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The eZ Upgrade Kit Procedures

Introduction

This document describes how to upgrade an eZ Publish site by using the eZ Upgrade Kit. It serves both as a check list for the upgrade process and as documentation of the eZUpgrade application. The target group for this kit is experienced eZ developers upgrading customers websites to a new version of eZ Publish. Following these instruction will help you save time on upgrades and reduce the risk of human errors, but it will not automate the complete task.

eZUpgrade is a stand-alone application (not an eZ Publish extension) automating the upgrade process. Using eZUpgrade is as easy as extracting the application on the server where the upgraded installation will reside (target), inputting some configuration settings, and running ezupgrade from the command line. eZUpgrade makes a point of affecting the original (source) installation as little as possible.

Supported platform

| | |
|-----------------------------|--------|
| Operating System: | Linux |
| Database: | MySQL |
| Web Server: | Apache |
| eZ Publish Cluster support: | No |

How eZUpgrade works

The old eZ Publish installation can be located either on the same server as the upgraded installation, or on a remote server. If the latter is the case, eZUpgrade will make use of eZCopy to copy from source to target server.

eZUpgrade then performs the following steps:

1. Downloads and unpacks the distro of the version we want to upgrade to.
2. Copies files (var/, settings/ and extension/) from the source to target, prompting when overrides are needed.
3. Copies the database from source and updates the database connections in the target installation to the database copy.
4. Performs the upgrade steps needed between the version we are upgrading from and the version we are upgrading to. This includes SQL updates, upgrade scripts and any other upgrade actions that can be performed automatically. If there are any upgrade actions that need to be performed manually, you will be informed.
5. Grants the database user access to the new database(s).

Structure of the process

The process described in this document expects you to go through the following steps:

1. Preparing the live site for an upgrade
2. Creating an upgrade in a test environment and verifying it
3. Repeat the upgrade on the production environment

Preparations and requirements

| Task | Done |
|---|------|
| <p>Log into the eZ Publish Admin interface to check the installation for changed files. This is in order to find out whether there are any hacks that needs to be considered in the upgrade process:</p> <p>eZ Publish Admin > Setup > Upgrade check</p> <ul style="list-style-type: none"> • Check file consistency • Check database consistency <p>Modifications that origins from official bug-fixes from eZ Systems are included in newer releases. Replace the bug-fix with the original file in order to progress the upgrade.</p> <p>For upgrades from version 4.1 and 4.2, see note Database consistency checks on old versions</p> | |
| Check the server requirements on our requirements page ¹ . | |
| <p>Check that there is enough storage space on the upgrade account. The free disk space needed will at least amount to the size of the existing eZ Publish installation and the database all together:</p> <pre>\$ du -sh /var/lib/mysql/my_old_ezpublish_db \$ du -sh /my/old/ezpublish/install/dir</pre> | |
| <p>Unpack the eZ Upgrade Kit in the home folder of the upgraded site's location:</p> <pre>\$ unzip ezupgrade.zip -d /home/<user name></pre> | |
| <p>eZ Publish Enterprise Edition 4.4 and newer are only available from the login-protected site support.ez.no/ez-publish and must be downloaded manually.</p> <p>ezupgrade will look for eZ Publish releases locally before attempting to download it from Internet. Copy the downloaded zip or tar.gz of eZ Publish EE into the folder ezupgrade/distros/</p> | |

¹ <http://ez.no/eZPublish/Requirements>

Configuration

| Task | Done |
|---|------|
| <p>Configure settings/account.ini</p> <p>Each eZ Publish installation you will upgrade on a single web server, requires an Account block with the proper settings. The name “account” refers to a hosting account, but can in fact be any given eZ Publish installation. “BasePath” is the directory in which the extracted folder of the new eZ Publish release will reside. Each “account” must be updated separately via the interactive command line tool. In the example below, note how the configuration block name for each “account” listed in “AccountList” has the “Account_” prefix:</p> <pre>[Accounts] AccountList[]=my_ezp_install [Account_my_ezp_install] # Version upgrading to ToVersion=4.5.0 # Subdirectory will be created within the path BasePath=/var/www/ SiteaccessList[]=eng ExistingInstallationLocation=/var/www/ezpublish-4.4.0/</pre> | |

Configure settings/ezcopy.ini

Example configuration:

```
[DBRoot]
username=my_user_name
password=my_password

# Name as in account.ini
[Account_my_ezp_install]
# Version upgrading from
ez_version=4.4.0
mysql_db=ezpdb44
mysql_user=my_sql_user_name
mysql_pass=my_sql_password
```

If the upgraded site will reside on a separate server, all ssh fields in ezcopy.ini must be filled in order to copy (scp) the website from the source server:

```
ssh_host=my_ssh_servername
ssh_user=my_ssh_user_name
ssh_pass=my_ssh_password
```

Upgrading eZ Publish

| Task | Done |
|--|------|
| On target server, run ezupgrade interactively from command line: <pre>\$ php ezupgrade my_ezp_install</pre> <p>Usage: php ezupgrade [account_name as listed in the setting AccountList]</p> | |
| Manually reconfigure site.ini.* on target: <p>The upgraded site is created with new database(s). ezupgrade notifies you which setting files that must be manually reconfigured.</p> | |
| Point domains to the new install: <p>Point the test domains to the correct upgraded installation on the server. You do this by configuring VirtualHost in your Apache configuration file or with a local .htaccess file.</p> | |
| Update Apache's rewrite rules to reflect latest requirements from eZ Publish: | |

| | |
|--|--|
| <p>eZ Publish 4.5 and newer include example files to ease the configuration:</p> <ul style="list-style-type: none"> • doc/examples/ezpublish.conf • doc/examples/htaccess | |
| <p>Clear cache and generate autoloads on target installation:</p> <pre>\$ sudo -u apache php bin/php/ezpgenerateautoloads.php -e -p \$ php bin/php/ezcache.php --clear-all --purge</pre> | |
| <p>Update cron jobs on target server:</p> <p>crond runs scheduled tasks on Linux. Run the command “crontab -e” to display and edit scheduled cron jobs. Ensure that the configuration of the cron jobs reflects the upgraded environment. See the online documentation for more information about cron jobs ²</p> <p>Example: We have a live site on /home/testuser/ezpublish-4.1.0 . This site has been upgraded to /home/testuser/ezpublish-4.5.0 .</p> <p>The cronjob for the live site may look like this:</p> <pre>1 1 * * 0 cd `/home/user/ezp-4.1.0' && php runcronjobs.php 2>&1</pre> <p>Create a new job for the upgraded install:</p> <pre>1 1 * * 0 cd `/home/user/ezp-4.5.0' && php runcronjobs.php 2>&1</pre> | |
| <p>Manual update of ezflow and ezwebin on target server:</p> <p>ezupgrade copies over all extensions from source that does not exist in the new installation. Several extensions are not included in the eZ Publish distros, but are downloaded when required by the install wizard. In order to upgrade ezflow or ezwebin, packages must be downloaded from packages.ez.no/ezpublish and installed via the admin interface.</p> <p>The URL www.domain.com/ezinfo/about lists detailed information of each extension. Compare the original and updated sites to see if all extensions are updated correctly. The version information for extension packages is also available via the following eZ Publish command:</p> <pre>\$ sudo -u apache php ezpm.php list</pre> <p>Please see note: Online documentation for upgrades of ezflow and ezwebin</p> | |

² <http://doc.ez.no/eZ-Publish/Technical-manual/4.x/Features/Cronjobs/Running-cronjobs>

Post upgrade testing

This part of the document serves as a check-list for an upgraded eZ Publish installation with some *very basic* tests. More thorough testing on features specific to the site is advised.

| Task | Done |
|---|------|
| Modify contact details for testing purposes: <ul style="list-style-type: none">• Comment out AdminEmail under [MailSettings] in “settings/override/site.ini.append.php”. Create a new AdminEmail and point it to your email adress.• If the site has one or more contact forms, make sure to change the receiver name to your name. | |
| Verify all site-accesses: <p>For every site-access registered click through the front end main menu:</p> <ul style="list-style-type: none">• Check that the sites are shown without any error messages• Verify login to front-end and administration interfaces. | |
| Publish image: <p>Publish an object that contains an attribute for an image. Upload an image to the object. For all site-accesses in the front end, check that:</p> <ul style="list-style-type: none">• the object is published and visible• the image is visible• the image is scaled proportionally to other objects in the same content class. | |
| Publish xml text and links: <p>Publish an object that contains an attribute for an xml text field. In this field you create a link that points to an existing node. Upload an image and right-justify it.</p> <p>For all siteaccesses in the front end, and in full screen, check that:</p> <ul style="list-style-type: none">• the link is visible• the link points to the correct node• the image is visible and that it is right-justified. | |
| Clean up (Depending of further use of test environment): <ul style="list-style-type: none">• Revert change of AdminEmail in “settings/override/site.ini.append.php”• Change the contact forms back to their original receivers• Delete objects and images created earlier | |

Going into production

| Task | Done |
|--|------|
| <p>Close the live site for editing and creation of objects by modifying “settings/override/site.ini.append.php”. Note that custom read-views must be edited as well.</p> <pre>[SiteAccessRules] Rules[]=access;disable Rules[]=moduleall Rules[]=access;enable Rules[]=module;content/view Rules[]=module;content/download Rules[]=module;content/search Rules[]=module;user/login</pre> | |
| <p>Run “ezupgrade” again configured for the production environment. See the section Upgrading eZ Publish</p> | |
| <p>If the new installation is on the same server as the source installation, you will need to change “document root” and “Directory” in the Apache configuration to point to the new installation (see upgrade tasks in Upgrading eZ Publish).</p> | |
| <p>If the target installation is on a different server than the source installation, you will need to point the domain name’s DNS records to the new server. Verify that the records are updated before continuing.</p> | |
| <p>If the live site has been open for editing, please check whether any new content has been added to the old installation during the upgrade procedure. If so, please add this new content to the new installation.</p> | |
| <p>If the site uses the eZ Network Client, please notify eZ Systems Support and let them know about the upgrade and the new version, so that eZ Network will operate correctly on the site.</p> | |
| <p>Open the live site for editing again by reverting the modifications to “settings/override/site.ini.append.php” and custom read-views.</p> | |

Clearing/Deleting

| Task | Done |
|---|------|
| Delete the web servers virtual host block that was created during testing | |
| Delete the old installation and test upgrades | |
| Delete the database of the old installation and test upgrades | |
| Delete all cronjobs related to the old installation and test upgrades | |

Notes

Database consistency checks on older eZ Publish versions

For eZ Publish 4.1 and 4.2 the result of the DB consistency checks must be evaluated with care. These versions have known issues about the additional schemas provided by extensions like ezwebin and ezflow.

Online documentation for upgrades of ezflow and ezwebin

- [Upgrading ezwebin for eZ Publish 4.5](#) ³
- [Upgrading ezflow for eZ Publish 4.5](#) ⁴

Online documentation for manual upgrades

- [Upgrading from 4.4 to 4.5](#) ⁵
- [Direct upgrading from 4.3 to 4.5](#) ⁶
- [Direct upgrading from 4.2 to 4.5](#) ⁷
- [Direct upgrading from 4.1 to 4.5](#) ⁸

³ <http://doc.ez.no/Extensions/eZ-Publish-extensions/Website-Interface/Website-interface-1.8-upgrade>

⁴ <http://doc.ez.no/Extensions/eZ-Publish-extensions/eZ-Flow/Upgrading-eZ-Flow/eZ-Flow-2.3-upgrade>

⁵ <http://doc.ez.no/eZ-Publish/Upgrading/Upgrading-to-4.5/Upgrading-from-4.4-to-4.5>

⁶ <http://doc.ez.no/eZ-Publish/Upgrading/Direct-upgrading-to-4.5-from-4.1-4.2-and-4.3/Direct-upgrading-from-4.3-to-4.5>

⁷ <http://doc.ez.no/eZ-Publish/Upgrading/Direct-upgrading-to-4.5-from-4.1-4.2-and-4.3/Direct-upgrading-from-4.2-to-4.5>

⁸ <http://doc.ez.no/eZ-Publish/Upgrading/Direct-upgrading-to-4.5-from-4.1-4.2-and-4.3/Direct-upgrading-from-4.1-to-4.5>