Preview Server

Version 10.2

Ex Libris

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Updates to This Guide

This guide includes the following changes:

- Updated references to PREVOY1010 to PREVOY1020
- Updated references to preview1010_install to preview1020_install
- Updated references to VOY1010 to VOY1020
- Added the section **Installing Voyager Skins** on page **19**

1

Introduction

This section includes:

- Local Client Preview Server on page 7
- Remote OPAC Preview Server on page 8
- Local OPAC Preview Server on page 8

Preview Server is available for customers to view a preview of the new features of Voyager before upgrading to a new software release or version.

There are three types of Preview Server:

- Local Client Preview Server
- Remote OPAC Preview Server
- Local OPAC Preview Server

This document explains how to connect to these three options so that you can test the new features and prepare for your upgrade.

Local Client Preview Server

You can test the Voyager clients of the latest voyager release by downloading the clients from the documentation center. You are able to see all of the client feature updates and enhancements. If there is a client feature that depends on server side changes, those features are not enabled. This is to ensure that customers experience the functionality of the software without special customizations for any specific institution or workflow. Also, your changes might not remain in the Ex Libris environment for the duration of your testing. If at any point a refresh of the preview server is required, this refresh may be performed without notice.

Remote OPAC Preview Server

Using an environment that is setup and hosted by Ex Libris, you can connect your browser to an Ex Libris provided URL to preview the basic functionality of the OPAC. You cannot make any changes to the display of the OPAC and you cannot preview the OPAC's extensive feature set. With this option, you can see what changes have been made out-of-the-box for the new release. You can compare the new version of the OPAC with what is available in your installation using an unmodified skin.

Local OPAC Preview Server

If you are primarily interested in making customization changes to the OPAC in preparations for your Voyager upgrade, use the local OPAC Preview Server installation. The local preview server installation is the third component of preview server and allows you to test the OPAC in a local setting prior to the upgrade. This option gives you access to the XSL, CSS, and configuration files necessary to making changes to the look and feel of the OPAC. This feature can be valuable and reduce the stress of going through the Voyage upgrade process by making the necessary changes to the OPAC skins prior to your upgrade date. When you upgrade, you can then copy the skins from the preview server into your production environment. This feature can be particularly useful if you do not have a test server environment to receive the latest version prior to your production environment upgrade.

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Requirements

This section describes the system requirements for installing Preview Server.

This section includes:

- **Browser Requirements** on page 9
- **System Requirements** on page 9
- **Local Preview Server Requirements** on page 9
- **Local OPAC Preview Server Requirements** on page 10

Browser Requirements

For browser requirements to use the Remote OPAC Preview Server and the Local OPAC Preview Server, refer to the *Voyager Installation and Upgrade Requirements* document.

System Requirements

Refer to the *Voyager Installation and Upgrade Requirements* document for the minimum requirements for installing the Voyager clients on your PC.

If you already have Voyager clients on your local PC, be sure to install these clients in a different location – do not overwrite your current production clients.

Local Preview Server Requirements

The *Voyager Installation and Upgrade Requirements* document contains the packages necessary to run the local OPAC and Client Preview Servers. Ensure that your system has all of the system packages for your Voyager server's operating system and that all requirements have been met.

Local OPAC Preview Server Requirements

- Outbound access to `preview1.hosted.exlibrisgroup.com` and preview server ports 9814 and 9914 must be configured on the server.
- One (1) external port (by default 7098) is required for WebVoyáge and Skin Administration. Ensure that this port is available through your firewall. For information on changing the default port, see **Appendix A: Changing the Default Port for Preview Server** on page **27**.
- Root access is not required for this installation

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Installing the Local Client Preview Server

This section describes how to install the local client Preview Server.

To set up the local client Preview Server:

1. Download and install the clients from the Documentation Center. (For more information on how to download and install the Voyager clients, refer to the *Voyager Technical User's Guide*.)
2. Modify the `Voyager.ini` file located at `C:\PreviewVoyager` with the following information:

```
[Cataloging]
Server=preview1.hosted.exlibrisgroup.com
Port=9810
Timeout=60

[Acquisitions]
Server=preview1.hosted.exlibrisgroup.com
Port=9820
Timeout=60

[Circulation]
Server=preview1.hosted.exlibrisgroup.com
Port=9830
Timeout=60
ChargeTimeout=60

Reports]
Server=preview1.hosted.exlibrisgroup.com
Port=9840
Timeout=60

[SysAdmin]
Server=preview1.hosted.exlibrisgroup.com
Port=9850
Timeout=60

[CallSlip]
Server=preview1.hosted.exlibrisgroup.com
Port=9880
Timeout=60
```

```
[MediaScheduling]
Server=preview1.hosted.exlibrisgroup.com
Port=9885
Timeout=60

[GlobalDataChange]
Server=preview1.hosted.exlibrisgroup.com
Port=9815
Timeout=60000

[GlobalLog]
SingleLogin=Y
Encrypt=N
ServerSortList=Y
ASCIISortList=Y
ASCIISortColumn=Y

[SearchURI]
#Name=Barn&esNoble
#URI=http://search.barnesandnoble.com
#Copy=Y
#SearchSyntax=/booksearch/results.asp?WRD=<searchtext>
#Name=WebVoyage
#URI=http://preview1.hosted.exlibrisgroup.com/
#Copy=Y
#SearchSyntax=/vwebv/
search?searchArg=<searchtext>&searchCode=TALL&limitTo=none&re
cCount=10&searchType=0
#Name=Amazon
#URI=http://www.amazon.com
#ECopy=Y
#SearchSyntax=/exec/obidos/external-
search?keyword=<searchtext>&mode=blended
#Name=Worldcat
#URI=http://www.worldcat.org/
#Copy=Y
#SearchSyntax=search?&q=
#Name=Google
#URI=http://www.google.com/
#Copy=Y
#SearchSyntax=search?&q=

[MARC POSTing]
#Classic WebVoyage
#WebVoyage="http://preview1.hosted.exlibrisgroup.com/cgi-bin/
Pbibredirect.cgi"
#Tomcat WebVoyage
WebVoyage="http://preview1.hosted.exlibrisgroup.com/vwebv/
holdingsInfo"
#Classic WebVoyage
#LinkResolver="http://preview1.hosted.exlibrisgroup.com/cgi-
bin/Phttplinkresolver.cgi"
```

```
#Tomcat WebVoyage
LinkResolver="http://preview1.hosted.exlibrisgroup.com/vwebv/
linkResolver"
```

3 Run the clients by navigating to the directory where you installed them. (The default location is `C:\PreviewVoyager\`). Double-click the Voyager modules that you selected during installation.

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Remote OPAC Preview Server

This section describes how to run the remote OPAC Preview Server.

To run the OPAC Preview Server:

1 Enter the following URL into the browser address bar:

```
http://preview1.hosted.exlibrisgroup.com:9808
```

2 Enter the following username and password when you are prompted:

```
User: preview
Pass: (Open a case with Support to obtain username and password information.)
```

3 If you want to log on as a patron, enter the following barcode and last name:

```
Barcode: 2692
Last Name: Hayes
```

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Local OPAC Preview Server

This section describes how to install, manage, and customize the local OPAC Preview Server.

This section includes:

- **Installing the Local OPAC Preview Server** on page 17
- **Managing the Local OPAC Preview Server** on page 23
- **Customizing the Local OPAC Preview Server** on page 24
- **Stopping the Local OPAC Preview Server** on page 25
- **Uninstalling the Local OPAC Preview Server** on page 26

Installing the Local OPAC Preview Server

This section describes how to install the local OPAC Preview Server.

To install the local OPAC Preview Server:

1 Download the Preview Server package.

- For UNIX, log on to your voyager server as the `voyager` user:

```
mkdir -p /m1/incoming
cd /m1/incoming
ftp downloads.exlibrisgroup.com
  user: preview
  password:
cd VOY1020/<OS>
bin
hash
get preview1020_install
bye
```

NOTE:
Open a case with Support to obtain the FTP password for the Preview Server.

For example:

```
/export/home/voyager $ mkdir -p /m1/incoming
/export/home/voyager $ cd /m1/incoming
/m1/incoming $ ftp downloads.exlibrisgroup.com
Connected to downloads.exlibrisgroup.com.
220-Unauthorized use is prohibited.
220-
220-All transactions are logged.
220-
220 downloads.exlibrisgroup.com FTP server (Version wu-
2.6.0(2) Fri Mar 10 08:47:43 CST 2000) ready.
Name (downloads.exlibrisgroup.com): preview
331 Password required for preview.
Password:

230 User preview logged in. Access restrictions apply.

ftp> cd VOY1020/<OS>

ftp> bin
200 Type set to I.
ftp> hash
Hash mark printing on (8192 bytes/hash mark).
ftp> get preview1020_install
200 PORT command successful.
......
ftp> bye
221-Thank you for using the FTP service on
downloads.exlibrisgroup.com.
221 Goodbye.
```

2 Install the Preview Server package.

- For UNIX:

a Log on to the server as the `voyager` user.

```
cd /m1/incoming
chmod u+x preview1020_install
./preview1020_install
```

b Enter where you want to install the package.

c Enter where Voyager is located.

d Enter `Y` to begin the installation.

NOTE:
You can change the port from 7098 to a different port now. For information on changing the default port, see **Appendix A: Changing the Default Port for Preview Server** on page **27**.

For example:

```
#####################
Welcome to the Voyager Preview Server Installer
#####################

Where do you wish to install? [/m1/incoming]
Where is voyager located? [/m1/voyager]

Ready to install Preview Server for Voyager ? Y/N [Y]

Checking for required files.........OK
Checking install space..............OK
Creating Install Directory..........OK
Extracting files, please be patient..OK
Configuring Preview Directory........OK
Creating mock xxxdb skins...........OK
```

IMPORTANT:
If there are any errors, uninstall the local OPAC Preview Server and re-execute preview1020_install. For information on uninstalling the local OPAC Preview Server, see **Uninstalling the Local OPAC Preview Server** on page **26**.

Installing Voyager Skins

The preview server installer provides the option to generate an auto-customized version of the newest Voyager skins for you. The new skin is named `<xxxdb name>-<Skin Name>-<Voyager Release>` and placed in `/m1/incoming/PREVOY1010/tomcat/vwebv/context/vwebv/ui` with the template skins and uncustomized skins that the preview server has created.

During the automatic customization process, any new skin files are added to your skin. Skin files that you have not customized are replaced with the newest version of those files.

The skin converter tries to isolate your customizations and apply them to the new skin files. Note that this is not a consistently successful process. More information about this is provided later in this section.

See below for an example skin customization session.

```
Configuring Preview Directory........OK
Creating mock xxxdb skins............OK
  Shall I try to automatically convert xxxdb skin en_US Y/N
[Y]
Attempting to convert skin xxxdb en_US to 2010.2.0
Extracting skin catalog....
Creating new skin /m1/incoming/PREVOY1010/tomcat/vwebv/
context/vwebv/ui/xxxdb-en_US-2010.2.0
   htdocs/help/index.html appears to be based on v2007.0.4 .
We weren't able to completely update it to version 2010.2.0
        Hunk #1 FAILED at 139.
        1 out of 1 hunk FAILED -- saving rejects to file
htdocs/help/index.html.rej

============================================================
    Review the file htdocs/help/index.html.rej
    for a list of customizations that we couldn't
automatically
    make.  Manually apply these customizations to
    htdocs/help/index.html_autocustomized
    Then copy it back to htdocs/help/index.html

============================================================
    webvoyage.properties -- Attempting semantic update.
    xsl/contentLayout/configs/displaycfg.xml appears to be
based on v2007.1.0 .  We weren't able to completely update it
to version 2010.2.0
        Hunk #1 FAILED at 35.
        Hunk #5 FAILED at 155.
       2 out of 9 hunks FAILED -- saving rejects to file xsl/
contentLayout/configs/displaycfg.xml.rej

============================================================
    Review the file xsl/contentLayout/configs/
displaycfg.xml.rej
    for a list of customizations that we couldn't
automatically
    make.  Manually apply these customizations to
    xsl/contentLayout/configs/displaycfg.xml_autocustomized
    Then copy it back to xsl/contentLayout/configs/
displaycfg.xml

============================================================
  Shall I try to automatically convert traindb skin en_US Y/N
[Y]
Attempting to convert skin traindb en_US to 2010.2.0
Extracting skin catalog....
Creating new skin /m1/incoming/PREVOY1010/tomcat/vwebv/
context/vwebv/ui/traindb-en_US-2010.2.0
```

When Auto-Customization Fails

The auto-customization tool tries very hard to apply all of your skin customizations to the new Voyager skin files. But sometimes this is not possible. When the auto-customization does not work, you see a message like the following:

```
   htdocs/help/index.html appears to be based on v2007.0.4 .
We weren't able to completely update it to version 2010.2.0
        Hunk #1 FAILED at 139.
        1 out of 1 hunk FAILED -- saving rejects to file
htdocs/help/index.html.rej

============================================================
    Review the file htdocs/help/index.html.rej
    for a list of customizations that we couldn't
automatically
    make.  Manually apply these customizations to
    htdocs/help/index.html_autocustomized
    Then copy it back to htdocs/help/index.html

============================================================
```

When this happens, be aware of the following:

- When the installer is unable to apply your customizations to the new skin file, a copy of your old skin file is made in place of the new skin file. In the above example, the `htdocs/help/index.html` file in your new skin is the same one that you were using in the old skin.
- Since the customization tool is often able to apply some of your customizations to a file, even if it is unable to do the whole thing, the file is saved that was worked on as `<filename>_autocustomized`. In the above example, the partially customized file is named `htdocs/help/index.html_autocustomized`.
- The installer saves the customizations that could not be completed to the file called `<filename>.rej`. Using the above example, the file is named `htdocs/help/index.html.rej`. The `rej` file is in Unified Diff format.

- To apply the rejected customizations to your file, first review the `rej` file to determine how much work need to do. In the following example, it is relatively clear:

```
--- htdocs/help/index.html-version_2007.0.4     2018-04-16
16:27:12.000000000 -0400
+++ htdocs/help/index.html      2010-02-19 15:01:37.000000000 -0500
@@ -139,7 +139,7 @@

   <div Id="pageFooter">
     <div id="copyright">
-       <span id="copySymbol">&copy;</span> <span>2008 Ex Libris
Group. All rights
+       <span id="copySymbol">&copy;</span> <span>2010 Your Name
Here. All rights
          reserved.</span>
     </div>
   </div>
```

  - The first line, which begins with `---`, indicates the file that is being compared to your custom file.
  - The second line, which begins `+++`, indicates the name of your custom file.
  - What follows are one or more blocks of changes to apply. Each one begins with a line that starts like `@@ -139,7`.

    This means that this section starts on line 139 of the uncustomized file, and was originally seven lines long. The `+139,7` means that the section starts on line 139 of the customized file, and is still seven lines long.

    Lines following this that do not begin with a special character are unchanged. They are provided for context.

    Lines beginning with a `-` (hyphen) character are the original lines in the original file. Look for something like these in the new file that you are customizing. Note that what you find will not look quite the same.

    Lines beginning with a `+` (plus) character are the replacement, custom lines.

    Many times there are `-` lines and `+` lines together, but some customizations only add or remove lines from a file.

- Open the `autocustomized` file (like `htdocs/help/index.html_autocustomized`). For each `-` line and each `+` line, look for where that ought to fit. It is likely to be near where it was in the old file, so start around there. Look for unique strings in, or near the lines that you need to change, like `div Id="pageFooter"` or `copySymbol`.

- After you have applied or discarded all of the rejected customizations from your `rej` file, back up your old uncustomized file and replace it with the new autocustomized file that you worked on:

  ```
  cp htdocs/help/index.html htdocs/help/index.html.orig
  cp htdocs/help/index.html_autocustomized htdocs/help/
  index.html
  ```

- If you want to start over with a new, uncustomized copy of the file you can find that in `/m1/incoming/PREVOY1010/tomcat/vwebv/context/vwebv/ui/exl_default`.

Even though the auto-customization tool makes every effort to apply all of your skin customizations to the new Voyager skin files, remember that it is not always successful; and it is important that you test all of your customizations in the preview server. You should also test again with your own data and configuration after the upgrade.

Note that the automatic customization tool is meant to encourage you to use the best quality skins, but support for automatically customized OPAC skins remains at the same level offered for your manually customized skins.

Managing the Local OPAC Preview Server

This section describes how to manage the local OPAC Preview Server.

To manage the local OPAC Preview Server:

1. Start the Preview Server.
   - For UNIX:

     Log on to the server as the `voyager` user.

     ```
     cd /m1/incoming/PREVOY1020
     ./preview.ksh start
     ```

2. Test the Preview Server.
   a. Open a supported browser.
   b. Enter the following URL into the browser address bar:

   ```
   http://<voyager server IP or fqdn>:7098/
   ```

3. Log on to the Administration area.

a Open a browser on your PC

b Enter the following URL into the browser address bar:

```
http://your.library.edu:7098/skins
```

c Enter the following user name and password:

```
User name: preview
Password: preview
```

The following is displayed:

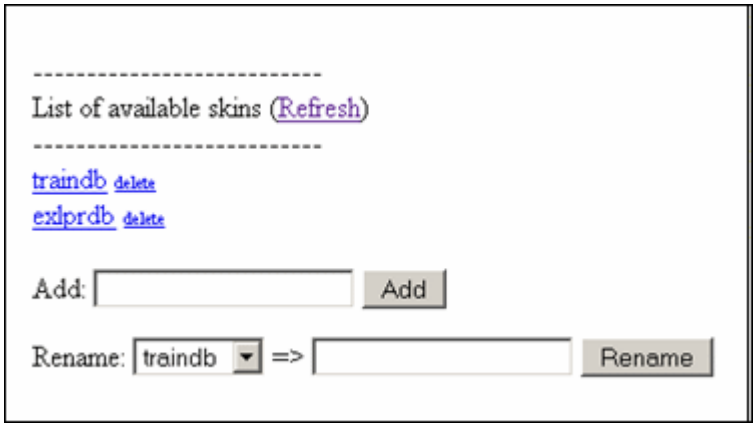

Figure 1: Skin Management

You can perform the following actions from this page:

Table 1. Skin Management

Action	Description
View Skins in the OPAC	Click the database to display the skin.
Delete Skins	Click **delete** next to the skin to be removed.
Add Skins	In the Add text box, enter the name of the additional skin, and click **Add**.
Rename Skins	Select an available skin from Rename drop-down list. Enter the new name for the skin in the text box, and click **Rename**.

Customizing the Local OPAC Preview Server

For instructions on how to customize the skins, see the *Voyager® 9.1.0 WebVoyáge Basic User's Guide* or the *Voyager® 8.1.0 WebVoyáge Architecture Overview and Configuration Models*.

IMPORTANT:
Do not make any changes to `exl_default`. This skin is not for customer use. Any customizations may be lost during upgrade.

To customize the Local OPAC Preview Server:

- For UNIX:
  a. Log on to your server as the `voyager` user.
  b. Change the directory to `ui` where the skins reside.

```
cd /m1/incoming/PREVOY1020/tomcat/vwebv/context/vwebv/ui
```

  c. View your created skins:

```
ls
```

  For example:

```
exl_default traindb v910db
```

Stopping the Local OPAC Preview Server

This section describes how to stop the local OPAC Preview Server.

To stop the local OPAC Preview Server:

- For UNIX

  Log on to your server as the `voyager` user.

```
cd /m1/incoming/PREVOY1020/
./preview.ksh stop
```

  For example:

```
Stop tomcat...
Using CATALINA_BASE: /m1/incoming/PREVOY1020/
  tomcat/vwebv
Using CATALINA_HOME: /m1/incoming/PREVOY1020/
  tomcat/vwebv/catalina_home
Using CATALINA_TMPDIR: /m1/incoming/PREVOY1020/
  tomcat/vwebv/temp
Using JAVA_HOME: /m1/incoming/PREVOY1020/
  tomcat/vwebv/java
PLEASE WAIT...
Tomcat is stopping...
```

Uninstalling the Local OPAC Preview Server

This section describes how to uninstall the local OPAC Preview Server.

- For UNIX:
  a. Stop the Preview Server. See **Stopping the Local OPAC Preview Server** on page **25**.
  b. Log on to your server as the `voyager` user

```
cd /m1/incoming
rm -rf PREVOY1020
```

A

Changing the Default Port for Preview Server

This appendix describes how to change the default port for Preview Server.

To change the default port for Preview Server:

- For UNIX

  a Log on to your server as the `voyager` user:

```
cd /m1/incoming/PREVOY1020
./preview.ksh stop
cd apache2/conf/ActivatedVirtualHosts
vi PREVOY_vwebv_httpd.conf
```

  b Change `7098` to `<New Port>`:

```
Listen 7098
<VirtualHost *:7098>
```

  c Start Preview Server:

```
cd /m1/incoming/PREVOY1020
./preview.ksh start
```