EQUELLA Upgrade Guide

Version 6.5

Document History

Date	Change	Responsible
12/05/17	Created document	C Fitzgerald
29/09/2017	Released Draft version	C Fitzgerald
1/12/2017	Published	C Fitzgerald

December 2017 edition.

Information in this document may change without notice.

Table of Contents

Upgrade overview

Upgrading to EQUELLA 6.5 will provide new functionality and enhancements to existing features.

This guide provides information on upgrading current installations to EQUELLA 6.5 and is intended for system administrators who must deploy the upgrade.

Upgrade EQUELLA to version 6.5

EQUELLA 6.5 uses in-place upgrades, ensuring your institution's decision to upgrade EQUELLA is faster, easier and cheaper.

NOTE: For EQUELLA versions prior to 6.4, an upgrade to 6.4 QA4 must be run first, then the upgrade to 6.5.

Upgrade process

Upgrading involves the following steps:

1. Upgrade your existing version to the latest QA release version.
2. Plan the upgrade and notify users that the server will not be available.
3. Backup existing databases and your EQUELLA filestore folder.
4. Test the upgrade process using a test server that is a clone of the production server.
5. Test the new version's functionality using a test server that is a clone of the production server.
6. Repeat the upgrade process using the production server.

Upgrade preparation

Planning the EQUELLA 6.5 version upgrade reduces:

- the time the system will be unavailable to users; and
- the risks associated with upgrading.

Institutions should consider the impact then test the required changes prior to attempting to deploy any new features to a production environment.

Testing the EQUELLA 6.5 version upgrade:

- identifies any potential issues with the upgrade process; and
- provides an indication of potential down-time for the production environment. (*NOTE: The server upgrade downtime will vary from institution to institution depending on the features to be implemented and the size of the EQUELLA repository*.)

Upgrade prerequisites

Performing these preparatory tasks reduces the risk associated with upgrading an installation and enables easy restoration of the existing system if an intractable issue occurs.

Prior to upgrading

The following actions should be completed:

1. Backup your existing database and be aware of the procedures required for restoring the database.
2. Backup your EQUELLA filestore folder.
3. Ensure that users are aware EQUELLA will be unavailable for the duration of the upgrade.

Upgrades with Windows

When upgrading a system using a Windows environment, the EQUELLA Manager and application service must be run by a user with Administrator rights.

Upgrade current version

Before upgrading to EQUELLA 6.5, your existing EQUELLA server may require upgrading to the most recent 6.4 QA release. Further information is provided in the *EQUELLA Release Notes* for your current version.

EQUELLA 6.5 test server

Using an EQUELLA 6.5 test server is recommended so that:

- potential issues with the upgrade process can be identified;
- down-time of the production server is minimised;
- an accurate estimate of production server down-time can be made; and
- the stress of any new version deployment is reduced.

(NOTE: Any upgrade completed using a test server will be invalid if the test server is not a clone of the production server.)

Install a new test server

1. Ensure the test environment is a clone of the production environment.
2. Perform all tasks described in the Upgrade preparation section on page 5.
3. Complete the relevant tasks described in the Upgrade EQUELLA section on page 7.

Upgrade an existing test server

Existing EQUELLA 6.4 test servers require upgrading to the most recent QA release. Further information is provided in the *EQUELLA Upgrade Guide* for your current version.

1. Ensure the test environment is a clone of the production environment.
2. Perform all tasks described in the Upgrade preparation section on page 5.
3. Complete the relevant tasks described in the Upgrade EQUELLA section on page 7.

Upgrade EQUELLA

EQUELLA 6.5 upgrades are completed using the **EQUELLA Manager**.

Before executing the upgrade it is recommended that you:

- Perform all tasks described in the Upgrade preparation section on page 5.
- Apply all upgrades to a test environment that is a clone of the production environment first.
- Refer to the Troubleshoot the upgrade section on page 19 to resolve any issues.

EQUELLA Manager

The **EQUELLA Manager** is accessed using the server port number. The server port can be found in the <path-to-equella>**manager\config.properties** file.

To access the EQUELLA Manager:

1. Open a browser and enter the address of the hosting server with the port number (e.g. *http://equella.myinstitute.edu:3000*).
2. Log in using the EQUELLA Manager **Username** and **Password** to display the **EQUELLA Manager.** An example is shown in Figure 1. (The EQUELLA Manager password is set during the EQUELLA installation process.)

Figure 1 EQUELLA Manager

The EQUELLA Manager shows the current **Deployed Version**, the **Server Status** and has two tabbed pages:

- **Downloaded Versions**—provides access to all downloaded EQUELLA versions, allowing administrators to upgrade to any downloaded version.
- **Get Other Versions**—allows administrators to browse to and upload **Manually Provided Versions** of EQUELLA or to download any available **Official Upgrades**.

Upgrade to EQUELLA 6.5

When upgrading to a major version such as *EQUELLA 6.5*, the upgrade file can be accessed by browsing to and uploading it via the **Manually Provided Versions** section of the **Get Other Versions** page.

The upgrade process includes the following steps:

1. Perform all tasks described in the Upgrade preparation section on page 5.
2. Download an upgrade file from EQUELLA Support.
3. Upload the upgrade file to the EQUELLA Manager.
4. Deploy the new version.
5. Restart the EQUELLA Manager.
6. Restart the EQUELLA server.
7. Migrate existing repository data.
8. Upgrade systems integrated with EQUELLA.
9. Upgrade customisations.

The first step is to perform all tasks described in the Upgrade preparation section on page 5. The next step is to download the upgrade file from the Service Desk.

Download the upgrade file

1. Download the **EQUELLA 6.5-GA** upgrade file to a temporary directory.

The next step is to upload the upgrade file in the EQUELLA Manager.

Upload the upgrade file

The upgrade file is uploaded in the **Manually Provided Versions** section of the **Get Other Versions** page in the **EQUELLA Manager**.

1. Select the **Get Other Versions** tab to display the **Get Other Versions** page.
2. Click Choose File in the **Manually Provided Versions** section.
3. Navigate to and select the **tle-upgrade-6.5rXXXXX (branches+'***VersionName'*)**.zip** file from your temporary directory. The file path is displayed in the **Manually Provided Versions** field. An example is shown in Figure 2.
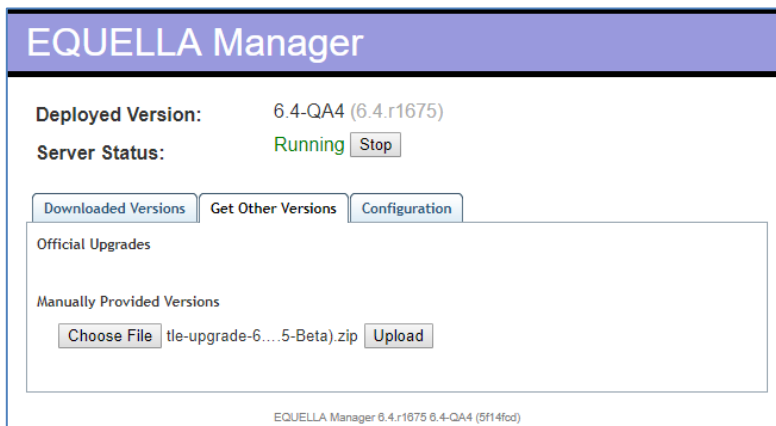
Figure 2 Get Other Versions page

4. Click ⟦Upload⟧. When the upload is completed, the new version is displayed in the **Newer Versions** list on the **Downloaded Versions** page. An example is shown in Figure 3.

Downloaded versions

The **Downloaded Versions** page displays any **Newer Versions** that have been downloaded but not deployed, the **Current Version** as well as any **Older Versions** that have been downloaded, whether they have been deployed or not. An example is shown in Figure 3.

Figure 3 Downloaded Newer Version

The next step is to deploy the upgrade version.

Deploy a new version

The upgrade version is deployed on the **Downloaded Versions** page.

1. Select the radio button next to the required version (e.g. *6.5.r1324*) in the **Newer Versions** list.

2. Click [Deploy now] to display a confirmation dialog that asks the user if they wish to proceed and warns that to do so will stop the EQUELLA App Server service.

3. Select [OK] to confirm the deployment. The App Server is stopped and the steps of the upgrade process are displayed. An example shown in Figure 4.
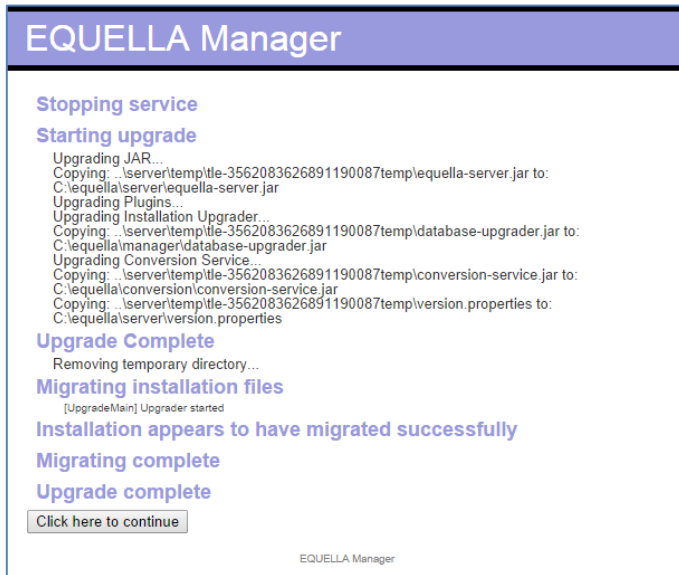

Figure 4 Deploy version dialog upon completion

Deployment errors

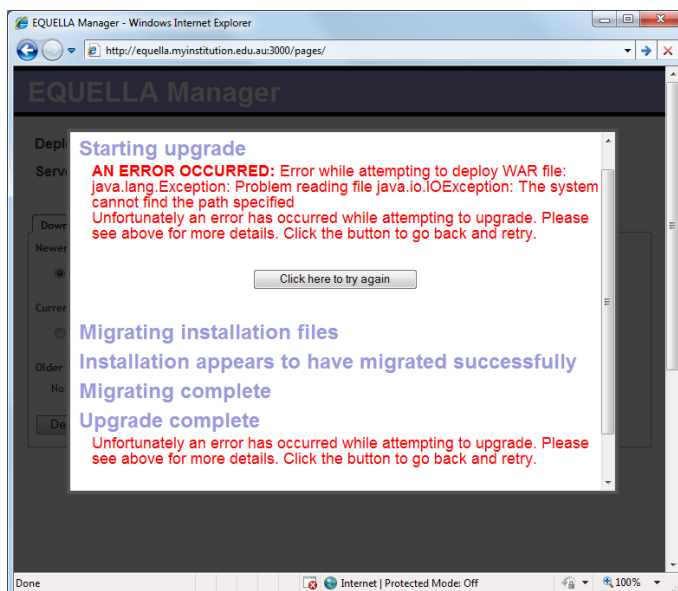Any errors that occur during upgrading are displayed in the dialog. An example is shown in Figure 5.

Figure 5 Error Message

Depending on the type of error and the administrator's experience with EQUELLA upgrades, either resolve the issues and attempt the deployment again, or contact Client Support.

To attempt the deployment again

1. Resolve any issues associated with the error message. Further information is provided in the Troubleshoot the upgrade section on page 19.

2. Click `Click here to try again` to return to the **Downloaded Versions** page. (*NOTE: Do not use the browser back button.*)

3. Repeat the steps outlined in the Deploy a new version section on page 9.

To contact Client Support

1. Call the Edalex Support Team on 1300 EDALEX (1300 332539) and provide the error details.

Successful deployment

When the deployment process is completed successfully a `Click here to continue` button is displayed, as shown in Figure 4.

To complete the deployment

1. Click `Click here to continue` to display the **Downloaded Versions** page. An example is shown in Figure 6.

Figure 6 Downloaded versions with Current Version updated

The EQUELLA Manager restarts in the background.

Start the EQUELLA server

The EQUELLA server is started in the EQUELLA Manager. When the **Server Status** is *Stopped*, a `Start` button is displayed. An example is shown in Figure 7.

Figure 7 EQUELLA server – Stopped

2. Click Start to change the **Server Status** to *Running.*

Figure 8 shows an example of the newly deployed version with the server running.

Figure 8 New version deployed and running

The next step is to migrate existing repository data.

Migrate existing data

The data migration process can take a significant amount of time and depends on the size of the EQUELLA repository.

1. Open a browser and enter the address of the hosting server (e.g. *http://equella.myinstitute.edu*). The **Welcome** page displays, instructing the user to login to the **Server Administration** page displays, as shown in Figure 9.
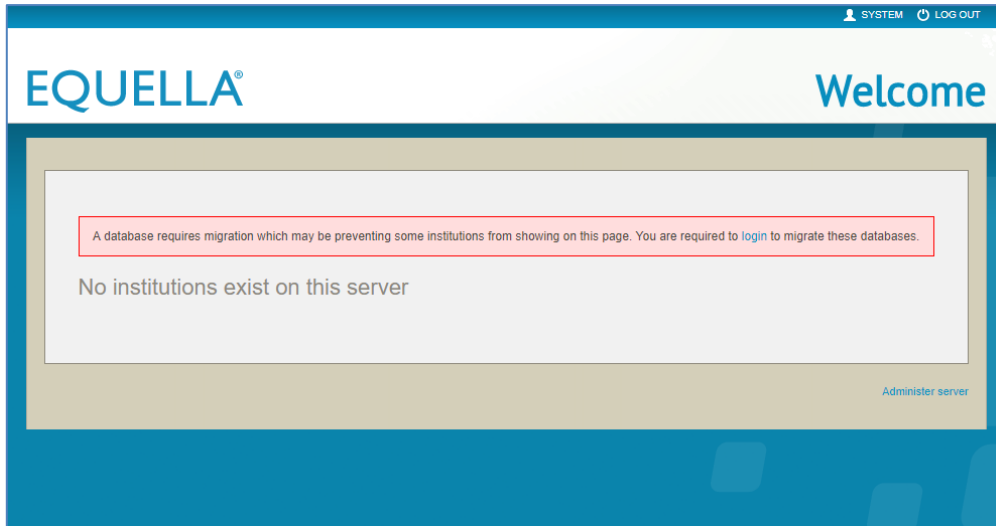

Figure 9 Welcome page with instructions

2. Click either the **login** or **Administer server** links to open the **Server administration** login page. An example is shown in Figure 10.
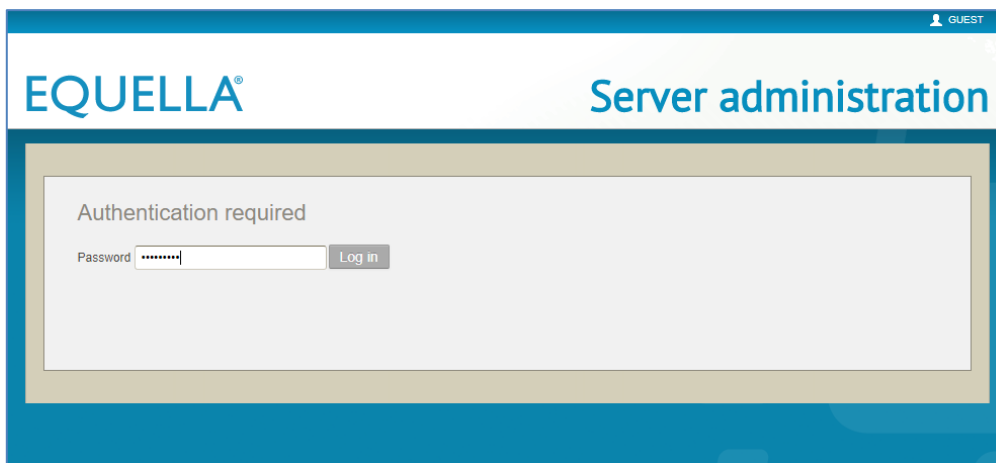

Figure 10 Server administration login page

3. Enter the administration password to display the **Databases** page.

4. Select **Databases** from the Server administration navigation menu (although the system should default to this page). An example is shown in Figure 11.
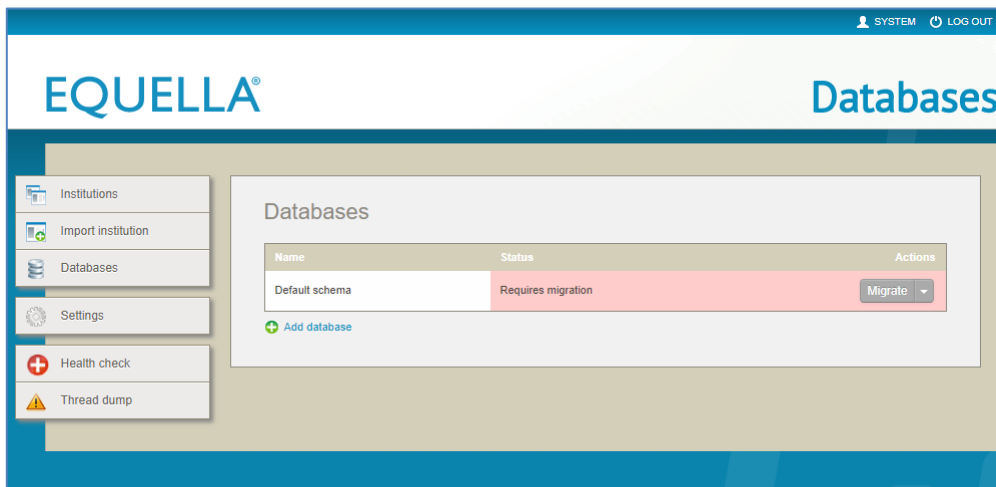
Figure 11 Databases page

(*NOTE: It is important that your system is backed up before executing the upgrade. Further information is provided in the* Upgrade preparation *section on page 5*.)

5. Select [Migrate] to start the migration process. A confirmation dialog displays, as shown in Figure 12.
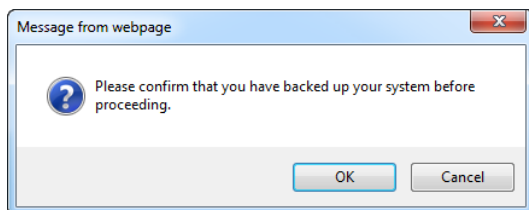

Figure 12 Backup confirmation dialog

6. Click [OK]. A progress percentage displays.

(*NOTE: The data migration process can take a significant amount of time*.)

When multiple databases are in use, the Databases screen lists each database with a checkbox. Check each checkbox then select the **Migrate selected** link to start the migration process. The databases are migrated sequentially and the progress percentage displays. An example is shown in Figure 13.
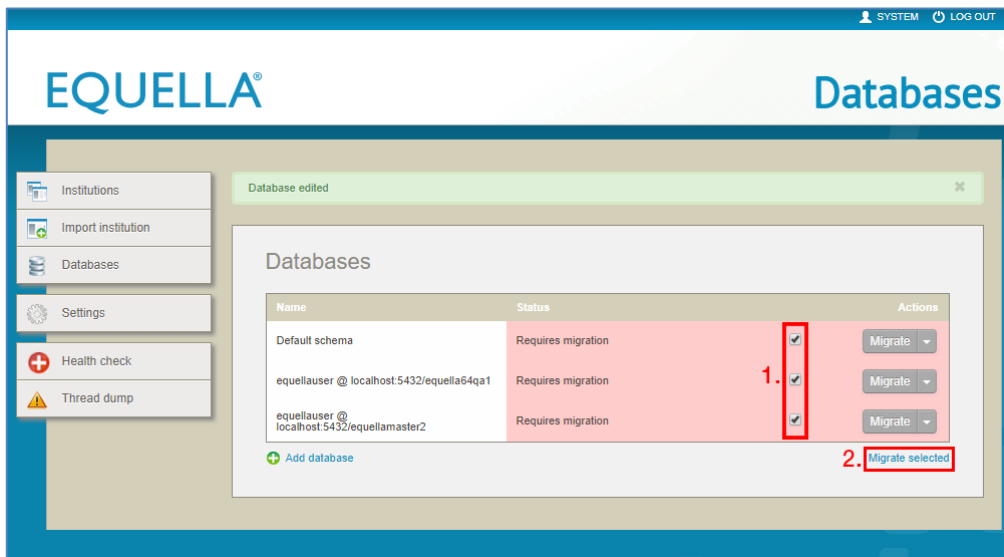
Figure 13 Databases page—multiple databases in use

Migration errors

When an error occurs during the migration process, a message and a **Show migration error** link display. An example is shown in Figure 14.
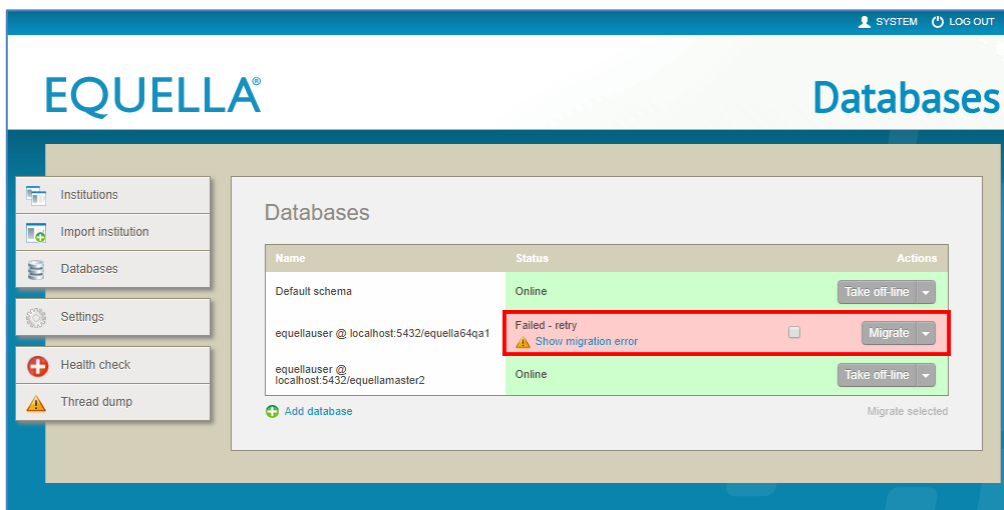

Figure 14 Example of data migration error

Select the **Show migration error** link to display the error report. An example is shown in Figure 15.

Figure 15 Example migration error report

Depending on the type of error and the administrator's experience with EQUELLA upgrades, either resolve the issue and attempt the migration again by clicking the **Migrate** link, or contact Client Support.

To attempt the migration again

1. Click the **Migrate** link next to the relevant database to retry the migration process. A progress percentage displays.

To contact Client Support

1. Provide the error details to Client Support at support@equella.com

Successful migration

When the migration process is completed successfully, the status of each database will display as *Online.* An example is shown in Figure 16.
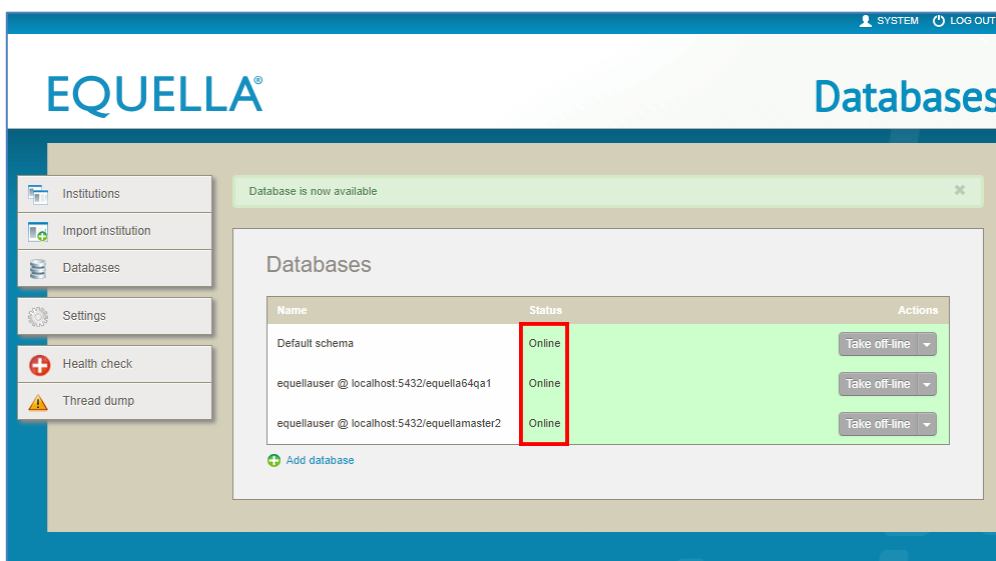

Figure 16 Databases page—successful migration

Upgrade systems integrated with EQUELLA

The systems that integrate with EQUELLA require upgrading, including:

- Blackboard Building Block
- Moodle Module

To obtain the latest version

1. Select the **Downloads** link from the navigation menu to display the **Downloads** page.
2. Select the required download link and save the files. Further information is provided in the relevant configuration guide (e.g. *EQUELLA Moodle Configuration Guide*).

The next step is to review customisations.

Upgrade customisations

Institutions that have installed customised CSS styles, language packs and reports should refer to the *EQUELLA* 6.4 *Release Notes* for information on changes and upgrades that are required.

The major release upgrade process is now complete.

Important information for test upgrades

When testing of the upgrade process is complete, the new version's functionality should be tested to identify and resolve any issues associated with the upgrade. Once all issues have been resolved the upgrade process should be repeated using the production server. Further information is provided in the EQUELLA 6.5 production server section on page 18. (*NOTE: If the test environment was not a clone of the production environment, any tested upgrade process will be invalid.*)

EQUELLA 6.5 production server

To avoid major problems and system disruptions, the recommended upgrade process is to test the upgrade and new version on a test server that is a clone of the production server before upgrading a production server.

Install a new production server

1. Ensure the upgrade process and new version's functionality were previously tested using a test environment that is a clone of the production environment.
2. Perform all tasks described in the Upgrade preparation section on page 5.
3. Complete the relevant tasks described in the Upgrade EQUELLA section on page 7.

Upgrade an existing production server

Existing EQUELLA test servers require upgrading to the most recent QA release. Further information is provided in the *EQUELLA Upgrade Guide* for your current version.

1. Ensure the upgrade process and new version's functionality were previously tested using a test environment that is a clone of the production environment.
2. Perform all tasks described in the Upgrade preparation section on page 5.
3. Complete the relevant tasks described in the Upgrade EQUELLA section on page 7.

Troubleshoot the upgrade

Generally, upgrading an EQUELLA installation is uneventful but occasionally issues appear that require some troubleshooting assistance.

Resolve issues

In most instances, a message describing why the upgrade cannot be completed is displayed. In this situation, resolving the issue then restarting the upgrade process allows the upgrade to successfully complete. The following sections can help resolve issues:

Error during deployment

As mentioned in the Deployment errors section on page 10, problems during deployment will often be resolved by redeploying the upgrade file. In cases where this doesn't work it is recommended that the upgrade file be downloaded again before attempting redeployment. Occasionally downloaded files can become corrupted and this approach reduces that effect.

Manager file changes

Any changes made to the EQUELLA Manager details in the

<path-to-equella>**manager\config.properties** file or the

<path-to-equella>**manager\users.properties** file will require the EQUELLA Manager service to be restarted.

Unable to access the EQUELLA Manager

Options:

- Ensure the correct server port number is used. The server port can be found in the <path-to-equella>**manager\config.properties** file.
- Ensure the correct password is used.

Unable to upgrade server on Linux™

New releases appear to download and install, but the system has not been upgraded.

Option:

- Ensure the EQUELLA Manager has read and write permissions for all folder and files in the installation directory.

View the system logs

Search the following EQUELLA logs for clues:

- <path-to-equella>\logs\
  - resource-centre\20XX- xx-xx\application.html
  - equella-manager\20XX- xx-xx\services.html
  - equella-upgrader\20XX-xx-xx\upgrader.html
  - manager.log
  - tomcat.log
- operating system logs (e.g. Event Viewer in Windows).

Contact Client Support

We are always happy to help.

Please call 1800 EDALEX (1800 332539) to speak to our Support Team or email support@equella.com.