



Installation and Upgrade Requirements

Version 9.2.0

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Updates to This Guide

This guide includes the following changes:

- Updated the following tables:
 - **Table 3**
 - **Table 4**
 - **Table 7**
- Updated references to Oracle, Solaris, and RHEL (Linux) throughout the guide
- Updated server information in **Server Access** on page **28**
- Updated step 3 in **Before Your Upgrade** on page **47**

1

Introduction

This section includes:

- **About This Guide** on page 9

About This Guide

This document describes the requirements for installing and working with Voyager.

Before purchasing and installing your hardware and operating system, confirm the hardware and operating system requirements with your Ex Libris representative.

NOTE:

These requirements may change due to Ex Libris development requirements.

To ensure work begins on time, you must make certain that your server requirements are met 10 business days prior to the work scheduled. Details of the requirements can be found in the documents identified below.

First review the *Installation_Policies.pdf*.

Subsequently, ensure that your system meets the requirements provided in one of the following documents based on your operating system:

- *Operating System Requirements for the Sun Platform.pdf*
- *Operating System Requirements Red Hat Enterprise Linux.pdf*
- *Operating System Requirements for AIX.pdf*
- *Windows OS Requirements.pdf*

Refer to the Ex Libris Documentation Center for the Voyager installation forms under Ex Libris Documentation Center > Voyager > Upgrade Release Planning > Installation Request Forms. You need to complete an installation request form and submit it with your eService request.

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Server Hardware and Software Requirements

This section includes:

- **Server Requirements** on page 11
- **Operating System/Platform Considerations for Voyager** on page 13
- **File System and Disk Space Requirements** on page 14
- **Backup and Recovery Media and Procedures** on page 16
- **Additional Server Software** on page 16
- **top on Non-Linux Platforms (Optional Server Software)** on page 16

Server Requirements

Install Voyager and the Oracle database on dedicated servers with the specifications listed in **Table 1**.

Table 1. Server Specifications

Specification (for each server)	Description
Operating system/ platform	<ul style="list-style-type: none"> ■ Linux: <ul style="list-style-type: none"> ■ RHEL 7.x 64-bit ■ RHEL 6.x 64-bit ■ RHEL 5.x 64-bit (Update 6 and later) ■ Sun: <ul style="list-style-type: none"> ■ Solaris 10 on SPARC (Update 11 - 1/13 and later) ■ Solaris 11 on SPARC (SRU 14.5 or later SRUs and updates)
CPUs*	Minimum of 2
RAM*	Minimum of 4 GB
Media for data exchange	<ul style="list-style-type: none"> ■ FTP and Internet connection (see Communication Requirements) ■ CD-ROM drive for data and software exchange (in case FTP is not available temporarily, or if Ex Libris has approved work without an Internet connection)
Database**	<ul style="list-style-type: none"> ■ Oracle 64-bit
Additional server software**	Oracle RDBMS add-on software (installed by Ex Libris to ensure full compatibility with Voyager)
* Consult with the Ex Libris Sizing Manager	
** Installed by Ex Libris to ensure full compatibility with Voyager	

Other Ex Libris Products

Other Ex Libris products can be installed on a server running a Voyager installation when due care and attention are taken to ensure the adequate performance of all applications. Consult with your Ex Libris representative.

If other Ex Libris products are going to be installed on the same server, confirm that your system can handle the requirements of all these products. Refer to the requirements for installation documents available for other Ex Libris products for more details.

NOTE:

Many of the software and hardware resources are shared by Voyager and other Ex Libris products. However, disk space requirements are accumulative. See **File System and Disk Space Requirements** on page 14.

Operating System/Platform Considerations for Voyager

IMPORTANT:

Refer to the Operating System Requirements for Red Hat Enterprise Linux and the Operating System Requirements for the Sun Platform (for basic and detailed requirements) documentation prior to referring to the specific Voyager requirements identified in this section.

For each of the following operating system versions, Ex Libris recommends that you install the latest operating system update level:

- Sun - Solaris 10 (Update 11 - 1/13 and later) on SPARC or Solaris 11 (SRU 14.5 or later SRUs and updates) on SPARC
- Linux - RHEL 5.x (Update 6 or later) (64 bit), RHEL 6.x (64 bit) based on Intel or AMD 64-bit processors, or RHEL 7.x 64-bit

The minimum requirement for a Voyager installation is 4 GB RAM. For the exact production server specifications, including the required number of CPUs and required RAM as a function of the database size and the number of concurrent users, contact your Ex Libris representative.

It is recommended that you install a second instance of Voyager on a separate test server. For details, contact your Ex Libris representative regarding a test server license.

SPARC Considerations

With older SPARC models (UltraSPARC II, III, IV), you may experience performance degradation and should consider upgrading your hardware to the newest SPARC model. Recommended hardware configurations can be obtained by contacting your Ex Libris office or distributor.

Virtual Machine Considerations

Ex Libris supports installations in a virtualized server infrastructure. Refer to *Guidelines for Using Virtual Environments for Ex Libris Products* located in the Cross Product Information section of the Documentation Center for more information.

File System and Disk Space Requirements

Mount each physical disk that is to be used by Voyager on a separate file system.

Define a file system named /m1. This mandatory file system is used exclusively for all software and files that are installed by Ex Libris. Mount the /m1 file system directly on the server.

A /oracle file system with a minimum of 8GB can be used to install Oracle Server and database. If /oracle is not a separate file system the Oracle software is installed on /m1 with a symbolic link from /oracle to /m1/oracle.

The Voyager database files are placed in /oracle/oradata/VGER. The Oracle software installation and database creation is performed by Ex Libris staff as a part of the Voyager installation process.

Table 2 lists the minimum disk-space requirements necessary for running and maintaining Voyager software and data.

Table 2. Disk Space Requirements

Voyager Software and Data	Minimum Requirement*	Location	Server
Voyager software	At least 20 GB	/m1	App server Web server
Voyager database (xxxdb) working space	3* (Voyager database space)	/m1	App Server
Voyager database (xxxdb) space*	10%* (1.5 KB * # of bibliographic records)	/m1/voyager	App Server
Oracle software	At least 15 GB + (1.5 KB * # of bibliographic records)	/oracle/app	Oracle server App server
Oracle DB size**	At least 10 GB	/oracle/oradata/VGER	Oracle server
RAM*	At least 4 GB		All servers

Table 2. Disk Space Requirements

Voyager Software and Data	Minimum Requirement*	Location	Server
Swap space (/tmp)*	Linux and Sun OS minimum: If RAM = 1024MB to 2048Mb then 1.5 times RAM otherwise if RAM > 2048MB and < 8192MB then match RAM otherwise if RAM > 8192MB then .75 times RAM Linus and Sun OS recommended: *Sum of Voyager processes times 32 MB + Voyager minimums		All servers
* This space does not include working space used by Global Data Change. For details on disk space usage when working with Global Data Change, see section Disk Space in the <i>Global Data Change User's Guide</i> ** Consult with the Ex Libris Sizing Manager			

NOTE:

The requirements identified in **Table 2** are general guidelines for determining disk-space requirements. To determine the exact amount of disk space required, consult with your Ex Libris representative.

The disk-space requirements specified in **Table 2** do not include:

- System disk-space requirements for operating system overhead
- Disk space necessary for running Oracle in Archive-Log mode (see **Backup and Recovery Media and Procedures**)
- Disk space requirements for backup at large sites (see **Backup and Recovery Media and Procedures**)
- Any type of data redundancy such as RAID 1, 0/1 solutions
- Voyager upgrade requirements

NOTE:

In special cases, an upgrade may require additional temporary disk space.

Backup and Recovery Media and Procedures

You are responsible for the backup and recovery procedures and selecting the media for performing these procedures.

Refer to the *Voyager Technical User's Guide* for backup script information.

Additional Server Software

The following are add-on software products required for Voyager:

Ex Libris installs all this additional software in order to ensure full compatibility with Voyager.

- Oracle 12c
- Perl
- Apache Server
- Java
- Tomcat

top on Non-Linux Platforms (Optional Server Software)

The installation of top (system performance monitoring tool) by the customer is highly recommended. It must be installed by your system administrator.

NOTE:

The top tool is part of the standard Linux operating system.

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Client Hardware and Software Requirements

This section includes:

- **PC Requirements** on page 17
- **Staff PC Voyager Requirements** on page 18
- **Public PC Voyager Requirements** on page 19
- **Monitors** on page 21

PC Requirements

Ex Libris strongly recommends that the following requirements be met for optimal performance. If you go below the specified requirements, you experience decreased performance, particularly, in Cataloging and Acquisitions. If you have PCs that are below these requirements, we recommend you use them at the Circulation desk rather than in your Cataloging and Acquisitions departments.

PC hardware requirements, for both staff PCs and WebVoyage PCs, are adequate if minimum requirements for the installed operating system are met.

NOTE:

Operating systems not listed in the tables are not currently supported.

Staff PC Voyager Requirements

Table 3 lists the Voyager staff client PC configuration requirements.

Table 3. Voyager Staff Client PC Requirements

Staff PC Configuration	Staff PC Requirements
Windows XP Service Pack: 1 Version 5.1 Build 2600.xpclient.01087-1148	<ul style="list-style-type: none"> ■ CPU: Pentium III 450 ■ Memory: 256 MB ■ Disk: 256 MB*
Windows Vista Business/Vista Enterprise (32-bit or 64-bit)	<ul style="list-style-type: none"> ■ CPU: 2 GHz or higher ■ Memory: 1GB ■ Disk: 256 MB*
Windows 7 Professional/Business/Enterprise (32 or 64 bit) Windows 8 Professional/Business/Enterprise (32-bit or 64-bit) Windows 8.1 Professional/Business/Enterprise (32-bit or 64-bit)	<ul style="list-style-type: none"> ■ CPU: 2 GHz or higher ■ Memory: 1GB ■ Disk: 256 MB*
Video card	<ul style="list-style-type: none"> ■ XGA resolution or better ■ 16-bit color or better
Monitor	<ul style="list-style-type: none"> ■ 15-inch or larger display
Browsers (for end-user interface)	<ul style="list-style-type: none"> ■ Internet Explorer 7/8/9/10/11 for Windows ■ Firefox for Windows ■ Chrome
Third-party software	<ul style="list-style-type: none"> ■ Microsoft Office XP/2003/2007/2010 ■ Microsoft Access 2002/2003/2007/2010 ■ Oracle 10g Client and ODBC

Table 3. Voyager Staff Client PC Requirements

Staff PC Configuration	Staff PC Requirements
Miscellaneous	<ul style="list-style-type: none"> ■ Network interface card with Internet/LAN connection ■ TCP/IP installed and connection to server tested ■ Telnet or terminal emulator client (administrator's machine only) ■ FTP (administrator's machine only) ■ Mouse, roller ball, or other pointing device ■ Audio card ■ Floppy drive
Unicode font	<ul style="list-style-type: none"> ■ An appropriate Unicode font on both the PC and browser ■ Verify that the selected Unicode font includes all required characters
* of the available hard disk space	

IMPORTANT:

Administrative rights are required in order to install or update the Voyager Clients. Windows 64-bit is supported when running the Voyager clients.

Public PC Voyager Requirements

You must set up all client, Web-based workstations to run the minimum supported version of an approved browser on a Windows operating system. Hardware requirements are minimal and are based only on the need to run the browsers in a given operating system.

Table 4 lists the public PC configuration requirements.

Table 4. Public PC Requirements

Public PC Configuration	Public PC Requirements
Windows XP	■ CPU: Pentium III 450
Service Pack: 1 Version 5.1	■ Memory: 192 MB
Build 2600.xpclient.01087-1148	■ Disk: 100 MB*

Table 4. Public PC Requirements

Public PC Configuration	Public PC Requirements
Windows Vista Business/Vista Enterprise/7	<ul style="list-style-type: none"> ■ CPU: 2 GHz or higher ■ Memory: 1GB ■ Disk: 100 MB*
Windows 8 (32-bit or 64-bit) Windows 8.1 (32-bit or 64-bit)	<ul style="list-style-type: none"> ■ CPU: 2 GHz or higher ■ Memory: 1GB ■ Disk: 100 MB*
Video card	<ul style="list-style-type: none"> ■ XGA resolution or better ■ 16-bit color or better
Monitor	<ul style="list-style-type: none"> ■ 15-inch or larger display
Browsers (for end-user interface)	<ul style="list-style-type: none"> ■ Internet Explorer 7/8/9/10/11 for Windows ■ Firefox for Windows ■ Chrome
Third-party software	<ul style="list-style-type: none"> ■ Microsoft Office XP/2003/2007/2010 ■ Microsoft Access 2002/2003/2007/2010 ■ Oracle 10g Client and ODBC
Miscellaneous	<ul style="list-style-type: none"> ■ Network interface card with Internet/LAN connection ■ TCP/IP installed and connection to server tested ■ Telnet or terminal emulator client (administrator's machine only) ■ FTP (administrator's machine only) ■ Mouse, roller ball, or other pointing device ■ Audio card ■ Floppy drive
Unicode font	<ul style="list-style-type: none"> ■ An appropriate Unicode font on both the PC and browser ■ Verify that the selected Unicode font includes all required characters
* of the available hard disk space	

NOTE:

If you are working with CJK, the fonts may cause the pages to load slowly. Therefore, if you are using only Latin fonts, select a Latin Unicode font for better performance

Monitors

To take advantage of Voyager's multi-window capability in the technical modules (Cataloging and Acquisitions):

- Higher pixel resolution yields an obvious difference. Higher color resolution does not.
- Using larger fonts to compensate for a marginal display negates the contribution of higher resolution to the multi-window versatility.

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Extension Module Requirements

This section includes:

- **ILL** on page 23
- **Analyzer** on page 25

ILL

Server Requirements

Table 5 lists the Voyager InterLibrary Loan server configuration requirements.

Table 5. ILL Server Requirements

Staff PC Configuration	Staff PC Requirements
Windows 2000/XP/Vista Business/Vista Enterprise/7	<ul style="list-style-type: none">■ CPU: Pentium III 1 GHz■ Memory: 256 MB (512 recommended)■ Disk: 10 GB
Display resolution	<ul style="list-style-type: none">■ 1024 X 768 pixels or better
Third-party software	<ul style="list-style-type: none">■ Microsoft Access XP/2002/2003/2007
Miscellaneous	<ul style="list-style-type: none">■ Network interface card with Internet/LAN connection■ TCP/IP installed and connection to server tested■ Telnet or terminal emulator client (administrator's machine only)■ FTP (administrator's machine only)■ Mouse, roller ball, or other pointing device

Table 5. ILL Server Requirements

Staff PC Configuration	Staff PC Requirements
Unicode font	<ul style="list-style-type: none"> ■ An appropriate Unicode font on both the PC and browser ■ Verify that the selected Unicode font includes all required characters
* of the available hard disk space	

PC Requirements

Table 6 lists the requirements for Voyager ILL 6.x or higher.

Table 6. ILL PC Requirements

ILL PC Configuration	ILL PC Requirements
Windows XP	<ul style="list-style-type: none"> ■ CPU: Pentium III 450 ■ Memory: 128 MB ■ Disk: 100 MB*
Windows Vista Business/Vista Enterprise/7	<ul style="list-style-type: none"> ■ CPU: 2 GHz or higher ■ Memory: 1GB ■ Disk: 256 MB*
Video card	<ul style="list-style-type: none"> ■ SVGA 800 X 600 resolution or better
Monitor	<ul style="list-style-type: none"> ■ 19-inch CRT or better ■ 15-inch flat display panel or better
Browsers (for end-user interface)	<ul style="list-style-type: none"> ■ Internet Explorer 7.0/8.0 for Windows ■ Firefox 2.x for Windows
Third-party software	<ul style="list-style-type: none"> ■ Microsoft Office XP/2003/2007 ■ Microsoft Access 2002/2003/2007 ■ Oracle 10g Client and ODBC ■ Oracle 11g Client and ODBC (Required for Windows 7)

Table 6. ILL PC Requirements

ILL PC Configuration	ILL PC Requirements
Miscellaneous	<ul style="list-style-type: none"> ■ Network interface card with Internet/LAN connection ■ TCP/IP installed and connection to server tested ■ Telnet or terminal emulator client (administrator's machine only) ■ FTP (administrator's machine only) ■ Mouse, roller ball, or other pointing device ■ Audio card ■ Floppy drive
Unicode font	<ul style="list-style-type: none"> ■ An appropriate Unicode font on both the PC and browser ■ Verify that the selected Unicode font includes all required characters
* of the available hard disk space	

Analyzer

Server Requirements

Table 7 lists the specifications for the Analyzer server requirements.

Table 7. Analyzer Server Requirements

Specification	Description
Operating system/platform	<ul style="list-style-type: none"> ■ Linux: <ul style="list-style-type: none"> ■ Linux RHEL 6.x (Update 3 or later) (64-bit) ■ Linux RHEL 5.x (Update 8 or later) (64-bit) ■ Sun: <ul style="list-style-type: none"> ■ Solaris 10 on SPARC (Update 11 - 1/13 and later) ■ Solaris 11 on SPARC (SRU 14.5 or later SRUs and updates)
CPUs	Minimum of 2
RAM	Minimum of 4 GB

Table 7. Analyzer Server Requirements

Specification	Description
CD-ROM	CD-ROM drive for data and software exchange (in case FTP is not available temporarily, or if Ex Libris has approved work without an Internet connection)
Database	Oracle 64-bit
Additional server software	Oracle RDBMS add-on software (installed by Ex Libris to ensure full compatibility with Voyager)

File System and Disk Space Requirements

Table 8 lists the file system and disk space requirements for the Analyzer server.

Table 8. Analyzer File System and Disk Space Requirements

Voyager Software and Data	Minimum Requirement*	Location	Server
Analyzer software	At least 15 GB	/m1	App server
Oracle software	At least 15 GB	/oracle/app	Oracle server App server
Oracle DB size*	At least 15 GB	/oracle/oradata/MRDN	Oracle server
RAM*	At least 4 GB		All servers
Swap space (/tmp)*	4 GB		All servers
* Consult with the Ex Libris Sizing Manager			

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Communication Requirements

This section includes:

- **Network Configuration** on page 27
- **Defining the Server Host Name:** on page 27
- **Server Access** on page 28
- **Ports and Activity Types** on page 29

Network Configuration

The Voyager application server should have a fully-qualified host name (both a short host name and domain name) that is registered in the DNS. If you are working with a distributed installation of Voyager, all the application servers should have DNS entries.

Defining the Server Host Name:

In `/etc/hosts`, link both the fully-qualified name and the short host name to a physical IP address (internal). To ensure that the correct name is defined, use the following command:

```
grep `eval hostname` /etc/hosts
```

This command returns a valid entry with a physical IP address.

An internal IP address can also be found using the following commands:

- SunOS

```
>> /usr/sbin/ifconfig -a | grep inet | grep -v 127.0.0.1 | awk  
'{print $2}'
```

- Linux

```
>> /sbin/ifconfig -a | grep addr: | grep -v 127.0.0.1 | awk  
'{print $2}'
```

The following is an example of a `/etc/hosts` configuration:

```
# Do not remove the following line, or various programs  
# that require network functionality will fail.  
127.0.0.1    localhost.localdomain    localhost  
10.1.222.22 ml-inst.corp.metalib.com  ml-ins
```

NOTE:

The first active line should be configured exactly as in the above example.

The second line should contain the internal IP address, followed by the fully-qualified name (host name + domain name), and then the short name and possible aliases.

Server Access

Set up Ex Libris access to the system via the Internet with a minimum bandwidth of 64 K.

Ex Libris requires access to the following:

- The Voyager server for installation of Voyager software, setup, support, and troubleshooting during the implementation and maintenance phases.
- If a firewall is installed, SSH access should be enabled for Ex Libris support and implementation staff for the following IP addresses:
 - HQ Jerusalem Israel
212.179.71.70
 - Local Ex Libris office - USA
 - Des Plaines
192.80.206.206
 - Boston
12.21.149.130
 - Local Ex Libris office - Germany
 - Seefeld

- 217.91.56.60
- Hamburg
195.37.97.145
- Cologne
194.8.220.178
- Local Ex Libris office - France
195.5.253.245
- Local Ex Libris office - UK
88.96.11.121
- Local Ex Libris office - Australia
203.87.118.110

Ports and Activity Types

Verify that the ports in **Table 9** are open and can be used by Voyager. These ports are used by library staff and Ex Libris support. This list can be very useful for network configuration and security troubleshooting.

NOTE:

In a multiple server environment, communications on these ports between servers maybe required.

Table 9. Ports for Voyager

Port	Server	Accessed By
xx00 (7000)	OPAC server	Client access by Ex Libris support
xx10 (7010)	Cataloging server	Client access by Ex Libris support
xx15	Global Data Change server	Client access by Ex Libris support
xx20 (7020)	Acquisitions server	Client access by Ex Libris support
xx30 (7030)	Circulation server	Client access by Ex Libris support
xx31 (7031)	Standard Interface Protocol (SIP)	Client access by Ex Libris support

Table 9. Ports for Voyager

Port	Server	Accessed By
xx38 (7038)	SMS Proxy	Operational, outbound SMS messages
xx40 (7040)	Reporter server	Client access by Ex Libris support
xx50 (7050)	System Administration	Client access by Ex Libris support
xx60 (7060)	Keyword server	Client access by Ex Libris support
xx70 (7070)	File server	Client access by Ex Libris support
xx80 (7080)	Call Slip server	Client access by Ex Libris support
xx81 (7081)	Scandoc / Image server	Client access by Ex Libris support
xx85 (7085)	Media Scheduling server	Client access by Ex Libris support
xx90 (7090)	Z39.50 server	Client access by Ex Libris support
xx97(7097)	Patron Directory Service	Operational, authentication
7098	Preview Server Port	Activities performed using the preview server. <hr/> NOTE: This port does not change based on port series. It will be this port by default for all customers. 6008 will no longer be the default port.
7099	AutoUpdate HTTP Server	Client access by Ex Libris support <hr/> NOTE: This port does not change based on port series. It will be this port by default for all customers.
80	World Wide Web (WWW)	

Table 9. Ports for Voyager

Port	Server	Accessed By
20	FTP data (outbound)	
21	FTP control (outbound)	FTP connection from Ex Libris support. Outgoing access to FTP server: <code>downloads.exlibrisgroup.com</code>
22	SSH	SSH connection from Ex Libris support
25 (outgoing - optional)	Deposit, operational	SMTP outgoing mail
1521 (TCP/IP)	Oracle Listener	Operational, permanent, Ex Libris support (jdbc)
3389	Remote Desktop Protocol (RDP) for Windows Server(s)	Access to Windows Servers from Ex Libris support
5900	VNC Server for Windows server(s)	Access to Windows Server from Ex Libris support

NOTE:

Coordinate the use of any other ports with Ex Libris.

If you have an additional version of Voyager (for testing or training purposes) on your server, open additional HTTP ports using the <Port Series> for xx (see **Table 9**).

For example, if you have a training database, use port numbers 8000, 8010, 8020, 8030, 8031, 8040, 8050, 8060, 8070, 8080, 8081, 8085 and 8090.

For AIX, use port numbers 10000, 10010, 10020, 10030, 10031, 10040, 10050, 10060, 10070, 10080, 10081, 10085 and 10090.

6

Installation Requirements

This section includes:

- **Schedule the Voyager Installation** on page 33
- **Installation Preparation** on page 33
- **sudo Preparation** on page 34

Schedule the Voyager Installation

Whether a change of platform, data move to a new server, or installation of Voyager into a virtual environment is needed, schedule the installation of Voyager and its related components by opening an Install incident via eService. Due to the complex nature of the interactions between our software and the environment, Ex Libris restricts ongoing support to installations performed by Ex Libris staff. This may include cloning a new VM or zone. Check with your account manager to plan for any fees associated with this work.

Installation Preparation

To log on to the Voyager server, an initial user by the name of `exlibris`, with access to `su` or `sudo`, is required. This user can be deleted after the installation.

Ex Libris requires a root password in order to:

- Create the following users:
 - Voyager with the group ID `exlibris`
 - Oracle with the group ID `dba`
- Enable the users (`exlibris` and `dba`) to create directories and files under the following file systems:

`/m1`, `/oracle`, and so on

- Install Voyager and the additional software detailed in **Server Requirements** starting on page 11
- Add automatic activation of Voyager servers and Oracle to the machine's boot process
- Reboot the machine to make the new values of system parameters that were modified during the installation process effective and to test the automatic activation of Voyager and Oracle

NOTE:

The reboot is coordinated with the customer.

- Work under ksh

NOTE:

Ex Libris products and the users, `exlibris` and `dba`, work under ksh.

IMPORTANT:

The system manager must 1) define an alias for the host name in `/etc/hosts` and 2) must be available throughout the Voyager installation process.

sudo Preparation

Verify that the operations identified in **Table 10** are available for `sudo`:

Table 10. sudo Requirements

Operation	Description
Create users and groups	<ul style="list-style-type: none">■ <code>useradd</code>■ <code>groupadd</code>■ <code>vipw</code>■ <code>smit</code> (for AIX only)
Change system parameters	<ul style="list-style-type: none">■ Sun Solaris servers: <code>/etc/system</code> file■ Sun Solaris server: <code>/etc/project</code> file■ Linux: <code>/etc/rc.d/rc.local</code> and <code>/etc/security/limits.conf</code> files
Create directories and change permissions	<ul style="list-style-type: none">■ <code>mkdir</code>■ <code>chown</code>
Create files	<code>/etc</code> directory (necessary for autostartup mechanism)

7

Upgrade Requirements

This section includes:

- **Duration** on page 37
- **Extension Modules** on page 38
- **Continuous OPAC** on page 39
- **Upgrade Options** on page 39

Duration

Timing estimates for the upgrade process depend on the number of records per database.

NOTE:

The estimates below include time for any necessary regen(s) for a few production databases.

For consortiums, multiple or large databases, or multiple servers consult with an Ex Libris engineer for specific upgrade duration estimates for your site.

Table 11. Duration Estimates

Size	Timing
< 500,000 bibliographic records	1 day
500,000 - 3,000,000 bibliographic records	2 days
> 3,000,000 bibliographic records	Consult with the Ex Libris installation team

IMPORTANT:

If you have full Library of Congress Authority Headings, you must add one additional day to the upgrade timing estimates in **Table 11**.

IMPORTANT:

If you have Analyzer for Voyager, you must add one additional day to the upgrade timing estimates in **Table 11**. This is in addition to the LC Authority Headings if you also have them.

Extension Modules

Universal Borrowing (UB) and Universal Catalog (UC)

Ex Libris recommends that:

- Sites with Universal Borrowing (UB) or Universal Cataloging (UC) should upgrade at the same time with their UB/UC partners

Ex Libris does not recommend running cross versions.

- Everyone in a group run the same user interface (WebVoyage Classic or WebVoyage Tomcat)
- Each UB and UC customer test his specific work flows prior to upgrading
- Each UB and UC customer review the known UB and UC issues logged in eService to assess the impact on specific UB and UC local policies, environments, and workflows

Analyzer

Analyzer must be upgraded to the latest version.

Meridian

Electronic Resource Management (ERM) integration with Meridian remains available with WebVoyage Classic.

Web Cataloging

Web cataloging remains available in WebVoyage Classic.

Continuous OPAC

If you want to utilize the Continuous OPAC option, specify this when you schedule your upgrade. Your Engineer needs your specific plan of the hardware and/or software solutions to be implemented, at least, three days prior to the upgrade. A fee of \$225.00 (USD) per hour may be applied if timing and assistance are not pre-arranged.

Upgrade Options

Voyager Installation Kit (VIK)

You can obtain the latest version of Voyager software and perform the upgrade without a need for certification. The Voyager Installation Kit (VIK) is a menu-driven program that steps you through the upgrade for your servers.

To get started, begin by reading the VIK documentation located in the Ex Libris Documentation Center under `Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Installation Kit`.

Ex Libris Upgrade

If you want to have Ex Libris perform your upgrade, open an e-Service ticket with several scheduling date options to suggest. This initiates the upgrade process for you.

8

Data Move Requirements

This section includes:

- **Data Move Outline** on page 41
- **Server Hardware and Software Requirements** on page 42
- **Duration** on page 42
- **Downtime Considerations** on page 42
- **Disk Space Requirements** on page 43
- **Server Communications Setup** on page 44
- **Requesting a Data Move** on page 44
- **Considerations for Production Environments** on page 44
- **Data Migration Process** on page 44
- **Basic Functionality Testing** on page 45
- **Detailed Functionality Testing** on page 45
- **Set Up and Confirm Working Backups** on page 45

This section pertains only to the work involved with the data move. You must review this document to understand the requirements for the Voyager server setup, software requirements, and work required prior to performing the move.

Data Move Outline

A data move is required if you want to move your current system to a different system. Data moves, for example, may be used to migrate from Solaris to Linux or from Solaris to Solaris. You may consider a data move if your current hardware is failing, aging, or needs replacement. Data moves must be performed by Ex Libris. Check with your account manager to plan for any fees associated with this work.

Server Hardware and Software Requirements

The new hardware must meet the standard server hardware and software requirements (see [Server Hardware and Software Requirements](#) on page 11). If you are setting up this environment for production use, make sure that you consult with the Ex Libris Sizing Manager for appropriate sizing.

Duration

The following table displays the approximate number of days it will take to perform a data move.

Table 12. Duration Estimates

Size	Timing
< 500,000 bibliographic records	2 days
500,000 - 3,000,000 bibliographic records	3 days
> 3,000,000 bibliographic records	Consult with the Ex Libris installation team

NOTE:

If you plan to upgrade your Voyager software at the same time as your data move, make sure that you add the data move duration to the Voyager upgrade duration for an accurate calculation of project time.

Downtime Considerations

For test environment data moves, there may be no downtime required. A current working backup may be used to ensure that the test server has a current copy of your production data. If you want to use your production server as the master copy, then downtime would be required while the data is exported from your production server to your test environment.

Generally, downtime is dependent upon the size of the Voyager database being migrated, but you should expect and prepare for at least two hours of interruption in service while performing a production data move.

For special circumstances, consult with the Ex Libris Installation team to determine the actual downtime for your site.

Disk Space Requirements

To perform the data move, there must be additional disk space available. If necessary, it can be temporary space. This space is required for your data to be copied and installed on the new server.

The following tables show examples of how much disk space may be required for your data move.

Table 13. Example 1: Disk Space on the New Server

Voyager Software and Data	Minimum Requirement	Location
Voyager Software	Equal to or greater than /m1 data on current environment	/m1
Oracle Software	Equal to or greater than /oracle data on current environment	/oracle
Migration Space	Equal to or greater than /m1 + /oracle in current environment	/temporary

Table 14. Example 2: Disk Space on the New Server

Voyager Software and Data	Minimum Requirement	Location
Voyager Software	Equal to or greater than 2* /m1 data on current environment	/m1
Oracle Software	Equal to or greater than 2 * /oracle data on current environment	/oracle

Table 15. Example 3: Disk Space on the New Server

Voyager Software and Data	Minimum Requirement	Location
Voyager Software	Equal to or greater than 2* /m1 + /oracle data on current environment	/m1
Oracle Software	Equal to or greater than /oracle data on current environment	/oracle

Server Communications Setup

In addition to the server access requirements described in [Server Access](#) on page 28, you must have SSH access between the current environment and the environment to which you are performing the data move. FTP access would also be encouraged, but is not required.

Requesting a Data Move

To request a data move:

- 1 Open an e-Service ticket that includes several dates on which you want the data move performed.
- 2 At least 10 days prior to the scheduled date of the move, fill out the `Request_for_Voyager_Data_Move_Form.doc` file and attach it to the SI in e-Service. This form is stored in the following folder in the Documentation Center:

Voyager > Upgrade Release Planning > Installation Request Forms

Considerations for Production Environments

During a production environment data move, no add or update activities are permitted on the existing environment to prevent data loss. Through coordination with your installation engineer, your current system can be made available after the initial interruption of service for patrons to use the OPAC to locate and retrieve the status of items in your institution's catalog.

Off-line circulation can be used to permit circulation activities to take place during your production environment move. If an upgrade is being performed during this time, make sure that you are running circulation in off-line mode, using the version of the Voyager clients to which your institution is upgrading.

Data Migration Process

During the data migration, a copy of your data will be setup on the new environment. This data includes all customizations and tuning of the system for optimum performance. This process also includes maintaining read-only access to the original server during the database move when migration of a production environment occurs.

Basic Functionality Testing

Ex Libris will perform basic functionality tests to ensure at a high level that the data has been migrated as expected.

Detailed Functionality Testing

After the move, you will need to perform full system testing to make sure your environment is working as expected. If something is not working as it did in the previous environment, make sure that you report the problem.

If your site uses specific workflows, make sure that they are tested immediately after the move.

Set Up and Confirm Working Backups

Testing backups for your new server (regardless of whether it is a test or production environment) is important because it ensures that your software is restored properly in the event of a hardware failure or data loss.

9

Upgrade Planning/Worksheets

This section includes:

- **Before Your Upgrade** on page 47
- **Day of/Before Upgrade** on page 50
- **After You Upgrade** on page 51

Before Your Upgrade

Before you upgrade:

- 1 Confirm your contact, upgrade date, duration estimate, and start time with the upgrade engineer. When running the VIK yourself, ensure that you have confirmed with your staff the dates and times when the VIK is to be run.
- 2 Ensure a testing plan has been created to test institution workflows, standard operating processes, and extension modules with special consideration for Universal Borrowing (UB) and Universal Catalog (UC).
- 3 Determine if new prepackaged reports and/or Microsoft Access queries are required.

Prepackaged Voyager reports (`c:\voyager\AccessReports\reports.mdb`) use Microsoft Access.

Refer to the documented database schema changes for Voyager 9.2 located in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Data Dictionaries and ER Diagrams.

- 4 Upgrade ODBC drivers, if applicable.

If Oracle is being upgraded on your server, you may need new ODBC drivers. Instructions for downloading and installing new ODBC drivers can be found in KB record #16384-16641.

5 Archive existing cataloging tag tables.

If you have any customizations to your current tag tables, save them (in a directory that is not C:\VOYAGER) prior to the upgrade and, subsequently, run `VoyagerInstall.exe` or `VoyagerInstall.msi` on each Cataloging PC during the Voyager client installation. Afterward, incorporate your changes into the new files. See KB item #16819, *How do I add a tag to my tag tables?*, for more information.

6 Process all reports and notices.

All previous version reports and notice `.inp` files must be processed through that version's Reporter before the upgrade takes place. The Reporter client only processes reports and notices produced with the same server version.

7 Run Unauthorized Headings Reports (Pcatjob 1 - 4).

The unauthorized headings reports (Pcatjob 1 through 4) require a date range. In the upgrade process, if a Headings regen is run, the Create Date of the headings changes to the date of the upgrade. If these reports are not part of your normal work flow, this is not an issue. However, if these are key to your work flow, carefully plan how the reports are run to get meaningful data.

Immediately prior to your upgrade, run the reports with the date range from the beginning of your reporting period to the current date such as the day before the upgrade. At the end of the reporting period (which includes the date of your upgrade), run the reports again with a begin date as the first full day after the upgrade and the end date as the last day of the reporting period.

Do not perform any work that would generate data for these reports on the actual upgrade day(s).

For example, when reports are run to cover a calendar month and the upgrade occurs on 15 August:

- On 14 August, end all cataloging activity. Run the reports with a start date of 1 August and an end date of 14 August.
- On 15 August, the upgrade is performed. No cataloging work is to be done. All existing headings have a Create Date of 15 August as a result of the upgrade.
- On 1 September, reports are run again with a start date of 16 August and an end date of 31 August.

8 Process the global headings change queue.

Before an upgrade begins, the global headings change queue must be processed.

NOTE:

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

9 Process any outstanding Electronic Data Interchange (EDI) messages.

10 Download Voyager clients.

11 Determine if offline circulation is to be used.

12 Install the Preview Server to review customizations prior to the upgrade.

13 Confirm you have verified and successful backups prior to the upgrade.

One week prior to the scheduled upgrade, have the system administrator verify the backup procedure of the Voyager server(s).

Verify the output.

See **Table 16** for your planning checklist.

Table 16. Before You Upgrade Checklist

Complete (✓)	Task
	Confirm your contact, upgrade date, duration estimate, and start time with the upgrade engineer
	Ensure a testing plan has been created to test institution workflows, standard operating processes, and extension modules with special consideration for Universal Borrowing (UB) and Universal Catalog (UC)
	Determine if new prepackaged reports and Microsoft Access queries are required
	Upgrade ODBC drivers, if applicable
	Archive existing cataloging tag tables
	Process all reports and notices
	Run Unauthorized Headings Reports (Pcatjob 1 - 4)
	Process the global headings change queue
	Process any outstanding Electronic Data Interchange (EDI) messages
	Download Voyager clients
	Determine if offline circulation is to be used
	Install the Preview Server to review customizations prior to the upgrade.

Table 16. Before You Upgrade Checklist

Complete (√)	Task
	Confirm you have verified and successful backups prior to the upgrade

Day of/Before Upgrade

On the day of/before you upgrade:

- 1 Confirm you have a successful backup prior to the upgrade.
 The evening prior to the scheduled upgrade, the server(s) should be backed up. The engineer cannot perform the upgrade without written verification that a successful backup has been completed. When running the VIK, ensure that you have obtained verification that a backup has been completed successfully.
- 2 Enable offline circulation, if applicable.
- 3 Inform your upgrade engineer that you have a successful backup and that you are ready to begin the upgrade. When running the VIK, ensure that the appropriate persons have been notified that you are ready to run the VIK.
- 4 Install Voyager clients.
- 5 Be available during the upgrade. When running the VIK, use the supplied Voyager Installation Kit instructions to upgrade your environment to the latest version of Voyager.
 Someone must be available (not necessarily on-site) for the engineer to call as necessary.
- 6 Ensure that updates between you and the upgrade engineer have been arranged based on agreed-upon intervals.

See **Table 17** for your planning checklist.

Table 17. Day of/Before You Upgrade Checklist

Complete (√)	Task
	Confirm you have a successful backup prior to the upgrade
	Enable offline circulation, if applicable
	Inform your upgrade engineer that you have a successful backup and that you are ready to begin the upgrade
	Install Voyager clients
	Be available during the upgrade

Table 17. Day of/Before You Upgrade Checklist

Complete (√)	Task
	Ensure that updates between you and the upgrade engineer have been arranged based on agreed-upon intervals.

After You Upgrade

After you upgrade:

- 1 The Ex Libris engineer contacts you to report that the upgrade has been completed.
- 2 Confirm a full Voyager system backup has been completed successfully.
The system administrator conducts a Voyager system backup to include all Oracle files.
- 3 Coordinate a server reboot with the upgrade engineer to catch any problems with startup.
- 4 Use the testing plan created to test workflows, processes, and extension modules to ensure that the Voyager upgrade was successful.
Workflows for each module are tested, including:
 - Acquisitions
 - Cataloging
 - Circulation
 - System Administration
 - WebAdmin (if used)
 - WebVoyage
- 5 Relink existing Microsoft Access Voyager tables.
All Voyager sites need to relink their Microsoft Access Voyager tables.
- 6 Inform your upgrade engineer that your upgrade is tested and that a successful upgrade has been confirmed.
- 7 Restore customizations for WebVoyage.

- a Move in customized WebVoyage files.
- b Copy in your preview server WebVoyage files or begin recustomizing WebVoyage files.

If a WebVoyage test area pointing to the preview server has not been prepared, WebVoyage customizations must be moved in manually.

The old WebVoyage files are found under /m1/upgrade/2009.1.0/pre200910/voyager/*db/; or for Windows Server sites, the files are found in D:\incoming\voy910.

- 8 Test the new ODBC drivers, if applicable.
- 9 Begin general use of the new version of Voyager.

See **Table 18** for your planning checklist.

Table 18. After You Upgrade Checklist

Complete (✓)	Task
	The Ex Libris engineer contacts you to report that the upgrade has been completed
	Confirm a full Voyager system backup has been completed successfully
	Coordinate a server reboot with the upgrade engineer to catch any problems with startup
	Use the testing plan created to test workflows, processes, and extension modules to ensure Voyager was upgraded successfully
	Relink existing Microsoft Access Voyager tables
	Inform your upgrade engineer that your upgrade is tested and that a successful upgrade has been confirmed
	Restore customizations for WebVoyage
	Test new ODBC drivers, if applicable
	Begin general use of the new version of Voyager

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Data Move Planning/Worksheets

This section includes:

- **Before Your Data Move** on page 53
- **Day of/Before Your Data Move** on page 54
- **After Your Data Move** on page 55

Before Your Data Move

Before you move:

- 1 Confirm your contact, upgrade date, duration estimate, and start time with the installation engineer.
- 2 Ensure a testing plan has been created to test institutional workflows, standard operating processes, and extension modules with special consideration for Universal Borrowing (UB) and Universal Catalog (UC).
- 3 Determine if off-line circulation is to be used.
- 4 Set up the new hardware according to the standard Voyager hardware and software requirements. Ensure that the data move requirements are also satisfied.
- 5 Ensure that `Request_for_Voyager_Data_Move_Form.doc` file is filled out 10 days prior to the scheduled date of work and attached to the SI.
- 6 Ensure that there is access between the new environment and the current environment 10 days prior to the scheduled work date.
- 7 Ensure that the Ex Libris engineer has access to both environments 10 days prior to the scheduled work date.

- 8 Confirm that you have verified and had successful backups prior to the upgrade.

One week prior to the scheduled data move, have the system administrator verify the backup procedure of the Voyager servers.

Verify the output.

See **Table 19** for your planning checklist.

Table 19. Before You Move Checklist

Complete (√)	Task
	Confirm your contact, upgrade date, duration estimate, and start time with the installation engineer.
	Ensure a testing plan has been created to test institutional workflows, standard operating processes, and extension modules with special consideration for UB and UC.
	Determine if off-line circulation is to be used.
	Set up the new hardware according to the standard Voyager hardware and software requirements.
	Ensure that Request_for_Voyager_Data_Move_Form.doc file is filled out 10 days prior to the scheduled date of work and attached to the SI.
	Ensure that there is access between the new environment and the current environment 10 days prior to the scheduled work date.
	Ensure that the Ex Libris engineer has access to both environments 10 days prior to the scheduled work date.
	Confirm that you have verified and had successful backups prior to the upgrade.

Day of/Before Your Data Move

On the day of/before you move:

- 1 Confirm your contact, data move date, duration estimate, and start time with the upgrade engineer. Coordinate down time to your production environment with the installation engineer if necessary.
- 2 Ensure a testing plan has been created to test institution workflows, standard operating processes, and extension modules with special consideration for Universal Borrowing (UB) and Universal Catalog (UC).

- 3 Update the ODBC drivers if applicable. Ensure that they are referring to the new environment.
- 4 If the IP address or the DNS name of the server has changed, update the `voyager.ini` file in the Voyager Clients installation directory to point at the new server.
- 5 Ensure that updates between you and the installation engineer have been scheduled for agreed upon intervals.

See **Table 20** for your planning checklist.

Table 20. Day of/Before You Move Checklist

Complete (√)	Task
	Confirm your contact, data move date, duration estimate, and start time with the upgrade engineer. Coordinate down time to your production environment with the installation engineer if necessary.
	Ensure a testing plan has been created to test institutional workflows, standard operating processes, and extension modules with special consideration for UB and UC.
	Update the ODBC drivers if applicable.
	If the IP address or the DNS name of the server has changed, update the <code>voyager.ini</code> file in the Voyager Clients installation directory to point at the new server.
	Ensure that updates between you and the installation engineer have been scheduled for agreed upon intervals.

After Your Data Move

After you move:

- 1 The Ex Libris engineer will contact you to report that the data move has been completed.
- 2 Confirm a full Voyager system backup has been completed successfully. The system administrator conducts a Voyager system backup to include all Oracle files.
- 3 Coordinate a server reboot with the installation engineer to catch any problems with startup.
- 4 Use the testing plan created to test workflows, processes, and extension modules to ensure that the Voyager data move was successful. Workflows for each of the following modules should be tested:

- Acquisitions
 - Cataloging
 - Circulation ?
 - System Administration
 - WebAdmin (if used)
 - WebVoyage
- 5 Ensure that customizations are preserved to your satisfaction.
 - 6 Inform your installation engineer that your data move is tested and that a successful data move has been confirmed.
 - 7 Test the new ODBC drivers if applicable.
 - 8 Begin general use of the new environment.

See **Table 21** for your planning checklist.

Table 21. After You Move Checklist

Complete (✓)	Task
	The Ex Libris engineer will contact you to report that the data move has been completed.
	Confirm a full Voyager system backup has been completed successfully.
	Coordinate a server reboot with the installation engineer to catch any problems with startup.
	Use the testing plan created to test workflows, processes, and extension modules to ensure that the Voyager data move was successful.
	Ensure that customizations are preserved to your satisfaction.
	Inform your installation engineer that your data move is tested and that a successful data move has been confirmed.
	Test the new ODBC drivers if applicable.
	Begin general use of the new environment.

11

Responsibilities Checklist

This section includes:

- **Upgrade and Installation Responsibilities Checklist Reference** on page 57
- **Data Move Responsibilities Checklist Reference** on page 58

Upgrade and Installation Responsibilities Checklist Reference

Use the checklist provided in **Table 22** to identify the tasks for which you are responsible.

Table 22. Upgrade and Installation Responsibilities Checklist

Section/Title	Responsibility
Server Hardware and Software Requirements	Customer
Server Requirements and Additional Server Software	Customer Ex Libris
File System and Disk Space Requirements	Customer
Backup and Recovery Media and Procedures	Customer
Client Hardware and Software Requirements	Customer
Communication Requirements	Customer
Installation Requirements	Customer
Upgrade Requirements	Customer
Extension Module Requirements	Customer

Testing backups on your new server, regardless of it being a test or production environment is important. Backups permit an immediate restore of software in case of hardware failure or data loss.

Data Move Responsibilities Checklist Reference

Use the checklist provided in **Table 23** to identify the tasks for which you are responsible.

Table 23. Data Move Responsibilities Checklist

Work Description	Responsibility
Acquire new hardware	Customer
Setup Server Hardware according to requirements	Customer
Filesystem and Disk Space	Customer
Server Communications Setup	Customer
Request data move	Customer
Downtime Considerations	Customer
Considerations for Production Environments	Customer
Install Voyager in new environment	Ex Libris
Data Migration Process	Ex Libris
Basic Functionality Testing	Ex Libris
Detailed Functionality Testing	Customer
Setup and Confirm working backups	Customer