Migration from server to cloud

Since ConfiForms version 2.20 we now support **automatic migration of your forms and data from server to cloud**

Please see Differences between ConfiForms server/data center and ConfiForms cloud, as the functionality of cloud version differs from server/data center version

What to expect

- ConfiForms form and views configurations are migrated automatically as they are part of Confluence pages
- ConfiForms migration service (part of Confluence Cloud Migration Assistant) migrates your form's data to cloud, automatically fixing pages, attachments and user references
- ConfiForms migration process also fixes forms' configurations for smart fields and ConfiForms IFTTTs (page references, user/group references)

⊘ Important

ConfiForms expects you to migrate the **WHOLE** instance, as only this way it can fix the usernames to be user accounts, fix user groups, change pages to match the pages on cloud and re-link attachments and fix form configurations (smart fields)

Especially the ones that span across multiple Confluence spaces

ConfiForms relies on Confluence search to find the pages with ConfiForms forms

Make sure you have search index is in-sync and is up to date. See more Content Index Administration.

Please raise a ticket if something is still un-migrated or broken after the migration and we will try to fix it.

Get support

ⓘ **IMPORTANT**

Make sure you have updated ConfiForms app to version 3.5.1 or later. It is highly recommended that you use absolutely LATEST version of ConfiForms for the cloud migration

See our Release Notes and versions https://marketplace.atlassian.com/apps/1211860/confiforms-data-forms-workflows?hosting=datacenter&tab=versions

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⊘

Pre-migration

Make sure you read and understand the differences and accept that the plugin functionality on cloud could not be as versatile as on server/data center. And this is mainly due to differences in hosting platforms and APIs we are allowed to use

Differences between ConfiForms server/data center and ConfiForms cloud

ConfiForms relies on the data provided by Confluence search API.

Make sure you have search index is in-sync and is up to date. See more Content Index Administration.

Also, please run the pre-check report on **your Confluence server** to understand what forms and pages will have differences in functionality

Migration pre-check report

Run this report to see what ConfiForms forms could not be migrated to Confluence cloud

Run report

This is available in the Confluence administration ConfiForms configuration Cloud Migration

Direct link

```
https://YOUR_SERVER/admin/vertuna/confiforms/config.action
```

Migration process

> ⊘ And this is step number 0 really - please see the **Prerequisites** on the right to make sure everything mentioned there is done and understood

1. You need to install ConfiForms on **cloud** instance and generate API token (ConfiForms app configuration - accessible through Confluence administration)

Prerequisites

Your **Confluence server** must have access to **app.confiforms.net**

At the moment we have the following IP addresses

- 143.244.202.153
- 198.211.107.220
- 147.182.163.216

(uses HTTPS for communication, port 443 (SSL), communication is **one way** - from your server to ConfiForms app servers)

ConfiForms configuration

General settings   Webservices connections   **API tokens**   Migration

API tokens for ConfiForms REST API

Here you can configure access tokens for ConfiForms REST APIs

Token

xxx–xx–xx–xxxxx–xxxx

Generate token

2. Register your **cloud** instance to receive migration events

ConfiForms configuration

General settings   Webservices connections   API tokens   Migration

Register for migration

This will enable ConfiForms cloud to receive migration events and mappings between your cloud and server/datacenter instances

Status: **Registered**

Unregister

Please also make sure to **register an API token** which you will need to put in your server/datacenter Confluence instance to complete migration

Migration events

3. This token needs to be registered in ConfiForms **server** app (ConfiForms app configuration, Manage apps ConfiForms Configure)

General settings   Database connections   Webservices connections   Pages with ConfiForms forms   Migration

Cloud connection details

ConfiForms cloud
API token

You need to create API token in ConfiForms (cloud) app configuration and provide it here before migration.
You need to have administrative access to your cloud instance and do it in ConfiForms configuration at https://your_instance_name.atlassian.net/wiki/plugins/servlet/ac/com.vertuna.confluence.plugins.confiforms/confi-forms-admin

Save

Active migrations

TransferID   Re-run app migration

4. Make sure **ConfiForms app user is set to be administrator of your Confluence instance** for the time of migration at least

5. Start your migration process using Confluence Cloud Migration Assistant (CCMA). Follow documentation on https://www.atlassian.com/migration/cloud/guide/introduction/overview and dont forget to select ConfiForms as required in Cloud when you assess your installed apps (https://www.atlassian.com/migration/cloud/guide/assess/audit-apps)

More on Atlassian CCMA

- https://support.atlassian.com/migration/docs/use-the-confluence-cloud-migration-assistant-to-migrate/
- https://support.atlassian.com/migration/docs/what-migrates-with-the-confluence-cloud-migration-assistant/

ⓘ As CCMA is currently in beta you need to enable "*dark feature*" as per documentation on

https://developer.atlassian.com/platform/app-migration/getting-started/

Screenshot below:

Pre-migration setup on your server app

This section explains how to set up the communication between your server app and the App migration platform.

Prerequisite

ⓘ App migration is now available as a public beta feature with the Jira Cloud Migration Assistant. This means that your customers will no longer need to be part of the Early Access Program (EAP) for JCMA and/or use the app migration feature flag to migrate their app data to cloud.

- Enable feature flags for app migration in the server instance of Confluence.
  - Use the following link to enable the Confluence feature flag `migration-assistant.app-migration.feature` : `<Confluence_URL>/admin/darkfeatures.action`

⚠ **Warning**

App migration platform in CCMA is currently available as a beta release for Marketplace Partners (vendors) to build a migration path for their apps from server to cloud in preparation for app data migration.

Feature flags should not be used in production for customers of Marketplace Partners when using the beta release version of the App migration platform.

Confluence search index

ConfiForms relies on the data provided by Confluence search API.

Make sure you have search index in-sync and up to date. See more Content Index Administration.

Migration compatibility report

Migration compatibility report might be incomplete, as ConfiForms is very flexible at what you can do and how forms could be built and configured.

At the moment we dont support **configurations in user macros** (which is perfectly supported by the plugin itself). This is work in progress.

Also expressions using virtual functions via [entry.field_name] notations which are not used within macro parameters, but, for example, in macro body (PlainViews or ListViews/CleanViews) are not analyzed / processed.

Current issues

⊘ There is a blocking issue with space permissions for the automatic migration path. Atlassian is aware of that and trying to come up with a solution.

We offer a way to "re-run" the migration after it has been ran by CCMA by starting a long running task. This allows you to fix the possible permissions issues and allow ConfiForms app system user to access and update the pages it needs to update (to fix possible configuration issues with smart fields, to move the data from server to cloud)

How to give permissions to ConfiForms app user

ConfiForms full system user name is

```
com.vertuna.confluence.
plugins.confiforms
```

ⓘ

6. **ConfiForms migration process will start automatically by CCMA**. But you can always re-run it if necessary through the ConfiForms app configuration / migration section

Active migrations

TransferID	Re-run app migration
86a8b729-0285-311e-8b6b-3ba76463bd4d	86a8b729-0285-311e-8b6b-3ba76463bd4d

UPDATED

ConfiForms App user in cloud has a new name

Conf

CA   ConfiForms App

Restrictions   Inspect permissions

🔒 Only specific people can view or edit   ⌄

com.vertuna.confluence.plugins.confiforms ✕   Can view ⌄   Add

OT Opsgenie Incident Timeline   Has no access

                                            Can edit

JI Jira Ops Confluence integration

OT Opsgenie Incident Timeline

Learn more   Cancel   Apply

Shown then as a normal user in the restrictions

Restrictions   Inspect permissions

🔒 Only specific people can view or edit   ⌄

Type a user name or group   Can edit ⌄   Add

👥 Everyone   Has no access

C   com.vertuna.confluence.plugins.confiforms   Can edit ⌄   Remove

                                        Can edit

Learn more   Cancel   Apply