



OpenOPAC Upgrade Guide

Version 6.1

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WELCOME

Welcome to the *OpenOPAC 6.1* Upgrade Guide.

Details on installing other components (such as the *Amlib Client* and SIP2) are available in separate Installation Guides.

OVERVIEW

The upgrade of the *OpenOPAC* involves the following steps:

Upgrading of the 4 required components and services

- 1. OCLC Amlib Backend Setup
- 2. OCLC Backend Search Setup
- 3. OCLC Frontend Setup
- 4. OCLC CentralFrontend Setup

NOTE: Before commencing this UPGRADE please ensure no browsers or connections to OpenOPAC are open.

BEFORE YOU BEGIN THE INSTALLATION...

Before upgrading **OpenOPAC** you **must have** upgraded to or installed **Amlib 6.1** on your server. These instructions are for sites who have OpenOPAC previously installed

Read the Installation Notes First

Please carefully read the entire upgrade guide prior to commencing the actual *OpenOPAC* release upgrade.

If you have any questions please log a support call on TOPdesk <u>https://servicedesk.oclc.org/tas/public/index.jsp</u>.

If you do not know your TOPdesk login please email <u>support-anz@oclc.org</u> and we will send it to you.

OPEN SUPPORTED OPERATING SYSTEMS & SYSTEM REQUIREMENTS

Operating System	 Windows Server 2003, 2008, 2012 Windows 7
.Net Framework	• 4.0 or later including Web Server (IIS) Support and HTTP Activation
IIS	6.0 or later with ASP.net support installed
Java runtime	• 6.0 or later
Memory (RAM)	Minimum 4GB
Hard Disk	 Minimum 40GB depending on the size of the catalogue (Only applies to Solr search server)
Browser	 IE 7 or higher Chrome, Firefox, Opera Safari 5.1.7 or higher
JavaScript	Must be activated
Cookies	 Must be activated Automatic mobile device detection does not work without cookies. When cookies are disabled, the site can't store culture information [For example, the language that is selected, and the date settings] and the login information is stored in a way that is considered to be unsafe.

PRE REQUISITES

This Upgrade is for those sites which <u>previously have installed the full version of the OpenOPAC</u> and are updating the components to the newest Version.

The Upgrade process should detect the previous Installation of OpenOPAC. If a serial key is requested, it has not detected your previous version of OpenOPAC. If this happens, please contact Amlib Support via Topdesk <u>https://servicedesk.oclc.org/tas/public/index.jsp</u> before continuing.

As these instructions are for an Upgrade, it is assumed **.NET Framework Full version 4.0 or later and Java runtime version 6.0 or later** are already installed.

IIS with **ASP.NET** support must also be installed. For information on how to complete this please see <u>the</u> <u>Full Installation instructions</u> for *OpenOPAC*.

Note: OpenOPAC can be installed on the Amlib server, NetOpac server or a separate server depending whether it's to be for internal use or external use.

INSTALLATION OF THE OPENOPAC UPGRADE

<u>OpenOPAC v6.1 software installers</u> are available on-line to download from our OCLC website from the Amlib Customer Support Centre by using your login. If you need assistance with your login for this site or do not know your login please Log a call on Topdesk or contact: <u>support-anz@oclc.org</u>

<u>Select OpenOPAC > Set-up Programs</u>

Save and install the following components:

- SetupOpenBackend.exe
- SetupOpenCentralFrontend.exe
- Setup OpenFronend.exe
- SetupOpenSearch.exe

PLEASE Install the services in the order set out in guide for a smooth upgrade.

Documentation outlining the many new features for OpenOPAC are in the Version 6.1 Release Notes



Install OCLC Amlib Backend

- 1. Run the installer <u>SetupOpenBackend.exe</u>
- 2. The OCLC Amlib Backend Setup Wizard window and Welcome message will display



- 3. Click Next to continue
- 4. The Ready to Install OCLC Amlib Backend window will display



- 5. Click Install
- 6. The installation will run until it is complete
- 7. The Completed OCLC Amlib Backend Setup Wizard window will display when complete



- 8. Click Finish to exit the Backend Setup Wizard
- 9. The configuration manager will automatically open, but as this is an upgrade and the database you are connecting will be the same

lib Configuratio	on Manager					
Configuration File	ot\OCLC Amlib Backe	end\BackendS	Gervice\bin\\App_Data\	AmlibConfig xml	New Op	en
Prefix	Description	VDX Email	Debt Collection Service	SIP2 Server OP	EN New	
AM	Live				Edit	
TE TE6	Test Amlib 6.1				Delete	
					Test	
				[Help	Exit

10. - Select > **EXIT**

Continue and install the next component: OCLC Central Frontend

Install OCLC Open CentralFrontend

- 1. Run installer <u>SetupOpenCentral.exe</u>
- 2. The OCLC Open CentralFrontend Setup Wizard window and Welcome message will display
- 3. Select Next



4. The Ready to install OCLC Open Frontend window will display



- 5. Select Install
- 6. The installation will run until it is complete

🗒 OCLC Open CentralFrontend Setup	- • ×
Installing OCLC Open CentralFrontend	Ð
Please wait while the Setup Wizard installs OCLC Open CentralFrontend.	
Status:	
BadkNext	Cancel

6. The <u>Completed OCLC Open Central Frontend Setup wizard</u> window will display when completed



7. Select Finish

8. The browser will open with the central Frontend but as this is an upgrade > select **save** and **close** this browser

First steps Service	25 Connections Soir Logging Parameters Initial Upload					
After installing:	 Update the Amlibconfig.xml file as per the installation instructions. Use the AmlibConfiguration Manager for this. The Amlibconfig. file is found at: Onetpublywwwrodt/DCIC Amlib Backend/Backend Backendendendendendendendendendendendendende					
	2. Start the Central Protein Service (1) is a service). From the TAB "Forwises", from the TAB "Connectional" check all Web Service addresses and the connectional shortext has from the TAB "Services", from the TAB "Central service and the connectional shortext has the Service address and the service address a					
	 Make sure you can start OPEN to ensure the Connections are correct and the Service is working. The default address is: http://OpenOpac.8893/Frontend/Main.appx. The search will not return any items because the Solr database does not contain the cataloanees as wet. The auton accourt we whould work. 					
	4. From this Main page 16 possible to set the Marc Tag parameters before doing the Initial load to ensure the Data will come accurate section of the Initial based to ensure the Data will come accurate to Utername: Administrator and Password 1334). Go to the TAB "Configuration and select TAB "Marc Telds". There are some default Marc Tags set already but these can be checked and additional Marc Tags and Subfelds can be specified as required. Select SAVE.					
	 Navigate back to http://OpenOpac:8981/CentralFrontend/Default.aspx to complete the initial load of all the Catalogue and associa Stockitem records. 					
	6. From the TAB "Initial Upload" try one Catalogue/Tem upload find: Entre a valid Cat BeTK for more of your Catalogue, records not the TRE of the Upload Detains (Table Table Tab					
	7. Congratulations: you have finished the installation of OPEN!					
	 If you decide to use SSL transport security, you have to create the relevant binding (for example Https) in IIS and connect a valid certificate with the binding. Client certificates are not necessary. 					
frontend.	Saving these settings will automatically reset all cached values. This is necessary in order to update all changes to the web services and					

Install OCLC Open Frontend

- 1. Run installer <u>SetupOpenFrontend.exe</u>
- 2. The OCLC Amlib Open Frontend Setup window and Welcome message will display



3. Select Next

4. The Ready to install OCLC Open Frontend window will display



5. Select Install

6. The installation will run until it is complete

🛃 OCLC Open Frontend Setup	- • •
Installing OCLC Open Frontend	
Please wait while the Setup Wizard installs OCLC Open Frontend.	
Status: Removing files	
	Cancel
<u>B</u> ack <u>N</u> ext	Cancel

6. The <u>Completed OCLC Open Frontend Setup wizard</u> window will display when completed



- 7. Select Finish
- # Continue and install the Last component: OCLC Open Search

Install OCLC Open Search

- 1. Run installer <u>SetupOpenSearch.exe</u>
- 2. The OCLC Amlib Open Search Setup window and Welcome message will display
- 3. Select Next



The Ready to Install OCLC Open Search window will display



- 6. Select Install
- 7. The installation will run until it is complete



8. The Completed Search Setup window will display when completed



9. Select Finish to exit the Open Search Setup Wizard



10. A popup- may appear – YOU MUST RESTART YOUR SERVER/SYSTEM



11. Select YES and restart your server

The Upgrade is complete. It should be possible to continue to use the OpenOPAC.

The Version Number can be checked from the *OpenOPAC* window from Help. The Version Number will appear at the base of the Window.



You are currently running version 8.0.5507.36525 from 29/01/2015 3:17:31 PM

Note: The *OpenOPAC* Version are different to the Amlib Client Versions and the most recent OpenOPAC Version should be from 16/01/2015 as shown above.

SECTION 3: TROUBLESHOOTING

What services do I need to check if none of the pages from OpenOPAC can be accessed?

- There are 2 potentials areas that may need attention:
- **Tomcat**: This is most likely the issue. A better assumption can be made by inspecting the error being received.
- **IIS:** There may be an issue with IIS or its configuration. This is less likely and once again troubleshooting will depend on the error received.

Where are the services that I need to check when OpenOPAC is not working correctly?

- There are five services that are application pools that can be accessed through IIS manager. These are:
 - Apache Tomcat
 - OCLC_Amlib_Backend
 - OCLC_Open_CentralFrontend
 - OCLC_Open_Frontend
 - OCLC_Open_Search

How do I restart Tomcat if this stops working?

• Find the Apache Tomcat Service inside Windows Services and restart it.

If while installing you get the pop-up message below:

 OpenOPAC is open on a browser somewhere > close all browsers with OpenOPAC open on them > then continue with upgrade

OCLC Open Search	×
The following applications should be closed before continuing th install:	1e
Apache Tomcat 7.0 Tomcat7	
 Automatically close applications and attempt to restart them a setup is complete. 	after
Do not close applications. (A Reboot may be required.) OK Cancel	

How do I restart the central front-end services?

• This can be done by restarting IIS or recycling the application pools through IIS manager

How do I restart Central services?

• This can be done by restarting IIS or recycling the application pools through IIS manager

When do I need to use the SAVE function?

• As part of the initial configuration and when you have made Supervisor/ Parameter changes in the Amlib client, so the changes will be sent and updated to OpenOPAC

I cannot complete 'Upload all Catalogues' when doing the Initial Load, because it stops or an error message displays before it fully completes ...

• There could be an issue with your tables or indexes in the database, please log a support call on TOPdesk and attach a screen shot of the error message. If you do not know your TOPdesk login please email support-anz@oclc.org and we will send it to you

Have I installed all four Services?

 To check if you are unsure you have done all of them, before proceeding > go to C:\inetpub\wwwroot\ in this folder you will see 4 folders with the following names: Backend Services ; Open Search Services; Open Frontend Services; Open CentralFrontend Services

How do I check if a catalogue update/change has occurred in OPEN ?

- Go to Main > Supervisor > Supervisor > Library Menu > OpenTransactions you can see what has been updated and is waiting to be transferred across to Open.
- Highlight the record in question: you can either select F4 Delete to delete an update or select F5Query to check whether it's been updated yet. If it has, it will disappear from this table, when you select F5Query. If you select F8Cat you will see what Catalogue record has been updated or is awaiting update in Open.

How do I ensure parameter changes I make in Amlib are transferred to OpenOPAC [such as supervisor or loan parameter settings]?

 Go to the Open Central Fontend Gui <u>http://openopac:8981/CentralFrontend/Default.aspx</u> and select > First Steps tab > select SAVE

How do I check Security issues when I get this error: Content from the Website listed below is being blocked by IE enhanced Security Configuration when I go to Central Frontend

http://openopac:8981/CentralFrontend/Default.aspx



Depending on the Browser currently used, it should be possible to make the OpenOpac Central Frontend a trusted site. For example, in Internet Explorer, select **Internet options** from the <u>Tools menu</u>.

	₼ ☆	•
Print		•
File		•
Zoom (100%)		•
Safety		•
View downloads	Ctrl+J	1
Manage add-ons		
F12 developer tools		
Go to pinned sites		
Internet options		
About Internet Explor	er	_

Select the Trusted sites button from under the Security tab.

Nect a zor	te to view or change security settings.	
() Interne		Restricted
The second secon	rusted sites is zone contains websites that you ust not to damage your computer or air files, un have websites in this zone.	Stes
Security I	evel for this zone	
Allowed	levels for this zone: All	
	Medium - Prompts before downloading pot- content	entually unsafe

Add http://openopac as a trusted site select ADD and APPLY

rusted sites	×
You can add and remove websites from this zone. All this zone will use the zone's security settings.	websites in
Add this website to the zone:	
http://openopac	Add
Websites:	
http://*.update.microsoft.com	emove.
http://*.windowsupdate.com	
http://*.windowsupdate.microsoft.com	
Keter // Ander aller a	
Require server verification (https:) for all sites in this zone	
	Close

APPENDIX A: LANGUAGE AND DATE CONTROL OF BROWSERS VIA IIS SETTINGS]

To control the language setting of all your browsers used for *OpenOPAC*, it is possible to change two settings in IIS [Internet Information Services manager]. This will ensure that the flag in the top right hand corner of your browser when you access the OpenOpac will always be the Australian flag.

2	HOME SEARCH THE CATALOGUE		MY AC			HELP HOW TO USE THIS SITE	
	RECENT ACTIVITY (0)	PRINT - SAVE	NEW IN LIBRARY	CART (0) - LISTS (0) -	QUERIES (0)		
Query							
Enter your search query						Q Search Catalogue	Advanced Search

- 1. Open IIS7
- 2. Highlight OpenOpacGui in your Sites folder on the left
- 3. Double click Net.Globalisation icon from the ASP.Net section of OpenOpacGui Home



- 4. The .NET Globalization window will display
- 5. Use the drop-down menu for **Culture**

.NET Globalization		
Display: Friendly Names -		
Culture		
Culture	English (Australia) (en-AU)	•
Enable Client Based Culture	Dutch (nl)	*
UI Culture	English (Australia) (en-AU)	
D. F. P.	Facility (Defact) (an DZ)	

- 6. Select English (Australia) (en-AU) from the list
- 7. Use the drop-down menu for UI Culture
- 8. Select English (Australia) (en-AU) from the list
- 9. Once both are configured, select Apply from the Actions section in the right hand section



APPENDIX B: FORCING COMPATIBILITY MODE IN IIS7

If OpenOPAC is opening in Compatibility Mode when using Internet Explorer it can be **turned off** via IIS. This is recommended if external users are accessing the website and having Compatibility Mode issues.

IIS 7 and IE 7 -9

- 1. Open IIS [Internet information Service Manager]
- 2. Highlight OpenOPACGui
- 3. Select HTTP Response Headers from under OpenOPACGui home page

🅘 OpenOpacGui Hom	e			
Filter: • 🔐 Go 🗸	Show All Group by: Area	• 10 •		
ASP.NET				
.NET Authorization Rules	.NET Compilation	.NET Error Pages	.NET Globalization	.NET Profile
.NET Trust Levels	Application Settings	Connection Strings	Machine Key	Pages and Controls
Session State	SMTP E-mail			
IIS				
ASP ASP	Authentication	CGI CGI	Compression	Default Document
Directory Browsing	Aut Error Pages	📰 Handler Mappings	HTTP Response Headers	us ISAPI Filters
Logging	MIME Types	Modules	Output Caching	Request Filtering
SSL Settings				

4. Select Add on right -top hand side

HTTP Response Headers			Actions Add	
Use this feature to confi	gure HTTP headers that a	are added to responses fr	rom the Web server.	Set Common Headers
Group by: No Grouping	•			Help
Name A	Value	Entry Type		Online Help
HeaderName	HeaderValue	Inherited		
HeaderName22	HeaderValue22	Inherited		
HeaderNameTesting	HeaderValueTesting	Inherited		
P3P	policyRef=http//co	Inherited		
X-Powered-By	ASP.NET	Inherited		
X-UA-Compatible	IE=Edge	Inherited		

5. A pop-up box labelled Add Customer HTTP Response Header will appear

Name:		
X-UA-Compatible		
Value:		
IE=8		
	OK	Cancal

G this

- 6. Type in X-UA-Compatible In the Name field
- 7. Type in IE=8 Value field
- 8. Then select OK
- 9. This will cause **IIS** to open in Internet Explorer to display OpenOPAC as if it was Internet on Explorer 8.

IIS 7 and IE 10 -11

- 1. Open IIS [Internet information Service Manager]
- 2. Highlight OpenOPACGui
- 3. Select HTTP Response Headers from under OpenOPACGui home page

OpenOpacGui Ho	ome			
Filter: 👻 👬 G	io 🗸 🙀 Show All Group by: 🛛 Area	•		
ASP.NET				
.NET Authorization Rules	.NET Compilation	.NET Error Pages	.NET Globalization	.NET Profile
NET Trust Levels	Application Settings	Connection Strings	Machine Key	Pages and Controls
Session State	SMTP E-mail			
ASP	Authentication	CGI CGI	Compression	Default Document
Directory Browsing	Act Error Pages	Handler Mappings	HTTP Response Headers	5 ISAPI Filters
Logging	MIME Types	Modules	Output Caching	Request Filtering
SSL Settings				

4. Select Add on right -top hand side

HTTP Response Headers		Actions Add		
Use this feature to confi	gure HTTP headers that a	are added to responses fi	rom the Web server.	on neaders
Group by: No Grouping	, .			🕐 Help
Name 🔺	Value	Entry Type		Online Help
HeaderName	HeaderValue	Inherited		
HeaderName22	HeaderValue22	Inherited		
HeaderNameTesting	HeaderValueTesting	Inherited		
P3P	policyRef=http//co	Inherited		
X-Powered-By	ASP.NET	Inherited		
X-UA-Compatible	IE=Edge	Inherited		

5. A pop-up box labelled Add Customer HTTP Response Header will appear

Edit Custom HTTP	Response Header	8 23
Name:		
X-UA-Compati	ble	
Value:		
IE=Edge		
	ОК	Cancel

- 6. Type in X-UA-Compatible In the Name field
- 7. Type in IE=EDGE Value field
- 8. Then select OK
- 9. This will cause **IIS** to open in Internet Explorer to display OpenOPAC with compatibility mode turned off [Warning **Edge** is sometimes unstable and is considered the setting for non-production sites, if you have any issues using this setting, then try IE=8 as the value instead]