



The ARC Service Pack

Version 3.0

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1 The ARC Service Pack

The ARC service pack is an update that includes all changes made since the last ARC version was made available. It includes bug fixes, refinements, and features and is a combination of many individual fixes, thoroughly tested and delivered in a coordinated way.

The ARC Service Pack is based on the concept of “No Regression”. This means that any change in functionality, which is not a pure bug, is optional as it needs to be configured in order to be in effect. In other words, if you install a service pack and make no manual configuration changes, your system might not benefit from some elements of the Service Pack, but will not show any negative effect.

The main step in filling data into the ARC database is done through the ETL process performed on the ALEPH side. rep_changes were written to indicate the ARC service pack changes done in ALEPH that are relevant to ARC. These rep_changes will make customers aware of the need to install the ALEPH service pack as well as the ARC service pack. These changes will be displayed as part of the excel sheet, in which all ARC rep_changes are displayed. These rep_changes will not include a list of the files changed as is the usual case, rather they will contain just a description of the change (since changes are on ALEPH side and not ARC). The description includes the ALEPH expected release dates of the service packs for each ALEPH version.

The Service Pack installation, as described in this document, is currently available for the ARC 3.00 release.

Note

Not all the service pack related actions are automatic. An important step – updating the content store (ARC_Repository.zip file) – is manual.

Note

The ARC schemas (usmr0.export.gz_aa) are updated in ARC 3 SP. This was not the case in ARC 2.

Note

The installation of a service pack does not involve automatic configuration changes.

The following steps need to be carried out in sequence in order to perform an installation of the ARC 3.00 service pack:

If this is the first time you install an ARC 3.00 service pack, download and install the Util SP mechanism that will be used later for the service pack installation.

1. Backup your Content Store (ARC Portal). This is done in case some error will occur while implementing the service pack. For a detailed explanation, refer to [Section 2 Backing up the Content Store](#).
2. Run Util SP to download the service pack onto your server. **Do not install the service pack at this stage.** For a detailed explanation on how to use the Util SP and download the service pack onto the sever, refer to [Section 3 Service Pack Installation Utility](#).
3. Use the Util SP for installing the service pack. For detailed instructions on how to install the service pack, refer to [Section 4 Installing the ARC Service Pack](#).
4. Use the 'ver' command on your command prompt to determine your current service pack level. For further explanation regarding the meaning of the service pack level, refer to [Section 5 Service Pack Level](#).

Note:

In ARC 2, when the Service Pack summary included the file name: "usmr0.export.gz_aa" there was a need to update ARC_LIBS schemas. Now - In ARC, the new schema is provided and updated automatically as part of the service pack. The old schemas are backed up in case of SP uninstall.

5. Update your ARC Content Store by importing a new content store provided as part of the service pack. For a detailed explanation, refer to [Section 6 Updating the Content Store Post Installation](#).
6. Perform a brief check that everything is working properly after the service pack is installed and implemented. To perform such a check:
 1. Log into the ARC Portal.
 2. Run several reports from canned reports and from your own Customized Folder reports. Check whether the results are correct and make sure no regression occurred due to the service pack.

If the results are incorrect and the service pack has created a regression, then perform the following steps:

1. Run Util SP. Select option 5 – "Run SP Utility (view implementation notes)". Select option 9 – "Uninstall Service Pack NN". This will restore the files in the server to the condition they were in before the service pack was installed.
2. Restoring the original files in the server is not enough, since the Content Store needs to be imported again so that it matches the original files in the server. To import the Content Store, perform [step 5](#) again. (This time the import is done on the original files and not on the service pack's new files). The old ARC schema is automatically restored.

2 Backing up the Content Store

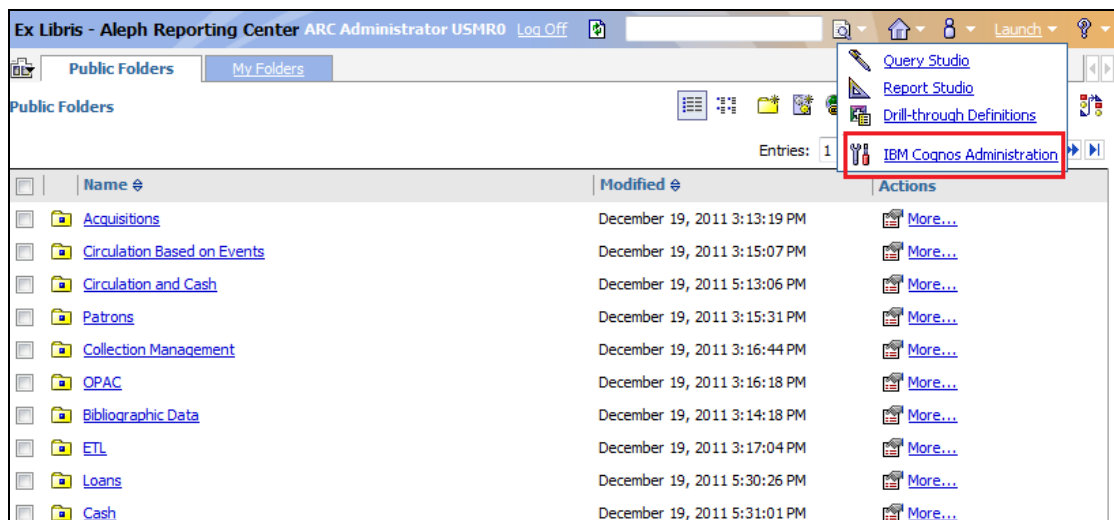
Note:

The content store is backed up just in case you need the last version of the content store. After installing the service pack, import a new content store provided by the SP, and not the one backed up in the steps below.

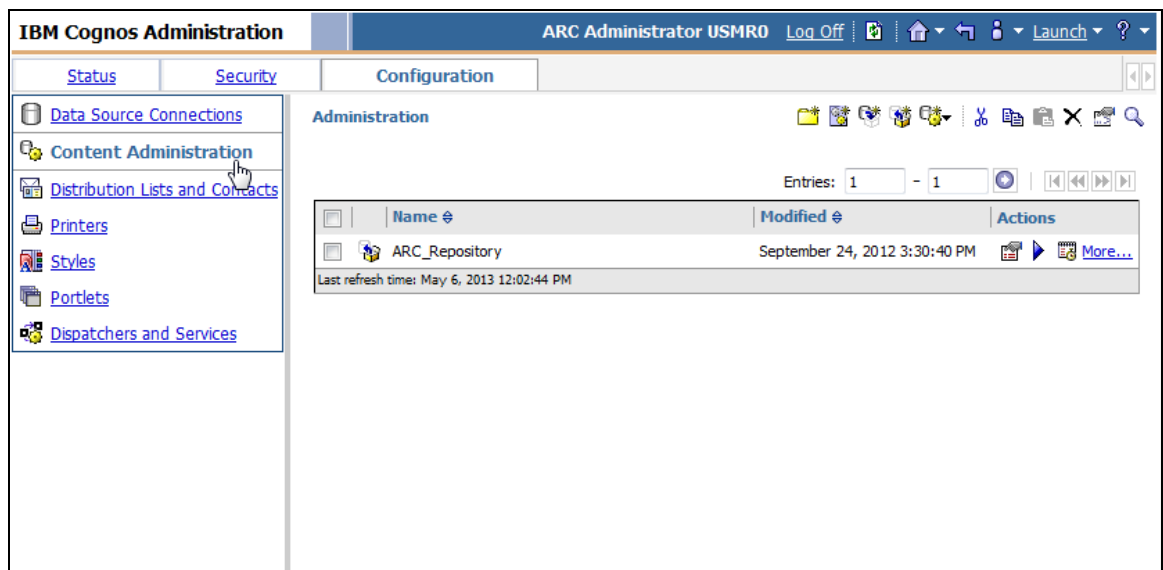
Prior to the Export, all the reports that need a backup in all the users “My Folders” tabs, should be moved to the “Customized Reports” folder under the “Public Folders” tab.


Steps

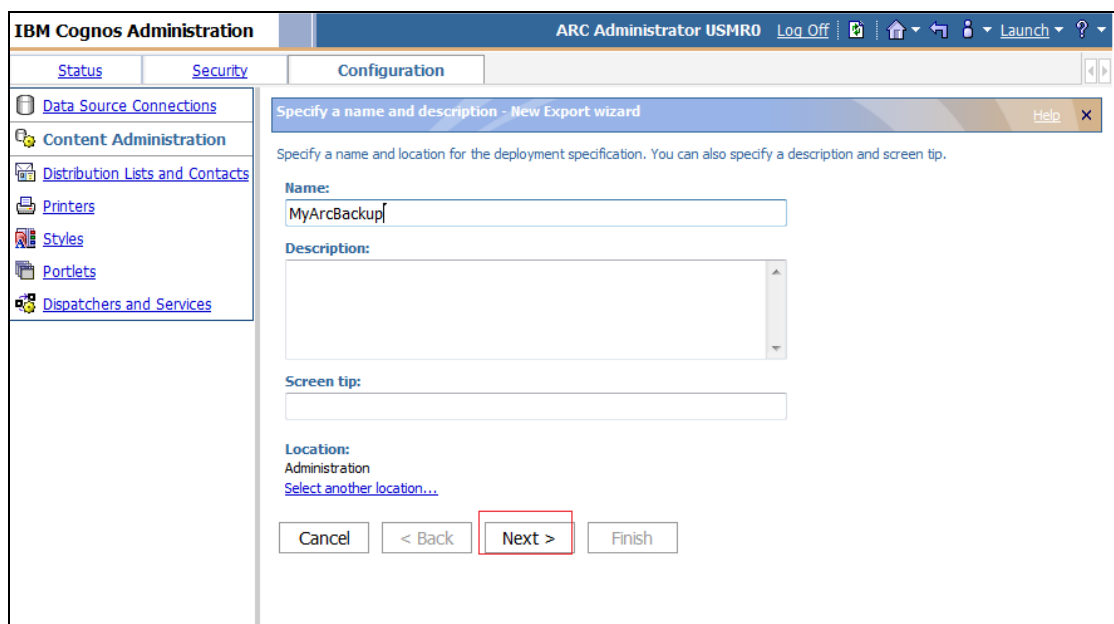
1. Log into the ARC portal using the Admin user for your ARC Portal.
2. On the Home page, click **Launch / IBM Cognos Administration / Configuration / Content Administration** as shown below:



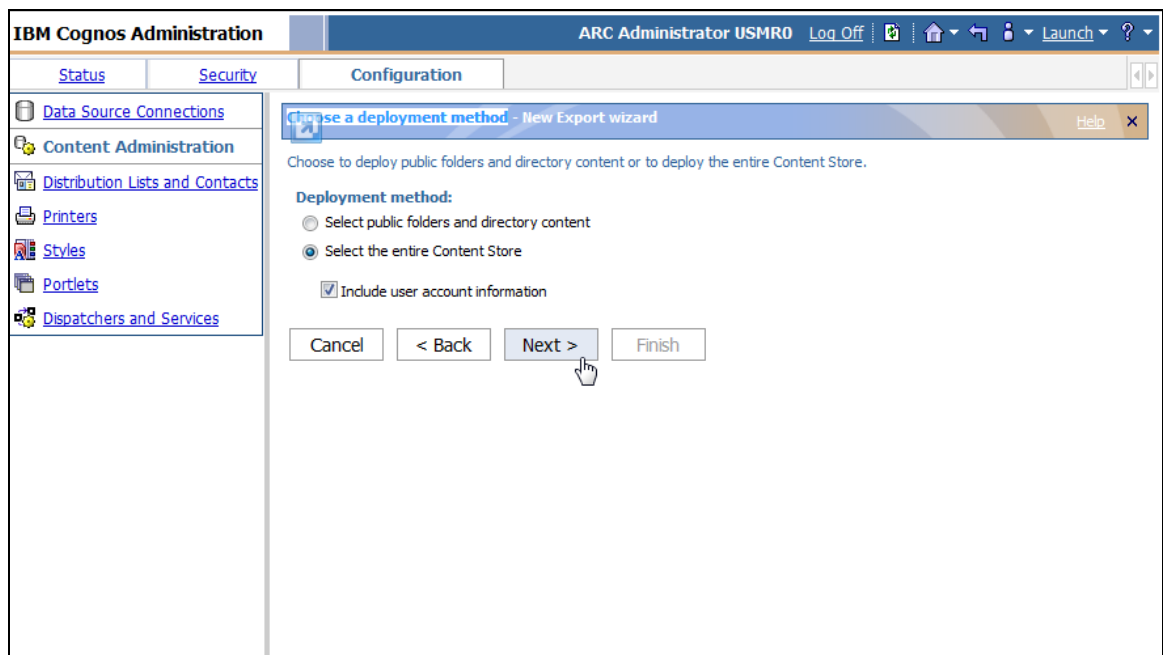
The following screen appears:



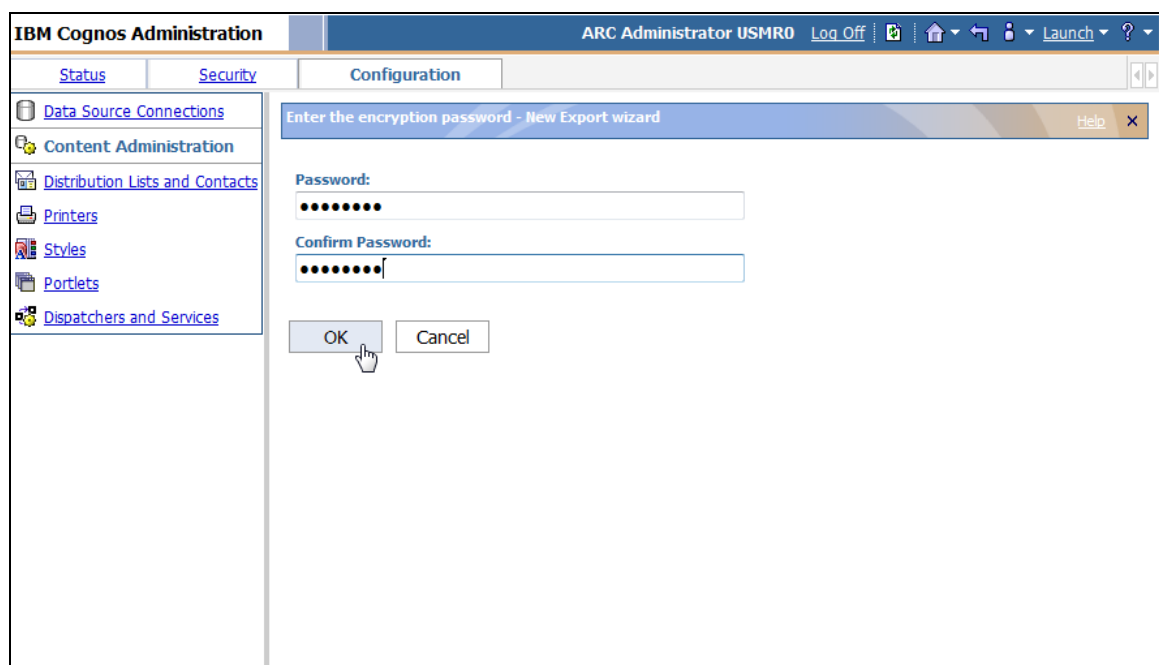
3. Click the **New Export** button . The following screen appears: “Specify a name and description - New Export wizard”



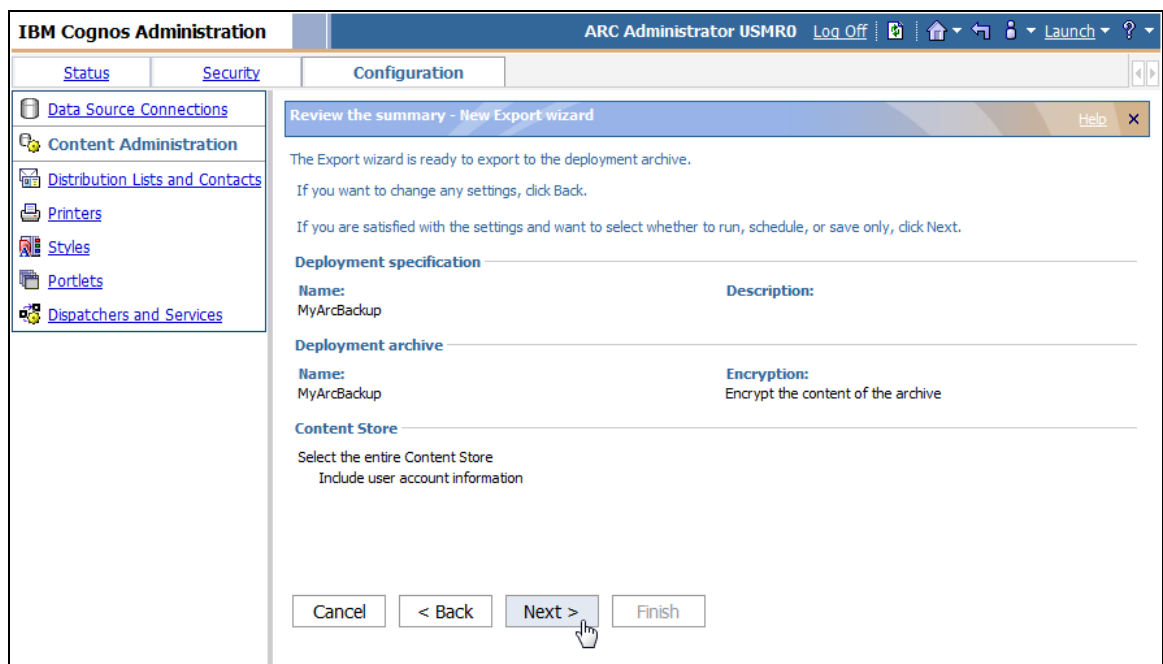
4. Enter a name for your backup and click **Next**. The following screen “Choose a deployment method” appears:



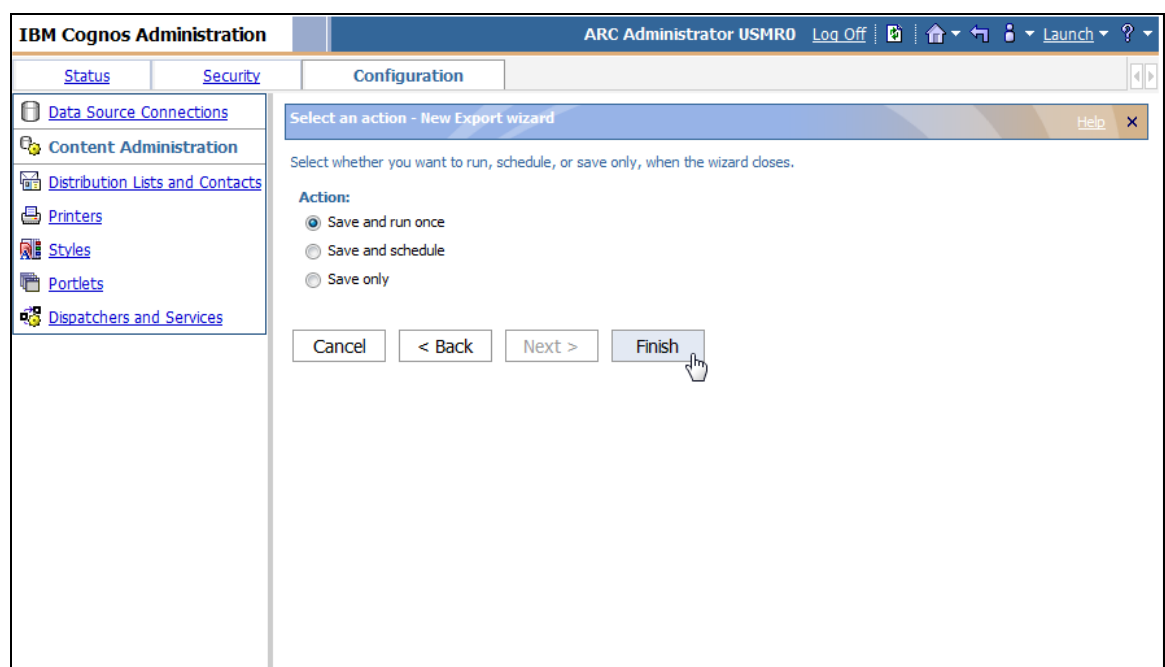
5. Select the **Select the entire Content Store** option and the **Include user account information** check box, and then click **Next**. The following screen appears:
6. Click **Next**. The following screen appears: Enter the encryption password



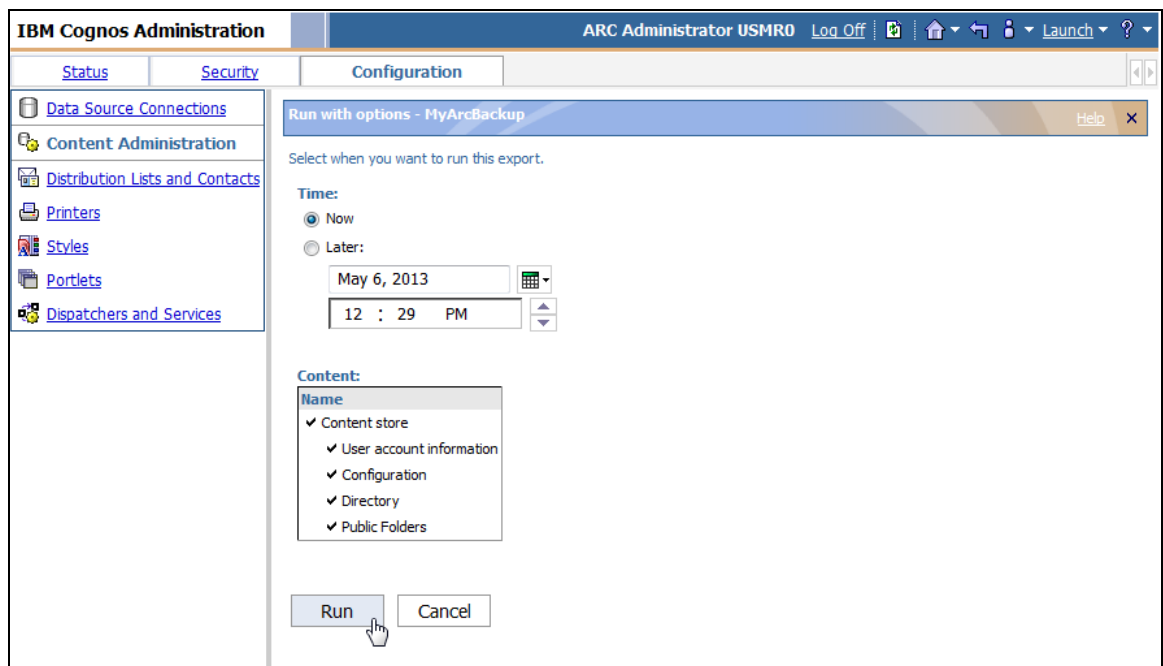
7. Enter a password for the export (the password must be at least 8 characters long) and click **OK**. The Export Summary report appears: Review the Summary.



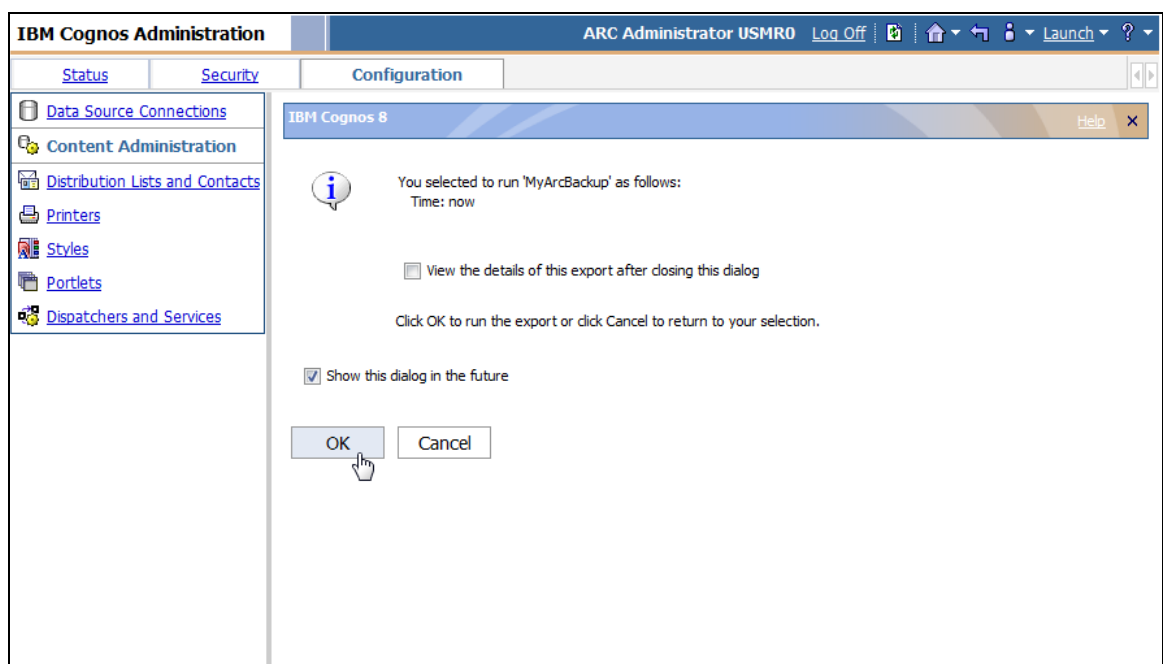
8. Click **Next**. The following screen appears:



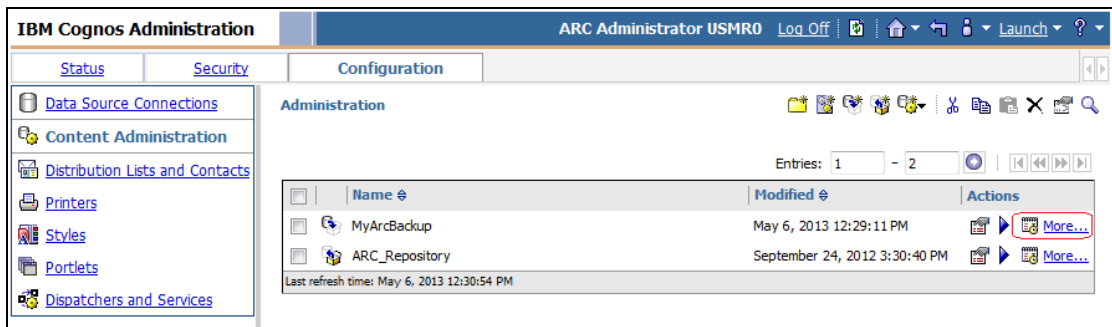
9. Click **Finish**, and the following screen appears:



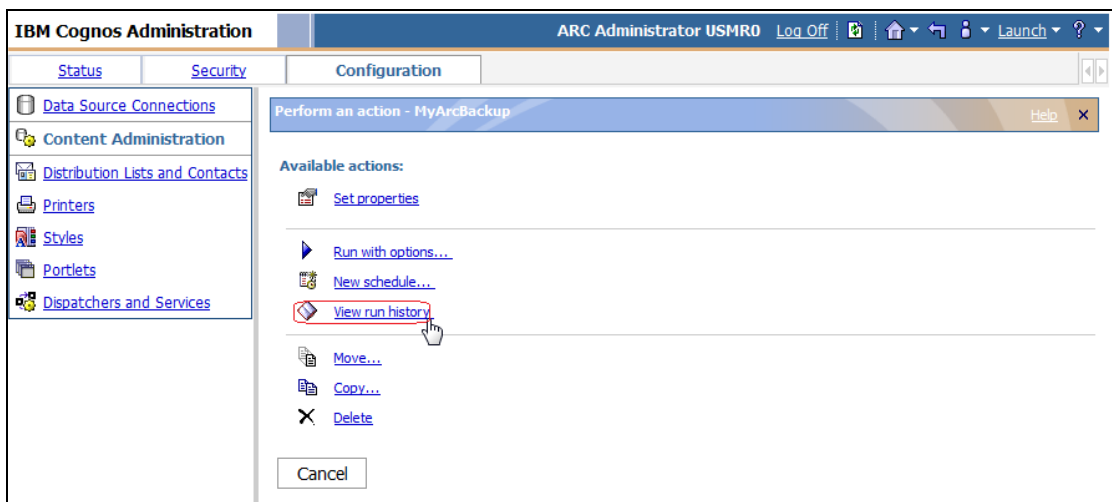
10. Click Run. The following screen appears:



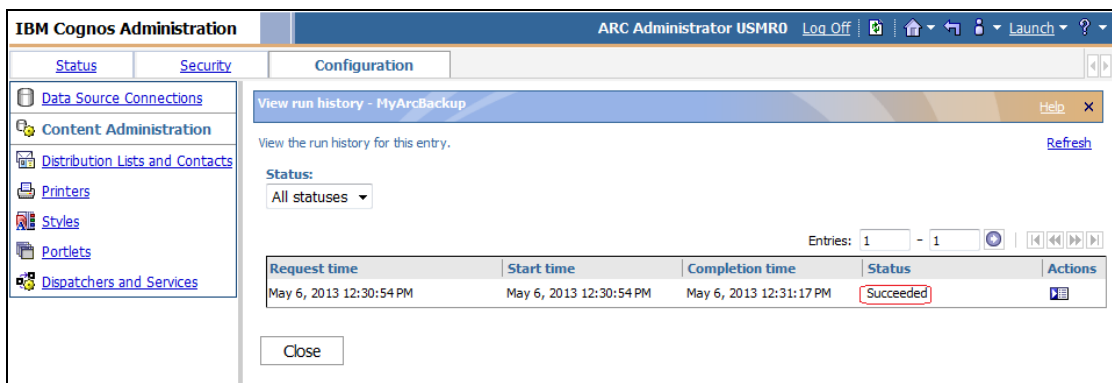
11. Click **OK**.



12. In order to check whether the backup completed successfully (the backup may take several minutes to complete), click "More ...". The following screen appears:



13. Click **View run history**. The following screen appears:



3 Service Pack Installation Utility

The Service Pack Utility (Util sp) is an interactive routine which provides a simple download of the latest service packs from the Ex Libris FTP server or from an office's FTP server to the customer's machine and installs it.

Util sp provides a menu-based interface in order to configure and run the original Ex Libris routine sp.install.

```
Utilities
=====
O. ORACLE management
SP. Download and install the latest ARC Service Pack
```

Through the util sp menus, you can configure parameters to download the latest available service pack, check this download, and receive an automatic e-mail confirmation after download.

Running the util_sp

In order to use the Service Pack management utility, log into the ARC application. Make sure to log into the appropriate slot.

Run:

```
>>dlib usmr0
>>util
>>sp
```

Note that at any step of the menu stage you can select "Exit" or press **ENTER** to return to the previous menu.

The Service Pack Utility contains 5 options:

```
SP. Service Pack Management
-----
0. Exit Procedure
1. Prepare/Update Environment
2. Download latest SP
3. Check SP download completing
4. Install SP
5. Run SP Utility (view implementation notes)
```

3.1 UTIL SP 1 - Prepare/Update Environment

```
SP.1.  Environment Setting
-----
0.    Exit Procedure

1.    Customer details
2.    FTP settings
3.    SP Download directory
4.    View Parameters
```

This step performs configuration and update of the parameters used in later steps. You will be asked to enter values or confirm the default ones. Make sure to receive in advance the relevant information from Ex Libris:

- FTP server name
- FTP user name
- FTP user password
- Your Ex Libris customer code
- Your mail address

These parameters are saved in case you want to use util_sp again at a later date.

```
SP installer configuration
-----
Enter new values or press <Enter> to keep existing

FTP server for SP download [il-inst02]:

FTP user for SP download [arc3_sp]:

If you want to insert new FTP password please type it now:
If you want to change the language please type it now [english]:
(This is an option for future usage)

Ex Libris customer code (country code + customer) [01DAN]:

Customer mail address for download status notifications (leave
empty for none) [name@company.com]

SP download directory [/exlibris/crn/arc3_1/arcm/scratch/sp]:

Configuration summary:
-----
FTP server:                il-inst02
FTP user:                  arc3_sp
FTP options:
Language:                  english
Service pack download dir: /exlibris/crn/arc3_1/arcm/scratch/sp
Customer code:             01DAN
Notification address:      name@company.com

Press <Enter> to continue
```

Note that after running Util Sp 1/1, the sp.config file is created under the \$sarce_root directory. This file should not be edited. If there is a need to modify the file, such as

when there is a need to define special FTP conditions, consult the Ex Libris Office before implementing the change.

3.1.1 UTIL SP 1.1 – Customer Details

This step configures the “Ex Libris customer code” parameter.

1. Enter the code received from Ex Libris.
2. Enter your e-mail to receive notification about the SP installation.

A summary of the details is displayed.

```
SP Customer details
-----
Enter new values or press <Enter> to keep existing

Ex Libris customer code (country code + customer) []:

Customer mail address for download status notifications (leave empty
for none) []

Configuration summary:
-----
Language:                english
Customer code:
Notification address:

Press <Enter> to continue
```

3.1.2 UTIL SP 1.2 – FTP settings

This step configures the FTP server for SP download.

You will have to enter FTP user, and - if needed - add special options (for example - if your local server is behind firewall).

After this - a summary of the details is displayed.

You are also asked to enter the FTP password.

```

SP FTP settings
-----
Enter new values or press <Enter> to keep existing

Select FTP server number for SP download:

1) USA/Asia Pacific      ftp.exlibris-usa.com
2) HQ/Middle east       ftp.exlibrisgroup.com
3) Europe                ftp.exl.de
4) internal HQ           il-ftp01
<Enter> to keep current (ftp.exlibris-usa.com)

FTP user for SP download [arc3_sp]:

FTP special options []:
*** for firewall connection problems try 'passive'
For details check the utility documentation

Configuration summary:
-----
FTP server:                ftp.exlibris-usa.com
FTP user:                  arc3_sp
FTP options:

If you want to insert new FTP password please type it now
Or press ENTER to keep current password

Press <Enter> to continue

```

3.1.3 UTIL SP 1.3 SP Download directory

In this step it is possible to configure the SP Download directory. Enter the path for SP download.

```

SP Download Directory
-----
Current SP Download directory is /exlibris/crn/arc3_2/arcm/scratch/sp
If you wish to change it enter the new path now
Press enter to keep current definition

Press <Enter> to continue

```

3.1.4 UTIL SP 1.4 – View Parameters

The following screen shows the current values of the util_sp parameters:

```

Configuration summary:
-----
FTP server:                il-inst02
FTP user:                  arc3_sp
FTP options:
Language:                  english
Service pack download dir: /exlibris/crn/arc3_1/arcm/scratch/sp
Customer code:             01DAN
Notification address:      name@company.com

Press <Enter> to continue

```

3.2 UTIL SP 2 - Download Latest SP

This step runs the download according to the parameters that have been defined in the previous step.

The latest available service pack will be downloaded.

You will receive an e-mail when the download is complete.

```
Dear Customer,  
The ARC Service Pack download has been successfully completed.  
Service Pack 9.  
il-aleph03 ARC 3 copy 1
```

you may continue with the SP installation steps

3.3 UTIL SP 3 - Check SP Download Completion

This step checks the integrity of the downloaded files. For example, in case of a download problem, you will be informed as follows:

```
SP Download status - failed  
Dear Customer,  
The ARC Service Pack download failed  
SeverName ARC 3 copy 1  
Please see ftp logs in /exlibris/crn/arc3_1/arcm/scratch/sp  
Error message is:  
ARC-3.00-ServicePackContent-1-9.xls ./sp.tar ./sp.install ./gnu_tar  
tar error extracting SP binary files
```

3.4 UTIL SP 4 - Install Service Pack

This step runs the Service Pack installation, using sp.install routine.
The latest service pack will be installed.

Before running this step, make sure that arc_shutdown has been performed and that Apache is down.

Note that when installing the service pack for the first time, the system might detect missing definitions.

3.5 UTIL SP 5 - Run SP Utility (View Implementation Notes)

This step runs the sp.utility routine which enables the following:

```
Welcome to ARC Service Pack utility.  
Your current Service Pack level is 9.  
  
0. Exit Procedure  
2. View Service Pack summary location (Excel format)  
3. View Service Pack summary (Plain format)  
4. View optional implementation notes  
5. View installation log  
  
9. Uninstall Service Pack 9  
  
Please select:
```


Although plain format and implementation notes reports can be viewed immediately, the report created for Excel cannot be viewed immediately. It is recommended to download it onto a PC via FTP.

Service Pack Summary (Excel Format)

This report contains a grid with the following columns:

- Change Number
- Short description
- Module
- Change type (Correction/Enhancement/Technical Change)
- SI number if available
- Implementation Notes

3.5.1 Service Pack Summary (Plain Format)

This report creates a text file which is very similar to the one created by the `rep_change view` command.

3.5.2 View Implementation Notes

As stated above, the implementation notes contain instructions for the actions required in order for some corrections to take effect. The report contains only those changes that actually have implementation notes.

The service pack utility also includes an Uninstall option (util sp 5/9). This option restores the system to its configuration prior to the installation of the Service Pack. After a service pack is uninstalled, the installation log is saved under `./service_pack` directory.

4 Installing the ARC Service Pack

The service Pack contains all the relevant files that have been changed; however, only the files needed to be upgraded from the current level to the Service Pack level will be installed.

Do not start the installation process before making sure that there is sufficient disk space available. Make sure that the free disk space is at least twice the size of the sp.tar file.

Depending on the system setup, the installation process may take a while.

To install the ARC Service Pack via the Util SP:

1. Run util_sp 1 to prepare the environment (see [UTIL SP 1 - Prepare/Update Environment](#)).
2. Download the service pack by running util_sp 2 (see [UTIL SP 2 - Download Latest SP](#)).
3. Check the integrity of the download files by running util_sp 3 (see [UTIL SP 3 - Check SP Download Completion](#)).
4. Run arc_shutdown with the following command in the server:
\$arce_root/arc_shutdown.
5. Make sure Apache is down.
6. Install the service pack by running util_sp 4 (see [UTIL SP 4 - Install Service Pack](#)).
7. Run arc_startup with the following command in the server:
\$arce_root/arc_startup.
8. Make sure Apache is up. If it is not, restart it.
9. Examine the reports (descriptions, implementation notes) by running util_sp 5 (see [UTIL SP 5 - Run SP Utility \(View Implementation Notes\)](#)).
10. Optional – Change the configuration files manually as instructed in the Implementation Notes.

Note that by default, files are backed up with a sp.NN extension where NN is the Service Pack level.

5 Service Pack Level

The service pack level indicates the number of fixes made since the version was made available. The service pack includes all these changes, but it only installs the fixes that are not in the current level.

The current Service Pack level is determined from the `$arc_m_proc/report_change.dat` file. Do not modify this file manually under any circumstances.

To view your current level, use the `ver` command from the command prompt. For example:

```
il-aleph03-arc3_1(USMR0)>ver
SUN_OS_2, il-aleph03, ARC 3 revision 00 copy 1, 04-May-2013
Oracle Version: 102
Service Pack   : 9
```

In the example, above the level is 9.

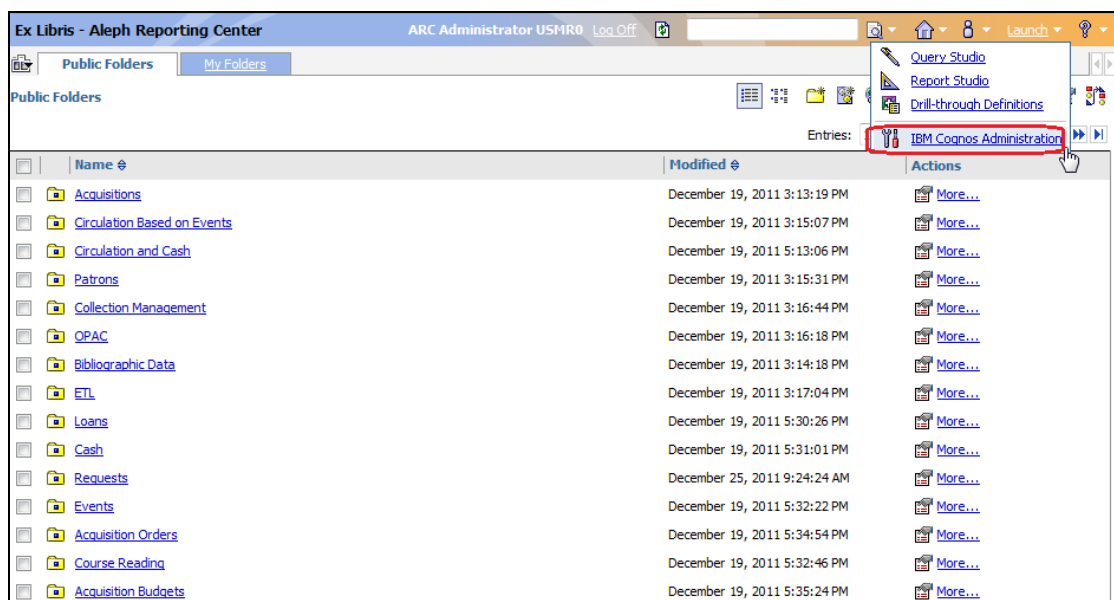
6 Updating the Content Store Post Installation

Steps

Note

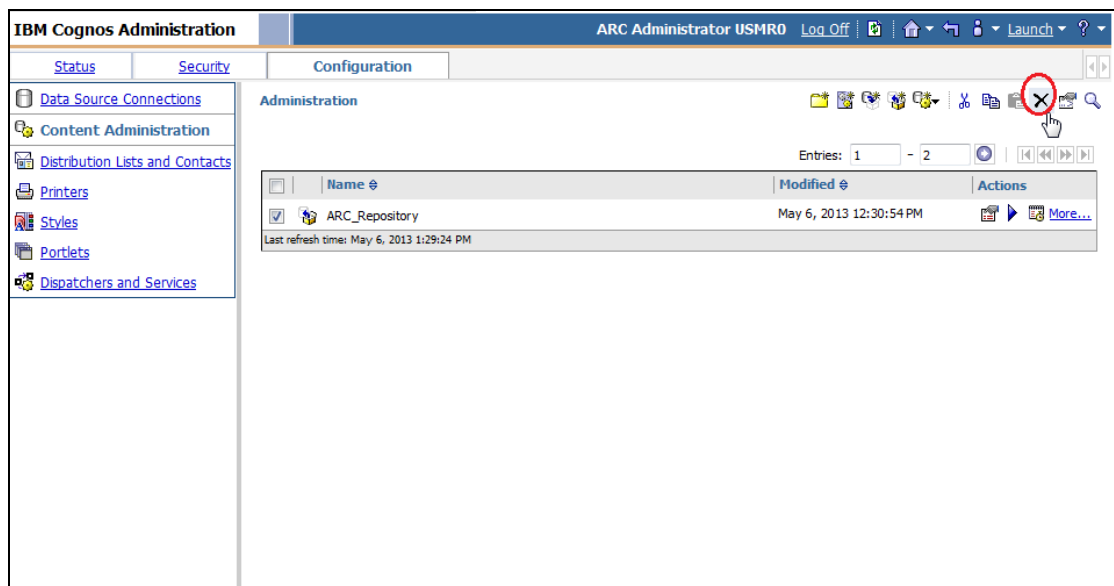
This update is done from a new content store provided by the SP and not from the content store backed up before installing the service pack.

1. Log in to the ARC portal as an administrator user.
2. In the home page, click **Launch / IBM Cognos Administration / Configuration / Content Administration** as shown below:

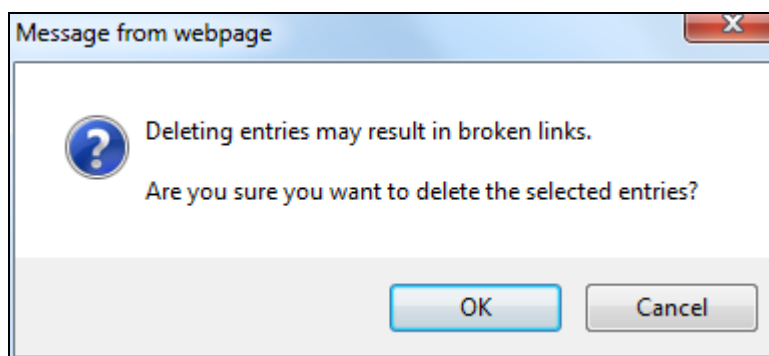


3. If the following screen appears, it means you have an ARC_Repository entry, and now is the time to delete it.

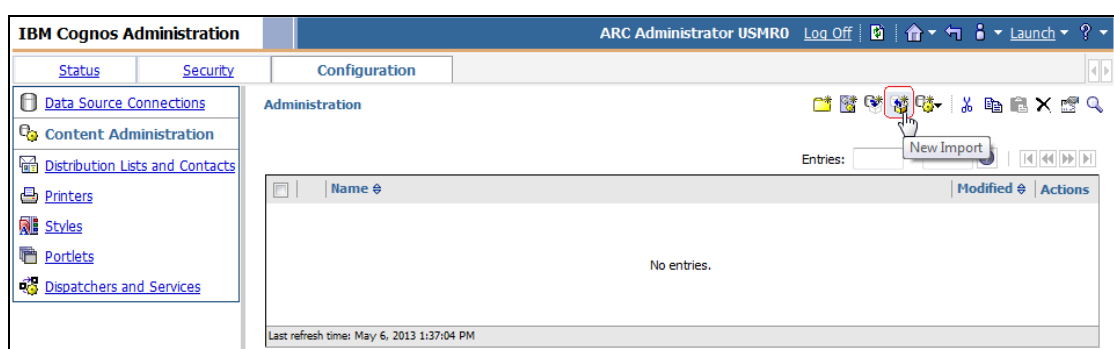
Note: The link displayed in the following screenshot (Administration > Import) is displayed if you defined an Import folder. If you did not, then the link displayed is Administration. So if the link displayed is different than the one in the screen shot, it does not indicate a problem.



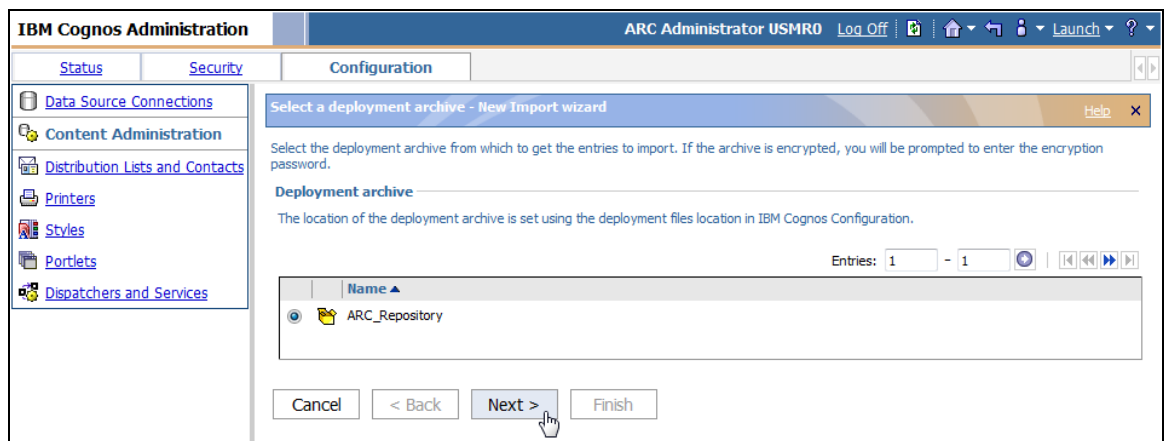
- Click **Delete**. The following window appears:



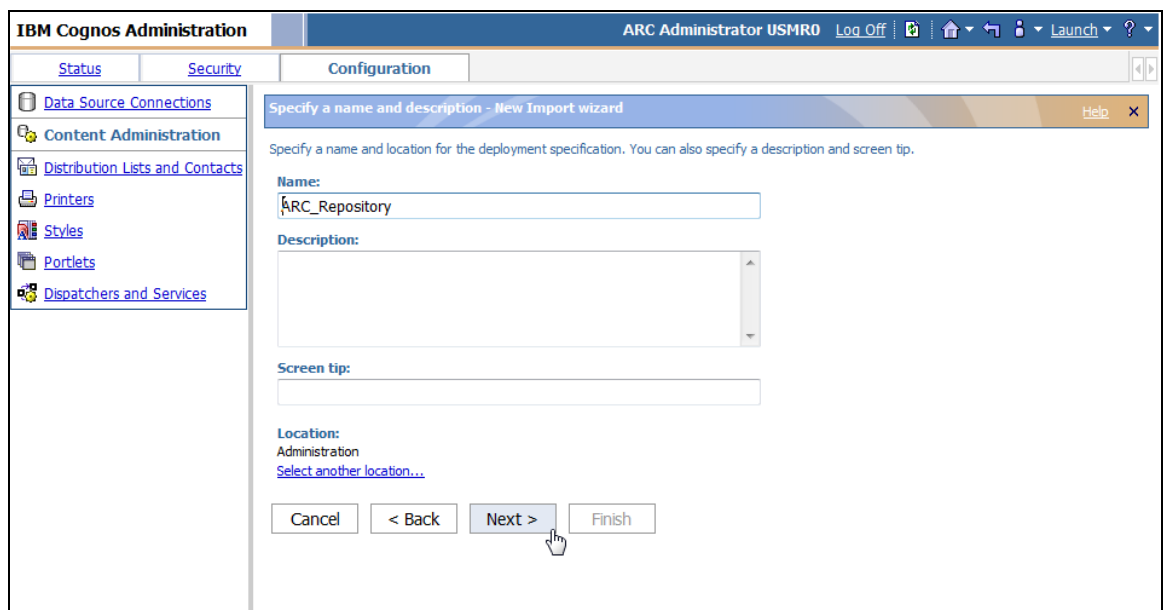
- Click **OK** and the following screen appears:



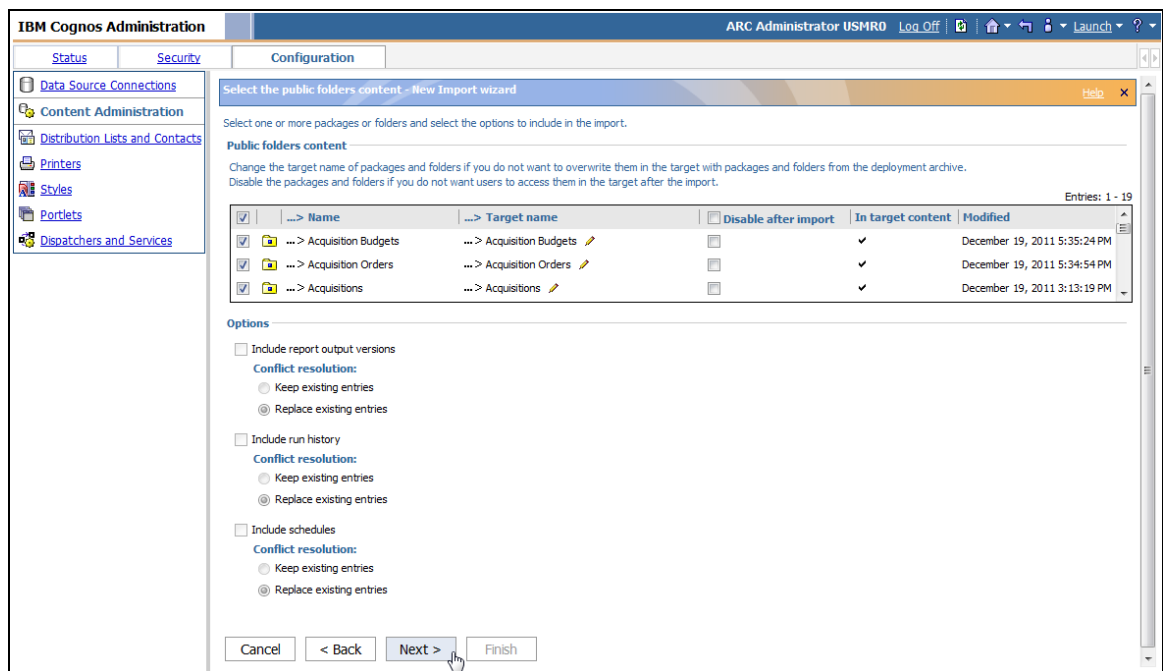
- Click **New Import**. The following screen appears: Select a deployment archive.



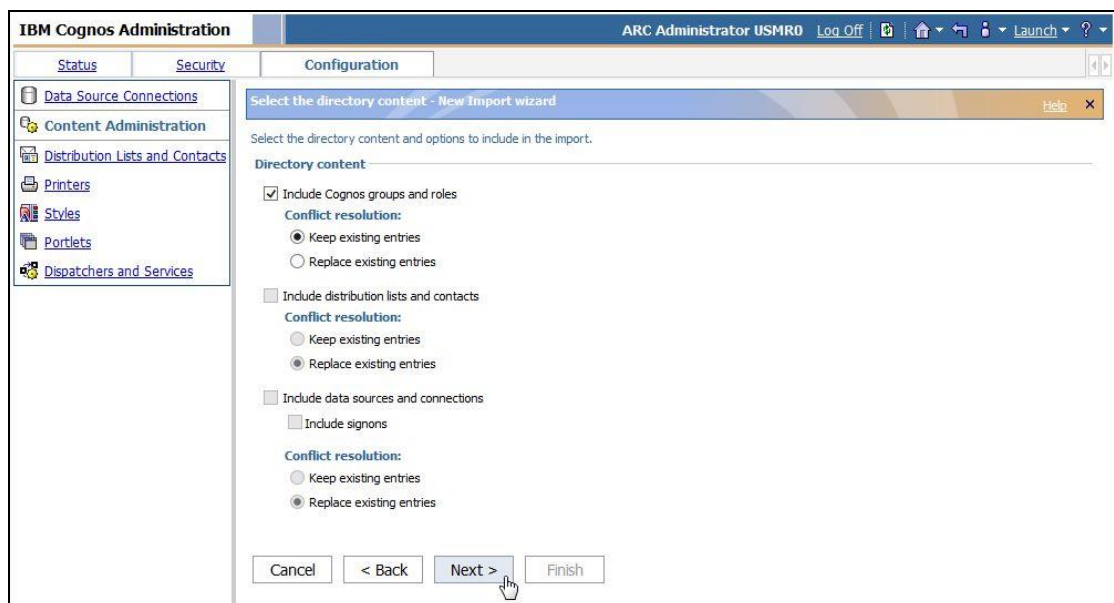
7. Click **Next**. The following screen appears: Specify a name and description.



8. Click **Next**. The following screen appears: Select the public folders content.



- Make sure all check-boxes are selected and then click Next. The following screen appears: Select the directory content.



- On the Include Cognos Groups and Roles screen, in the Conflict resolution section, select **Keep existing entries**.
- Click **Next**. The following screen appears: Specify the general options.

IBM Cognos Administration ARC Administrator USMR0 [Log Off](#) [Home](#) [Launch](#) [Help](#)

Configuration

Specify the general options - New Import wizard [Help](#) [X](#)

Specify the options applicable to all the entries in the import. You can also select the options applicable to the deployment record.

Access permissions

☒ Include access permissions

☐ Apply to new entries only

☒ Apply to new and existing entries

External namespaces

☐ Include references to external namespaces

☒ Do not include references to external namespaces

Entry ownership

Set the owner to:

☐ The owner from the source

☒ The user performing the import

Apply to:

☐ New entries only

☒ New and existing entries

Deployment record

Recording level:
Select the level of detail to save in the deployment record.

Basic

[Cancel](#) [< Back](#) [Next >](#) [Finish](#)

12. Click **Next**. The following screen appears: Review the summary.

Review the summary - New Import wizard [Help](#) [X](#)

The Import wizard is ready to import into the target environment.

If you want to change any settings, click [Back](#).

If you are satisfied with the settings and want to select whether to run, schedule, or save only, click [Next](#).

Deployment specification

Name: ARC_Repository **Description:**

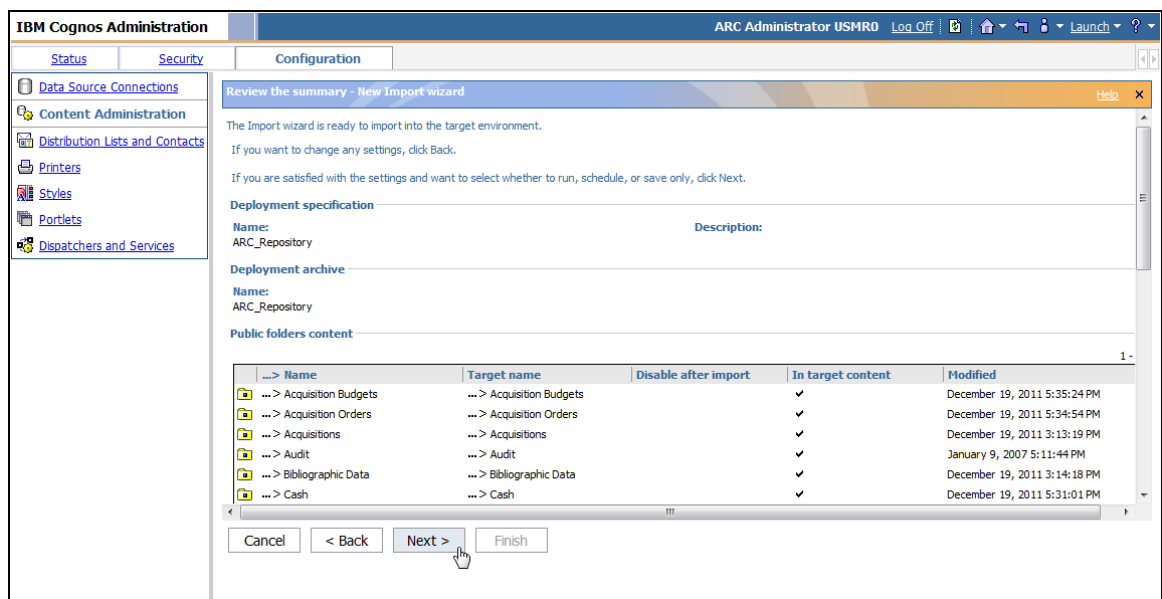
Deployment archive

Name: ARC_Repository

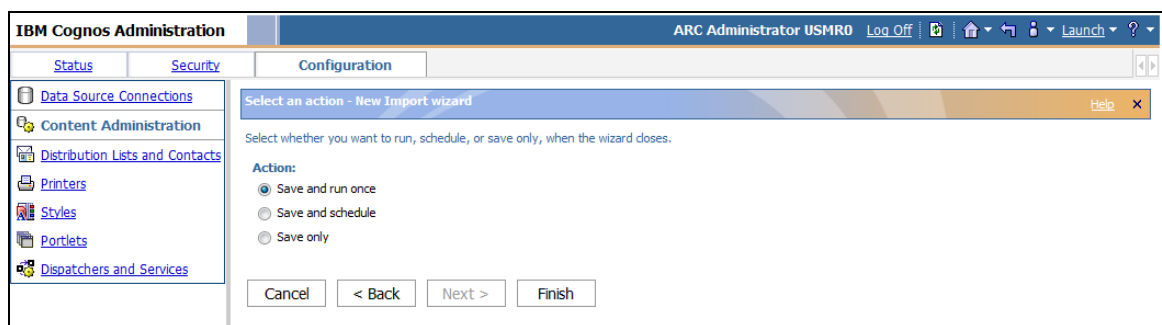
Public folders content

Name	Target name	Disable after import	In target content	Modified
Acquisitions	Acquisitions		✓	September 2, 2007 4:23:42 PM
Audit	Audit		✓	May 29, 2007 11:14:58 AM
Bibliographic Data	Bibliographic Data		✓	September 2, 2007 4:23:58 PM
Circulation and Cash	Circulation and Cash		✓	October 7, 2007 5:07:38 PM
Circulation Based on Events	Circulation Based on Events		✓	October 24, 2007 8:11:47 PM
Collection Management	Collection Management		✓	September 2, 2007 4:25:07 PM
Customized Reports	Customized Reports		✓	March 22, 2007 5:36:02 PM
ETL	ETL		✓	September 2, 2007 4:25:52 PM
OPAC	OPAC		✓	October 8, 2007 3:14:14 PM

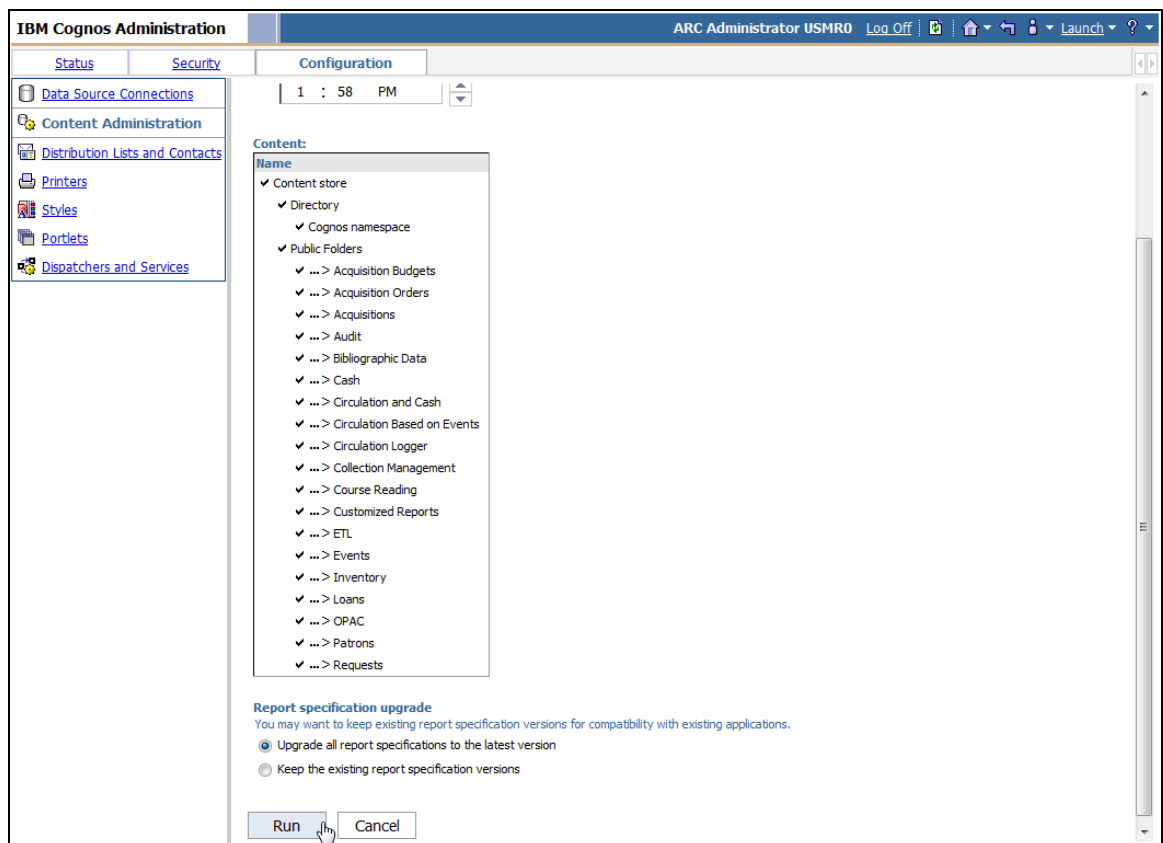
[Cancel](#) [< Back](#) [Next >](#) [Finish](#)



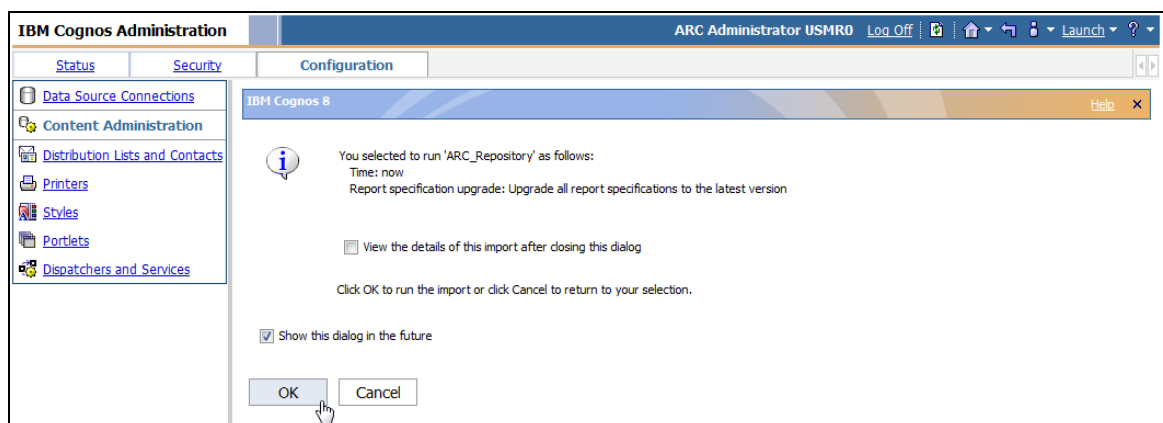
13. Click Next. The following screen appears: Select an action.



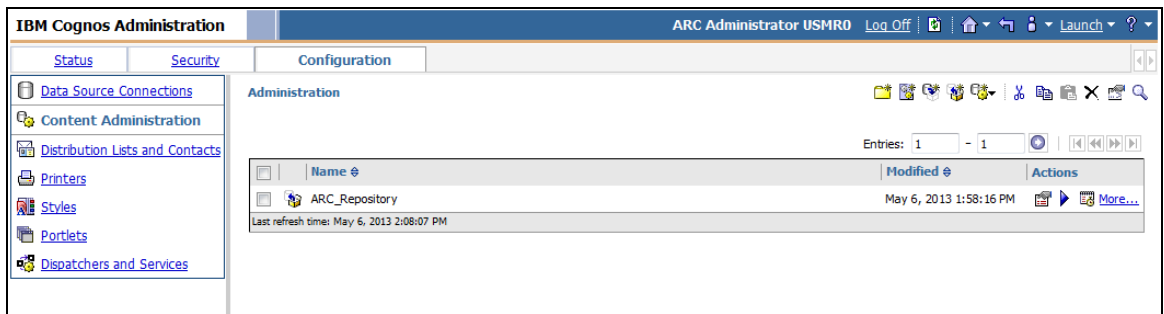
14. Click Finish. The following screen appears: Run with options.



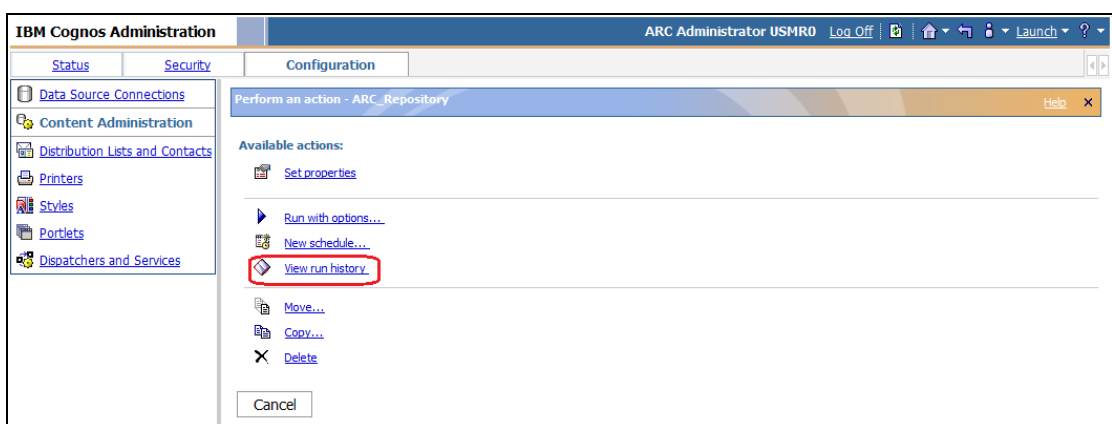
15. Make sure that the Upgrade all report specifications to the latest version radio button is selected, and then click Run. The following screen appears:



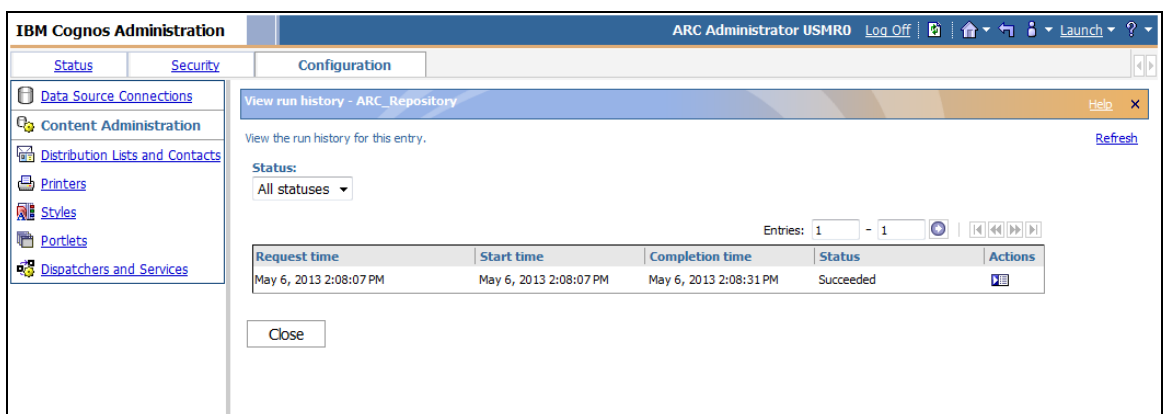
16. Click OK. The Import is started and the following screen appears:



17. In order to see the status of the import, click "**More...**". The following screen appears: Perform an action.

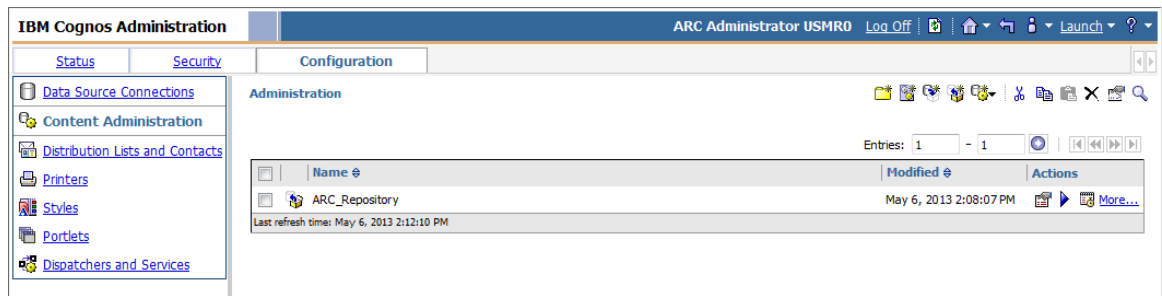


18. Click **View run history**. The following screen appears: View run history.

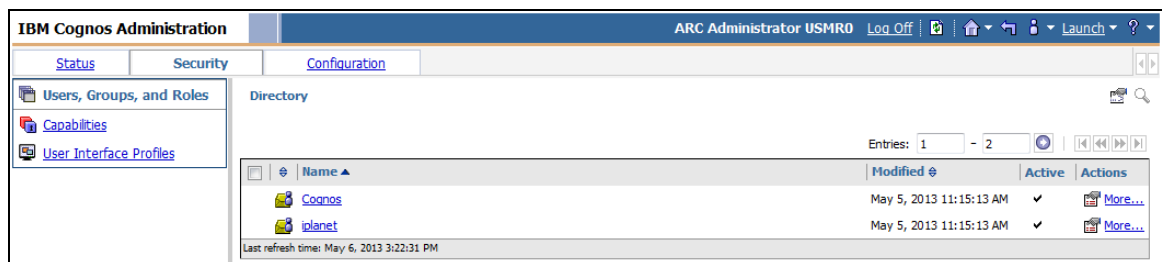


19. If the status is "Executing", click the Action icon in order to view the final status.

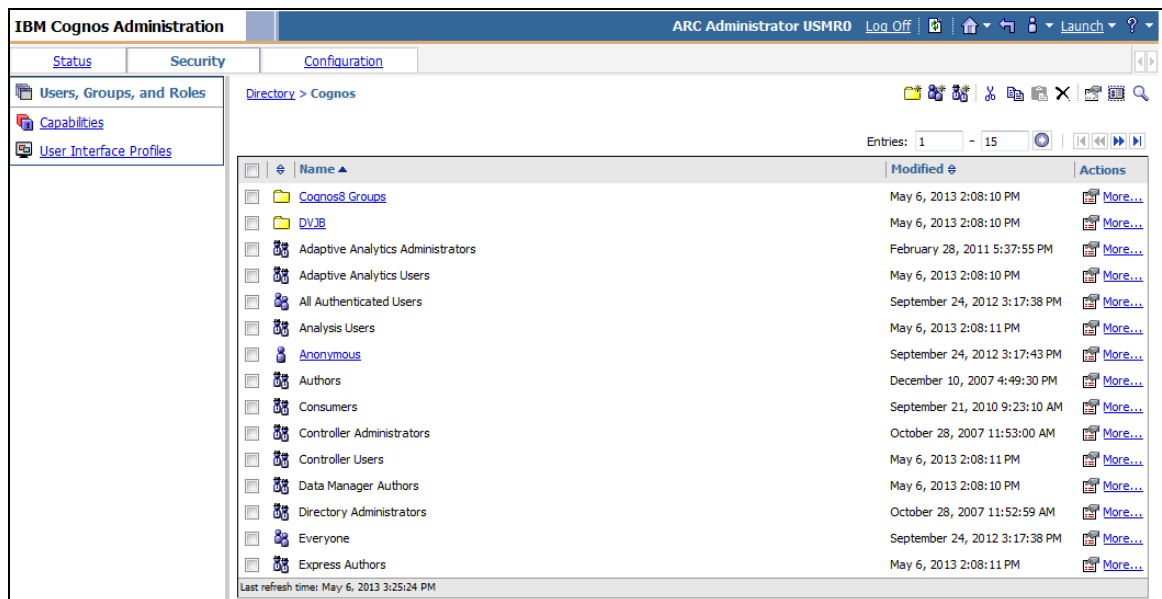
20. When the status is "Succeeded" click **Close**. The following screen appears:



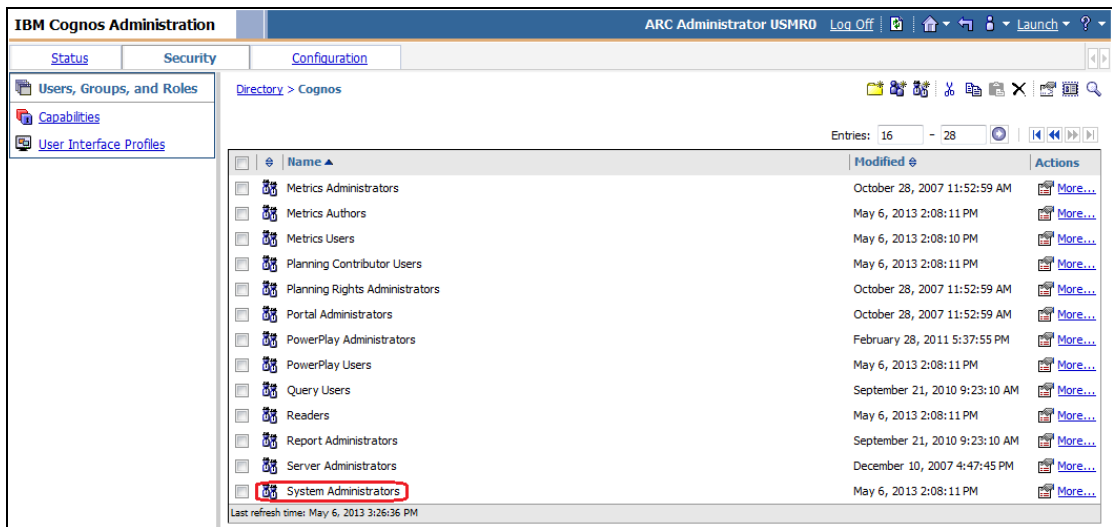
21. Click Security and then select Users, Groups, and Roles and Directory. The following screen appears:




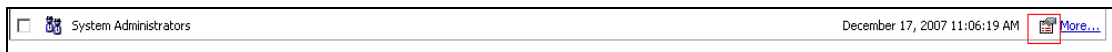
22. Click **Cognos**. The following screen appears:



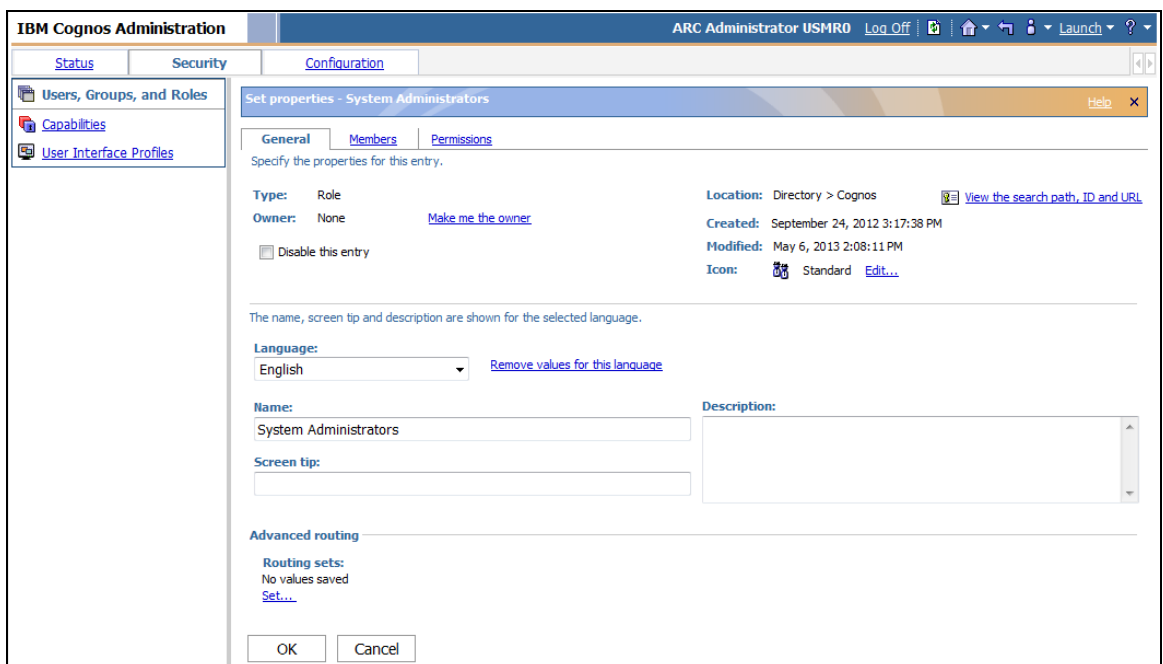
23. Click the Arrow icon on the upper right side of screen until the following screen appears:



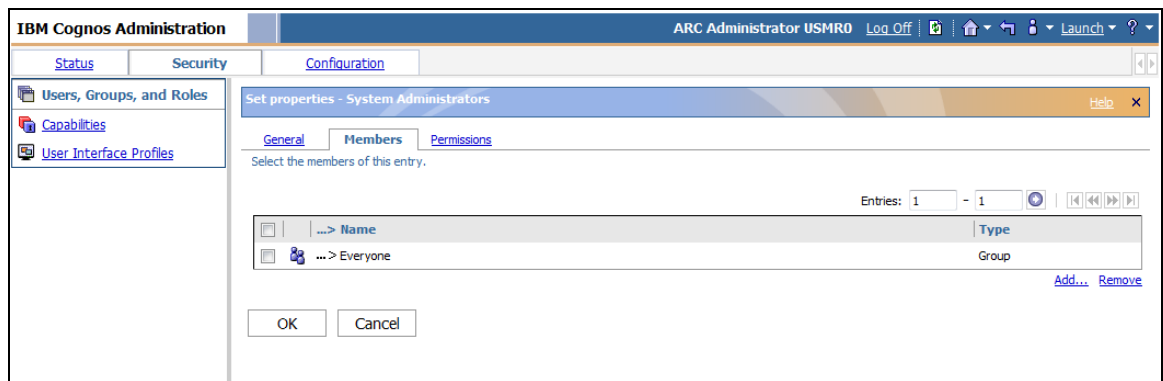
24. Click the Set Properties icon  to the right of the **System Administrators** entry:



The following screen appears:



25. Click the Members tab. The following screen appears:



26. If below the ARC Administrators entry, there is an entry called Everyone, select the check box next to that entry and click **Remove** in the lower right side of the screen:

