



## Road To

Version 8.0.0

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# 1

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## Voyager Release Methodology

This section includes:

- **Major Release (for example, 8.0.0)** on page 5
- **Minor Release (for example, 7.2.0)** on page 5
- **Service Pack (for example, 7.2.5)** on page 5

### Major Release (for example, 8.0.0)

Voyager major releases introduce new functionality, particularly enhancements that may require database changes.

### Minor Release (for example, 7.2.0)

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

### Service Pack (for example, 7.2.5)

Service packs include bug fixes only.

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**NOTE:**

The release number is built by combining the following:

Major.Minor.Service Pack

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



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## 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

Defects are fixed in previous releases and rolled up in Voyager 8.0.0. For example, if a problem was fixed in Voyager 7.2.5, the fix would be available in Voyager 7.2.5 and 8.0.0.

More information about defects fixed in previous releases is available in the *Release Notes* available in the documentation center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning.

### New Enhancements

The Voyager 8.0.0 major release delivers new features and functionality to enhance your library's workflows and operations such as Global Data Change, SMS Messages, Client AutoUpdate, Patron Directory Service, and more. 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 the system functionality and performance improves the user experience, increases staff productivity, and lowers 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.

Detailed information about enhancements available in Voyager 8.0.0 are available in the *Release Notes* available in the Documentation Center under Home > Documentation Center > Ex Libris Documentation Center > Voyager > Upgrade Release Planning > 8.0.0.

## 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 8.0.0 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.

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## Getting Started

This section includes:

- **Options for Upgrading to 8.0.0** 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 8.0.0

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 8.0.0 requires an upgrade to Oracle 11g R2. The VIK will perform this upgrade for you if you prefer. If you would rather 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)



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## Basic Upgrade Planning

This section includes:

- **Versions** on page 13
- **Review Documentation** on page 14
- **Decisions** on page 14
- **Timing** on page 15
- **Ex Libris Preview Server** on page 15
- **Upgrade Worksheets** on page 15
- **WebVoyage Skin Files** on page 15
- **Questions** on page 16

### Versions

Voyager 8.0.0 is a major release. This major release contains enhancements, new Voyager clients, 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 14 July 2011 and 27 July 2011 have the choice of upgrading to Voyager 7.2.5 or Voyager 8.0.0. Sites upgrading after 28 July 2011 will be upgraded to Voyager 8.0.0.

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

Review the *Installation and Upgrade Requirements* document in the Documentation Center. This document includes information regarding server and client requirements (such as PC, browsers, and third-party software) as well as upgrade and installation requirements.

Review each updated core and/or extension module Voyager document (such as the *Voyager 8 Technical User's Guide*) for new information. The Reason for Reissue section in the About this Document chapter provides page numbers to new feature details.

If you plan on using the new 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).

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.

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- 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 > 8.0.0 for more information regarding timing estimates for the upgrade process.

## Ex Libris Preview Server

Using the Preview Server provided by Ex Libris, sites can begin customizing WebVoyage long before they upgrade. Files are available for download and instructions are provided for using the Preview Server database as your WebVoyage 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 > 8.0.0.

## 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.

## WebVoyage Skin Files

With Voyager 7 minor releases and service packs, Ex Libris included a document of *WebVoyage Changed Skin Files and Content*. Since Voyager 8.0.0 is a major release, the process of migrating skin files is a bit different. Only the new, Voyager 8 skin directories are created in your /ui directory. Any customized

skin directories that you have created can be found in the directory where your previous version is archived.

Due to the significant changes from Voyager 7 to Voyager 8, it is essential that you start your OPAC customization process from the new Voyager 8 skin files. With the new Voyager 8 files as the base, you can apply your local customizations one at a time, adapting them to the new files. In some cases, the new and old files may be similar enough that you could essentially apply your previous customizations to the new file directly; but in other cases, your customizations may need to be modified to work properly in Voyager 8.

Since the process for this major release requires that you begin with the Voyager 8 version of all skin files, no list of changed files is necessary. Instead, you may want to use your own list of files that you have customized locally since this will guide you to the customizations you may want to apply to the Voyager 8 interface.

## Questions

If you have any questions about Voyager 8 or the process of the upgrade, use the eService to open an incident with Ex Libris.