Indexing, Migration to Version 16, and Upgrade Express

Christina Perkins Meyer
University of Minnesota Libraries
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c-meye@umn.edu
Recommendation from Ex Libris

Ex Libris **strongly** recommends regeneration of all Aleph indexes during the migration from version 14 or 15 to version 16.
Why?

• Known changes in structure of indexes:
  -- Conversion from Unicode to UTF8 for headings (needed for some version 14 sites)
  -- Addition of z01_normalized_text field to headings entries (needed for all version 14 sites)
  -- Addition of xyz functionality for headings (version 14 and 15 sites)
  -- Need to merge z95/950, etc. word indexes (version 14 and 15 sites)

• Unknown “gotchas”
Options for Reindexing

1. **Upgrade Express**: Reindexing with minimal production downtime.
   - Will be the default routine built into Upgrade Express.
   - Advantage: Significantly reduced downtime for migration.

2. **Classic**: Reindexing with the production system down.
   - Disadvantage: Significantly greater downtime during migration.
   - Advantage: Disk space requirements **may** be lower.
Reindexing with Upgrade Express

Note: There will be two instances of Aleph on the production server:

1) The **source** instance. This is the existing version 14 or 15 instance.

2) The **target** instance. This is the new version 16 instance.
Reindexing with Upgrade Express

Phase 1

Sometime before STP, on the production server:

• Complete final preparation of the target instance.
• Export data from all source libraries.
  N.B.: All database updates other than circulation transactions must be stopped during this process.
• Set triggers to log all new and changed doc records in the source instance. A special program saves Z07 records.
• Resume ordinary work in the source version
Reindexing with Upgrade Express

Phase 2
Meanwhile ..

• Import source data into the target. Data will be converted as specified in the Upgrade Express setup.
• Regenerate indexes.
Reindexing with Upgrade Express

Phase 3
Just before STP:

• Suspend all update of the source other than circulation transactions.
• Re-export all source data.
• Import source data into the target. However, retain all indexes created in phase 2.
• Start ue-01 to begin processing of updates from the interim period.
Reindexing with Upgrade Express

Phase 4
• Stop circulation in the source instance.
• Export circulation-related tables; convert and import them on the target.
• Build circulation-related indexes.

Phase 5
STP is complete. Resume work in version 16.