Road To

Version 8.1.2

ExLibris *The bridge to knowledge*
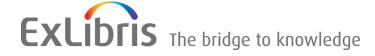
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Voyager Release Methodology

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- **Major Release (for example, 8.0.0)** on page **5**
- **Minor Release (for example, 8.1.0)** on page **5**
- **Service Pack (for example, 8.1.1)** on page **5**

Major Release (for example, 8.0.0)

Voyager major releases introduce new functionality, particularly enhancements, that may require database changes and may also include bug fixes.

Minor Release (for example, 8.1.0)

Voyager minor releases introduce new enhancements that usually do not require database changes and may also include bug fixes.

Service Pack (for example, 8.1.1)

Service packs usually include bug fixes only, but may also include new features.

NOTE:

The release number is built by combining the following:

Major.Minor.Service Pack

All Voyager releases are cumulative, meaning that fixes in each version are rolled up to the next version.

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Why Upgrade?

This section includes:

- **Defect Fixes** on page **7**
- **Unsupported Versions (Voyager 6 or Earlier)** on page **7**

Defect Fixes

Voyager 8.1.2 contains defect (bug) fixes. Information about the defect fixes included in 8.1.2 is located in the Release Notes that reside in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.2.

Defects are fixed in previous releases and rolled up in Voyager 8.1.2. For example, if a problem was fixed in Voyager 7.2.5, the fix would be available in Voyager 7.2.5, 8.0.0, 8.1.0, 8.1.1, and 8.1.2. More information about defects fixed in previous releases is available in the Voyager Release Notes that reside in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > version number. As a result, if you are upgrading from Voyager 7.2.4 to 8.1.2, you would want to review the Release Notes from 7.2.5, 8.0.0, 8.1.0, 8.1.1, and 8.1.2.

Unsupported Versions (Voyager 6 or Earlier)

Ex Libris Voyager Customer Support supports the current major release and one release back. Therefore, any customer running Voyager 8.x.x or on any Voyager 7.x version (such as 7.0.1 - 7.2.5) is supported.

Voyager 6 is the previous major release and anyone on Voyager 6.x or earlier is not supported. If you are on an unsupported version, Customer Support assists with incidents provided that an upgrade to the latest software release has been scheduled. If a bug is found in an unsupported release and cannot be replicated in a supported release, the fix will be to upgrade. If a bug is found in an

unsupported release and is replicable in a supported release, Customer Support sends an issue report to Development.

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Getting Started

This section includes:

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Options for Upgrading to 8.1.2

Your options are:

- Voyager Installation Kit (VIK)
- UTIL Menu
- Scheduling an upgrade with the installation team

Voyager Installation Kit

The Voyager Installation Kit (VIK) is a menu-driven, upgrade kit that provides customers the ability to upgrade Voyager to the latest release without the assistance of the Ex Libris installation team and allows more flexibility in upgrade scheduling. Read more in the Voyager Installation Kit instructions available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Installation Kit.

Voyager 8.1.2 requires an upgrade to Oracle 11g R2

> **NOTE:**
> If you are upgrading from Voyager 8.0.0, 8.1.0, or 8.1.1 you are already using Oracle 11g R2.

The VIK performs this upgrade for you if this is your preference. If you prefer to perform the Oracle upgrade manually, be sure to follow the instructions for installing the 11g R2 upgrade.

UTIL Menu

The UTIL Menu is a menu-driven interface for commonly used tasks and processes that were previously performed manually by system administrators, systems librarians, and Ex Libris Customer Support.

Customers currently on Voyager 8.1.0 or 8.1.1 can use the UTIL Menu to upgrade to 8.1.2.

Read more in the Voyager Installation Kit instructions available in the Documentation Center.

Scheduling an Upgrade with the Installation Team

The installation team's upgrade engineers are available for integrating new software releases for you. They are technical professionals who are well-versed in Sun Solaris, AIX, Linux, and Microsoft Server operating systems as well as Oracle and Voyager integration issues that can provide technical expertise for software upgrades.

The installation team can perform all of the necessary Voyager upgrade-related steps. This can include system tuning, third-party software updates, start/stop script replacements, and so forth.

The following tasks are to be handled by your site and are not included in the upgrade:

- Customization fixes
- Operating system patches
- Site-specific modifications/additions and fine-tuning

Opening an Upgrade Support Incident

Use eService to open an upgrade incident with Ex Libris. Under the field `What type of difficulty are you experiencing?`, select Upgrade.

Be sure to include your preferred dates for the upgrade (at least three possible date options). Upgrade engineers are available Sunday through Friday.

Fill out and attach the Request_for_Voyager_Upgrade_Form to the upgrade incident. This form is available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > Installation Request Forms. If you are unable to complete this form, provide the following information with the incident:

- Any special connection instructions
- Contact name (someone with access to the server during and after business hours) if different from the person logging the incident
- Daytime telephone number(s)
- After-hours telephone number(s)

  This can be a pager number.

  The person at this number must be on call but not necessarily by the server for the entire upgrade. The after-hours contact is used only if requested by the customer or if a server emergency occurs.

- Preference (e-mail, telephone, pager, and so forth) and frequency of updates during the upgrade
- A list of your extension modules (such as Media Scheduling, Self-Check, and so forth)

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Basic Upgrade Planning

This section includes:

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Versions

Voyager 8.1.2 contains new Voyager clients, defect fixes, and fixes rolled up from previous releases. While sites are not required to move to the latest release, Ex Libris may recommend upgrading as the best way to resolve a problem.

Sites upgrading between 17 July 2012 and 31 July 2012 will have the choice of upgrading to Voyager 8.1.1 or Voyager 8.1.2. Sites upgrading after 31 July 2012 will be upgraded to Voyager 8.1.2.

Exceptions are made for sites that have installed a previous, supported version on their test server. Other exceptions must be approved by the installation manager. Use eService to open an upgrade incident following the instructions provided in **Opening an Upgrade Support Incident** on page **11** to request an exception.

Review Documentation

Sites upgrading from any release prior to Voyager 8.1.2 should review the *Release Notes* for each interim release. For example, if you are upgrading from Voyager 7.2.5 to Voyager 8.1.2 look at the *Release Notes* for Voyager 8.0.0, 8.1.0, 8.1.1 as well as 8.1.2.

Review the *Installation and Upgrade Requirements* document in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.0.0. This document includes information regarding server and client requirements (such as PC, browsers, and third-party software) as well as upgrade planning/ worksheets. For example, the Before Your Upgrade section includes Process the global headings change queue and Process all reports and notices.

Review each updated core and/or extension module Voyager document on the Documentation Center (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation) for new information. The Reason for Reissue section in the About this Document chapter provides page numbers to new feature details and any other changes to the guide. Note that the *BatchCat.dll Technical User's Guide* is now provided as part of the Core Voyager documentation on the Ex Libris Documentation Center (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Core Voyager Documentation > Version 8.1.1).

If you plan on using the Global Data Change feature, review the Global Data Change documentation (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Core Voyager Documentation > Version 8.0.0) as well as the GDC Support Policy (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Support > Technical Information).

No database schema changes were made in Voyager 8.1.2 but changes were made in Voyager 8.0.0. Therefore, if you run queries on the Voyager database, review the *Voyager 8 Database Schema Changes* and *Voyager 8 Data Dictionary* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Data Dictionaries and ER Diagrams.

Decisions

Decide how you would like to handle the following and communicate your decisions to Ex Libris as needed:

■ Current system requirements are based on the recommendation that sites either run Classic WebVoyáge or the new WebVoyáge interface. The new

> interface is activated by default, thereby inactivating the Classic interface. If your site has decided to use the Classic interface after you upgrade, you must notify the upgrade engineer.

- Training databases are refreshed at upgrade. If you would like to retain your existing training databases, alert your upgrade engineer.

- In a single-server, multi-database environment, Voyager databases can be upgraded separately.

NOTE:

Ex Libris does not recommend running cross versions. Sites with Universal Borrowing (UB) or Universal Cataloging (UC) should upgrade at the same time with their UB/UC partners and run the same version of Voyager for the best performance and ease of troubleshooting.

- Upon request to Ex Libris, Apache with SSL is installed on your site's Voyager server(s). This allows your institution to acquire and install its own SSL certificates for encryption with Apache.

Timing

Refer to the *Installation and Upgrade Requirements* available in the Documentation Center for more information regarding timing estimates for the upgrade process.

Voyager Clients

Refer to the *Voyager 8.1.2 Technical User's Guide* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Core Voyager Documentation >Version 8.1.2 for client installation options. You may install the Voyager clients manually, or use the AutoUpdate feature (if you are upgrading to Voyager 8.1.2 from 8.1.1, 8.1.0 or 8.0.0).

Patron SIF and Tag Tables

The Patron SIF, used for patron update/extract, has not changed in Voyager 8.1.2. There is no need to make any changes to patron update/extract procedures at your institution.

No tag tables for Cataloging have changed with Voyager 8.1.2.

Ex Libris Preview Server

Using the Preview Server provided by Ex Libris, sites can begin customizing WebVoyáge long before they upgrade. Files are available for download and instructions are provided for using the Preview Server database as your WebVoyáge test bed. If you are interested in using the Preview Server, refer to the Preview Server documentation located in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.2.

Upgrade Worksheets

The upgrade worksheet steps you through Voyager functionality preparations before, during, and after the upgrade. Refer to the *Installation and Upgrade Requirements* guide in the Documentation Center for more information.

WebVoyáge Skin Files

Refer to *WebVoyáge Changed Skin Files and Content 811 to 812* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.2 > WebVoyage for a list of files in the skin directories changed from 8.1.1 to 8.1.2 as well as what has been changed within the skin files. It is intended to be used when planning for the best way to continue your skin-level customizations from a previous version of WebVoyáge to version 8.1.2.

Also refer to the Responsibilities Checklist section in the *Installation and Upgrade Requirements* document located in the Documentation Center for more information on restoring customizations for WebVoyáge.

Questions

If you have any questions about Voyager 8.1.2 or the process of the upgrade, use the eService to open an incident with Ex Libris.