Preparing for Voyager Software Upgrades
Best practices for a more seamless move to a new version

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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 session 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
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](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.

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**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

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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 (Spinelabel.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 ...


Day 2-5: Work continues until upgrade complete, regens finished, etc.

Final day: Upgrade complete - time to get up and running again!
If you are running the VIK …

• Same thing! Except you’ll be the upgrade engineer this time.

Preparatory steps in VIK completed ahead of upgrade start date
Make sure custom configurations or scripts backed up
Ensure a good backup before beginning

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.
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

- 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
Sample checklist to customize ...

Voyager Software Upgrades - Planning

<table>
<thead>
<tr>
<th>Task</th>
<th>Priority</th>
<th>Status</th>
<th>Start Date</th>
<th>Due Date</th>
<th>% Complete</th>
<th>Done/Overdue?</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrations</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>List extension modules, integrations, scripts, etc., that communicate with Voyager</td>
</tr>
<tr>
<td>Local customizations</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>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 customizations; locally-created scripts for processes and other integrations.</td>
</tr>
<tr>
<td>Install/Preview Server</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Install Preview Server for target version and begin work on recustomizing WebVoyage skins.</td>
</tr>
<tr>
<td>Set up AutoUpdate for client installation</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Configure [Upgrade] stanza in voyager.ini on local PCs.</td>
</tr>
<tr>
<td>Offline circulation</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Notify installer if using Classic WebVoyage</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Global Headings Change Queue</td>
<td></td>
<td>Not Started</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GCHQ does not always persist through upgrade. Best practice: process and clear prior to upgrade.</td>
</tr>
</tbody>
</table>

Q & A

Any Questions?
Session Survey Evaluation

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

THANK YOU