

Managing a Voyager Upgrade

Ten Year Anniversary Edition



Successfully Navigating a Voyager Upgrade

- 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?)

Agenda

- Reasons to Upgrade
- Ways to Upgrade
- Customer Center
- Timeline
- Tomcat OPAC
- Testing Scripts
- When. Things. Go. Wrong.
- Essential Tools & Resources

Release Methodology

- **Major release (8.0.0)**
 - Introduces new functionality, defect fixes; may require database changes
- **Minor release (8.2.0)**
 - Introduces new enhancements, defect fixes; may require database changes
- **Service pack (8.2.2)**
 - Usually defect fixes only; may include enhancements
- Note: Your release number is built by combining the following: Major.Minor.Service Pack

Version Detection

- **O.S.** version plus patch level of the OS. Will also tell you what type of server you are running:
 - `uname -a` (Solaris)
 - `cat /etc/redhat-release` (Linux)
- To find out **Oracle**, you simply can run sqlplus:
 - `/export/home/voyager => sqlplus`
- For **Voyager** version check `voyager.env` file
- **Apache**: `cd /m1/shared/apache2/bin`
 - `httpd -v`

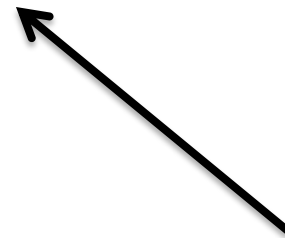
Reasons to Upgrade

- Defect fixes
- Enhancements
- Is your version supported?
- Keeping Tomcat (your OPAC) current
- Not necessarily “If it ain’t broke don’t fix it.”



When is an Upgrade *not*?

- Move to hosted
- Change of platform (O.S. from Solaris to Linux)
- Change of Hardware



NOPE.

Getting Ready = Preparation

- Check server hardware requirements
- Check server O.S./software requirements
- Check server file system and disk space
- Check server backups and **restores**
- Check client O.S./software requirements
- Check client hardware requirements



KEEP
CALM
AND
DO THAT
HOMEWORK

Ducks. Row. Yes.

- Local documentation review:
 - Workflows
 - Testing Scripts
 - Integration with other applications (Banner, etc.)
 - ODBC and Access tables
 - Extension modules
 - Skin customizations
 - Tag tables, ini file customizations, etc.



Variety is the Spice of Life

- Different ways to upgrade:
 - Outsource It: Schedule with Installation Team
 - DIY: Voyager Installation Kit (VIK)
 - Patch



Outsource It to Ex Libris

- Open an incident; specify preferred dates
- ExL will take care of all 3rd party products (Oracle, Apache, Tomcat, etc.) and all modules
- You must do customizations, O.S. patches, site-specific add-ons (like newBooks), client installations
- Can take several days (extra for Oracle, and/or Analyzer)
- It's free!

Request for Voyager Upgrade Form

Note:

This form uses a Microsoft Word macro (Windows only) to save the information you enter in the form. Set your macro security to enable the macro to run.

To set macro security:

1. In the **Tools** menu, click **Options**.
2. Click the **Security** tab.
3. Click **Macro Security**.
4. Select your security level in the **Security Level** tab.
Note: If you are unsure as to which security level to select, contact your System Administrator or Computer Support staff.
5. Click **OK**.

If you receive a warning message when you open this form, ensure that you enable all macros. If you have disabled the macros, close the form and reopen it to enable the macros.

Customer name:

Voyager Server Login Information:

Server IP address:

Server host name:

Server operating system:

Is this an ASP server that hosted by Ex Libris? Y/N

Password of the voyager user:

su or sudo password is mandatory for the installation period.

su or sudo password:

Outsource it

- Once you have a date, work out your timeline.
 - **Before**: Preview Server, customizations, server cleanup, connectivity for technician, decide about options available (if applicable), worksheet
 - **During**: Clients, patience (using auto upgrade?!)
 - **After**: Tomcat, add-ons, testing, worksheet
- Good communication with your tech and reading all the documentation are IMPORTANT!
- The Upgrade Worksheet can be very helpful: use it or develop your own

Voyager Installation Kit

- Root (sudo) access required.
- Do It Yourself. Includes Apache/Tomcat/Perl
- With Voyager 8 it will upgrade **Oracle** too.
- Are your extension modules all supported?
- Double-check your backups/restores.
- Decide when. Carve out enough time.
- Open an incident to let ExL know.
- Get your documentation together.
- Know License Key & passwords (e-Service)
- Test run VIK installation through step 4.1.

But *Should* You VIK?

- ExL will still do upgrades for you *for free*
- Takes time – just how much depends...
- Familiarity with your server and Voyager
- Extension modules all supported?
- Oracle/Voyager/O.S. versions okay?
- Easy but not stress-free (“Intestinal Fortitude”)
- Read the Manual!
- See my 2010 ELUNA presentation on the VIK



Voyager Installation Kit

Date: Wed Apr 14 08:12:20 MDT 2010
OS: SunOS
Server: voytest
User: root
Version: 1.1

- 1. Complete the preinstallation tasks
- 2. Download the software
- 3. Create / Restore Backup
- 4. Complete Third Party Software Upgrade / Installation
- 5. Complete the Voyager Software Upgrade / Installation
- 6. Complete the postinstallation tasks

Enter an Option (q to Quit)[q]: █

Patch (UTIL)

- Only applies to Service Packs (8.2.1 to 8.2.2)
- UTIL is easy to use!
- Don't forget to upgrade clients!
- UTIL does a lot more than just patches:
 - Keyword Regen
 - Oracle management
 - WebVoyage management





dc02vg0179na.hosted.exlibrisgroup.com - PuTTY



```
Library Utilities: Voyager database csmdb
=====
I. Index Maintenance
O. ORACLE Management
S. Linux Maintenance activities
SP. Voyager Service Pack Utilities
W. WebVoyage Utilities
Please select [exit]: █
```

Client Auto Update

- Hooray!
- Introduced in 8.0.0
- Easy
- No admin rights needed*
- Staff can update clients*



* Windows 7 & 8 UAC can cause issues

Upgrade Stanza

[Upgrade]

Voyager=http://clients:<PASS>@<IP>:7099/autoupdate/voyager/

Media=http://clients:<PASS>@<IP>:7099/autoupdate/media/

Ours:

Voyager=http://clients:Voyag3R@xx.217.12.37:7099/autoupdate/voyager/

Media=http://clients:Voyag3R@xx.217.12.37:7099/autoupdate/media/

Voyager Cataloging



This application has a more recent version available.
Would you like to retrieve it now?

Selecting NO will result in the application shutting down.

Yes

No

VerUpdate



Voyager client upgrade complete

OK

Customer Center

- No matter which method you choose.
- Lots of help with planning.
- Provides access to all documentation.
- Choose Voyager and look for the “Upgrade Release Planning” section.
- Not all versions have identical documents. But recently things have seemed to standardize.

[View All Site Content](#)

Site Hierarchy

- Ex Libris Documentation Center
 - bX
 - Conference and Seminars
 - Cross-Product
 - DigiTool
 - General
 - MIS
 - Primo
 - Primo Central
 - SFX
 - UStat
 - Voyager**
 - Download Center
 - Product Information
 - Security
 - Services
 - Support
 - Technical Documentation
 - Upgrade Release Planning
 - User Groups

Ex Libris Documentation Center

Actions

View: **Custom view**

Type	Name	Modified
Folder	Download Center	1/25/2011 12:17 PM
Folder	Product Information	1/25/2011 12:17 PM
Folder	Security	8/27/2012 12:58 PM
Folder	Services	1/25/2011 12:17 PM
Folder	Support	1/25/2011 12:17 PM
Folder	Technical Documentation	1/25/2011 12:17 PM
Folder	Upgrade Release Planning	1/25/2011 12:17 PM
Folder	User Groups	1/25/2011 12:17 PM

Awash in Documentation

- Warning! Man overboard!
- Read *all* the documentation for previous versions not yet installed
- VIK, extension modules, preview server...
- Following example: going from 8.1.2 to 9.0



8.2.0

- Road to 8.2.0*
- Technical ReadMe
- Release Notes*
- Defect fixes
- Voyager Index Changes
- Installation and Upgrade Requirements *
- Preview Server 8.2.0
- WebVoyage Changed Skin files & Content 8.1.2 to 8.2.0
- Cross-Product Integrations (Primo, anyone?)

* Required Reading

8.2.1

- Road to 8.2.1*
- Technical ReadMe
- Release Notes *
- Service Pack Installation Guide *
- Preview Server 8.2.1
- WebVoyage Changed Skin files & Content 8.2.0 to 8.2.1

* Required Reading

8.2.2

- Preview Server - 8.2.2
- Release Notes *
- Road To 8.2.2 *
- Service Pack Installation Guide *
- Technical Readme
- WebVoyage Changed Skin Files and Content 821 to 822

* Required Reading

9.0

- Installation and Upgrade Requirements *
- Preview Server - 9.0.0
- Release Notes *
- Road To 9.0.0 *
- Technical Readme
- Voyager 9.0 Release Resolved Issues
- Voyager Index Changes
- WebVoyage Changed Skin Files and Content 822 to 900

* Required Reading

Release Notes

- Describes Enhancements and Bug Fixes.
- If you are crossing more than one version you'll need to read them all but focus more on the enhancements and any changes or decisions required.
- Make sure you share this information with your staff.

Installation and Upgrade Requirements

- Published for some but not all
- Specific requirements for server and client hardware (CPU, RAM, disk space).
- Specific requirements for software (O.S., third-party).
- Upgrade planning worksheets and checklists.
- Responsibilities checklist

Road To

- High-level overview.
- Helpful for newbies or if it's been a while.
- Includes:
 - Why Upgrade?
 - Getting Started.
 - System Requirements.
 - Decisions.
 - Planning.

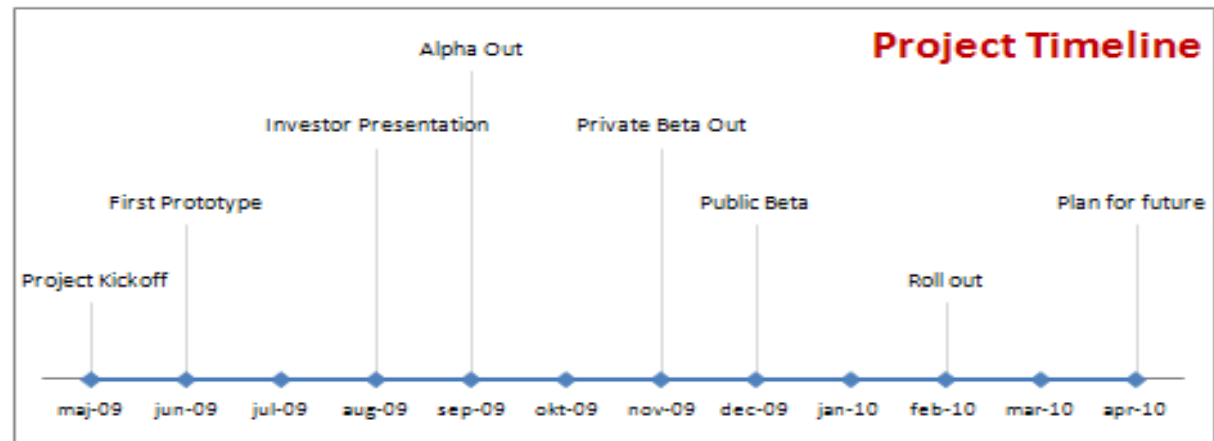
Other Documents

- Defect Fixes
- Voyager 9.0 Release Resolved Issues
- Voyager Index Changes
- Changed Skin Files
- Preview Server documentation
- Extension Module documents



Timeline

- Weeks before
- Day or two before
- During
- After



Weeks Before

- Pull together and read relevant documentation
- Talk with your staff.
- Inform patrons of scheduled downtime.
- Talk with upgrade engineer (if not DIY)
- New ODBC drivers/prepackaged reports?
- Archive existing tag tables/edit new tables if needed
- Test backups *and* restores
- Identify and review logs for health of system (the VIK can help here!)

Weeks Before

- Deploy Preview Server
- Commit your skin changes to new Tomcat files on the Preview Server
- Review client installation procedures/doc
- Download, test new clients on Preview Server
- Review/update your testing procedures and scripts for the modules
- Review Patron Loader (SIS) logs

Local OPAC Preview Server

- Useful for testing local customizations
- Installs on your local server
- Listens on default port 7098
- URL: `http://<ip|dns>:7098`

- Also used for previewing clients.

Day or Two Before

- Ensure that backups are still working
- Check the health of the system (*logs. again.*)
- Download the VIK if DIY
- Download the upgrade files if DIY – The VIK helps with this and you can do it ahead of time
- Check Oracle Logs
- Check Apache Logs
- Check the Process List



Day Of

- Run all Reports/Notices and EDI files
- Confirm you have a good cold backup
- Contact the engineer (if not DIY)
- If VIK, let your staff know you're starting
- Enable offline circulation if used
- Install the new clients, deal with tag tables/etc.
- Communicate with your engineer early/often

After

- Wait to hear from engineer (if not DIY)
- Relink Voyager tables *if necessary*
- Review upgrade logs
- Coordinate **server reboot** with engineer to catch any startup problems
- Do your module testing before going into production
- Move in the new Tomcat files from your preview server work (test one file at a time)

Tomcat OPAC

- Know what files have changed
- Document your customizations
- Use Preview Server
- Move in files one at a time and TEST!
- New Tomcat files are moved into `exl_default` (except in Major upgrade!)
- Current (aka: old) left in place (Minor/Patch)
- 99.99% of the time “old” files should work*

Wait! Wait!

- If the old files still work....?
 - Bug fixes
 - New features
 - Java compatibility
 - Troubleshooting



Tomcat OPAC

- Number of customizations + Number of versions jumped = Total amount of work 4 U
- Some customizations (especially customer-created “add-ons”) may not work at first
- Take your time, be methodical and be precise
- Good commenting practice is invaluable
- It really helps to have access to a test server or the Preview Server

KISS

- Find a workflow that works for you
- Find the tools that work for you:
 - UltraEdit, WinSCP, WinMerge...
- What I do and what I use may not be for you
- Find a way to *rename* and keep old files as backups
- DOCUMENT YOUR CHANGES!



Commenting

- Create comments in edited files:

```
<!-- Additional code added for Brief  
Record 4/25/12 lag -->  
    <xsl:param name="moreActions"/>  
<!-- end additional code -->
```

Haven't ever done it? Start now!

Testing Scripts

THINGS TO CHECK at the CIRCULATION DESK:	TIM	WENDY	ROZ	ROZ	WENDY	TIM	TIM
(for each patron group)							
PATRON GROUPS:	Faculty/Staff	Grad Student	Ugrad Student	Recip	Member	Depart	Alumni
Charge							
Discharge							
Fines – added/cleared correctly							
Holds – entered/expired/picked up, correctly							
Recalls - entered/expired/picked up, correctly							
Lost books – auto. applied, \$100 fine applied							
Addresses/Email							
On The Fly Records							
Media Scheduler							
NOTICES – running correctly, addresses/emails							
THINGS TO CHECK at the RESERVE DESK:							
(for each patron group)							
PATRON GROUPS:	Faculty/Staff	Grad Student	Ugrad Student	Reciprocal	Member	Depart	Alumni
Charge							
Discharge							
Add records							
Edit record							
View records by number, title, and instructor							
Fines – added and removed correctly							
On The Fly Records							

Testing Scripts

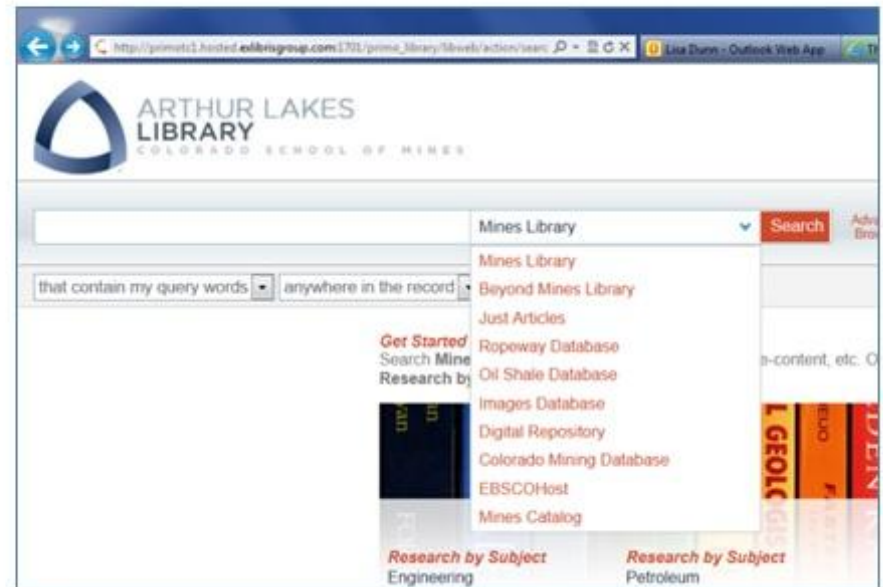
<u>THINGS TO CHECK BY CSM CATALOGERS</u>	PAM	CRAIG	STEVE	CHRISTINE	CHRIS	LISA	ANITA
	Monographs	Monographs	Serials	GP Records / Special Formats	Map Records	GP Records	GP Records
CATALOGING CLIENT:							
Searching in Cataloging Client and OPAC:							
Verify call number indexing		X			X	X	
Verify search functionalities (search by index selection, builder, keyword)							
Retrieve record by bib, MFHD, item, authority, barcode							
Verify session defaults and options			X				
Cataloging Record:							
Ability to import records to module	X			X		X	
Ability to change 006					X		
Ability to change 007				X	X		
Ability to change 008 (Bib fixed field)	X	X			X		X
Ability to change MFHD fixed field	X	X					
Ability to change Leader			X			X	
Ability to overlay records			X			X	
Ability to merge records		X					
Ability to generate MFHDs			X	X		X	X
Ability to generate items			X	X			
Ability to save records (bib, MFHD, item, authority)			X	X			X
Verify export function from OCLC to Cataloging Client			X	X			
Verify export function from non-OCLC sites to Cataloging Client (i.e., Prospector, DDM2, etc.)			X			X	X
Ability to re-link MFHDs to other bibs						X	
Ability to re-link items to MFHDs						X	
Ability to use the bound-with function (existing and new)						X	
Accuracy of tag tables (any updating needs to be reported)			X				
Verify bound-with function is working						X	
Check disciplines (degree symbols, Russian, etc.)	✓		✓	✓	✓	✓	

Primo Testing

Check that Primo is available and has all of its features:

- Library logo
- Links to other library services
- Search box options
 - “that contain my query words”
 - “with my exact phrase”
 - “starts with”
 - “anywhere in the record”
 - “in the title”
 - “as author/creator”
 - “in subject”

- Scopes →



When. Things. Go. Wrong.

- Know where the log files are before you upgrade.
- Know where the backup location is for files and customizations is before you upgrade
- VIK logs...
- Upgrade logs...
- Regen logs...
- Service pack logs...
- Tomcat (Catalina) logs...



Essential Tools and Resources

- Customer Center (Upgrade Documentation)
- Technical User's Guide (Core Documentation)
- PuTTY (terminal emulator)
- WinSCP (Powerful FTP/SFTP Client)
- UltraEdit (Shareware editor/file compare)
- WinMerge, Firebug, Notepad++
- Voy-L, Voy-Admin, ExL Support



**BREAKING
NEWS**

User Environment Variables

- Do you get annoyed that your voyager or root user environment variable customizations get overwritten?
- Well...there's now an app for that!



Bottom of `.profile`

```
if [[ -f .profile.local ]]; then  
    . .profile.local  
fi
```

```
# LOCAL MODIFICATIONS in  
.profile.local
```

```
.profile.local
```

```
/home/voyager => more .profile.local
```

```
unalias ls
```

```
PS1=' $PWD => '
```

Recap

- Be prepared
- Do your homework
- Read the documentation
- Investigate tools that may help
- Document local workflows, customizations
- Use Preview Server, checklists
- Know where to go for help

Thank You!
😊

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