Managing Voyager in Small Libraries
Upgrading Voyager 7

Laura Guy
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Who am I?

- Laura Guy
- lguy@mines.edu
- Systems Librarian at the Colorado School of Mines
- Working with Voyager for eleven years.
- Working with Tomcat since early 2008.
- I’ve done A LOT of upgrades!
- Presented session on Upgrading in 2004.
Agenda

- Reasons to Upgrade
- Ways to Upgrade
- Doc Portal (aka: “Customer Center”)
- Timeline
- Tomcat
- Testing Scripts
- When Things Go Wrong
- Essential Tools & Resources
Voyager Release Methodology

★ **Major release (7.0.0)**
  - Introduces new functionality, particularly enhancements that may require database changes

★ **Minor release (7.2.0)**
  - Introduces new enhancements but will not require database changes
  - May also include bug fixes. Voyager 7.2.0 is a minor release.

★ **Service pack (7.2.3)**
  - Includes bug fixes only ("patch")

★ Note: The release number is built by combining the following: Major.Minor.Service Pack.
Reasons to Upgrade

★ Bug Fixes
★ Enhancements
★ Is your version supported?
★ Keeping Tomcat current
★ Not necessarily a case of “If it ain’t broke don’t fix it.”
So You Think You Want to Upgrade?

- Check server hardware requirements
- Check server O.S./software requirements
- Check server file system and disk space
- Check server backups and restores
- Check PC hardware requirements
- Check PC O.S./software requirements
Detecting Versions

★ Solaris version plus patch level of the OS. Will also tell you what type of server you are running:
- `uname -a`

★ 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`
Questions?
Different Ways to Upgrade

★ Schedule with the installation team
★ Voyager Installation Kit ("VIK")
★ Patch
Have Ex Libris Do It

- Open an incident; specify preferred dates
- ExL will take care of all 3\textsuperscript{rd} 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, 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: 
a or sudo password is mandatory for the installation period.
a or sudo password: 
Have Ex Libris Do 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
- **After**: Tomcat, add-ons, testing, worksheet

★ Importance of good communication and reading all the documentation
Voyager Installation Kit

★ 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.
★ Get your documentation together.
★ Know License Key & passwords (e-Service)
★ Test run VIK installation through step 4.1.
Should You Run The 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

★ Do It Yourself.
★ Or... Ex Libris will do it for you.
★ Only applies to Service Packs (7.2.1 to 7.2.3)
★ Download simple script.
★ Read/understand the documentation.
★ You still need to test after you are done.
★ Don’t forget clients!
Welcome to the Patch

Press q to Continue

Finding Databases please wait...

1): [ ] csmdb
2): [ ] traindb

This Patch (...) will directly effect the following databases:

    csmdb
    traindb

It will indirectly effect any other databases sharing patched files

Press Enter to Apply this patch or CTRL+C to exit

!!! Upgrade Complete !!!
Thu Dec 7 20:42:04 CST 2010

Executing ...

Executing spp...
    Restoring permissions...
    Restored

Please check all log files in /m1/incoming/patch/voy723_Files/logs
The patch is not complete until you have examined all the logs!
Questions?
Customer Center

- No matter which method you choose.
- Will help with planning.
- Provides access to all documentation.
- Go to the Documentation Center, choose Voyager and look for the “Upgrade Release Planning” section.
- Not all versions have identical documents.
- http://customercenter.exlibrisgroup.com/_layouts/Netwise/ExlibrisLogin.aspx
Customer Center
“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 versions (example: 7.2.0)
★ Specific requirements for hardware (CPU, RAM, diskspace).
★ 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.
“Client Installation Instructions”

★ Best Practices for installation of Clients.
★ Troubleshooting workflow.
★ Does not include some (many?) aspects of client installation that I think are really important (uninstalling, etc.)
“Supported Software and PC Requirements”

- Supported Operating Systems
- Supported Third-party Products
- Supported PC Operating Systems and Browsers.
- This is a historical overview and goes way, way back...
“Changes to Skin Files”

- Located in the WebVoyage subfolder.
- Often but not always two documents:
  - List of the changed Tomcat files
  - Changes to skin files (can be large!)
- Use in conjunction with Preview Server.

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>WebVoyage 721-722 GR Changed Files</td>
<td></td>
</tr>
<tr>
<td>WebVoyage Changes to Skin Files from 721 to 722</td>
<td></td>
</tr>
</tbody>
</table>
“Service Pack Documentation”

- Instructions for running the patch script.
- Read it ahead of time. Make sure you understand everything.
- Note if there is a regen required.
- Availability of clients/OPAC.
- Reboot requirement.
“Voyager Installation Kit Guides”

- VIK Instructions
- In the Technical Documentation section
- Essential Reading
- Includes version requirements, extension modules supported, server types supported.
Questions?
Week(s) Before You Upgrade

★ 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
Week(s) Before You Upgrade

- Deploy Preview Server
- Commit your skin changes to new Tomcat files on the Preview Server
- Review client installation procedures
- Download, test new clients on Preview Server
- Review/update your testing procedures and scripts for the modules
Day Of

- Run all Reports/Notices and EDI messages
- 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.
- Facilitate communication with engineer.
**After The Upgrade**

- Wait to hear from engineer (if not DIY)
- Do full system backup (?)
- 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 (testing one at a time).
Questions?
Upgrading Tomcat

- Expand the WebVoyage folder and print the Change documentation
- New Tomcat files are moved into exl_default (except in Major upgrade!)
- Current (aka: old) left in place
- 99.99% of the time “old” files should work
- Customizations need to be made (recommitted) to the “new” (Changed) files and those files moved into production.
- Extensive testing will be required.
Upgrading Tomcat

★ The more customizations you have made, the more work for you (yay!).
★ Some customizations (especially customer-created “add-ons”) may not work at all.
★ 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.
“Changes to Skin Files”

- Lists which Tomcat files have been **changed**
- Does *not* list non-Tomcat file changes
- Does *not* list new Tomcat files added
- Upgrade overwrites exl_default with new files
- Copy changed files you’ve not customized to en_US
- For changed files you customized, recommit your customizations to the new files and move them over
Tomcat Nuts & Bolts

★ Print out the list of changed tomcat files
★ Your goal: files listed as changed copied to your production area
★ You needn’t copy files not on change list
★ Where you’ve made customizations: it can be complicated – some involve multiple files.
★ Come up with a logical workflow.
★ Document your customizations.
### 5 Databases

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>comine</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>csmdb</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>csmphotos</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>ropeway</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>tellertl</td>
<td></td>
<td>File Folder</td>
</tr>
</tbody>
</table>

---

### en_us dirs

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>content_layout</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>css</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>pagefacets</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>pagetools</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>usertextconfigs</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>webvoyage-properties</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>xsl</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>Name</td>
<td>Size</td>
<td>Type</td>
</tr>
<tr>
<td>--------------------</td>
<td>------</td>
<td>---------------</td>
</tr>
<tr>
<td>cl_displayrecord</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>cl_searchbasic</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>display.xsl</td>
<td></td>
<td>File Folder</td>
</tr>
</tbody>
</table>

Customized files

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>current</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>new</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>ready-to-go</td>
<td></td>
<td>File Folder</td>
</tr>
<tr>
<td>test server version</td>
<td></td>
<td>File Folder</td>
</tr>
</tbody>
</table>

File versions
<!--

** Product: WebVoyage :: display
** Version: 7.1.0
** Created: 26-OCT-2007
** Orig Author: David Sellers
** Last Modified: 07-MAY-2009
** Last Modified By: Mel Pembble
** Note By: Laura Guy - imageBorder
** Modified By: LG - to add image title

-->

<xs:stylesheet version="1.0"
xmni:xsl=http://www.w3.org/1999/XSL/Transform
xmni:page=http://www.exlibrisgroup.com/voyager
xmni:fo=http://www.w3.org/1999/Format
xmni:ser=http://www.endinfosys.com/Voyager
xmni:hol=http://www.loc.gov/MARC21/slim
xmni:mfh=http://www.endinfosys.com/Voyager
xmni:item=http://www.endinfosys.com/Voyager

<xsl:import href="../display/marc21slim.xsl"/>
<xsl:import href="../config/102x_display.xsl"/>
<xsl:import href="../config/102X_display.xsl"/>
<xsl:variable name="constStr_Field000Leader">00</xsl:variable>
<xsl:variable name="constStr_SpacingUnderline">
<xsl:variable name="constStr_SubfieldPipe">|</xsl:variable>

<!-- ## Our Document Holders ## -->
<xsl:variable name="HoldXML" select="/hol:mfh/..."/>
<?xml version="1.0" encoding="UTF-8"?>

<xsl:when test="string-length(@al)"/>
<xsl:value-of select="@al" />
</xsl:when>
<xsl:otherwise>&#160;</xsl:otherwise>
</xsl:choose>
</xsl:variable>

<xsl:variable name="singleInstance">
<xsl:choose>
<xsl:when test="string-length(@si)"/>
<xsl:value-of select="@si" />
</xsl:when>
<xsl:otherwise><xsl:otherw...
</xsl:choose>
</xsl:variable>

{xsl:variable name="title">
<xsl:choose>
<xsl:when test="string-length(@ti)"/>
<xsl:value-of select="@ti" />
</xsl:when>
<xsl:otherwise>&#160;</xsl:otherwise>
</xsl:choose>
</xsl:variable>

{xsl:variable name="infoPRE-TEXT">
<xsl:choose>
<xsl:when test="string-length(@ip)"/>
<xsl:value-of select="@ip" />
</xsl:when>
<xsl:otherwise><xsl:otherw...
</xsl:choose>
</xsl:variable>

{xsl:variable name="infoPOST-TEXT">
<xsl:choose>
<xsl:when test="string-length(@ip)"/>
<xsl:value-of select="@ip" />
</xsl:when>
<xsl:otherwise><xsl:otherw...
</xsl:choose>
</xsl:variable>

1 <?xml version="1.0" encoding="UTF-8"?>
Questions?
### Testing Scripts

#### THINGS TO CHECK at the CIRCULATION DESK:

(for each patron group)

<table>
<thead>
<tr>
<th>PATRON GROUPS:</th>
<th>Faculty/Staff</th>
<th>Grad Student</th>
<th>Ugrad Student</th>
<th>Recip</th>
<th>Member</th>
<th>Depart</th>
<th>Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discharge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fines – added/cleared correctly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holds – entered/expired/picked up, correctly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recalls - entered/expired/picked up, correctly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lost books – auto. applied, $100 fine applied</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addresses/Email</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On The Fly Records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media Scheduler</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notices – running correctly, addresses/emails</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### THINGS TO CHECK at the RESERVE DESK:

(for each patron group)

<table>
<thead>
<tr>
<th>PATRON GROUPS:</th>
<th>Faculty/Staff</th>
<th>Grad Student</th>
<th>Ugrad Student</th>
<th>Reciprocal</th>
<th>Member</th>
<th>Depart</th>
<th>Alumni</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discharge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit record</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View records by number, title, and instructor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fines – added and removed correctly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On The Fly Records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Testing Scripts

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

★ Upgrade logs
  - /m1/incoming/v720/vik/logs/voyager_installation.log
  - /m1/incoming/patch/voy723_Files/logs/PatchLog.voy723
  - /m1/voyager/upgrade/2007.2.0/xxxdb/upgrade/log.xxxdb.upgrade
  - /m1/voyager/utility/2007.2.0/xxxdb/log.xxxdb.regen
  - /m1/incoming/v720/voy<VER>_Files/logs/PatchLog.voy<VER>

★ Software logs
  - /m1/voyager/xxxdb/tomcat/vwebv/logs/catalina.out
  - /m1/voyager/xxxdb/tomcat/vxws/logs/catalina.out
  - /m1/voyager/xxxdb/log/log.voyager
  - /m1/shared/apache2/logs/xxxdb

★ Find Command
  - find /m1/incoming/v720 -type f -name "*[Ll]og*" -ls
Essential Tools & Resources

PuTTY - Free terminal emulator application which can act as a client for Telnet and SSH

WinSCP - Free FTP and SFTP client for Windows

UltraEdit - Commercial Text Editor/File Compare

Doc Portal, EL Commons

Voy-L, Voy-Admin lists

ExL Support
Questions?
Thank you for attending!

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