e.g. Tomcat 8 to Tomcat 9)

Java Virtual Machine
(e.g. Java 7 to Java 8)

Search Engine

Browser most used by your users

2. Do you have a non-production environment (test, development, etc) that mirrors production? Yes No
3. Will you host your Liferay installation locally or in a cloud environment?
Locally Cloud environment
 - a. If cloud, which provider will you use?
4. Are you using container based deployments? Yes No

Data Upgrade

1. Have you customized any Liferay database tables? Yes No
 - a. If said yes, which tables, and how?

2. Do you use Liferay Services API in your Application Display Templates and DDM Templates? Yes No

3. Do you use Liferay's Sharding functionality? (only valid if you are coming from 6.2) Yes No
 - a. If so, how many shards do you have (including the default one)?

4. Please provide row counts for all Liferay database tables executing the attached Groovy script following these instructions:
 1. Go to Control Panel/Server/Server Administration/Script.
 2. Select Groovy as Language.
 3. Paste the content of the script and execute it.
 4. Attach the generated file located in {LIFERAY_HOME}/databaseTables.info with this completed questionnaire when submitting back to Liferay.

Development Environment

1. Which development environment are you using?
 - Liferay Plugins SDK
 - Liferay Workspace
 - Liferay Maven plugin
 - Other

Code Upgrade

Customizations and Extensions

1. Are you using the Liferay EXT environment for customizations?

Yes No

a. If so, could you describe in detail each piece of logic you are modifying:

How many files are you overwriting?

Which components of Liferay are you modifying?

(WCM, Asset Publisher, Document Library, Login, Users management, etc.)

Describe the kind of files you are modifying and how.

(JSP, Actions, Services impl, etc.)

2. Please provide the number of the following customizations you have:

Hooks

Themes

Layout templates

Portlets

OSGi Modules

Webs

3. Please briefly describe all of your most important modules or plugins. For each one, answer the following:
 - a. Describe what this customization does.
 - b. Is this customization extending Liferay functionality, if so, what?
 - c. Which Liferay APIs is it using?
 - d. Does it connect to external databases?

4. Which features of the Liferay Hook extension point are you using?

JSP Hook/Custom JSP	Indexer Post Processors
Servlet Filters	Service Wrappers
Struts Actions	Override Portal Properties

5. Are you using the functionality of Application Adapter for a JSP Hook?
(If you are upgrading from DXP 7.0, this only impacts portlets in the core.)

Yes No

6. What Portlet MVC framework do you use in your portlets?

Struts
Spring MVC
Vaadin
GWT
Angular (What version?)
Other?

7. Please describe where and how you are using the portlet MVC framework.

8. How many of your portlets use Liferay Service Builder?

9. Are you overriding any language files?

Front-end Development

1. What JavaScript frameworks and libraries are you using?

Alloy UI	Liferay NPM	Vue UI
Angular JS	bundler	YUI
ExtJS	Lodash	Other?
Dojo	Metal JS	
JQuery	React JS	

2. Please describe where and how you are using these frameworks and libraries.
3. Do you use Bootstrap as the CSS framework for building your themes?
Yes No
- a. If yes, which version of Bootstrap?
4. Which approach are you going to follow to adapt your themes to the new version of Liferay?
- Upgrade current themes
Redesign or create new themes
Not sure
5. Do you leverage Velocity or Freemarker in Liferay? If so, please specify, which you are using and where (Layout or theme templates, ADTs, Web Content templates, etc.) Yes No

External Integrations

1. What technologies are you using for external integration?
- JSON Web Services
SOAP/XML web services
Java RMI
Enterprise Messaging/Enterprise Service Bus (e.g. MQ Series, etc)
Headless API
Other

Available References

Features Overviews

- [Liferay DXP 7.4 New Features](#)
- [Liferay DXP 7.4 Features Overview](#)

Developer Guides and References

- [Liferay DXP 7.4 Upgrade Reference Guide](#) - read this first before planning and executing your upgrade.
- [Liferay Auto Upgrade Feature](#)
- [Breaking changes fo 7.4](#)
- [Liferay Upgrade from 6.x Overview](#)
- [Liferay Performance Benchmark](#)
- [Liferay DXP 7.2 Developer Tutorials](#)
- [Liferay DXP 7.1 Developer Guide](#) - provides key tutorials for various stages of the code upgrade process. This entire section is extremely important to review and understand, especially when deciding when to convert WAR based plugins to OSGi modules
 - [What's Changed and What Hasn't](#)
 - [Migrating from Plugins SDK to Liferay Workspace](#)
 - [Planning Upgrades and Optimizations for WAR based plugins](#)
 - [Upgrading Plugins](#)
 - [Upgrading Themes from 6.x to 7.0](#)
 - [Upgrading Themes from 7.0 to 7.1](#)
 - [Upgrading Themes from 7.1 to 7.2](#)
 - [Upgrading and Migrating From EXT](#)
- [Liferay Developer Tools](#)
 - [Liferay Workspace](#) - replacement for Liferay Plugins SDK
 - [Blade CLI](#) - command-line tool for developing in Liferay DXP
 - [Liferay Developer Studio](#)
 - [Liferay IntelliJ Plugin](#)
 - [Liferay Maven Plugin](#) - series of Maven integration points for developing with Liferay
- [Liferay Blade Samples](#) - Repository of sample code and use cases
- [Liferay Project Templates](#)

Deployment Guides and References

- [Liferay DXP 7.4 Compatibility Matrix](#) - make sure your infrastructure components (DB, Application Server, etc) are supported



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