

## Best practices for Voyager Upgrade preparation

### Transcript

- 0:00 Rules for Voyager Upgrades. This video will cover best practices for preparing for Voyager software upgrades.
- 0:11 Rule number one: know your Voyager environment. Do you have special scripts? What's in your crontab? How extensively has WebVoyage been customized, and have those customizations been documented? Do you have third party products and extensions that integrate with Voyager? What about Voyager extension modules or other Ex Libris products?
- If you don't keep a list of these aspects that stretch beyond a standard, out-of-the box Voyager installation, this is a great time to make one.
- 0:43 Rule number two: know your institution.
- Is there a break period or lower-usage time when upgrades are less disruptive? Does this coincide with break periods for other institutions?
- For example, Installation activity is typically highest during higher education break periods in North America, so it's usually best to request dates during these times as far in advance as possible to improve the chances that your preferred dates will be available.
- How much time do you need to prepare? Do staff have an established method for capturing offline circulation activity? Will someone on site upgrade voyager, or will Ex Libris perform the upgrade?
- How many versions are you bypassing between your current and upgrade version? More versions between your current and upgrade versions may mean more WebVoyage file changes, or starting from a fresh set of skin files and reapplying customizations, as in the case of upgrading to a new major version.
- Knowing these answers will help you determine how far in advance to begin preparation and when to request upgrade dates if Ex Libris performs the upgrade.
- 1:53 Rule number three: Read up and communicate!
- Have you reviewed the documentation relevant to your upgrade? Do staff know the upgrade is happening and when? Do patrons?
- 2:04 Ex Libris provides a large amount of documentation for upgrades. It may feel a little overwhelming to need to review so much, but upgrades go more smoothly when you know what to expect.

- 2:17 Start with the Road To document for the version you plan to upgrade to. It's an upgrade roadmap and will guide you to other relevant documentation. And also take a look at the article, "Resources and FAQs for Voyager Upgrades" which is a comprehensive list of upgrade resources. You'll find links to documents on server and PC requirements and supported software; new features and defect fixes; and instructions for running the VIK to upgrade the Voyager software
- 2:52 One of the most important areas of Voyager to pay attention to for an upgrade is WebVoyage. Because customizations can range from relatively simple to quite complex, customized skins are not updated automatically during upgrade.
- This sometimes means an existing skin may be incompatible in some ways with a new version – some features may not look or function as expected when an old skin is used on a new version of Voyager.
- Preview Server and WebVoyage and Configuration File Changes documents allow sites to customize WebVoyage ahead of upgrade to avoid this issue.
- 3:28 Rule number 4: When the upgrade is complete, test, test again, and stay in touch!
- Did your cronjobs run overnight? Was Primo updated with the records you added since upgrade? Do you have questions about new features in the version you upgraded to that aren't answered in the release notes?
- Use the list you created to follow Rule number one to create a list of tests to conduct after upgrade.
- Update your engineer to let them know if you run into any issues, or if everything works as expected.
- Your engineer may ask you to open a case with Support.
- Some issues that arise after upgrade may be more appropriate for Support to handle, and opening a case allows Support to help you directly instead of having the engineer as a go-between.
- 4:14 Preparation can make for a smoother upgrade process. Here's a list of resources in the Knowledge Center to help you, which you'll also find on this video's page in the Knowledge Center.
- 4:24 If you have feedback about the content of this video, or any of the resources in the Knowledge Center, use the feedback button at the bottom of the page on any page for which you'd like to leave feedback.
- 4:35 And if you have questions about the upgrade process itself, feel free to open a Case with Support any time. Thank you!