



Requirements for Upgrading from MetaLib 3.13 to MetaLib 4

Version 4

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Upgrade Guidelines

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- **MetaLib Version 4 Recommended Hardware** on page 4
- **MetaLib Installation Kit (MIK)** on page 4
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Overview

MetaLib version 4 can be installed on the same server as your current MetaLib version, or on a new server.

This document provides guidelines for installing MetaLib version 4 on the same server as your current MetaLib version 3.13.

If you are installing MetaLib version 4 on a new server, refer to the *Requirements for MetaLib Version 4 and SFX Version 3 Installation* document.

Ex Libris provides an automated MetaLib Installation Kit (MIK) for customer self-installation. The installation takes two to three hours depending on the server, and must be performed by a local System Administrator. Ex Libris offers installation services at cost to interested customers. To obtain a quote, contact your local office.

NOTE:

The upgrade kit for version 4 is designed for migrating from MetaLib version 3.13 only.

MetaLib Version 4 Recommended Hardware

MetaLib version 4 does not necessitate more hardware resources than version 3.13. The minimum required resources for version 4 are two single core 3.0 GHz CPUs and 4 GB RAM.

NOTE:

If your installation is on older hardware (two or more years) or you are not satisfied with current performance of MetaLib version 3.13, we recommend you consult with your local office to evaluate your current server and determine if an upgrade is necessary.

MetaLib Installation Kit (MIK)

MetaLib version 4 is installed parallel to your current MetaLib version 3.13 and does not affect its ongoing operation. During the installation, the script prompts customers for the port on which they want to install MetaLib version 4. For further details, refer to **Ports and Activity Type** on page 6.

NOTE:

Two reboots of the server are required for new values of system parameters to take effect, and to test the automatic activation of MetaLib version 4. Other Ex Libris applications on the server that use Oracle will experience a short downtime of a few minutes as well when the new Oracle 10g listener is configured.

Supported Platforms

NOTE:

Refer first to *Operating System Requirements for Red Hat Enterprise Linux* and *Operating System Requirements for the Sun Platform* for basic and detailed requirements and then refer to the additional specific MetaLib requirements below.

For each of the following operating system versions, Ex Libris recommends that you install the latest OS update level.

- **Sun** — Solaris 5.9, 5.10 (64 bits SPARC processors)
- **Linux** — RedHat Enterprise Linux AS/ES version 4.0 32 bit OS and 5.0 64 bit based on Intel x86 processor

IMPORTANT:

- We recommend upgrading your Sun Server OS from 5.8 for performance and support reasons.
 - Customers who need to upgrade their operating system should do so prior to installing MetaLib version 4. The *Operating System Upgrade - MetaLib 3* document is available separately for this purpose.
-

Oracle and Third-Party Products

MetaLib version 4 is installed with a completely new Oracle 10g installation, including new Oracle software and a new Oracle database. In addition, all required third-party products are installed as part of the MetaLib Installation Kit.

Disk Space Requirements

In order to both install and run the MetaLib Upgrade Kit, the following disk space is required, calculated according to the specific needs of each site:

(A) MetaLib Version 4 software: including Oracle 10g software: 7 GB on the `/exlibris` file system.

(B) Oracle Database: Current MetaLib 3.13 Oracle database size multiplied by three (triple your current database size mounted on the `/exlibris` file system or on another file system)

Total disk space required: **(A) + (B)**

To check the size of your current database, enter the following command while logged in as the `metalib` user:

```
du -sk /exlibris*/oradata/$ORACLE_SID
```

For example, the following command:

```
du -sk /exlibris*/oradata/$ORACLE_SID
```

returns the following response:

```
16299244      /exlibris/oradata/meta3
```

NOTE:

The upgrade process includes several iterations of data conversion from 3.13 to 4. The full data from 3.13 is stored within the database until final

switch to production to enable recurring data conversion. In other words, during the upgrade process both the new and the old data coexist side by side, in addition to the original default 4 installation data. This explains the need for triple the size of the database.

Communication Requirements

Telnet or SSH Access

Telnet or SSH access to the server must be enabled. If a firewall is installed, SSH access should be enabled for Ex Libris support and implementation staff for the following IP addresses:

- 212.179.71.70
- 12.45.228.130
- 72.164.6.114 (for US sites only)

Outgoing FTP access should be enabled for the following FTP server addresses:

- ftp.exlibris.co.il
- ftp.exlibrisgroup.com
- ftp.exlibris-usa.com

NOTE:

Your local support office will also require access to your server.

Ports and Activity Type

- Telnet or SSH standard port (incoming)
- FTP standard port (incoming and outgoing)
- HTTP ports for MetaLib (incoming)

Because version 4 can be installed in parallel to your current version 3.13, additional ports need to be opened during the implementation and testing phases of your upgrade.

Table 1 lists the HTTP and SSL ports that should be opened and used based on the ports that are currently being used. A special utility is provided for switching ports when moving to production with version 4.

Table 1. Additional HTTP and SSL Ports

Current Open/Used Version 3.13	New HTTP Port for Version 4
80	8331
80, 8331	8332
8331, 8332	8333
SSL Port 443	SSL Port 4443

Table 2 lists the TCP/IP ports for running the MetaLib Z39.50 Gate (outgoing).

Table 2. Additional TCP/IP Ports

Current Open/Used Version 3.13 Ports	New TCP/IP Port for Version 4
7331	7332
7331, 7332	7333, 7334

NOTES:

- Use of other ports must be coordinated with Ex Libris.
- The SSL certificate used for MetaLib version 3.13 can be used for MetaLib version 4.

MetaLib 4 License

To perform an installation of MetaLib version 4, customers need to receive a new MetaLib license from their local support office. (The license format has changed in version 4.)

For further information about the upgrade, refer to the following documents:

- *MetaLib Upgrade Express Methodology*
- *MetaLib Upgrade Express User Guide 3.13 to 4*

