

Upgrading

Surviving a Voyager 7 Upgrade

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.
- *NOT* a programmer!
- Presented session on Upgrading in 2004.

Plus...



Agenda

- Reasons to Upgrade
- Ways to Upgrade
- Doc Portal
- 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
- 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`



Different Ways to Upgrade

- Schedule with the installation team
- Voyager Installation Kit
- Patch

Have Ex Libris Do It

- 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), clients
- 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?

Password of the voyager user:

su or sudo password is mandatory for the installation period.

su 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
- Do you need to upgrade Oracle separately?
- 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 version? Current Voyager version?
- 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
```

Patch

```
!!! 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!
```



Doc Portal

- No matter which method you choose.
- Will help with planning.
- Provides access to all documentation.
- Use the Tree Search and look for the “Upgrade Release Planning” section.
- Not all versions have identical documents.
- <http://docs.exlibrisgroup.com/docportal>

Doc Portal

- [-]  7.2.2
 - [+]  Preview Server
 - [+]  Readmes
 - [-]  WebVoyage
 -  [WebVoyage 721-722 GR Changed Files.pdf](#)
 -  [WebVoyage Changes to Skin Files from 721 to 722.pdf](#)
 -  [Client Installation Instructions for 7.2.2.pdf](#)
 -  [Road To 7.2.2.pdf](#)
 -  [Service Pack - 7.2.2 Documentation.pdf](#)
 -  [Voyager 7.2.2 Release Notes.pdf](#)
 -  [Voyager 7.2.2 Release Notes.xls](#)
 -  [Windows - Service Pack -7.2.2 Documentation.pdf](#)

“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 cataloging, circulation, etc. staff.

“Installation and Upgrade Requirements”

- Published for some versions (example: 7.2.0)
- Specific requirements for 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.

“Client Installation Instructions”

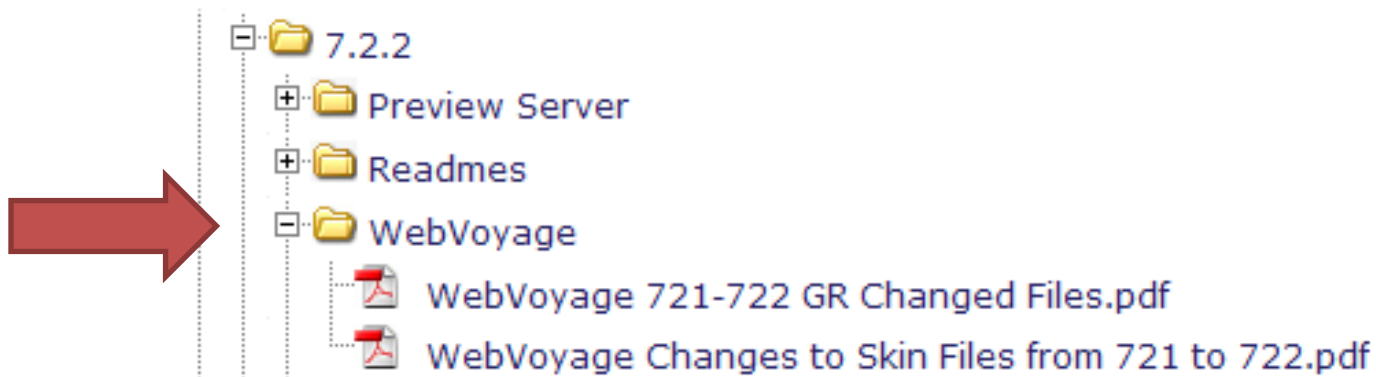
- Best Practices for installation of Clients.
- Troubleshooting workflow.
- Does not include some (many?) aspects of client installation that I think are really important (uninstalling, etc.)

“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.



“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
- Found in the User Guides section
- Essential Reading
- Includes version requirements, extension modules supported, server types supported.



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).



Upgrading Tomcat WebVoyage

- Expand the WebVoyage folder to find the Change documentation in the Doc Portal
- New Tomcat files are moved into exl_default
- Current (aka: old) left in place
- 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 WebVoyage

- 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 use the Preview Server.

“Changes to Skin Files”

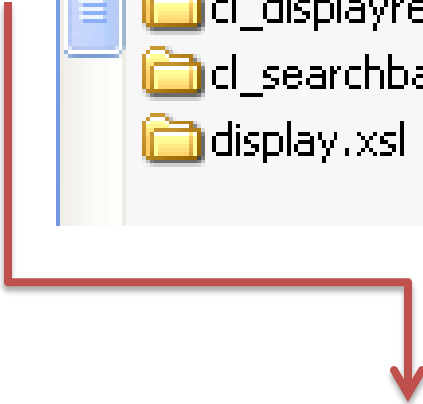
- Lists which Tomcat files have been **changed**
- Does *not* list non-Tomcat file changes
- Does *not* list new Tomcat files added
- Upgrade overwrites `exl_default` with new files
- Copy changed files you've not customized to `en_US`
- For changed files you customized, recommit your customizations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

Tomcat Nitty-gritty

- 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 system.
- Document your customizations.

Name	Size	Type
comine		File Folder
csmdb		File Folder
csmphotos		File Folder
ropeway		File Folder
tellertl		File Folder

Name	Size	Type
content_layout		File Folder
css		File Folder
pagefacets		File Folder
pagetools		File Folder
usertextconfigs		File Folder
webvoyage-properties		File Folder
xsl		File Folder



Name	Size	Type
cl_displayrecord		File Folder
cl_searchbasic		File Folder
display.xsl		File Folder

Name	Size	Type
current		File Folder
new		File Folder
ready-to-go		File Folder
test server version		File Folder

UltraEdit-32 - [Y:\LBUsers\lguy\Voyager 7 Upgrade\7.2 FT UI Work\csmb\display.xml\current\display.xml]

File Edit Search Project View Format Column Macro Scripting Advanced Window Help

display.xml display.xml

Y:\LBUsers\lguy\Voyager 7 Upgrade\7.2 FT UI Wor... Y:\LBUsers\lguy\Voyager 7 Upgrade\7.2 FT UI Wor...

```
1 <?xml version="1.0" encoding="UTF-8"?>
2
3 <!--
4 #(c)#####
5 #(c)#
6 #(c)# Copyright 2007-2009 Ex Libris (USA)
7 #(c)# All Rights Reserved
8 #(c)#
9 #(c)#####
10 -->
11
12 <!--
13 ** Product : WebVoyage :: display
14 ** Version : 7.1.0
15 ** Created : 26-OCT-2007
16 ** Orig Author : David Sellers
17 ** Last Modified : 07-MAY-2009
18 ** Last Modified By : Mel Pemble
19 ** Note By : Laura Guy - imageBorder 1
20 ** Modified By : LG - to add image title 1
21 -->
22
23 <xsl:stylesheet version="1.0"
24 xmlns:xsl="http://www.w3.org/1999/XSL/Trans:
25 xmlns:page="http://www.exlibrisgroup.com/vo:
26 xmlns:fo="http://www.w3.org/1999/XSL/Format:
27 xmlns:ser="http://www.endinfosys.com/Voyage:
28 xmlns:hol="http://www.endinfosys.com/Voyage:
29 xmlns:slim="http://www.loc.gov/MARC21/slim"
30 xmlns:mfhd="http://www.endinfosys.com/Voyage:
31 xmlns:item="http://www.endinfosys.com/Voyage:
32
33 <xsl:import href="../display/marc21slim.xsl"/>
34 <xsl:import href="../configs/104X_display.xsl"/
35 <xsl:import href="../configs/102X_display.xsl"/
36
37 <xsl:variable name="constStr_Field000Leader">00
38 <xsl:variable name="constStr_SpacingUnderline">
39 <xsl:variable name="constStr_SubfieldPipe">|</
40
41 <!-- ## Our Document Holders ## -->
```

```
1 <?xml version="1.0" encoding="UTF-8"?>
2
3 <!--
4 #(c)#####
5 #(c)#
6 #(c)# Copyright 2007-2009 Ex Libris (USA)
7 #(c)# All Rights Reserved
8 #(c)#
9 #(c)#####
10 -->
11
12 <!--
13 ** Product : WebVoyage :: display
14 ** Version : 7.2.0
15 ** Created : 26-OCT-2007
16 ** Orig Author : David Sellers
17 ** Last Modified : 29-SEP-2009
18 ** Last Modified By : Mel Pemble
19 -->
20
21 <xsl:stylesheet version="1.0"
22 exclude-result-prefixes="xsl page fo ser ho.
23 xmlns:xsl="http://www.w3.org/1999/XSL/Trans:
24 xmlns:page="http://www.exlibrisgroup.com/vo:
25 xmlns:fo="http://www.w3.org/1999/XSL/Format:
26 xmlns:ser="http://www.endinfosys.com/Voyage:
27 xmlns:hol="http://www.endinfosys.com/Voyage:
28 xmlns:slim="http://www.loc.gov/MARC21/slim"
29 xmlns:mfhd="http://www.endinfosys.com/Voyage:
30 xmlns:item="http://www.endinfosys.com/Voyage:
31
32 <xsl:import href="../display/marc21slim.xsl"/>
33 <xsl:import href="../configs/104X_display.xsl"/
34 <xsl:import href="../configs/102X_display.xsl"/
35
36 <xsl:variable name="constStr_Field000Leader">00
37 <xsl:variable name="constStr_SpacingUnderline">
38 <xsl:variable name="constStr_SubfieldPipe">|</
39
40 <!-- ## Our Document Holders ## -->
41 <xsl:variable name="HoldXML" select="//hol:mfhd
```

For Help, press F1 Ln 1, Col. 1, CO U8-UNIX XML Mod: 10/5/2009 6:09:44 AM File Size: 166648 INS



Testing Scripts

<u>THINGS TO CHECK at the CIRCULATION DESK:</u>	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							
<u>THINGS TO CHECK at the RESERVE DESK:</u>							
(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

THINGS TO CHECK BY CSM CATALOGERS	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
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, accents, etc.)	✓		✓	✓	✓	✓	

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/

- Find Command

- find /m1/incoming/v720 -type f -name "*[LI]log*" -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
- Voy-L, Voy-Admin lists
- ExL Support

Thank You!

