



All Hands on Deck

Successfully Navigating a
Voyager Upgrade
(A Small Library Point of View)

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Presentation Outline

- A. Sighting the Horizon
- B. Preparing to Set Sail
- C. Charting Your Course
- D. Avoiding Hazards
- E. Batten Down the “Patches”
- F. Main Stays: Early Release Partners
- G. Ready About: Unicode Upgrade Notes
- H. The Bitter End (Questions?)

Sighting the Horizon

What is your Destination?

- Your goal is to upgrade Voyager.
- So, what *is* an upgrade?
- Are you a member of a consortium?
- Is anything else going on at the same time?
- Are you an ‘early adopter’?
- Considering Continuous OPAC?

Sighting the Horizon

Why Are You Upgrading?

- New functionality or feature.
- Tired of bugs.
- Older version no longer supported.
- Why *not* upgrade?

Sighting the Horizon When Do You Want to Upgrade?

- During a break (summer, winter, spring).
- At beginning or end of the fiscal year.
- Is your crew present and accounted for?
Who's necessary? Who's around? Who's on vacation?

Sighting the Horizon Who Will Do The Upgrade?

- “Roll Your Own” -- Your site is certified to do its own upgrade.
- Endeavor will upgrade your server (still involves a lot of work for you!).

Sighting the Horizon Who's on Your Crew?

- A number of different people will be involved/SHOULD be involved.
- Someone has to be designated 'Captain': coordinator, communicator and responsible.
- This can be a scary time for some staff -- keep them informed and involved.
- Make sure you have a full crew – get plenty of help – this should be a team effort.

Preparing to Set Sail Server

- Operating system version.
- Oracle version.
- Disk space requirements.
- Voyager files: workspace/database growth.
- Full system backups.

Preparing to Set Sail Clients

- Evaluate staff workstation hardware.
- Evaluate staff workstation O.S. and software.
- Document preferences and defaults.
- Registry settings have become important.
- Verify Internet Browser requirements.

Preparing to Set Sail OPAC

- What local customizations have you made.
- What services/functions do you provide.
- Make sure you have copies of your ini, etc. files -- find a way to document which files you've changed (ini, cfg, etc.), and *how*.
- Remember that sometimes you cannot just copy over your ini, etc. file(s) -- there may be extensive changes.

Preparing to Set Sail

OPAC (cont.)

- Do you support multiple databases?
- Do you have more than just a /local directory to worry about (e.g., SimulSearch Z39.50)?
- Training on new features
 - Staff
 - Users

Charting Your Course

- If Endeavor is doing your upgrade, then you need to get on their schedule.
- If you are doing your own upgrade, then who will be doing the server stuff? (Library staff or computing department folks?).
- What else is going on? (fiscal period close, mid-terms, holidays, etc.).

Charting Your Course (cont.)

- How 'big' an upgrade is it? (Redesigned modules? New OPAC? DB conversion?).
- What is your window of opportunity?
- How many people (and sites) are involved and what are the politics?

Your Course

2 – 4 Months

- Answer the what, why, when and who questions.
- Monitor support web, release notes, and Voyager-L.
- Read all the documentation available.
- Check your client specifications against Endeavor's minimum requirements.
- Pick 3 target upgrade dates (2-4 months in the future).

Your Course

2 – 4 Months (cont.)

- Order server hardware if required.
- Contact Endeavor with your dates.
- Decide if you want to use the “Continuous OPAC” option.
- Review any changes to the patron SIF (these would require changes to any local systems that pass patron information to or from Voyager).

Your Course

2 Months

- Re-review release notes/documentation on SupportWeb.
- Get firm date from Endeavor.
- Determine server hardware needs.
- Inform your staff.
- Put together your upgrade crew.
- Organize and update local documentation.

Your Course

1 – 2 Months

- Monitor release progress on Voyager-L.
- Prepare staff (training database, documentation, new clients on Preview Server, etc.).
- Decide if you are going to use off-line circulation during the upgrade.
- Organize your team and assign responsibilities.

Your Course

1 – 2 Months (cont.)

- Begin Preview Server work: OPAC and client.
- Reconfirm date with Endeavor.
- Upgrade server hardware if required.
- Review status of any locally used customer-created add-ons (e.g., New Books List).
- Review notes/procedures from previous upgrades.
- Still unsure? Talk to other sites, send email to Voy-L, check Knowledge Base.

Your Course

1 – 2 Weeks

- Review release success/problems.
- Finalize Preview Server work: OPAC, clients.
- Prepare training materials.
- Publicize upgrade.
- Review client and system administration changes.
- Make printouts/screenshots/copies of all ini files, system administration settings, and staff client defaults/preferences.

Your Course

1 – 2 Weeks (cont.)

- Verify server backup procedures.
- Test your full system backup with a verify.
- Review notes/procedures from previous upgrades.
- Are your screenshots and printed/saved files up-to-date?
- If you will be doing off-line circulation, review the manual.
- Get out P.R. to patrons on downtime.

Your Course

Day Before Upgrade

- Make sure critical client files are safely copied elsewhere (tag tables, mdb files, ini files, etc.)
- Run reports.
- Set up for off-line circulation.
- Make a full system backup.
- Check in with Endeavor.
- Get a good night's sleep.

Your Course: Day of Upgrade

- Last chance to bail!
- Mobilize your crew.
- Start off-line circulation if to be used.
- Upgrade server.
- Install clients (set preferences and defaults).
- Move over and test WebVoyage configurations.
- Training sessions for staff/public.
- Do another full backup post-upgrade.

Your Course: Day of Upgrade (cont.)

- Remember to relink your Access database (reports.mdb under the Access Reports for the Prepackaged Reports). See FAQ 1408. Note schema changes that may make customized reports unusable.
- Talk to Endeavor: Passwords? Extensions? Local configurations? On time?
- **TEST, TEST, TEST, TEST!**

Avoiding Hazards

- Communication can make or break the process.
- Assume nothing. If Endeavor is doing your upgrade, ensure their information is current.
- Keep detailed notes and procedures for next time.
- Infield chatter rule.
- Remember post-upgrade publicity.

Avoiding Hazards (cont.)

- Reasonable and solid deadlines will keep things on track.
- The preview server is an important tool. But it has limitations both for OPAC configuration and client testing.
- You cannot always simply copy the opac.ini and other files from one version to another.
- Schedule Server “Cleanup” for 4 weeks *after* the upgrade.

Avoiding Hazards (cont.)

- Look at what other sites have done and monitor problems on Voyager-L.
- You need a fallback plan, because bad things can happen. If they do, stay cool (someone has to!)
- An upgrade can be challenging and frustrating: adequate preparation can make the difference.
- **DOCUMENT, DOCUMENT!**
- **TEST, TEST!**

Batten Down the “Patches”

- Server patches are not cumulative.
- Client patches are cumulative.
- Options: do it yourself, ask Endeavor to do it for you, or don't patch.
- If you feel your system is working fine, and you don't want to "rock the boat", you are **not required to patch**. Obviously if there are any problems later on, EISI may recommend that you patch to fix those issues.

Main Stays: Early Release Partners

- Owning extension products helps.
- A proven track record with good incident reports and positive working relationship with Customer Support and PRIG.
- Customers who have expressed an interest in new features that are part of that new release.

Main Stays: Early Release Partners (cont.)

- Rewarding
- Interesting
- Challenging
- Fun (?!)
- A lot of work
- A lot of time
- All staff must be “on deck”

Ready About: Unicode Upgrade Notes

- DB conversion went well – for us.
- Important to check the conversion logs.
- Big changes in custom reports.
- Big changes in Oracle client.
- Change of browser font for public systems.
- “Character sets” become important.
- Z39.50 and Bulk Import changes.
- **READ THE MANUALS!**

The Bitter End (Questions?)



Session 44 – Upgrading Voyager – April 2004
(WebVoyage Upgrade Notes for the Unicode Upgrade at CSM)
Laura Guy, Systems Librarian
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Advice: use file-naming conventions to help you keep track of file changes and facilitate recovery if needed. Always make a backup copy of a file before editing it.

Example (backup file naming convention if editing file on January 20th, 2004):

- webvoyage.ini
- webvoyage.ini.012004

When moving files from Preview Server to your new directory structure, make copies of original files (and original directories) before moving.

Examples:

- cp display1.cfg display1.cfg.orig (Copies file)
- cp -r /local /local.bak (Copies directory)

/m1/voyager/xxxdb/etc/webvoyage/local

- **opac.ini**

Hints on dealing with OPAC.INI changes:

- *Use comments to document your file!*
- *Use the manual to learn of changes.*
- *Compare line-by-line your current file and the new file.*

/m1/voyager/xxxdb/etc/webvoyage/local/

- **emailf.cfg**

This file is where the footer information of the email messages sent by the OPAC is configured. Make sure to change it to the Library's address, etc.

Example:

```
+++++  
Arthur Lakes Library  
Colorado School of Mines  
(303) 273-3694/273-3698  
libref@mines.edu
```


/m1/voyager/xxxdb/etc/webvoyage/local/

- **save1f.cfg**
- **save2f.cfg**
- **savb3f.cfg**

These files provide footer information content used in the Print/Save from the OPAC. (For CSM the content of all three is identical to the content in emailf.cfg)

/m1/voyager/xxxdb/etc/webvoyage/local/

Related to email sent from the OPAC, remember to change subject line of emailing search results subject line in the:

- **opac.ini**

Example:

```
[Mail_and_Requests]
EmailSubject1=CSM Catalyst Results of your %s for %s
```

/m1/voyager/xxxdb//etc/webvoyage/local

A lot of local customizations to the OPAC are found in this directory location. A good example of this is the various display files:

- **Display*.*** files should be replaced with current files unless there have been changes (unlikely):
- **Display.ini** controls number of tabs in WebVoyage
- **Display*.cfg** files control record views

Another good example of where customizations can often be found are the ht_*.htm files:

- **ht_buildersearch.htm**
- **ht_combinedsearch.htm**
- **ht_coursereve.htm**

These ht_*.htm HTML files can typically be copied over. They control the help content in their respective search pages and have been significantly changed at CSM. A setting in the **/m1/voyager/xxxdb/webvoyage/cgi-bin/webvoyage.ini** file controls the location of the help content (e.g., “top” or “bottom”).

- **limits.ini**

Copy the LIMITS.INI over if you use search limits and/or Quick (“Simple”) Limits. These “limit” features are turned on or off in the OPAC.INI

Example of Simple_Limits (“QUICK”) Stanza in LIMITS.INI:

```
[Simple_Limits]
#Use Location Limit Group Names
Counter=8
1=Archive
2=Book Stacks
3=CSM Theses
4=Journals & Newspapers
5=Map Collections
6=Reference
7=U.S. & Colorado Gov. Pubs.
8=Internet Resources
```

```
[Archive]
1=LOCA=Archive
```

```
[Book Stacks]
1=LOCA=Book Stacks
```

```
[CSM Theses]
1=LOCA=CSM Theses
```

```
[Journals & Newspapers]
1=LOCA=Journals & Newspapers
```

```
[Map Collections]
1=LOCA=Map Collections
```

```
[Reference]
1=LOCA=Reference
```

```
[U.S. & Colorado Gov. Pubs.]
1=LOCA=US & Colorado Government Pubs.
```

```
[Internet Resources]
1=LOCA=Internet
```

- **logonmsg.htm**

This HTML file controls text content where patron logons are entered. At CSM we have found it useful to have some explanatory content included in the HTML:

Example:

Please enter your **Full** Patron Barcode and Last Name, then click the Login button.
If your logon is rejected and you are sure you typed in your ID and name correctly, contact the Circulation Desk at 303-273-3022.

- **noattmsg.htm**

CSM does not want the “no attachments” message showing up in our record views, so we “white out” the content of the HTML in this file so that it is not visible.

Example:

```
<B><I><FONT SIZE=+1 COLOR="WHITE">  
There are no Attachments for this record.  
</FONT>  
</I></B>
```

- **noholdmsg.htm**

At CSM we change the color of the “no holdings available” content to red for visibility in this HTML file.

- **setlimmsg.htm**

This HTML file provides content for the top of the Set Limits page. At CSM we use it to supply some explanatory information on how to use limits properly (especially which search times can be used with limits).

- **truncmsg.htm**

This HTML file is used to provide the content used when a search is truncated. At CSM we use it to provide a bit more information for our patrons than simply “Your Search is Truncated!”

Example:

```
<FONT SIZE=+1 color="#000000">  
<b>Your search was stopped at the first 10000 items:</b> You may want to use  
<b> Limits </b> to narrow your search
```

- **search.ini**

You should be able to copy the SEARCH.INI file over intact from this directory (it is a good idea to comment this file). The content must match exactly the codes in the [Search_Text] stanza in the OPAC.INI. This file controls which types of searches will be available in “Simple Search” and which search TAB will be displayed first (the “default” tab) in the search window.

/m1/voyager/xxxdb/webvoyage/cgi-bin/

- **webvoyage.ini**

Changes to this file:

1) Adjust time-out on search screen for OPAC to desired time (e.g., 10 minutes):

Example:

```
[WebRecon]  
Timeout=600
```

2) If needed, activate thumbnails for Online Resources. Thumbnails are small graphic files related to the 856 field that display in the far right column on the title level results display in WebVoyage.

Example:

```
[Thumbnails] stanza  
Activate=True
```

3) Change Help location on Search Pages to where you want it (e.g., “bottom”)

Example:

```
[HelpLocation]  
Position=B
```

- **URL.jpg**

Make sure this image is the correct one if Thumbnails are activated in webvoyage.ini. This image is in a slightly (but understandably) odd location relative to other OPAC images.

/m1/voyager/xxxdb/webvoyage/html

- **webconerr.htm** (This is the “Timeout Page” -- configure it to point to correct database and insert correct content)
- **webvoy.htm** (this allows you to exclude the Voyager intro page and go directly to your search page)
- **exitpage.htm** (this is the URL of the page that appears when the exit button is pressed; configure it as you want)

/m1/voyager/xxxdb/webvoyage/html/images

Check to make sure all local images copied here

A lot of important graphic files live in this directory!

- This is where the OPAC button images live. Make sure they are copied over.
- This is where the OPAC banner image lives.
- Title list BIB format thumbnails live here: am.gif, em.gif, etc.; this functionality is configured in the OPAC.INI “Format Display” section.

Example to activate BIB Format Thumbnails in OPAC.INI:

```
[Title_Page]
#Format Display
GenerateHTMLColumn=L
HTMLColumnHeaderL=Format
HTMLColumnL=bib_format:
```

Usually you can safely copy over entire the directory.

/m1/voyager/xxxdb/webvoyage/thumbnails

Note this exception to where most graphic files are stored!

- **URL.jpg**

The URL.jpg file is the thumbnail file used for signifying an online resource.

/m1/voyager/xxxdb/webvoyage/html/help

CSM has extensively customized many of the help files for our main OPAC and for one of the citation databases. We have added new pages to this directory and need to make sure that all the changed files and *new files* are copied over.

/m1/voyager/xxxdb/etc/webvoyage/

- **connect.ini**

Databases and folder configurations for Z39.50 [EZConnect] are configured in this file. It needs to be copied over:

And related to this, remember to configure the EZConnect directories in **/etc/webvoyage**. In general what needs to be changed for these directories are the display files, the OPAC.INI, the SEARCH.INI, the email files, the save files, and some of the html files:

EBAPH
EXPACA
IIT
LOC
MIT
MT
PROSP
ROPE
WEBED
WORLD

/m1/voyager/xxxdb/etc/webvoyage/

- **header.htm**
- **footer.htm**

The Header and Footer of WebVoyage are configured in these HTML files. Make sure URLs and the content of footer text is correct (they can typically be copied over).

/m1/voyager/xxxdb/etc/webvoyage

Warning: This file has something to do with EZConnect directories. Even though CSM uses EZConnect, I've never understood it and so don't change it.

- **search.ini**

(Not to be confused with **/local/search.ini!**)

/m1/voyager/xxxdb/etc/webvoyage

linkfinder.cfg

This configuration file is used to configure parsing profiles for LinkFinder to use in creating active URLs. CSM uses this functionality with some of our EZConnect databases.

Example:

```
[EBAPH]
LinkFinderDisplay=Y
USE_LFV3=Y
atitle=245/a/0//0/
aulast=100/a/0//, /0/
aufirst=100/a/0/, //0/
title=773/t/0//0/
date-year=903/a/0//0/
issn=022/a/9//0/
isbn=020/a/10//0/
volume=945/m/0//0/
issue=945/n/0//0/
spage=945/p/0//0/
```

In order for LinkFinder to work, there must also be a related configuration done in the OPAC.INI file.

Example:

```
[View_Record_Page]
LinkFinderButton=Gold Rush OpenURL
LinkFinderServer=http://grlinker.coalliance.org/grlinker/grl000001/grl-CSM.cgi?
```

/m1/voyager/xxxdb/ini

- **voyager.ini**

Turn on LOGSEARCH for statistics gathering in the VOYAGER.INI file located here.

Example:

```
LOGSEARCH=Y  
LOGBIBUSAGE=N  
OCCURRENCE=N
```

/m1/voyager/xxxdb/ini

- **z3950svr.ini**

Check that ports and DBname are correct.

New to UNICODE: configure character set for incoming Z39.50 in this file.

Example:

```
# As per EISI support  
Encoding=MARC8
```

/m1/voyager/xxxdb/etc/ascopac

- **opac.ini**

Edit this file as needed. See Editascii.txt for information.

/m1/voyager/xxxdb/ini/

Install Michael Doran's Newbooks and make sure it runs nightly

Make sure that no line breaks are introduced into that string of HTML code when moving it from the old OPAC.INI to the new OPAC.INI file. Edit newbooks.pl, newbooks.English, etc. files so that the interface is as we want it.

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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Status Key



- Item Completed
- Item In Progress
- Item Not Started

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4 months Before Upgrade

	Monitor Support Web, Release Notes, and Voyager-L	Mod SysAdmin	- ongoing -
	Check server hardware specifications against the Endeavor list of minimum requirements.	[Name(s)]	Approximately 3 times the used database space is needed for workspace during the upgrade process. In addition extra permanent space is required.
	Pick acceptable target upgrade dates	[Name(s)]	January 31, 2004
	Contact Endeavor to schedule upgrade	[Name(s)]	Email upgrade@endinfosys.com or call toll free Customer Support number (1-877-445-5693) and press 4 for Upgrade Scheduling. Have at least three possible dates in mind.
	Determine / Verify Internet Browser requirements	[Name(s)]	This is especially important for public systems. Make sure browsers will be compliant. A Unicode-compliant browser and font are required unless you decide to make server-side changes via cascading style sheets, etc.
	Verify Server OS requirements and Verify that you have it.	[Name(s)]	Is a Solaris (Sun OS) upgrade required? For Unicode Oracle moves to Oracle 9i (done at time of upgrade)
	Verify Apache version installed meets requirements	[Name(s)]	We are running 1.3.26
	Verify required Oracle/ODBC Client and Driver	[Name(s)]	The Unicode release involves an Oracle client upgrade. See the Unicode™ Reporter User's Guide
	Verify required MS Access version for Reports.	[Name(s)]	Is a Microsoft Office/Access upgrade required?
	Verify Staff Client PC Hardware requirements	[Name(s)]	Make sure memory and CPU are within requirements. These requirements have not changed for Unicode.
	Verify Staff Client PC OS requirements	[Name(s)]	Is a client operating system upgrade required? For Unicode a Unicode compliant PC operating system is required (Windows 2k or XP). Win98 and WinNT are no longer supported. Don't forget to check Service Pack levels.
	Order server and / or client hardware / software if required	[Name(s)]	

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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2 - 3 months Before Upgrade

	Review release notes / documentation	Mod SysAdmin	Download manuals and make them available to appropriate staff. Of particular importance is the Technical User's Guide chapter 4
	Confirm server / hardware needs	[Name(s)]	Double-check memory requirements for server
	Confirm Hard Drive requirements	[Name(s)]	Because of the Oracle 9i upgrade, you will need to plan to have an additional 3 Gigabytes of permanent disk space. For Unicode most data collections will grow by about 1%.
	Receive Email from Endeavor with date / engineer info	[Name(s)]	Note upgrade date, engineer name and email/phone here
	Form the upgrade team	[Name(s)]	* see bottom of spreadsheet
	Review changes to Tag Tables :	[Name(s)]	The tag tables have changed significantly - you must use the new tag tables after the upgrade and then manually upgrade with local changes as necessary. The new tables are based on the Oct 2002 update; all changes are incorporated
	Review implications for New Books functionality	[Name(s)]	Contact Mike Doran.
	Verify that all client software / hardware specifications have/can be met.	[Name(s)]	

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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1 - 2 months Before Upgrade

	Monitor release progress on Voyager-L	[Name(s)]	
	Verify that firewall or other changes do not prevent EISI from accessing the server	[Name(s)]	Document this information here. Beware password changes.
	Make personal contact with people who already have upgraded, create contact points for future questions.	[Name(s)]	
	Begin to prepare and distribute training information and documentation for staff.		
	Finalize upgrade team and assign upgrade staff responsibilities	[Name(s)]	
	Review new features and functions and decide on local application.	Mod SysAdmin	New features may be introduced to WebVoyage or modules. Decide what to use or not use.
	Review and finalize evaluation tests ("checklists") to be run on modules during post-upgrade	Mod SysAdmin	Module System Administrators should know what they will test directly after the upgrade to in order to evaluate systems.
	Reconfirm upgrade date with Endeavor	[Name(s)]	
	Finish installation of new client operating systems.	[Name(s)]	Note OS requirements.
	Finish installation of new hardware if required.	[Name(s)]	
	Review all pertinent available documentation on SupportWeb.	Mod SysAdmin	There is a huge amount of documentation available on SupportWeb. It can include: Upgrade FAQ, Release Overview, Release Notes, Voyager Checklist, Bug Fixes, PRIG PowerPoint presentations, EndUser presentations, Upgrade Road Maps, and much more.
	Review WebVoyage <i>and</i> Windows Client Changes .	Mod SysAdmin	A given upgrade often will focus on a specific module, set of modules, and/or WebVoyage.
	Design a plan to deal with database conversion errors.	[Name(s)]	The data conversion process to the Unicode coding standard will produce error logs (if errors are encountered). See the Technical Users Guide chapter 4.
	Review SCHEMA CHANGES between new and last versions	Mod SysAdmin	These will be posted on SupportWeb.
	Evaluate any Patron SIF changes	[Name(s)]	If there are SIF changes contact Information Services

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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	Review new version Voyager PATCHES for potential workflow issues.	Mod SysAdmin	These will be posted on SupportWeb.
	Review Voyager User Manuals for each Module and look for additional workflow information.	Mod SysAdmin	These will be posted on SupportWeb.
	Review previous ENDUSER / VUGM information for potential new information or SysAdmin training tools.	Mod SysAdmin	PowerPoint presentations VUGM 2001 / 2002 / 2003
	Verify Circulation OFFLINE requirements	[Name(s)]	* see Unicode Circ Manual for instructions. (Circ Manual pages 6-28 to 6-34).
	Review Standard and Custom Reports for any possible changes due to schema changes.	Mod SysAdmin	Changes to database structure (tables/columns added or deleted) could make reports unusable or not runnable. UTF 8 data will need special treatment in order to be viewed correctly. See chapter 4 of the Technical Users Guide.
	Set up a Preview Server test WebVoyage (OPAC) on Server	[Name(s)]	Download Preview Server and configure Apache. Set up URL for staff review and keep them informed of customization progress.
	Setup Preview Clients (with Endeavor test database) and notify staff	[Name(s)]	
	Download new Tag Tables.	[Name(s)]	Part of Preview Server Clients.
	Make local changes to the Tag Tables and prepare them for staff use after client installation.	[Name(s)]	The tag tables have changed significantly - you must use the new tag tables after the upgrade and then manually upgrade with local changes as necessary.
	Formulate cataloging practices.	[Name(s)]	Changes in this release necessitate a revision of some cataloging practices.
	Begin OPAC customization (preview server)	[Name(s)]	

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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1 - 2 Weeks Before Upgrade

	Review release success / problems.	[Name(s)]	
	Confirm availability of Unicode aware font	[Name(s)]	A Unicode aware font such as Arial Unicode MS or Lucida Sans Unicode should be installed. This font may need to be added to staff and public PCs. See the Unicode Release Handbook.
	Finalize OPAC changes on preview server	[Name(s)]	Have staff review Preview Server WebVoyage.
	Distribute any final training materials to staff		
	Ensure Catalog Templates have been saved to another directory (to be copied back after upgrade).	[Name(s)]	Set up Templates on Server (if necessary) and send email to staff (who catalog) to notify them.
	Review client and system administration changes	Mod SysAdmin	
	Make printouts or save copies of all ini files, system administration settings, and staff client defaults/preferences.	Mod SysAdmin	
	Verify that screenshots of System Administration settings are up to date.	Mod SysAdmin	
	Give Endeavor your preference for communication updates during the upgrade (email, phone, pager, etc) and frequency of update.	[Name(s)]	Use email or phone.
	Final verification that staff client PC OS and other software requirements are met.	[Name(s)]	Any OS upgrades should be done well before the Voyager upgrade. Make sure all upgrades are complete and stable.
	Verify public PC Internet browser requirements are met.	[Name(s)]	Make sure all upgrades are complete and stable.
	Perform a Full Verified Backup of Voyager and Oracle files. Test your full system backup.	[Name(s)]	Verify the Backup procedure and verify the actual output one week before upgrade.
	Remind upgrade team of responsibilities and finalize schedule	Mod SysAdmin	
	Remind all staff of upgrade schedule and expected downtime.	[Name(s)]	
	Get out public relations to inform users of downtime	[Name(s)]	Note on website, newsletter, etc. Try to give an estimate of downtime if possible. Remember this may be an extra-long downtime with the database conversion and the performance of all regens (keyword, left-anchored, etc.).

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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Day Before - Upgrade

	Ensure sure ini/cfg files, templates, tag tables, mdb files, etc. are copied elsewhere.	Mod SysAdmin	
	All previous Reports and Notice inp files must be processed through that version's Reporter before upgrade takes place. (Reporter will only process reports and notices produced with the same version of the server.)	Mod SysAdmin	Have circulation come in early to run that day's notices and reports.
	Run the reports with the date range from the beginning of your reporting period to the current date (date before upgrade). At end of the reporting period which includes the date of the upgrade, run the reports again with the beginning date being the first full day after the upgrade and the end date the last day of the report period.	Mod SysAdmin	
	Set up for Off-Line Circulation (need to install new circ voyager client at your circulation desk before the upgrade begins).	[Name(s)]	* see Circ Manual for instructions. (Circ Manual pages 6-26 to 6-34);
	Process all outstanding EDI messages before the upgrade takes place.	[Name(s)]	
	Full Verified Backup of the Server (night before).	[Name(s)]	
	Last chance to get out downtime info to users	[Name(s)]	

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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<div style="border: 1px solid black; display: inline-block; padding: 5px;"><u>Day Of - Upgrade</u></div>			
	Verify you still want to do it ? Last chance to stop.		
	Communicate with your upgrade technician.		Confirm upgrade is still on with the technician. You should be contacted by the technician prior to any work. Your technician should keep in touch with you and let you know how things are going. The Unicode upgrade is lengthy because of the data conversion!
	Verify that a full system backup was done last night.	[Name(s)]	Your upgrade technician <i>should</i> ask you about this
	Mobilize the upgrade team	[Name(s)]	Make sure everyone is clear as to what needs to be done.
	Start Off-Line Circulation	[Name(s)]	* see Unicode Circ Manual for instructions. (Circ Manual pages 6-28 to 6-34).
	Establish staff communication schedule.	[Name(s)]	Plan on at least several messages to staff on update progress.
	Upgrade database on server (includes re-indexing).	[Name(s)] / Endeavor	
	Install Clients as per EISI instructions (set preferences and defaults; copy over new tag tables, etc. and set up C:\Voyager as desired.)	[Name(s)]	With the Unicode release installation is significantly easier than ever before. There is just one executable to run. You needn't uninstall the previous version's client (although you probably want to make a backup of the directory). See chapter 5 of the Technical Users Guide.
	When allowed move preview server files over to new WebVoyage directories	[Name(s)]	Wait for the technician to let you know you can do this. Keep a check list of files and directories to "touch"
	When informed that the technician is done	[Name(s)]	Make sure you find out important information such as where your conversion logs are and what your read only logon and passwords are (for Unicode)
	Commence training for staff / public (as necessary)	Mod SysAdmin	

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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Post - Upgrade

	Make sure everyone who needs Oracle/ODBC has it.	[Name(s)]	For people who run Prepackaged Reports there is an Oracle client/ODBC update with the Unicode release including a System DSN change. These are significant changes to local system setups. Included in this change is a new read-only logon and password (get these from your technician). See the Reporter Users Guide chapter 1.
	Relink Reports.mdb and any other custom databases created from the Voyager database schema.	[Name(s)]	Distribute or make available to anyone who requires it the newly linked file. Remember relinking can take time. For the Unicode release the read-only account name and password change. The good news: the 9i client is much faster.
	Open each Client and run a series of familiarization and evaluation tests to verify proper operations.	Mod SysAdmin	Each Mod SysAdmin person will have their own checklist of actions to verify proper operation of their module.
	Test OPAC configurations and WebVoyage customizations	[Name(s)]	
	Check PC Fonts	[Name(s)]	Make sure staff PCs are configured with a Unicode aware font. Public machines may need this too.
	Verify the new tag tables.	[Name(s)]	
	Process Offline Circulation files	[Name(s)]	* see Unicode Circ Manual for instructions. (Circ Manual pages 6-28 to 6-34).
	Set Preferences in each Module and modify ini / cfg files as necessary.	Mod SysAdmin	Many preferences are now retained in the System Registry
	System Administration : make configurations for any new features.	Mod SysAdmin	There may be new features or functions that need to be configured. Perform setup.
	Run another full backup (when upgrade finished). (including all Oracle files).	[Name(s)]	
	Make any necessary changes to Custom Reports	[Name(s)]	Review Schema changes. Note UTF-8 encoded columns in Technical User's Guide chapter 4
	After confirming with EISI, let staff know that Voyager is "up" and that they may resume work.	[Name(s)]	Let staff know who they should contact if there are problems.
	Review conversion error logs. Implement a plan to fix conversion problems.		Your upgrade technician will tell you where these logs are. Details on interpreting the logs are available in the Technical conversion manual.
	Post-Mortem.	Mod SysAdmin	What went well? What didn't? How can next time be improved?

Voyager Unicode Upgrade Tasks / Responsibilities

Session 44 -- EndUser 2004

Status	Task	Persons Responsible	Notes:
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Module System Administrators :

Ext.

These people have pre-upgrade responsibilities and post-upgrade testing responsibilities.

Voyager System : [Name(s)] (SysAdmin)

Server : [Name(s)]

Acquisitions :

Cataloging :

Cat Reports & Tag Tables :

Circulation :

ILS :

OPAC :

Reporter :

Call Slips :

Other Contacts :

Endeavor : Customer Support Manager

800-762-6300

Endeavor : Upgrade Technician

800-762-6300

New Books : Mike Doran

817-272-5326 office; doran@uta.edu