System Upgrade Checklist

For Axiell Staff Use Only

Be sure to replace `emu` with `vw` when performing a Vitalware upgrade.

Check off (tick) the boxes as you proceed through this checklist.

Environment being upgraded: ☐ Test -OR- ☐ Production

☐ Create JIRA ticket (separate tickets for Test upgrade and Production upgrade).

☐ Arrange a date and time for the upgrade with the customer.

☐ Update the Releases page on the EMu / Vitalware website with the installation date and links to the new client and server releases for the customer:

https://emu.axiell.com/support/downloads/emu/releases

https://vitalware.axiell.com/support/downloads/vitalware/releases

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☐ Prepare the *System Upgrade Form*, convert it to PDF and send it to the customer for approval (prior to agreed upgrade date).

A *System Upgrade Form* **must be completed** for both Test and Production upgrades.

Do not proceed with an upgrade without a signed copy of the form.

On the *System Upgrade Form*, note the ticket number of:

a) Jira tickets that are **Ready to Deploy**; and
b) Hornbill tickets where the status is **Open** and sub-status is **Resolved**

and ensure these are linked to the JIRA ticket for the upgrade.

Send the customer the link to the appropriate Client Installation page:

https://emu.axiell.com/support/downloads/emu/install-upgrade-notes/6-0/unix-new-installation/2237-5-install-emu-client

https://vitalware.axiell.com/support/downloads/vitalware/install-upgrade-notes/3-0/unix-new-installation/1974-5-install-vitalware-client

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☐ Check that the new release files are available and accessible from the customer's server.

Tip: You can use the `wget` command to download files from the EMu / Vitalware website to the customer's server, e.g.:

```
wget
http://emu.axiell.com/downloads/Texpress/Releases/8.3/texpress-8-3-
014-linux-libc6.sh
```

☐ Delete any redundant environments created as a backup of previous upgrades.

☐ Check that there is enough disk space to copy the existing environment:

```
cd ~emu
du -sh clientname
df -h .
```

☐ Check that the current system is working prior to the upgrade:

| | ```
emustatus
``` |

☐ Advise the customer that the upgrade is about to commence.

☐ Make sure that all users are logged out of the system and then stop the background loads:
```
texlicstatus
emuload stop
```

☐ Copy / backup the existing environment.

When upgrading the Test environment, move or tar/gzip the existing Test environment and then create a copy from the customer's Production environment (you will need permission from the customer to confirm that this is ok).

Use either the `find` or `rsync` command (DO NOT use `cp`) to copy existing environment:
```
cd ~emu
mkdir newdirectory
cd olddirectory
find . –depth –print | cpio –pvmud ../newdirectory
```
-OR-

It is good practice to perform a trial run before performing the copy (use the `-n` option):
```
cd ~emu
mkdir newdirectory
rsync -avn olddirectory/ newdirectory
```

When satisfied that all is fine, remove the `n` option to perform the copy.

To exclude the multimedia directory (first perform a trial run with the `-n` option):
```
rsync --exclude '/multimedia/' -avn olddirectory/
newdirectory
```
-OR-

If required, tar / gzip the environment to reduce space:
```
cd ~emu
tar cvf – clientname | gzip > clientname-x-y-yymmddx.tgz
```

where `x-y-yymmddx` is the previous EMu/Vitalware version that is being upgraded.

For **Test upgrade** (when the environment is a copy of Production):

☐ Update config files with the Test port numbers, e.g. `imuserver.conf` and `config` files in `etc` directory.

☐ Restart EMu / Vitalware background loads.

☐ Update `ServerPath` and `ServerMediaPath` (if available) Registry entries to reflect the Test environment directory path.

☐ Update/create Login Message Registry entry as per the previous Test environment.

☐ Check the number of records for all databases prior to the upgrade:
```
texlist –l > filename
```
Save the output to a file and attach to this document (where possible).

☐ Perform the upgrade.

	If performing a Test upgrade, note the time taken to perform the upgrade on the JIRA ticket as a Developer's comment; inform the customer of how long the upgrade will take.
☐	Confirm that all background loads are running.
☐	Check the number of records for all databases after the upgrade: `texlist -l > filename` Save the output to a file and attach to this document (where possible). Compare the before and after counts for any discrepancies.
☐	Test that the upgrade has completed successfully: e.g. texforms queries, IMu queries, etc.
☐	For **hosted customers**: install the new EMu client and publish it on RDWeb for the relevant customer.
☐	For **Test upgrade**: update "Ready to Deploy" JIRA tickets to "Deploy". -OR- For **Production upgrade**: update the Machines/Sites record with the Texpress, TexAPI and EMu / Vitalware versions installed (even if a new licence does not need to be generated).
☐	Notify the customer that the upgrade is complete and to install the new version of the EMu client.
☐	Attach this completed form to the *System Upgrade Approval* form.