



## Road To

Version 9.1.0

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# 1

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## Voyager Release Methodology

This section includes:

- **Major Release - For Example, 9.0.0** on page 5
- **Minor Release - For Example, 8.2.0** on page 5
- **Service Pack - For Example, 8.2.2** on page 5

### Major Release - For Example, 9.0.0

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

### Minor Release - For Example, 8.2.0

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

### Service Pack - For Example, 8.2.2

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

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**NOTE:**

The release number is built by combining the following:

Major.Minor.Service Pack

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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
- **New Enhancements** on page 7
- **Unsupported Versions - Voyager 7 or Earlier** on page 8

### Defect Fixes

Voyager 9.1.0 contains defect (bug) fixes. Information regarding the defect fixes included in 9.1.0 is located in the Release Notes which reside in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 9.1.0.

Also, defects are fixed in previous releases and rolled up in Voyager 9.1.0. For example, if a problem was fixed in Voyager 8.2.2, the fix would be available in Voyager 8.2.2, 9.0.0, and 9.1.0. More information about defects fixed in previous releases are available in the Voyager Release Notes available on the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > version number. Therefore, for example, if you are upgrading from Voyager 8.2.2 to 9.1.0, you would want to review the Release Notes from 9.0.0 and 9.1.0.

### New Enhancements

The Voyager 9.1.0 minor release delivers new features and functionality to enhance your library's workflows and operations such as additional features for Global Data Change, authority processing enhancements, Primo Integration, extended fund allocations in Acquisitions, and more. The Voyager Product Manager works with customers worldwide as well as the IGeLU and ELUNA user groups to identify ways to enhance the Voyager system.

Enhancements to the system functionality and performance improves the user experience, increases staff productivity, and lowers your total cost of ownership when using Voyager. The only way you can benefit from the enhancements to Voyager functionality is to upgrade to the latest release.

Detailed information about enhancements available in Voyager 9.1.0 are available in the Release Notes available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 9.1.0.

## Unsupported Versions - Voyager 7 or Earlier

Ex Libris Voyager Customer Support supports the current major release and one release back. Therefore, any customer running Voyager 9.x or any Voyager 8.x version (8.0.0 - 8.2.2) is supported. Voyager 7 is the previous major release and Voyager 7.x or earlier is not supported. If you are on an unsupported version, Customer Support assists with cases provided that an upgrade to the latest software release has been scheduled. If a defect is found in an unsupported release and cannot be replicated in a supported release, the fix will be to upgrade. If a defect is found in an unsupported release and is replicable in a supported release, Support sends an Issue report to Development.



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## Getting Started

This section includes:

- **Options for Upgrading to 9.1.0** on page 9
- **Voyager Installation Kit** on page 9
- **Scheduling an Upgrade with the Installation Team** on page 10
- **Opening an Upgrade Case** on page 10

## Options for Upgrading to 9.1.0

- Voyager Installation Kit (VIK)
- 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 in Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Installation Kit > VIK - 9.1.0.

Voyager 9.1.0 runs on Oracle 11.2.0.3. If you are running Voyager 8.2.0, you are on Oracle 11.2.0.3. If you are upgrading from a version prior to 8.2.0, the VIK performs the Oracle upgrade for you. If you prefer to perform the Oracle upgrade manually, follow the instructions for installing the 11.2.0.3 upgrade.

## Scheduling an Upgrade with the Installation Team

The Installation Team's Upgrade Engineers are available for integrating new software releases for our customers. They are technical professionals who are well-versed in Sun Solaris, AIX, Linux, and Microsoft Windows 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 expected to be handled by your site and are not included in the upgrade:

- Customization fixes, including WebVoyage skin files
- Operating system patches
- Site-specific modifications/additions and fine-tuning

## Opening an Upgrade Case

Use the Ex Libris Support Portal to open an upgrade case with Ex Libris.

Be sure to include:

- Preferred dates, at least three possible dates, for the upgrade

Upgrade Engineers are available Sunday through Friday.

Fill out and attach the Request\_for\_Voyager\_Upgrade\_Form (found in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > Installation Request Forms) to the Upgrade Case. If this form cannot be filled out for whatever reason, then include in the Case the following:

- Any special connection instructions
- Contact Name (someone with access to the server during and after business hours) if different from the person logging the case
- 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:

- **Versions** on page 13
- **Review Documentation** on page 14
- **Decisions** on page 14
- **Timing** on page 15
- **Patron SIF and Tag Tables** on page 15
- **Ex Libris Preview Server** on page 16
- **Upgrade Worksheets** on page 16
- **WebVoyage Skin Files** on page 16
- **Primo Interoperability** on page 16
- **Questions** on page 17

### Versions

Voyager 9.1.0 is a minor release. This minor release contains enhancements, 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 18 November 2014 and 1 December 2014 have the choice of upgrading to Voyager 9.0.0 or Voyager 9.1.0. Sites upgrading after 1 December 2014 will be upgraded to Voyager 9.1.0. Exceptions are made for sites that have installed a previous, supported version on their test server. Other exceptions must be approved by the Installations Manager. Use the Ex Libris Support Portal to open an Upgrade Case following the instructions provided in **Opening an Upgrade Case** on page 10 to request an exception to this rule.

## Review Documentation

Sites upgrading from any release prior to Voyager 9.0.0 should review the *Release Notes* for each interim release. For example if you are upgrading from Voyager 8.2.2 to 9.1.0 you would want to review the *Release Notes* from 9.0.0 and 9.1.0.

Review the *Installation and Upgrade Requirements* document in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 9.1.0. 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, Before Your Upgrade section includes Process the global headings change queue, Process all reports and notices).

Review each updated core and/or extension module Voyager documentation (such as the *Voyager 9.1.0 System Administration User's Guide*) for new information. The Reason for Reissue section in the About this Document chapter provides page numbers to new feature details and any changes to the documentation.

If you run queries on the Voyager database, review the Voyager 9.1 Database Schema Changes and Voyager 9.1 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 WebVoyage or the new WebVoyage 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.
- Before an upgrade to Voyager 9.1.0 begins, the global headings change queue must be processed.

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### NOTE:

The global headings change queue may not be preserved during the upgrade.

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- For Voyager 9.1.0, all reports and notices must be processed through Reporter prior to upgrade.

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**NOTE:**

The SIF format for reports and notices has been updated for Voyager 9.1.0. Any unprocessed .inp files from prior to upgrade cannot be processed after upgrade.

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- Training databases are refreshed at upgrade. If you would like to retain your existing training databases, alert your Upgrade Engineer.
- In a single-server, multidatabase environment, Voyager databases can be upgraded separately.

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**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.

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- 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.

## Patron SIF and Tag Tables

Changes to Patron loading are made for the XML Patron utilities, introduced in Voyager 8.2.0. The Patron SIF, used for the SIF method of patron update/extract, has NOT changed in Voyager 9.1.0. There is no need to make any changes to patron update/extract procedures at your institution if you are using the Patron SIF method for Patron Update.

Tag tables have not been updated for Voyager 9.1.0. Recent MARC 21 and OCLC updates will be added to the tag tables in a future release.

## Ex Libris Preview Server

Using the Preview Server provided by Ex Libris, sites can begin customizing WebVoyage long before they upgrade. Files are available for download and instructions are provided for using the Preview Server database as your WebVoyage 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 > 9.1.0 for details.

## Upgrade Worksheets

The Upgrade Worksheet walks 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.

## WebVoyage Skin Files

Refer to the document, *WebVoyage Changed Skin Files and Content 9.0.0 to 9.1.0* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 9.1.0 for a list of files in the skin directories changed from 9.0.0 to 9.1.0 as well as what has been changed within the skin files. It is meant to be used when planning for the best way to carry your skin-level customizations from a previous version of WebVoyage forward to version 9.1.0.

Refer also to the *Installation and Upgrade Requirements* document in the Documentation Center in the Responsibilities Checklist section for more information about restoring customizations for WebVoyage.

## Primo Interoperability

Sites that integrate Voyager with Primo should review the configuration and settings on the Voyager server prior to upgrade, and again when the upgrade is complete. See the Support Portal article, "Upgrading Voyager and also have Primo?" for details.



## Questions

If you have any questions about Voyager 9.1.0 or the process of the upgrade, use the Ex Libris Support Portal to open a Case with Ex Libris.

