



Preparing for Voyager Software Upgrades

Best practices for a more seamless move to a new version

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ExLibris
a ProQuest Company

■ Introductions

We are ...

Amy Rood & Laura Jacobs, Voyager Support

Combined 10 years of experience troubleshooting Voyager and managing Voyager projects including data center migrations and upgrades.

You are ...

Name

Institution

Experience with upgrades

Objectives and Target Audience

This session covers how to prepare for upgrades by leveraging documentation and other resources and understanding how to preserve & update configurations.

- **Objective**

- By the end of this sessions you will:

- Understand best practices planning and executing Voyager software upgrades
 - Be able to find resources to assist in planning and execution
 - Get a peek at the VIK and some basic tips for using it

- **Target Audience:** Librarians and system administrators responsible for planning Voyager upgrades

Agenda

1**Planning stages****2****Preparing for an upgrade****3****Executing the upgrade / What to expect during the upgrade****4****Wrapping up and finalizing****5****Next Steps, Support Resources and Survey**

Planning stages



Why upgrade?

- Improvements to existing functionality
- New features
- Defect fixes
- Stay on supported release
 - “Supported” release for Voyager: current major release and all its minor releases and service packs, plus 1 major release prior and all its minor releases and service packs
 - Example: Voyager 10.x and Voyager 9.x



Where are you now and what are your needs?

A few key questions for starting the planning process:

- What is current version? Target version?
- Test server to be upgraded first?
- Staying on same hardware/environment?
- Specific timeline / other projects that needs to be accounted for?
- Run VIK locally or request upgrade by Ex Libris engineer?



Timelines

Factors impacting time to prepare, execute & complete upgrade:

- Busy times locally? for all Voyager customers?
 - Break periods = busy periods: more lead time to book with Ex Libris
- Extent of local customization (scripts, reports, etc.)?
 - Extensive customization = more time to maintain & update
- Size of installation? Extension modules? Integrations?
- First time you're running VIK?
- How many versions between current and target versions?

Start considering well in advance of target timeline ...

Resources to help in planning

- Road To
 - “roadmap” for upgrade planning
- WebVoyage and Configuration File Changes
 - Changes to WebVoyage skin files and other config files on server
 - NOT cumulative – each file notes changes from previous version.
- Release Notes
 - New features and enhancements for each version
- Defect Fixes
 - Defect fixes in each version

... and sample checklist included as part of this presentation! Customize to suit local needs and revise with lessons learned each time you upgrade.



Next steps

Once timeline determined, schedule the upgrade:

- If requesting Ex Libris perform the upgrade, open a Case with preferred dates and information for scheduler.
- If you'll be running the VIK, open a Case with dates of upgrade to let Support know.

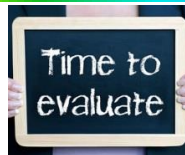
Confirm dates with Ex Libris and with staff locally.



Preparing for Upgrade



Take Stock ...



- What is special about your environment?

Start evaluating ...

- ... Voyager extension modules
- ... Integrations with other Ex Libris and third-party products
- ... Scripts that facilitate communication or data flow between Voyager and other systems
- ... WebVoyage customizations
- ... custom files and reports on staff workstations

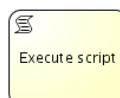
Take Stock: Extension modules and integrations

- Extension modules: additional, optional extensions to core software. Additional fees for purchase and maintenance.
 - Examples: Analyzer, SIP2/Self-Check
 - Listed here: https://knowledge.exlibrisgroup.com/Voyager/Product_Documentation/Voyager_Extension_Modules
- Integrations: Other Ex Libris and third party products can communicate with Voyager (sometimes using extension modules like SIP2).
 - Examples: Primo, Summon and other discovery products; SFX, 360 Link and other link resolvers; bursar and other institutional systems
 - How do they communicate with Voyager?

Preceding session covered upgrade concerns for these. Can be added to your local plan/checklist.

Take stock: Local scripts and customizations

- On staff workstations ...
 - Reports
 - Have operators created custom reports in Reports.mdb that need to be retained?
 - What other configuration and .ini files on the PC and server have been customized?
- On the server ...
 - Scripts
 - Where do they reside? What do they do?
 - Do they need to be updated?
 - WebVoyage customizations
 - Are these tracked? If not, start on this upgrade
 - Major release – start from brand new set of files and reapply
 - Leave time for this – can take more time than anticipated



Prepare: workstations

- Reports.mdb
 - New Reports.mdb distributed with clients may overwrite existing
 - New file will have any database changes if applicable
 - Retain backup copy in a different directory and add custom reports to new file after upgrade
- Other local files
 - Tag tables – often customized
 - voyager.ini
 - Other local client configs that have been customized (Spinlabel.cfg, Callslip.ini, Cataloging templates)
 - Save backup copies in a different directory

Extra credit: set up AutoUpdate to automatically update staff clients after upgrade

Prepare: server

- Local scripts and customizations
 - First, the basics ...
 - Where do they live on server?
 - What do they do?
 - Are there new features in Voyager that can be leveraged for this purpose after upgrade?
 - Then, determine what, if anything, needs to be done
 - What language are scripts using?
 - Are there updates that need to be made?
 - Are there paths that might change?
 - Backup copies of scripts?



Prepare: WebVoyage customizations

- Can be updated ahead of upgrade using Preview Server
- ***Do you track changes?***
- At upgrade, exl_default + sandbox will be replaced
 - Custom skins put back in place – not touched. No new files
 - Make copies of files from exl_default & re-customize
 - Use documentation of customizations + WebVoyage and Configuration File Changes documents to guide updates

Helpful tools:

vi (text editor on server)
 ftp client (WinSCP, Filezilla, e.g.)
 Notepad++ or Notepad
 File comparison tool (WinMerge, e.g.)

(W3Schools and numerous other sources provide free tutorials on CSS, XML, etc.)

Prepare: people

- What is impact – for staff? For patrons?
- How will this be communicated? When?
- Are staff expected to complete additional tasks before and after upgrade?
- How will you handle problem reports post-upgrade?

And don't forget ...

- Plan for offline Circ
 - Feature built into Voyager
 - Other systems or workflows that are suited to local need
- GHC queue
 - Sometimes GHC tables are cleared during the upgrade
 - Process before upgrade
- Classic WebVoyage
 - If using instead of Tomcat, be sure to notify engineer
 - No changes since Voyager 7.0.1 – minimal prep work – but default files may be in place if engineer doesn't know to put yours back in
- Primo Extract
 - Run immediately prior to upgrade
 - Alter ChangedSince date on first run to avoid picking up all records



Executing the upgrade / What to expect during the upgrade

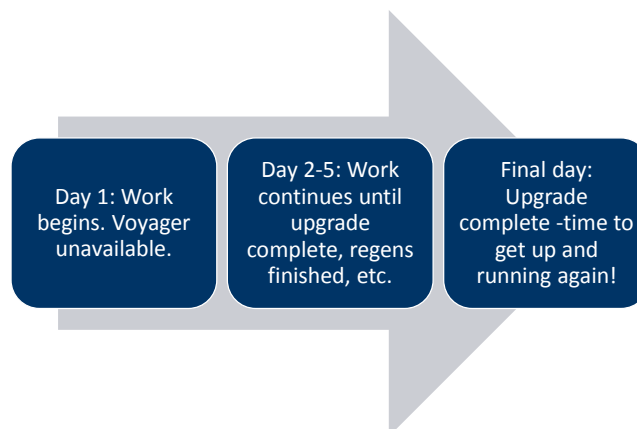
Let's do this!

You timed it out, you planned it out, you prepared your server, your staff, their workstations ... Now it's time to make it happen!



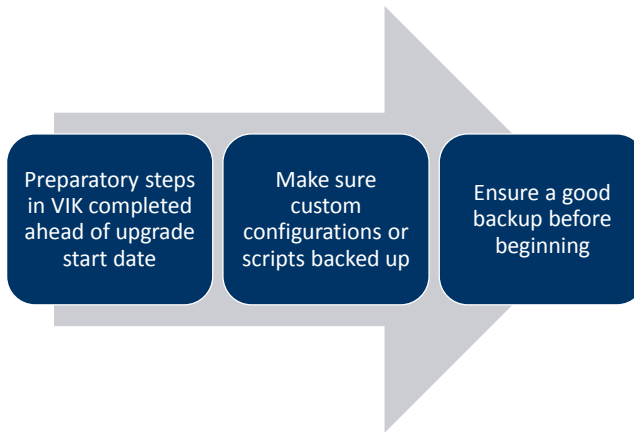
If Ex Libris is executing the upgrade ...

Timeline varies (estimate will be provided ahead of upgrade).
Very high level timeline ...



If you are running the VIK ...

- Same thing! Except you'll be the upgrade engineer this time.



In either case ... communicate!

- ... to staff what's happening, approximate timeline, etc.
- ... to patrons the services available (or not) while upgrade takes place.
- ... to Support if you run into any unexpected behavior or issues during process.



Wrapping up and finalizing



You're on a new version – congratulations!




☒ You just had an awesome upgrade

What next?

- Staff need updated clients.
 - AutoUpdate
 - Download from Knowledge Center
 - Other local distribution
- That WebVoyage skin you worked so hard to update ...
 - Move to /ui directory and make it active!
 - Test some basics (search, patron login, renew/request items, etc)
- Upload offline circ transactions!
- Workstations
 - Restore or reconcile customized config files
 - Relink tables in Reports.mdb
- Server
 - Run scripts on server (or wait for cron) and check results
 - Integrations – extension modules, discovery, etc ... are those all ship shape?

Report any issues

- Sooner the better!
- More information upfront means fewer questions later and faster resolution
- Sometimes helpful to provide “form” or set of questions to staff for reporting post-upgrade issues
 - Expected / previous behavior
 - Actual / current behavior
 - Steps to reproduce (include error messages, example records, login details)
 - Impact (# of operators, severity)



Next Steps and Support Resources

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Next Steps and Support Resources

- Release Notes and Documentation in the [Knowledge Center](#)
 - Voyager > Release Notes > [Version]
 - Release Notes
 - Defect Fixes
 - Voyager > Implementation Guides > [Version]
 - Clients (VoyagerInstall.exe)
 - Road To
 - Changed Files documentation
 - Voyager > Product Documentation > Voyager Installation Kit
 - VIK documentation for recent versions
- Knowledge Articles cited throughout this presentation
- [Support Portal](#) for assistance from Support

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Sample checklist to customize ...

Voyager Software Upgrades - Planning							2017	Technical Seminar
Task	Priority	Status	Start Date	Due Date	% Complete	Done/Overdue?	Notes	
Integrations		Not Started					List extension modules, integrations, scripts, etc. that communicate with Voyager	
Local customizations		Not Started					List all local customizations and scripts, and analyze. Note any that need to be updated. Examples: On PC, custom reports in Reports.mdb; tag tables; other .cfg and .ini files. On server, Primo extract and RTA config files; WebVoyage customization; locally-created scripts for processes and other integrations	
Install Preview Server		Not Started					Install Preview Server for target version and begin work on recustomizing WebVoyage skins.	
Set up AutoUpdate for client installation		Not Started					Configure [Upgrade] stanza in voyager.ini on local PCs	
Notify staff/patrons of impact		Not Started						
Offline circulation		Not Started					Prepare staff for how to collect offline circulation transactions during upgrade. Note that any software that resets circ machines at day end should be disabled.	
Notify installer if using Classic WebVoyage		Not Started						
Process Global Headings Change Queue		Not Started					GHCO does not always persist through upgrade. Best practice: process and clear prior to upgrade.	

Q & A

Any Questions?





Session Survey Evaluation

Please use the following link
<https://www.surveymonkey.com/r/techsem2017> to provide feedback on your sessions.

