



# Tales of Upgrade Express and the Aleph V. 16 Upgrade

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## Tales of Upgrade Express (mostly)

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- Confession—beta sites did preliminary testing!
- Very current: all presentations from beta sites were actually written on the way to NAAUG!
- Harvard's project: completed their v. 16 upgrade the "old way"
- Binghamton: UE overview, "small" site experience, tables, authorities
- U. of Minnesota: 14.2.6 issues, downtime, index migration, parallel indexing, delta records
- U. of Maryland: v. 15.2-16.02 migration issues, indexing from v. 15.2
- Ex Libris perspective: implementation and support



# Upgrade Express Basics

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- Tool kit to facilitate migration from earlier to later releases. Looks superficially like “semi-automated patch process” menus. Process generally proceeds in menu order.
- Opens libraries and related directories
- Pre-configures migration of certain aleph tables (e.G. Tab10)
- Moves and converts configuration tables
- Moves and converts oracle data to new oracle instance.
- Provides a migration path for both test and production systems.
- Can migrate from old to new system on the same or different servers.
- Handles adjustments to file\_list, aleph\_start, etc.



# Upgrade Express Menu

## Examples:

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Upgrade Express 1.0.19

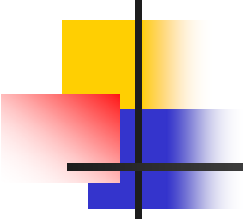
Test Target Server - cattest, Aleph 16 revision 02 copy 1,  
31-Mar-2004

Target ALEPH system main menu

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- \* 1. Define general setup of upgrade kit
- \* 2. Initialize setup of aleph\_start.private
- \* 3. Open ALEPH libraries
- \* 4. Convert ALEPH configuration tables
- 5. Localization of the new Web Interface (www\_f\_Ing)
- \* 6. Upload Oracle data tables

Select [exit] :



Upgrade Express 1.0.17

Source Production Server - cattest, Aleph 505.14.2.07, 08-May-2003

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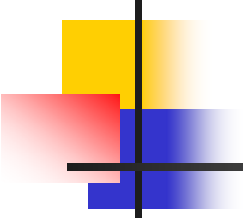
Source ALEPH system main menu

Download Oracle date tables

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- \* 1. Define Oracle data tables list (tab\_all\_z)
- \* 2. Define download instructions (tab\_dl\_z)
- 3. Check available disk space
- 4. Disable ue deamons run
- \* 5. Run download
- \* 6. Run circulation download
- 7. Enable ue deamons run
- 8. Record counts
- \* 9. File transfer
- 10. Log files

Select [exit] :



Upgrade Express 1.0.19

Test Target Server - cattest, Aleph 16 revision 02 copy 1, 31-Mar-2004

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Target ALEPH system main menu

Convert ALEPH configuration tables

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- \* 1. Modify upgrade kit configuration tables conversion setup tables
- \* 2. Open tar files from source version
- \* 3. Backup ALEPH Configuration tables in target before conversion
- \* 4. Perform conversion on ALEPH configuration tables
- \* 5. Synchronize ALEPH configuration tables headers
- 6. Create new cataloging tables package (UTIL M-7) and print template package (UTIL I-6)
- \* 7. Pack tables and transfer to production machine
- 8. Log files

Select [exit] :



# Upgrade Express Workflow

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- Ex Libris installs v. 16.02 and Oracle 9i (At Binghamton, Oracle was installed by the local DBA)
- If migrating to the same server, both 14.2.7 and 16.02 systems both coexist.
- UE “Source” install: manages export of old data and configuration files, installed under \$aleph\_dev/version\_upgrade in 14.2.7
- UE “Target” install: manages import and conversion of data from 14.2.7 to 16.02, installed in 16.02
- Source UE defines system environment, defines what is to be migrated, and then packages aleph configuration and finally oracle data.



# UE Workflow continued

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- “Source” and “target” installs of kit provide different functionality and display different menus.
- Although separately installed, the “source” and “target” must interface so that the output created by the “source” gets placed where the “target” expects to find it.
- Easy to omit libraries no longer needed from migration. UE will only migrate what is defined in `tab_all_libs`.
- There is a separate download of circ data suggesting minimal “downtime” between old and new systems for circulation transactions.





# Binghamton Conclusions

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- Example of “small shop” upgrade process (<1 FTE)
- Able to open libraries and migrate data using the upgrade express kit including bib, holdings, authorities, and ADM from a small (58K title) subset.
- Upgrade Express menus and scripts make a complex process considerably easier but the process still requires careful planning and knowledge of aleph data and database layout.
- Upgrade Express v. 2 needed to address migration of separate PWD library.
- Migration includes the conversion to 8-bit UTF storage in oracle 9i. Character set migration appeared to work.
- Upgrade Express v. 1 did not handle migration of www\_f files.
- Questions remain about indexing and how long you have to be down.



# UE: Binghamton Issues

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- Server resources: you need adequate disk space for your **existing system**, the **new v. 16.02 system**, and for **two copies of the sequential files** used during the migration. This is a “show stopper” for Binghamton until we can obtain adequate server disk space. Process different from past patch upgrades where the old system itself was migrated and not just orphaned.
- UE is a work in progress. Version 2 is only now being developed to handle separate PWD. Ex Libris is working hard on it.
- Only preliminary testing of migration completed prior to NAAUG. PWD migration and indexing not completed.
- As of June 10, the official word is that it is necessary for 14.2 sites to re-index.
- Sandy will now cover the migration of tables and discuss conversion to the new v. 16.02 authority system.