

Upgrading to Totara

Prerequisites

Before upgrading to Totara Learn 12 please ensure your site has been upgraded to at least Totara Learn 9. The following table shows the upgrade paths for all major versions to Totara Learn 12.

| From version | To version | Upgrade path |
|------------------|-----------------|--------------|
| Totara Learn 11 | Totara Learn 12 | 11 > 12 |
| Totara Learn 10 | Totara Learn 12 | 10 > 12 |
| Totara Learn 9 | Totara Learn 12 | 9 > 12 |
| Totara Learn 2.9 | Totara Learn 12 | 2.9 > 9 > 12 |
| Totara Learn 2.7 | Totara Learn 12 | 2.7 > 9 > 12 |
| Totara Learn 2.6 | Totara Learn 12 | 2.6 > 9 > 12 |
| Totara Learn 2.5 | Totara Learn 12 | 2.5 > 9 > 12 |
| Totara Learn 2.4 | Totara Learn 12 | 2.4 > 9 > 12 |
| Totara Learn 2.2 | Totara Learn 12 | 2.2 > 9 > 12 |

You will also need to check that your server meets the minimum requirements described in the [Technical specification](#).

Upgrade process

1. Log in as an administrator.
2. Check the live logs to check if any users are currently using the site. The site will be offline while the upgrades are performed (*Site administration > Reports > Live Logs*).
3. Enable maintenance mode in Totara Learn (*Site administration > Server > Maintenance Mode*).
4. Log out.
5. Back up the Totara Learn database.
6. Back up the sitedata directory.
7. Back up the Totara Learn source code directory.
8. Make a copy of your config.php and any plugins you have installed.
9. Remove the old source code - delete everything!
10. Extract the new source code into the source code directory.

 Do not copy the new code on top of the existing code folder.

11. Copy your config.php and any third party plugins back into the source code directory.
12. Run the command below in your terminal, replacing www-data with your web users username (if using a Linux or Unix based system), otherwise you can navigate to the site URL (redirected automatically) to perform the upgrade via the browser.

 `sudo -u www-data php admin/cli/upgrade.php`

13. Review the information provided and confirm you want to continue.
14. Carefully check the output in the terminal and ensure no errors were encountered.

 If you have encountered an error the site will need to be rolled back, the issue fixed, and then the upgrade attempted again.

15. Log in as an administrator.
16. Review and save changes to new settings (if any).
17. Disable server maintenance mode.
18. Congratulations, your site is now upgraded. Read **CHANGELOG.php** for details on what is new.

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What to do if the upgrade fails

When an upgrade fails for any reason the best course of action is to roll back to the last known good working state. This is likely the backups you took immediately before the upgrade (steps 5-7 in the upgrade process above). Fix the error, and then proceed through the upgrade again.

If you are unsure why the upgrade failed, or are unsure of how to fix it please reach out to us via our help desk.

 Attempting to resume an upgrade that has previously failed should not be attempted unless you fully understand the nature of the failure and are sure that the site data is still in a valid state. If at all unsure we recommend rolling back and restarting the upgrade process.

Considerations for upgrading

When upgrading there are many things to consider both from a technical and training perspective. It is important to ensure all elements of your system are technically compatible, including your theme and any customisations. You will also want to make sure any training materials, and indeed any trainers, are up-to-date with new features and improvements.

Changelogs

It is important to review the changelogs and make sure you understand what is changing. New features and improvements are likely to bring changes to interfaces, behaviour, and workflows. Our changelogs will help you identify which areas have changed, so you can then find information on new behaviours and workflows on this help site. This is important so that any internal training material you have can be updated and staff trainers can learn about what has changed.

You should also review any new administration settings, as new controls get added with every major release. These added controls may facilitate new functionality, improve security, or allow further customisation. Each setting should be reviewed so that you can check your Totara Learn site configuration is current and understood.

System requirements may also change and although these will have no impact for those using the site, you will need review them to ensure they are met during deployment of the new release.

Themes

User experience (UX) changes will mean that you will need to review your theme. It is likely there will be new places that need to be styled to make them look a part of your site. This is because HTML structure, CSS classes, and Javascript changes have been made. New features also bring new interfaces.

 The Standard Totara responsive, Custom Totara responsive, bootstrap base, and Kiwifruit responsive themes have been removed from Totara Learn v10+. You can read more in the [Totara Learn developer documentation](#).

Customisations

Our APIs can change significantly between major releases. We have a deprecation policy that ensures that all changes where possible are backwards compatible, and that customisations will continue to function in the short term. When backwards compatibility is being used developer debugging information will be printed out to inform you that customisations and plugins will need to be updated. It is important these changes are made as backwards compatibility is only maintained for a limited time (typically one major release).

Incompatible API changes are rare, but they do occur. If you have customisations using API that no longer functions you will be presented with a debugging notice and you'll find that your customisations don't function as they should.

Course Catalogue

The Grid Catalogue introduced in Version 12 will not be enabled by default on upgraded sites. To use the new Catalogue, go to **Advanced features** within the **Site administration menu** and select **Grid** from the **Catalogue type** option. Note that once enabled, the Grid Catalogue requires time to process before your catalogue display is updated. You will be notified when the process is complete.

Totara registration

You may be prompted to register your Totara Learn site, you can find more information on the [Totara registration](#) page.