



Road To

Version 8.1.1

CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract. This information is provided AS IS. Unless otherwise agreed, Ex Libris shall not be liable for any damages for use of this document, including, without limitation, consequential, punitive, indirect or direct damages.

Any references in this document to third-party material (including third-party Web sites) are provided for convenience only and do not in any manner serve as an endorsement of that third-party material or those Web sites. The third-party materials are not part of the materials for this Ex Libris product and Ex Libris has no liability for such materials.

TRADEMARKS

"Ex Libris," the Ex Libris bridge , Primo, Aleph, Alephino, Voyager, SFX, MetaLib, Verde, DigiTool, Preservation, Rosetta, URM, ENCompass, Endeavor eZConnect, WebVoyage, Citation Server, LinkFinder and LinkFinder Plus, and other marks are trademarks or registered trademarks of Ex Libris Ltd. or its affiliates.

The absence of a name or logo in this list does not constitute a waiver of any and all intellectual property rights that Ex Libris Ltd. or its affiliates have established in any of its products, features, or service names or logos.

Trademarks of various third-party products, which may include the following, are referenced in this documentation. Ex Libris does not claim any rights in these trademarks. Use of these marks does not imply endorsement by Ex Libris of these third-party products, or endorsement by these third parties of Ex Libris products.

Oracle is a registered trademark of Oracle Corporation.

UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Company Ltd.

Microsoft, the Microsoft logo, MS, MS-DOS, Microsoft PowerPoint, Visual Basic, Visual C++, Win32,

Microsoft Windows, the Windows logo, Microsoft Notepad, Microsoft Windows Explorer, Microsoft Internet Explorer, and Windows NT are registered trademarks and ActiveX is a trademark of the Microsoft Corporation in the United States and/or other countries.

Unicode and the Unicode logo are registered trademarks of Unicode, Inc.

Google is a registered trademark of Google Inc.

iPhone is a registered trademark of Apple Inc.

Table of Contents

Chapter 1	Voyager Release Methodology.....	5
	Major Release (for example, 8.0.0).....	5
	Minor Release (for example, 8.1.0)	5
	Service Pack (for example, 8.1.1)	5
Chapter 2	Why Upgrade?	7
	Defect Fixes.....	7
	New Enhancements.....	7
	Unsupported Versions (Voyager 6 or Earlier).....	8
Chapter 3	Getting Started	9
	Options for Upgrading to 8.1.1	9
	Voyager Installation Kit.....	9
	Scheduling an Upgrade with the Installation Team.....	10
	Opening an Upgrade Support Incident.....	10
Chapter 4	Basic Upgrade Planning.....	13
	Versions.....	13
	Review Documentation	14
	Decisions	14
	Timing	15
	Voyager Clients.....	15
	Patron SIF and Tag Tables.....	15
	Ex Libris Preview Server	16
	Upgrade Worksheets.....	16
	WebVoyage Skin Files.....	16
	Questions	16

1

Voyager Release Methodology

This section includes:

- **Major Release (for example, 8.0.0)** on page 5
- **Minor Release (for example, 8.1.0)** on page 5
- **Service Pack (for example, 8.1.1)** on page 5

Major Release (for example, 8.0.0)

Voyager major releases introduce new functionality, particularly enhancements, that may require database changes and may also include bug fixes.

Minor Release (for example, 8.1.0)

Voyager minor releases introduce new enhancements that usually do not require database changes and may also include bug fixes.

Service Pack (for example, 8.1.1)

Service packs usually include bug fixes only, but may also include new features.

NOTE:

The release number is built by combining the following:

Major.Minor.Service Pack

All Voyager releases are cumulative, meaning that fixes in each version are rolled up to the next version.

2

Why Upgrade?

This section includes:

- [Defect Fixes](#) on page 7
- [New Enhancements](#) on page 7
- [Unsupported Versions \(Voyager 6 or Earlier\)](#) on page 8

Defect Fixes

Voyager 8.1.1 contains defect (bug) fixes. Information about the defect fixes included in 8.1.1 is located in the Release Notes that reside in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.1.

Defects are fixed in previous releases and rolled up in Voyager 8.1.1. For example, if a problem was fixed in Voyager 7.2.5, the fix would be available in Voyager 7.2.5, 8.0.0, 8.1.0, and 8.1.1. More information about defects fixed in previous releases is available in the Voyager Release Notes that reside in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > version number. As a result, if you are upgrading from Voyager 7.2.4 to 8.1.1, you would want to review the Release Notes from 7.2.5, 8.0.0, 8.1.0, and 8.1.1.

New Enhancements

The Voyager Product Manager works with customers worldwide as well as the IGeLU and ELUNA User Groups to identify ways to enhance the Voyager system. Enhancements to system functionality and performance improve the user experience, increase staff productivity, and lower your total cost of ownership when using Voyager. The only way you can benefit from the enhancements to Voyager functionality is to upgrade to the latest release.

Voyager 8.1.1 delivers new features and functionality to enhance your library's workflows and operations, such as support for e-mail receipt in SIP2 patron information messages, a script to identify unused 9xx fields in Voyager records, and record re-linking features added to BatchCat.dll. Detailed information about the enhancements in Voyager 8.1.1 are available in the Release Notes available on the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.1.

Unsupported Versions (Voyager 6 or Earlier)

Ex Libris Voyager Customer Support supports the current major release and one release back. Therefore, any customer running Voyager 8.x.x or on any Voyager 7.x version (such as 7.0.1 - 7.2.5) is supported.

Voyager 6 is the previous major release and anyone on Voyager 6.x or earlier is not supported. If you are on an unsupported version, Customer Support assists with incidents provided that an upgrade to the latest software release has been scheduled. If a bug is found in an unsupported release and cannot be replicated in a supported release, the fix will be to upgrade. If a bug is found in an unsupported release and is replicable in a supported release, Customer Support sends an issue report to development.

3

Getting Started

This section includes:

- [Options for Upgrading to 8.1.1 on page 9](#)
- [Voyager Installation Kit on page 9](#)
- [Scheduling an Upgrade with the Installation Team on page 10](#)
- [Opening an Upgrade Support Incident on page 10](#)

Options for Upgrading to 8.1.1

Your options are:

- Voyager Installation Kit (VIK)
- Scheduling an upgrade with the installation team

Voyager Installation Kit

The Voyager Installation Kit (VIK) is a menu-driven, upgrade kit that provides customers the ability to upgrade Voyager to the latest release without the assistance of the Ex Libris installation team and allows more flexibility in upgrade scheduling. Read more in the Voyager Installation Kit instructions available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Installation Kit.

Voyager 8.1.1 requires an upgrade to Oracle 11g R2

NOTE:

If you are upgrading from Voyager 8.0.0 or 8.1.0 you are already using Oracle 11g R2.

The VIK performs this upgrade for you if this is your preference. If you prefer to perform the Oracle upgrade manually, be sure to follow the instructions for installing the 11g R2 upgrade.

Scheduling an Upgrade with the Installation Team

The installation team's upgrade engineers are available for integrating new software releases for you. They are technical professionals who are well-versed in Sun Solaris, AIX, Linux, and Microsoft Server operating systems as well as Oracle and Voyager integration issues that can provide technical expertise for software upgrades.

The installation team can perform all of the necessary Voyager upgrade-related steps. This can include system tuning, third-party software updates, start/stop script replacements, and so forth.

The following tasks are to be handled by your site and are not included in the upgrade:

- Customization fixes
- Operating system patches
- Site-specific modifications/additions and fine-tuning

Opening an Upgrade Support Incident

Use eService to open an upgrade incident with Ex Libris. Under the field **What type of difficulty are you experiencing?**, select **Upgrade**.

Be sure to include your preferred dates for the upgrade (at least three possible date options). Upgrade engineers are available Sunday through Friday.

Fill out and attach the **Request_for_Voyager_Upgrade_Form** to the upgrade incident. This form is available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > Installation Request Forms. If you are unable to complete this form, provide the following information with the incident:

- Any special connection instructions
- Contact name (someone with access to the server during and after business hours) if different from the person logging the incident
- Daytime telephone number(s)

- After-hours telephone number(s)

This can be a pager number.

The person at this number must be on call but not necessarily by the server for the entire upgrade. The after-hours contact is used only if requested by the customer or if a server emergency occurs.

- Preference (e-mail, telephone, pager, and so forth) and frequency of updates during the upgrade
- A list of your extension modules (such as Media Scheduling, Self-Check, and so forth)

4

Basic Upgrade Planning

This section includes:

- [Versions on page 13](#)
- [Review Documentation on page 14](#)
- [Decisions on page 14](#)
- [Timing on page 15](#)
- [Voyager Clients on page 15](#)
- [Ex Libris Preview Server on page 16](#)
- [Upgrade Worksheets on page 16](#)
- [WebVoyage Skin Files on page 16](#)
- [Questions on page 16](#)

Versions

Voyager 8.1.1 contains enhancements, new Voyager clients, defect fixes, and fixes rolled up from previous releases. While sites are not required to move to the latest release, Ex Libris may recommend upgrading as the best way to resolve a problem.

Sites upgrading between 27 February 2012 and 12 March 2012 will have the choice of upgrading to Voyager 7.2.5 or Voyager 8.1.1. Sites upgrading after 12 March 2012 will be upgraded to Voyager 8.1.1.

Exceptions are made for sites that have installed a previous, supported version on their test server. Other exceptions must be approved by the installation manager. Use eService to open an upgrade incident following the instructions provided in [Opening an Upgrade Support Incident](#) on page 10 to request an exception.

Review Documentation

Sites upgrading from any release prior to Voyager 8.1.1 should review the *Release Notes* for each interim release. For example, if you are upgrading from Voyager 7.2.3 to Voyager 8.1.1 look at the *Release Notes* for Voyager 7.2.4, 7.2.5, 8.0.0, 8.1.0, as well as 8.1.1.

Review the *Installation and Upgrade Requirements* document in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.1. This document includes information regarding server and client requirements (such as PC, browsers, and third-party software) as well as upgrade planning/worksheets.

Review each updated core and/or extension module Voyager document on the Documentation Center (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation) for new information. The Reason for Reissue section in the About this Document chapter provides page numbers to new feature details and any other changes to the guide. Note that the *BatchCat.dll Technical User's Guide* is now provided as part of the Core Voyager documentation on the Ex Libris Documentation Center.

If you plan on using the Global Data Change feature, review the Global Data Change documentation (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Core Voyager Documentation > Version 8.0.0) as well as the GDC Support Policy (under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Support > Technical Information).

No database schema changes were made in Voyager 8.1.1 but changes were made in Voyager 8.0.0. Therefore, if you run queries on the Voyager database, review the *Voyager 8 Database Schema Changes* and *Voyager 8 Data Dictionary* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Voyager Data Dictionaries and ER Diagrams.

Decisions

Decide how you would like to handle the following and communicate your decisions to Ex Libris as needed:

- Current system requirements are based on the recommendation that sites either run Classic WebVoyage or the new WebVoyage interface. The new interface is activated by default, thereby inactivating the Classic interface. If your site has decided to use the Classic interface after you upgrade, you must notify the upgrade engineer.

- Training databases are refreshed at upgrade. If you would like to retain your existing training databases, alert your upgrade engineer.
- In a single-server, multi-database environment, Voyager databases can be upgraded separately.

NOTE:

Ex Libris does not recommend running cross versions. Sites with Universal Borrowing (UB) or Universal Cataloging (UC) should upgrade at the same time with their UB/UC partners and run the same version of Voyager for the best performance and ease of troubleshooting.

- Upon request to Ex Libris, Apache with SSL is installed on your site's Voyager server(s). This allows your institution to acquire and install its own SSL certificates for encryption with Apache.

Timing

Refer to the *Installation and Upgrade Requirements* available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.1 for more information regarding timing estimates for the upgrade process.

Voyager Clients

Refer to the *Voyager 8.1.1 Technical User's Guide* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Technical Documentation > Core Voyager Documentation > Version 8.1.1. You may install the Voyager clients manually, or use the AutoUpdate feature (if you are upgrading to Voyager 8.1.1 from 8.1.0 or 8.0.0).

Patron SIF and Tag Tables

The Patron SIF, used for patron update/extract, has not changed in Voyager 8.1.1. There is no need to make any changes to patron update/extract procedures at your institution.

No tag tables for Cataloging have changed with Voyager 8.1.1.

Ex Libris Preview Server

Using the Preview Server provided by Ex Libris, sites can begin customizing WebVoyáge long before they upgrade. Files are available for download and instructions are provided for using the Preview Server database as your WebVoyáge test bed. If you are interested in using the Preview Server, refer to the Preview Server documentation located in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.1.

Upgrade Worksheets

The upgrade worksheet steps you through Voyager functionality preparations before, during, and after the upgrade. Refer to the *Installation and Upgrade Requirements* guide in the Documentation Center for more information.

WebVoyáge Skin Files

Refer to *WebVoyáge Changed Skin Files and Content 810 to 811* in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.1.1 > WebVoyage for a list of files in the skin directories changed from 8.1.0 to 8.1.1 as well as what has been changed within the skin files. It is intended to be used when planning for the best way to continue your skin-level customizations from a previous version of WebVoyáge to version 8.1.1.

Also refer to the Responsibilities Checklist section in the *Installation and Upgrade Requirements* document located in the Documentation Center for more information on restoring customizations for WebVoyáge.

Questions

If you have any questions about Voyager 8.1.1 or the process of the upgrade, use the eService to open an incident with Ex Libris.