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## 2.7 UPGRADE PROCEDURES

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In preparation for the 2.7 upgrade, we would like to share the following information and recommendations:

### SCHEDULE AND OFFLINE MODE

The servers will be shut down for staff and public use at 8pm EST on Tuesday, December 23, 2014. If your library's hours extend past that time, please plan to wrap up live transactions a few minutes before that time to minimize disruptions.

We do recommend that you use offline standalone mode and export a backup copy of your transactions daily during the downtime (don't delete from the workstation!). For a review of how to use the standalone offline interface, please check out the video on the blog under Quick Tutorials ([http://blog.evergreen.lib.in.us/?page\\_id=1845](http://blog.evergreen.lib.in.us/?page_id=1845)).

**We will send out notice on the Support List once the system is available for use on Sunday, December 28, 2014. Please, do not test your logins prior to receipt of that notice** as that may destabilize the system if we're still finalizing the installation and delay when we can bring everyone live. If things go very well, we hope to have that notice out by start of business or earlier in the weekend, but we will wait if we have concerns about the stability of the installation.

We will be pushing out an auto-update. After you have received notice that the server is available, when you try to log in, you will receive a warning that your software version is not supported by the server and offer you the chance to update. If your workstations are unable to complete the update, the installation package will be available for manual download (on or after the 28<sup>th</sup>) at: <http://evergreen.lib.in.us/updates/manualupdate.html>

Once we are back online, please completely upload your offline transactions before you begin checking in your backdated backlog to ensure that things sequence correctly.

### ADVANCE PREPARATIONS

Localadmins: If you have not done so already, please set your offline printer contexts now (accessed under Workstation Administration->Printer Settings Editor). **If this is not set, you will not be able to use offline mode with the 2.5 or 2.7 installation.** We also recommend that you confirm your "Force Printer Context" settings for offline receipts is set in the Receipt Template Editor.

Open up the Printer Settings Editor, click in the radio button for "Offline" (it's the last option at the top). Then click the "Set Default Printer and Print Test Page" button and make sure the receipt printer is selected. Run a test page and if the margins are off, then use the "Page Settings" button to fix those.

Then in the Receipt Template Editor, open each of the offline receipt options and in the dropdown just below the name of the receipt option, pick offline for the printer context.

You should not need to make any changes to or update your OPAC stations.

Any 3<sup>rd</sup> party vendor or product who authenticates against the live server will be unable to connect to the server over the weekend. Arrangements have been for the OverDrive consortiums to have uninterrupted service during the downtime.

## FOLLOW-UP

There will be several of us working the helpdesk the week following the upgrade. If you are having problems, please document them with screenshots and fulltext as much as possible. We will work through the tickets as quickly as we can. The helpdesk is available here:

<http://help.evergreen.lib.in.us/helpspot/index.php>

Once more, we continue to expand and our update documentation together with the recorded upgrade presentation on the blog: [http://blog.evergreen.lib.in.us/?page\\_id=2379](http://blog.evergreen.lib.in.us/?page_id=2379)

OUR THANKS TO YOU AND YOUR PATRONS FOR YOUR PATIENCE DURING THIS UPGRADE.