Instruction Sets

CURRENT	NEW	Instruction Set
1.2.3 through 2.0.0	latest 2.1	upgrade to latest 2.1

Overview

This repository contains scripts and instructions for upgrading a Fusion deployment. To upgrade Fusion you must install the new Fusion version and carry forward configurations, customizations, and indexing history from the current version.

The process of installing and configuring a new version of Fusion varies according to:

- the current and new versions of Fusion
- the current and new deployment configurations

If the current Fusion deployment uses the embedded Solr server for all Fusion collections, then these collections must be copied over to the embedded Solr server in the new deployment. Otherwise, the new Fusion deployment will work with the existing Solr.

Rollbacks and Changeover

The upgrade process leaves the current Fusion deployment in place while a new Fusion deployment is installed and configured. All of the upgrade operations copy information from the current Fusion over to the new Fusion. This provides a rollback option should the upgrade procedure encouter problems.

The current Fusion configurations must remain as-is during the upgrade process. The upgrade process requires stopping the current Fusion installation in order to start up the new Fusion installation, therefore upgrades must be carried out on a staging server in order to avoid an outage of service during the upgrade.

Terminology and Directory Names

- FUSION-CURRENT: version of current Fusion deployment.
- FUSION-NEW: upgrade version.
- INSTALL-DIR: All scripts and commands in the upgrade instruction set are carried out from this directoy. This directory must contain either the actual or a copy of FUSION-CURRENT. The upgrade instructions create and configure FUSION-NEW in this directory.
- FUSION-UPGRADE-SCRIPTS: the location of this repository.

Upgrade Planning and Checklists

- Disk space requirements: the INSTALL-DIR must be on a disk partition which has enough free space for the FUSION-NEW installation, which will be at least as large as FUSION-CURRENT.

- File-system permissions: the user running the upgrade scripts and commands must have read/write/execute (rwx) permissions on directory FUSION-CURRENT.

- Upgrade script requirements: the upgrade script is written in Python and uses packages requests and kazoo, which are an HTTP request handler and ZooKeeper client, respectively. If for some reason, the user running the upgrade scripts doesn't have install permissions, use Python's virtualenv.

- FUSION-CURRENT inventory. Identify the following components needed for the current production system:

  - all collections

  - all datasources, index and query pipelines, pipeline profiles

  - all Fusion users/roles

  - any JDBC drivers (if using JDBC datasources)

Validating Upgrade

NOTE   Clear your browser cache before you accessing the FUSION-NEW UI.

Start the FUSION-NEW installation and login to the Fusion UI, using the the same admin username and password as used for FUSION-CURRENT.

Check that:

- FUSION-NEW has the same sets of collections as FUSION-CURRENT, and that each collection has the same number of documents.

- Search over these collections works as expected.

- Each collection has the same set of datasources.

- The index and query pipelines in FUSION-NEW correspond to those in FUSION-CURRENT.

- The users and roles in FUSION-NEW correspond to those in FUSION-CURRENT.