



# Installation Kit

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Ex Libris

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## Updates to This Guide

This guide incorporates the following changes:

- Overview:

The VIK version 11 no longer performs in-place Oracle catalog upgrades. In order to upgrade to a new Oracle release, the VIK does the following:

- Exports your Voyager schemas and read-only users
- Removes the old Oracle data files
- Installs a new, clean copy of the VGER database
- Loads your Voyager schemas and users into the database

In a few cases, this may lose site specific customizations to the Oracle database such as the Oracle Enterprise Manager or the external patron authentication user. Make a note of these features that are in use prior to the upgrade and be certain to test them after the upgrade.

- Updated the section **Installation Overview** on page 12
- Updated the section **Voyager Installation Kit Requirements** on page 21
- Updated the section **Download VIK from the Ex Libris FTP Server** on page 22
- Updated the section **Run Overview** on page 25
- Updated the section **1.7 Create the exlibris Group** on page 30
- Updated the section **1.9 Create the oracle User** on page 30
- Updated the section **1.10 Create the voyager User** on page 30
- Updated the introduction in section **2 Download the Software** on page 31
- Updated the section **3 Create/Restore Backup** on page 36
- Updated the section **5 Add New ORACLE\_HOME to the Oracle Inventory (oracle)** on page 38
- Updated the section **6 Complete the Voyager Software Upgrade/Installation** on page 42



# 1

---

## Introduction

This section includes:

- **Installation Kit Introduction** on page 11
- **Installation Overview** on page 12
- **Can I Run the VIK?** on page 13
- **Before You Run the VIK** on page 15
- **Support Policy for the Voyager Installation Kit** on page 15
- **Conventions of the VIK** on page 17

## Installation Kit Introduction

Ex Libris provides an automated Voyager Installation Kit (VIK) for customer self-installation. The installation should be performed by a local System Administrator.

The length of time it takes to run the VIK to completion depends on the number of bibliographic records in the database and from which version you are upgrading. Refer to the *Voyager Road To* and *Installation and Upgrade Requirements* guides located in the Ex Libris Documentation Center for upgrade duration estimates.

Ex Libris offers installation services to interested customers. Contact your local office to schedule a time for installation by creating a Support Incident via the eService at <http://support.exlibrisgroup.com>. Select Upgrade as the response to the “What type of difficulty are you experiencing?” question.

The VIK package facilitates installation to Voyager version 8.2.0 and later. If Voyager is earlier than version 8.2.0, open an eServices ticket for assistance.

The VIK includes the following components:

- Installation package
  - Scripts and init files

- Oracle software
- Voyager software  
Voyager application and pre-generated, third-party products (Java, Tomcat, Perl, Apache, and so on)

The Voyager installation using the VIK involves the following steps:

- Preinstallation tasks
- Download the software from the FTP server
- Create/restore temporary backups
- Third-party product installations
- Oracle software installation and configuration
- Voyager software installation and configuration
- Post-installation tasks

---

**NOTE:**

During the Voyager installation, one reboot of the server is required to test start-up scripts.

Other Ex Libris applications on the server using Oracle experience a short downtime during this reboot process at the end of the installation process.

---

## Installation Overview

The VIK can be downloaded from the Ex Libris FTP server or, in special circumstances, supplied as a DVD package for customers with strict security policies.

Use the following link for the usernames and passwords to access the Ex Libris FTP server:

[https://knowledge.exlibrisgroup.com/Voyager/Knowledge\\_Articles/FTP\\_Passwords\\_for\\_voyager%2C\\_odbc%2C\\_preview%2C\\_and\\_patch\\_users](https://knowledge.exlibrisgroup.com/Voyager/Knowledge_Articles/FTP_Passwords_for_voyager%2C_odbc%2C_preview%2C_and_patch_users)

The Voyager installation is performed in the following standard directories:

- Voyager software under the directory `/m1/voyager`
- Oracle software under the directory `/oracle/app/oracle/product/19c`

## Can I Run the VIK?

Review the information below to help you decide whether you should run the VIK on your own or schedule Ex Libris to run it for you.

### Current Voyager Version

Only customers running Voyager with Oracle 11.2.0.3 and later can run the VIK. To check your version of Oracle, as the `voyager` user, enter the following command:

```
sqlplus -v
```

If you are running Voyager versions prior to 8.2 and/or Oracle 11.2.0.1, you cannot run the VIK. Schedule an Ex Libris Installation Engineer to run the upgrade. Use the eService to open an incident to schedule the upgrade. Under the **What type of difficulty are you experiencing?** field, select **Upgrade**.

### Extension Modules

Review the list of Voyager extension modules below. There are some extension modules that are not upgraded via the VIK; and therefore, you should schedule the upgrade with Ex Libris. If you are not sure which extension modules you have, you can look at your product registration information in the eService.

Table 1. Voyager Extension Modules

Extension Module	Upgraded by VIK?
Analyzer	No
Aurora Export	Yes
Automatic Retrieval System (ARS)	Yes
Bridge to INN-Reach	No
Circulation Clusters	Yes
Citation Server	Yes
Geospatial Search	Yes
ILL - Interlibrary Loan	Yes
ILL Web (LFP-ILL)	No
ImageServer	Yes
InterCirc - INN-Reach	No
InterCirc-U (InterCirc with NCIP)	Yes

Table 1. Voyager Extension Modules

Extension Module	Upgraded by VIK?
Media Scheduling	Yes
SelfCheck	Yes
Swedish Character Setting	Yes
Universal Borrowing - UB	Yes
Universal Catalog - UC	Yes
VDX Interface	Yes
Voyager-Primo integration	Yes
Voyager-Rosetta integration	Yes
Voyager-Verde integration	Yes
WebAuthorities	Yes
Web Cataloging	Yes

## Server Types

There are the following predefined server types:

- Single-server installation (Oracle + App + Web)
- Oracle and application server (Oracle + App)
- Oracle-only server
- Voyager application and Web server (App + Web)
- Voyager application-only server
- Web server

If your server is not one of these predefined server types, the VIK may not configure your server correctly. Contact the installation team for more details on whether you should use the VIK. Proceeding without advice may result in a non-working environment since your configuration may not be supported or is untested with the VIK.

## Access to the server

You must have `root` access to the server(s).

## System Requirements

Before installing Voyager, verify that all operating system components comply with the Voyager requirements as outlined in the Voyager Installation and

Upgrade Requirements document located in the Ex Libris Documentation Center.

## Before You Run the VIK

### Licensing

Before running the VIK, you must have a Voyager License Key. Open an SI via the eService to request your Key. Under the What type of difficulty are you experiencing? field, select Upgrade. The Licensing Manager sends you a long string of characters (this is your Key). The VIK prompts you to enter the Key. Make sure to paste in the whole string including any final symbols. This authorizes and properly tunes your system.

---

**NOTE:**

If you have run the VIK previously, you may not need to obtain a new license file. You can run step 1.11 to find out if you need a new license file.

---

### Backup

It is required that a full, cold-tape working backup of the Voyager system be performed prior to beginning the upgrade process. While the VIK has the ability to perform a backup, this backup allows an immediate rollback of an inoperable system. The VIK backup tool is optional since it requires available space on the local system. The VIK backup tool is not an acceptable replacement to a full cold-tape backup.

## Support Policy for the Voyager Installation Kit

The Voyager Installation Kit (VIK) was created to give customers more flexibility, power, and consistency when upgrading. With that in mind, Ex Libris has tried to create a support policy for the VIK that addresses the likely needs of customers.

### Categories of VIK Problems

Because the VIK was designed to be modular and flexible, you can safely exit and restart it without losing the state of your work. If you run into a problem or question when using the VIK, see the following categories that they can fall into:

- Preinstall Problems

All of the preinstallation tasks, including checks, downloads, and backups, can be done at any time. If they fail, they can be retried. If there is a problem,

the Voyager system is still running, and, at worst, the upgrade has to be delayed. This includes all items in the VIK until Apache and Voyager are stopped (4.2 and 4.3) except for step 3 Create/Restore Backup. Step 3 requires stopping and starting Voyager and/or Oracle.

- **Install Problems**

Once Apache and Voyager are stopped, any problems running the VIK or its component scripts have the potential to prolong the downtime and prevent the system from being used.

## Support for the VIK Problems

See the following description of support provided for VIK problems:

- **Preinstall Problems**

If you experience a preinstall problem, open an SI via the eService as you would with other Voyager problems or questions. These SIs fall under the standard Level 3 or 4 as outlined in the Ex Libris Service Level Agreement.

- **Install Problems**

If you experience an install problem that renders your system down during the standard hours of 7am to 7pm (Central), open a Down System SI and call the Support line, 877-445-5693.

If the problem occurs outside of the support hours, open an SI and use the VIK Restore feature to roll back the upgrade to the previous version. The problem can then be addressed when the office opens.

If the Restore feature does not work, follow the standard emergency, after-hours Down System procedure for Ex Libris assistance to either restore or go forward. Use of this emergency, after-hours pager service may be a billable event.

## The Importance of Backing Up

Every Voyager system must have a tested working backup and recovery system. When using the VIK, it is especially important to have a full backup and a plan for restoring before starting an upgrade.

The VIK includes a method to easily back up and restore your Voyager system configuration without having to exit, but it is not foolproof and is not a substitute for a standard full backup. However, it is extremely helpful if something goes wrong during an after-hours VIK upgrade.

## Conventions of the VIK

### The VIK Menu

Each section and task in the VIK has an associated number. In the menu, you can enter that number to go to a section or start a task. Entering `q` takes you up a level or exits the VIK from the main menu.

It is safe to exit and rerun the VIK. It remembers what has been completed. Also, if something unexpected happens, exit the VIK and restart where you left off. You can't hurt anything if you restart. Below is an example of a VIK menu.

```

                                Voyager Installation Kit
-----

Date:      <DATE>
OS:       SunOS
Server:    myserver
User:     <USER>
Version:  <VIK VERSION>
Voyager:  <VOYAGER VERSION>

-----

FAILED  1. Complete the preinstallation tasks
OK      2. Download the software
?       3. Create / Restore Backup
-       4. Complete Third Party Software Upgrade / Installation
-       5. Complete the Oracle Software Upgrade / Installation
-       6. Complete the Voyager Software Upgrade / Installation
-       7. Complete the postinstallation tasks

Enter an Option (q to Quit)[q]:

```

Upon completing the steps in the VIK, the status of a step change displays.

- OK

The step completed successfully.

- **FAILED**  
An issue occurred. More details about the error can be found in the installation log.
- **IN-PROCESS**  
This is used during the client download portion of the VIK. This step can be rerun periodically since it is waiting for the status of processes on the server to change to OK or FAILED.
- **SKIP**  
This means that the step can be skipped, and you can move on to the next step. If you run the step anyway, it reports back to you that it should be skipped.
- **?**  
An abnormal exit occurred. This could result from exiting a step prematurely or from an undetermined status of a step. Run the step again.
- **-**  
The minus sign (-) means that the step has not been run and needs to be run prior to proceeding to the next step.

If all the steps in a section are OK, press the Enter key to get to the next section. See below for an example:

```
2. Download the software
-----
OK 1. Download ftp configuration file
OK 2. Download Oracle software
OK 3. Download Oracle Critical Patch Update
OK 4. Download the Voyager software
OK 5. Download the Voyager Extension Modules
OK 6. Download Voyager Service Pack
OK 7. Download the third-party products
OK 8. Download Voyager Hot Fix
OK 9. Check for Completion of Downloads
OK 10. Check for the successful/correct download of the Oracle
Software
OK 11. Check for the successful/correct download of the Oracle CPU
OK 12. Check for the successful/correct download of the Voyager
software
```

```
OK 13. Check for the successful/correct download of the Voyager
Extension Modules

OK 14. Check for the successful/correct download of the Voyager
Service Pack(s)

OK 15. Check for the successful/correct download of the third-
party products

OK 16. Check for the successful/correct download of the Voyager
Hot Fix
```

## Supply a Value or Press Enter

Many times in the VIK, you are asked to supply a value. If there is an option inside square brackets, or sometimes parentheses, you can press Enter to accept that value instead of supplying a value. If you're unsure of a setting, this default value should be the safest option.

## Be Patient While the VIK is Working

Some tasks in the VIK take time; and after starting one, you may not get any further feedback until it's done. We've tried to indicate if a task takes a while to complete so that you know that you can let it wait.

## Re-Entering the VIK

If you exit/quit and want to get back into the VIK, from `/m1/incoming/vik` enter:

```
./ikit_menu
```

## VIK Log

A single log file containing confirmation and feedback on the installation, the status of each step, and reporting errors is created. This log file is placed in `/m1/incoming/vik/log/voyager_installation.log`.

## After Completion

Upon completing the VIK, Voyager clients need to be installed on each PC that uses the new version of Voyager. You can find these clients on your Voyager server in `/m1/voyager/clients/<version>`. You must use either an FTP or SFTP client depending on your server's configuration. The clients can also be found in the Ex Libris Documentation Center in the Download Center section.

If your institution is upgrading from Voyager 8.0.0 or higher, Client Autoupdate is a feature that can automatically update your staff PCs with the new client software. See the *Voyager Technical User's Guide* for more details.

Customizations for Classic WebVoyage are restored and work immediately following your upgrade.

If you are upgrading from a release of Tomcat WebVoyage earlier than Voyager 8.0.0, customized skins are not restored and are not available for immediate use after the upgrade. Customizations to WebVoyage must be applied manually. Use of the preview server is recommended prior to the upgrade. This helps ensure that downtime is minimal upon upgrading to your production environment. After the upgrade, backups of your customizations can be found in `/m1/upgrade/<VERSION>/pre<VERSION>/voyager/<db>/tomcat/vwebv/context/vwebv/`.

Refer to the Voyager Upgrade Release Planning section of the Ex Libris Documentation Center for documents (for each version) that identify the WebVoyage files that have changed in the skin directories (*WebVoyage <version>-<version> GR Changed Files*) and a description of the changes in the skin files (*WebVoyage Changes to Skin Files from <version> to <version>*).

# 2

---

## Preparation

This section includes:

- [Voyager Installation Kit Requirements](#) on page 21
- [Creating the incoming Directory](#) on page 22
- [Download VIK from the Ex Libris FTP Server](#) on page 22

## Voyager Installation Kit Requirements

You must run the VIK as the root user.

The VIK supports the following extension modules:

- Automated Retrieval System (ARS)
- Citation Server
- ILL
- ImageServer
- Voyager Self Check
- Swedish Character Setting
- Voyager Primo Interoperability
- Media Scheduling

If the Voyager installation is a multi-tier installation such as application/ database and Web server, it is required that the VIK be run on all servers in the multi-tier environment.

If you have a test server, it is not recommended to run the installation on your production environment and test environment simultaneously. Begin with your test environment. When the installation has been confirmed working in the test environment, proceed with the installation in your production environment.

---

**IMPORTANT:**

It is required that a full, cold-tape working backup of the Voyager system be performed prior to beginning the upgrade process. More information about the Voyager backup is available in Chapter 3 of the *Voyager Technical User's Guide*.

---

## Creating the incoming Directory

Create the `/m1/incoming` directory (if it does not exist) under the `/m1` directory:

```
1 cd /m1
2 ls -l
3 mkdir -p incoming
4 chmod 777 incoming
```

## Download VIK from the Ex Libris FTP Server

To download the installation package from the Ex Libris FTP server, execute the following commands:

```
1 Log into the server as root.
2 cd /m1/incoming
3 Rename the existing vik directory if it already exists:
  mv vik vik.$$
4 ftp downloads.exlibrisgroup.com [<username>:voyager ;
  <password>]
```

Use the following link for the usernames and passwords to access the Ex Libris FTP server:

[https://knowledge.exlibrisgroup.com/Voyager/Knowledge\\_Articles/FTP\\_Passwords\\_for\\_voyager%2C\\_odbc%2C\\_preview%2C\\_and\\_patch users](https://knowledge.exlibrisgroup.com/Voyager/Knowledge_Articles/FTP_Passwords_for_voyager%2C_odbc%2C_preview%2C_and_patch_users)

```
5 Pick the directory for the major or minor release of Voyager that you are
  upgrading to such as 2009.2.0.
6 bin
7 get vik4.10.2.0.tar.bz2
8 quit
```

**Extract the VIK package with the following commands:**

- 1 `bzip2 -dc vik4.10.2.0.tar.bz2 | tar -xvf -`
- 2 `cd vik4`
- 3 `./ikit_menu`

The main menu of the VIK displays.

- 4 Enter 1 or q if you want to exit the installation.

```
Voyager Installation Kit
-----

Date:      <DATE>
OS:        <OS>
Server:    myserver
User:      root
Version:   <VIK VERSION>
Voyager:   <VOYAGER VERSION>

-----

? 1. Complete the preinstallation tasks
- 2. Download the software
- 3. Create / Restore Backup
- 4. Complete Third Party Software Upgrade / Installation
- 5. Complete the Oracle Software Upgrade / Installation
- 6. Complete the Voyager Software Upgrade / Installation
- 7. Complete the postinstallation tasks

Enter an Option (q to Quit)[q]:
```



# 3

---

## Running the Installation Kit

This section includes:

- **Run Overview** on page 25
- **1 Preinstallation Tasks** on page 27
- **2 Download the Software** on page 31
- **3 Create/Restore Backup** on page 36
- **4 Complete the Third-Party Software Upgrade/Installation** on page 36
- **5 Add New ORACLE\_HOME to the Oracle Inventory (oracle)** on page 38
- **6 Complete the Voyager Software Upgrade/Installation** on page 42
- **7 Post-Installation Tasks** on page 46

### Run Overview

Perform all VIK steps in the order displayed on the menu. That is, first complete the steps under number 1 in the ordered listed. When those steps are complete, proceed to step number 2, and so on.

Upon completing the steps in the VIK, you see the status of a step change:

- OK
- FAILED
- ?
- -

OK means that the step completed successfully.

FAILED means an issue occurred. More details about the error can be found in the installation log.

The question mark (?) means that an abnormal exit occurred. This could result from exiting a step prematurely or from an undetermined status of a step.

The minus sign (-) means that the step has not been run and needs to be run prior to proceeding to the next step.

You can exit the VIK at any stage of the installation. The VIK and the upgrade remain in the state you left it. To begin again, you need to restart the VIK, navigate to where you ran the last step, and continue completing the necessary steps.

**To restart the process, do the following:**

- 1 `cd /ml/incoming/vik4`
- 2 `./ikit_menu`

A single log file containing confirmation and feedback on the installation, the status of each step, and reporting errors can be found under `/ml/incoming/vik/log/voyager_installation.log`.

The following main menu is used throughout the Voyager installation, outlining the main steps. The main menu has a header including the current date and operating system used.

```
Voyager Installation Kit
-----

Date:      <DATE>
OS:        SunOS
Server:    myserver
User:      root
Version:   <VIK VERSION>
Voyager:   <VOYAGER VERSION>

-----

? 1. Complete the preinstallation tasks
- 2. Download the software
- 3. Create / Restore Backup
- 4. Complete Third Party Software Upgrade / Installation
- 5. Complete the Oracle Software Upgrade / Installation
- 6. Complete the Voyager Software Upgrade / Installation
```

```
- 7. Complete the postinstallation tasks
Enter an Option (q to Quit)[q]:
```

## 1 Preinstallation Tasks

After you enter 1 for Complete the preinstallation tasks from the top VIK menu, the following screen displays:

```
1. Complete the preinstallation tasks
-----
- 1.  Configure the VIK Environment
- 2.  Complete the pre-installation system checks
- 3.  Create / Update the site information
- 4.  View Site
- 5.  Create / Update the server information
- 6.  View Server(s) Information
- 7.  Create exlibris group
- 8.  Create dba group
- 9.  Create oracle user
- 10. Create voyager user
- 11. Run Pre-Installation Setup
- 12. Install Voyager License
- 13. Run OS Tuning Setup

Enter an Option (q to Quit)[q]:
```

### 1.1 Configuring the VIK Environment

This step sets up the environment for running the VIK. You are prompted to enter parameters such as e-mail address, the FTP server to download the files, the local software repository directory, and other default values used throughout the VIK.

If at any point a variable is not defined or needs to be changed, this step can be rerun to change those parameters.

```
1. Complete the preinstallation tasks
```

```
1.1. Configure the VIK Environment
```

```
-----  
Set Local Software Repository Directory(LSWR) [/ml/incoming/v720]:  
Set Backup / Restore Directory []:  
Set Voyager Base [/ml/voyager]:  
Use Passive FTP [N]:  
Set ftp Server [downloads.exlibrisgroup.com]:  
Set Email Address []:email.address@institution.edu
```

## 1.2 Complete the Preinstallation System Checks

This step checks that your environment meets the minimum requirements for the version of Voyager that you are upgrading to. It checks for a compatible OS release, sufficient disk space, memory and the presence of required packages. You should run this step on all servers in a multi-server environment prior to continuing with the process you are performing.

If there are any warnings during the third-party product checks, this is acceptable since the VIK upgrades the third-party products that are not at the recommended version. This is much more important during the system check at the end of the installation.

During the extension modules checks, you may find "WARNING CHECK LICENSING FOR" with a list of databases specified. This means that the extension module seems to be partially installed according to the installation checks. It is safe to proceed since the VIK upgrades the components it finds. It also displays when this is run on a Web server since it cannot connect to the database to check schema for all of the extension modules.

At the end of the summary, the script determines if you are okay to proceed to the next version of Voyager. If for any reason the check script reports FAILED, you need to resolve any problems prior to continuing. This ensures that your system meets the requirements.

---

### NOTE:

The pre-installation checks generate a new `SEARCHPARAM_A1XX_conflicts.xls` file that is used as part of the Voyager upgrade. If you have not already addressed this conflicts file, see the *Voyager Index Changes* document for more information.

---

---

**IMPORTANT:**

Resolve any FAILED items prior to resuming the VIK installation for Voyager. This step can be run as many times as necessary to check all issues and confirm that all criteria have been met.

---

### 1.3 Create/Update the Site Information

This step creates the required site for the VIK to work properly. It automatically selects the local server for running the VIK.

You are prompted to Enter Customer Initials (no spaces). This can be your initials or your institution's initials. There is a 10-character maximum limit.

### 1.4 View Site

This step displays your Site Code as well as your server name. Press Enter and continue.

### 1.5 Create/Update the Server Information

Once the site is created, you move onto the creation of the server configuration. The user defines the IP, Fully Qualified Domain Name (FQDN), hostname, and so on. This process sets up the VOYAGER\_BASE, where voyager is installed, and other configurations specific to a Voyager server.

There are six predefined server types:

- Single Server Installation (Oracle + App + Web)
- Oracle and Application Server (Oracle + App)
- Oracle Only Server
- Voyager Application and Web Server (App + Web)
- Voyager Application Only Server
- Web Server

The VIK will automatically try to determine which type your server is. Verify that the VIK has chosen the correct server type. Press return to select the server type the VIK has chosen, or select a different server type.

---

**NOTE:**

If your server is not one of these predefined server types, the VIK may not configure your server correctly. Stop immediately and contact the installation team for more details regarding how to proceed with this installation. Proceeding without advice may result in a non-working environment since your configuration may not be supported or is untested with the VIK.

---

```
Server Hostname [astra.example.edu]:  
Hit enter  
Server IP Address [10.55.23.5]:  
Enter the IP Address, External IP address is preferred, of the  
server that you are running the VIK on.
```

## 1.6 View the Server(s) Information

This step displays the server that is currently configured for the VIK. To change any of the values you need to run the `Create/Update the server information` step.

## 1.7 Create the `exlibris` Group

This step creates the `exlibris` group if it does not exist.

## 1.8 Create the `dba` Group

This step creates the `dba` group if it does not exist.

## 1.9 Create the `oracle` User

This step checks or creates the `oracle` user for managing the oracle software with the user home of `/home/oracle`. The user shell is `/bin/ksh`.

When creating the new user, if needed, you are prompted for a new unix password.

## 1.10 Create the `voyager` User

This step checks or creates the `voyager` user for managing and using the `voyager` software with the user home of `/home/voyager`. The user shell `/bin/ksh`.

When creating the new user, if needed, you are prompted for a new unix password.

## 1.11 Run Preinstallation Setup

This step checks the permissions setup of required directories for the VIK to perform a successful installation.

## 1.12 Install Voyager License

Before running the VIK, you must have a Voyager License Key. If you haven't done so already, open an SI via the eService to request your Key. The Licensing Manager sends you a long string of characters (this is your Key). The VIK prompts you to enter the Key. Make sure you paste in the whole string including any final symbols. This authorizes and properly tunes your system.

---

**NOTE:**

If you have run the VIK previously and have entered the Voyager license key, you most likely do not need a new key. The VIK lets you know if you need a new key before you proceed.

---

## 1.13 Run OS Tuning Setup

This step checks the system for values used for tuning your voyager system. If the values are not correct, the step updates the values appropriately.

# 2 Download the Software

---

**NOTE:**

The steps in menu 2 connect to a file server in one of the following ways:

- \* ssh with the system 'scp' binary to port 10022 on downloads-na.hosted.exlibrisgroup.com
- \* sftp with the 'vik' curl program to port 22 on downloads.exlibrisgroup.com
- \* ftp with the 'vik' curl program to downloads.exlibrisgroup.com

The VIK automatically picks the best option in menu 2 step 1.

If you do not have outbound access from this server, the packages can be downloaded manually and stored in the local software repository directory previously defined in **1.1 Configuring the VIK Environment** on page 27.

If you have run through menu 2 more than a week before the upgrade, you should repeat each step in the menu 2 process. The VIK only downloads updated files.

---

The second step in the main menu is to download the software.

Enter the number 2 to display the submenu for Download the software from the FTP server:

```
2. Download the software
-----
- 1. Download ftp configuration file
- 2. Download Oracle software
- 3. Download Oracle Critical Patch Update
- 4. Download the Voyager software
- 5. Download the Voyager Extension Modules
- 6. Download Voyager Service Pack
- 7. Download the third-party products
- 8. Download Voyager Hot Fix
- 9. Check for Completion of Downloads
- 10. Check for the successful/correct download of the Oracle Software
- 11. Check for the successful/correct download of the Oracle CPU
- 12. Check for the successful/correct download of the Voyager software
- 13. Check for the successful/correct download of the Voyager Extension
Modules
- 14. Check for the successful/correct download of the Voyager Service
Pack(s)
- 15. Check for the successful/correct download of the third-party products
- 16. Check for the successful/correct download of the Voyager Hot Fix
```

## 2.1 Download the FTP Configuration File

Enter the number 1 to download the latest version of the configuration file used for downloading the Voyager, Oracle, and third-party software.

The target directory on your local server is the location setup in [1.1 Configuring the VIK Environment](#) on page 27. If you need to change the location of the target directory, do so in that step

This step automatically determines whether to use SFTP or FTP to connect to the Ex Libris FTP server.

An e-mail message is sent to the address you entered when the FTP download is started and completed.

---

**NOTE:**

If you fail to run this step the first time the VIK process is completed (when downloading the files using the VIK), it results in no files downloaded from the FTP server when proceeding to the next steps.

---

## 2.2 Download Oracle Software

The next step is to download the Oracle software. You see the packages being downloaded.

The target directory on your local server is the location setup in [1.1 Configuring the VIK Environment](#) on page 27. Change the location in that step.

An e-mail is sent to the address specified in the [1.1 Configuring the VIK Environment](#) step when the FTP download is complete. The e-mail address used can be changed. See [1.1 Configuring the VIK Environment](#) on page 27.

## 2.3 Download Oracle Critical Patch Update

The next step is to download the Oracle critical patch update software. You see the packages being downloaded.

The target directory on your local server is the location setup in [1.1 Configuring the VIK Environment](#) on page 27. Change the location in that step.

An e-mail is sent to the address specified in the [1.1 Configuring the VIK Environment](#) step when the FTP download is complete. The e-mail address used can be changed. See [1.1 Configuring the VIK Environment](#) on page 27.

## 2.4 Download Voyager Software

The next step is to download the Voyager software. You see the packages being downloaded.

The target directory on your local server is the location setup in [1.1 Configuring the VIK Environment](#) on page 27. Change the location in that step.

This utility uses the wget client for downloading the Voyager software from the Ex Libris FTP server.

An e-mail is sent to the address specified in the [1.1 Configuring the VIK Environment](#) step when the FTP download is complete. The e-mail address used can be changed. See [1.1 Configuring the VIK Environment](#) on page 27.

## 2.5 Download Voyager Extension Modules

The next step is to download the Voyager extension modules. You are prompted to select the extension modules that you have licensed and configured on your server.

---

**NOTE:**

If you know you have an extension module installed that is not on this list, you are required to coordinate the installation of this extension module with the installation team to ensure that your extension module is

properly installed and configured. For example, Analyzer is not supported with VIK.

---

**NOTE:**

You are required to obtain the password(s) from the e-Service in order to download the extension modules you have chosen. Refer to KCS Article 000009981 (Media) and 000002188 (ILL) in Salesforce (<http://support.exlibrisgroup.com>) for the usernames and passwords to access the Ex Libris FTP server. If you do not have access to a password for a particular extension module and you feel this is an error, open a Salesforce case and support can assist you in resolving this issue.

---

The target directory on your local server is the location setup in **1.1 Configuring the VIK Environment** on page 27. Change the location in that step.

An e-mail is sent to the specified address in the **1.1 Configuring the VIK Environment** step when the FTP download is complete. The e-mail address used can be changed in that step, too.

## 2.6 Download the Voyager Service Pack

To continue downloading the Voyager software, you need to download the most recent service pack released, if a service pack has been released.

```
2. Download the software
2.6. Download Voyager Service Pack
-----
No Files to Download
Press Enter to Continue:
```

## 2.7 Download the Third-Party Products

Once the Voyager software downloads are completed, you need to download any necessary third-party packages.

The target directory on your local server is the location setup in **1.1 Configuring the VIK Environment** on page 27. Change the location in that step.

An e-mail is sent to the specified address in the **1.1 Configuring the VIK Environment** step when the FTP download is complete. The e-mail address used can be changed in that step, too.

## 2.8 Download Voyager Hot Fix

This step downloads the most recent hot fix that applies to the version of Voyager that you are upgrading to, if one is available.

## 2.9 Check for Completion of Downloads

This step checks for the completion of the Voyager software, Voyager third-party software, Voyager extensions software, and service pack downloads.

## 2.10 Check for the Successful/Correct Download of the Oracle Software

This step checks the checksum of the Oracle software downloaded with a known correct size of the packages. If you encounter any problems with the download and you cannot resolve the problem yourself, contact your local support office.

## 2.11 Check for the Successful/Correct Download of the Oracle CPU

This step checks the checksum of the Oracle critical patch update software downloaded with a known correct size of the packages. If you encounter any problems with the download and you cannot resolve the problem yourself, contact your local support office.

## 2.12 Check for the Successful/Correct Download of the Voyager Software

This step checks the checksum of the Voyager software downloaded with a known correct size of the packages.

If you encounter any problems with the download and you cannot resolve the problem yourself, contact your local support office.

## 2.13 Check for the Successful/Correct Download of the Voyager Extension Modules

This step checks the checksum of the Voyager extension module software downloaded with a known correct size of the packages.

If you encounter any problems with the download and you cannot resolve the problem yourself, contact your local support office.

## 2.14 Check for the Successful/Correct Download of the Voyager Service Pack(s)

This step checks the checksum of the Voyager service pack software downloaded with a known correct size of the packages.

## 2.15 Check for the Successful/Correct Download of the Third-Party Products

This step checks the checksum of the third-party software downloaded with a known correct size of the packages.

If you encounter any problems with the download and you cannot resolve the problem yourself, contact your local support office.

## 2.16 Check for the Successful/Correct Download of the Voyager Hot Fix

This step checks that the Voyager hot fix software was downloaded completely and correctly.

# 3 Create/Restore Backup

If you need to restore Voyager part way through an upgrade, contact Voyager Support for assistance.

# 4 Complete the Third-Party Software Upgrade/ Installation

This VIK component installs third-party software such as Apache, Java, Tomcat, and Perl.

---

**NOTE:**

root access is required to perform the Complete Third-Party Software Upgrade / Installation tasks.

---

```
Voyager Installation Kit
```

```
4. Complete Third Party Software Upgrade / Installation
```

```
-----  
- 1. Extract the third-party software
```

```
- 2. Stop Voyager Software
- 3. Stop Apache Software
- 4. Install / Upgrade third-party software
- 5. Configure third-party software
Enter an Option (q to Quit)[q]:
```

## 4.1 Extract the Third-Party Software

This step extracts the third-party packages into the local software repository.

## 4.2 Stop the Voyager Software

In order to begin the upgrade of the Voyager xxxdb and schema and perform the necessary regens for `voyager`, it is required that `voyager` be stopped.

This step stops `voyager` and the current processes. It prevents any new connections from being made to the database, also.

## 4.3 Stop Apache Software

After stopping the Voyager software, it is important to stop the Apache software being used by `voyager`.

This step stops the Voyager Web server and prevents connections from being made to Voyager software via the Web.

## 4.4 Install/Upgrade the Third-Party Software

This step upgrades the existing Java, Perl, and Tomcat, or installs a new version of the software if it is required by the release of the software in `/m1/shared`.

## 4.5 Configure the Third-Party Software

This step finishes the upgrade of `/m1/shared`. It corrects the paths, permissions, and file ownership under `/m1/shared`. Insecure Apache SSL configurations are amended. New features may be added to Apache virtual hosts if they are missing. For Voyager 8.0 and later, the Tomcat OPAC is updated to use the Java and Tomcat versions installed in step 4.4.

## 5 Add New ORACLE\_HOME to the Oracle Inventory (oracle)

This process copies your Oracle RDBMS data into a new copy of the VGER database. The database contents are backed up, and the old database files are deleted. A new copy of the Oracle RDBMS software is installed, along with a new copy of the VGER database. The most recent Oracle Patch Set Update to the Oracle install is applied. After this is done, your data is loaded into the new VGER database.

```
5. Install Oracle and Voyager
-----
- 1. Shut down Oracle (root)
- 2. Disable Oracle Archive Logging (oracle)
- 3. Backup Voyager Schemas (oracle)
- 4. Archive the VGER Database (oracle)

      Install
      -----
- 5. Create and prepare required directories (root)
- 6. Extract the Oracle software (oracle)
- 7. Add Oracle new ORACLE_HOME to the Oracle Inventory (oracle)
- 8. Update OS files and permissions (root)
- 9. Migrate oracle configuration files (oracle)
- 10. Update oratab, Oracle user .profile (oracle)
- 11. Migrate spfile to the new ORACLE_HOME (oracle)
- 12. Test Oracle startup (oracle)
- 13. Extract Oracle Patches (oracle)
- 14. Install the Oracle Patch Set Update (oracle)
- 15. Patch the Oracle Catalog for PSU (oracle)
- 16. Recompile invalid Oracle objects (oracle)
- 17. Start Oracle (oracle)

      Reload Databases
      -----
- 18. Recreate Tablespaces (oracle)
- 19. Populate Oracle with Voyager Data (oracle)
- 20. Update Voyager application ORACLE_HOME (voyager)
- 21. Run Post Import processing (voyager)
- 22. Fix Oracle Catalog Permissions (oracle)
- 23. Tune Oracle (oracle)
- 24. Check Voyager Tablespace Size (oracle)
Enter an Option (q to Quit)[q]:
```

### 5.1 Shut Down Oracle

This step shuts down the Oracle database. This is necessary in order to ensure that the Oracle RDBMS is under the control of the VIK, rather than an automated process.

## 5.2 Disable Oracle Archive Logging

This step records the archive logging status of the database, and disables it if it is turned on. Refer to menu 7 step five.

## 5.3 Backup Voyager Schemas

This step records your Voyager data file configuration, Oracle listener configuration, and does an Oracle Data Pump export of your Voyager relevant schemas to `/m1/upgrade/<Voyager Release>/pre<Voyager Release>/oracle/voyager_backups`.

## 5.4 Archive the VGER Database

This step archives your Oracle database files (usually `/oracle/oradata/VGER`) to `/m1/upgrade/<Voyager Release>/pre<Voyager Release>/oracle/oradata/VGER`, and then compresses them.

## 5.5 Create and Prepare Required Directories

This step creates various Oracle relevant directories under `/oracle`, and ensures that the permissions on all relevant files and directories are appropriate.

## 5.6 Extract the Oracle Software

This step extracts the appropriate version of the Oracle RDBMS software, and VGER database in their appropriate locations.

## 5.7 Add Oracle new ORACLE\_HOME to the Oracle Inventory

Add the new software installed in step 5.6 to the Oracle Inventory area, which Oracle uses to manage installed components. This step also ensures that certain paths hard coded in scripts and configuration files are correct and contain the actual absolute path to the Oracle Home. The Oracle binaries are also relinked against the system libraries for optimal compatibility with the system.

## 5.8 Update OS Files and Permissions

This step runs the `$ORACLE_HOME/root.sh` script, which creates `/usr/local/bin/oraenv`, `/usr/local/bin/coraenv`, and `/usr/local/bin/dbhome`. It also does some post-inventory cleanup of files and permissions.

## 5.9 Migrate Oracle Configuration Files

This step copies the Oracle listener configuration and network configuration that was saved in step 5.5 into the new Oracle home.

## 5.10 Update oratab, Oracle user .profile

This step updates the system `oracle` user's login `.profile` file, and the `/etc/oratab` file that tells system users how to find the database install.

## 5.11 Migrate spfile to the New ORACLE\_HOME

This step copies the Oracle `init` file from the old Oracle home to the new Oracle home, and does some initial tuning.

## 5.12 Test Oracle startup

Start the database for the first time. This ensures that the previous activities in steps 5.5 – 5.11 have been successful.

## 5.13 Extract Oracle Patches

Current Oracle Patch Set Update files for the database are provided, and these are occasionally supplemented with additional bug and security fix packages. This step prepares these patches to be applied to the database.

## 5.14 Install the Oracle Patch Set Update

This step updates the Oracle Install binaries and configuration files with the latest patch set that Ex Libris distribute.

## 5.15 Patch the Oracle Catalog for PSU

These patch sets also contain components which must be loaded into the database catalog for use. This step performs that task.

## 5.16 Recompile Invalid Oracle Objects

Patch installation can invalidate database libraries and functions. This step recompiles these invalid objects with the new patched components. The database is shut down once this is done to ensure that all components are consistent.

## 5.17 Start Oracle

Ensure that the database is running and ready to load new data.

## 5.18 Recreate Tablespaces

Create new Oracle data files to hold the Voyager data.

## 5.19 Populate Oracle with Voyager Data

Load the Oracle Data Pump export files from the old database (step 5.3) into the new database.

## 5.20 Update Voyager Application ORACLE\_HOME

Configure various components of Voyager to use the new database install instead of the old one.

## 5.21 Run Post Import processing

This removes certain temporary data which may be corrupted by the migration process and ensures that the Voyager HEADING indexes are recreated appropriately.

## 5.22 Fix Oracle Catalog Permissions

Clean up a number of potential permission and configuration issues inside the Oracle database. Remove old logging files from `/oracle/app/oracle/diag`.

## 5.23 Tune Oracle

Tune the database appropriately now that the Voyager data is reloaded and the database is cleaned up.

## 5.24 Check Voyager Tablespace Size

Check that each Voyager tablespace in Oracle has at least 20% space available for growth. If 20% is not available, this step offers to create additional data files.

## 6 Complete the Voyager Software Upgrade/Installation

```
6. Complete the Voyager Software Upgrade / Installation
-----

Upgrade
-----
- 1. Extract the Voyager software (voyager)
- 2. Install the Voyager Software (voyager)
- 3. Configure the Upgrade (voyager)
- 4. View Configuration and Integrity Checks (voyager)
- 5. Back up Voyager Permissions
- 6. Prepare the Upgrade (voyager)
- 7. Install Extension Modules (voyager)
- 8. Prepare custom files for Upgrade (voyager)
- 9. Upgrade Voyager (xxxdb) directory (voyager)
- 10. Upgrade Voyager (xxxdb) schema (voyager)
- 11. Apply the Service Pack (voyager)
- 12. Apply the Hot Fix (voyager)

Maintenance
-----
- 13. Check / Setup Authority Heading Index(es) (oracle)
- 14. Setup Voyager Regens (voyager)
- 15. Run Voyager (xxxdb) Regens (voyager)
- 16. Run Voyager (xxxdb) DBCompare (voyager)
- 17. Tune Voyager Application (voyager)
```

### 6.1 Extract the Voyager Software

This step extracts the Voyager packages into the local software repository. This may take some time. The cursor blinks while the process is running. You are notified when it is complete.

### 6.2 Install the Voyager Software

Once the software is extracted, this step installs the new version of the Voyager binaries, libraries, upgrade scripts, and utilities into /m1/voyager. The files are installed into the respective directories separated by version such as /m1/voyager/bin/<version>. This may take some time. The cursor blinks while the process is running. You are notified when it is complete.

### 6.3 Configure the Upgrade

This step walks you through selecting the databases you need to upgrade on this server.

From this step forward the only databases that are available for processing are the databases selected in this step. To change the databases to work with, you must revisit this step and change the database selection(s). You must reselect the databases that were previously selected if you want to work with them again.

Once the databases have been selected, the VIK aggregates critical data for each database. Record counts, database port series, username and password, and database type.

This step checks for any inconsistencies in the voyager database. It checks the integrity of several different tables that have had issues in the past. It also ensures that any upgrade-specific issues are caught and brought to the attention of the person performing the upgrade.

## 6.4 View Configuration and Integrity Check

This step shows you the databases you selected and the important information gathered in [6.3 Configure the Upgrade](#).

Database	User/Pass	Port	Version	Type
train710db	train710db/Ttrain710db	80	2007.1.0	T

  

Database Size Stats					
Database	Auth Count	Bib Count	MFHD Count	Size (MB)	% TS Used
train710db	62305	60804	61387	910	22

Press Enter to Continue:

## 6.5 Back up

This step takes a snapshot of the permissions found in `/m1/voyager` prior to the upgrade. This can be important for institutions that use specific permissions based on distributed tasks.

## 6.6 Prepare the Upgrade

This step prepares to upgrade your database. New `xxxdb` directories are created in the `vik` working directory for each database. Database upgrades are configured based on the type of server on which the VIK is run.

## 6.7 Upgrade Voyager (xxxdb) Extension Modules

This step examines your database and ensures that extension modules found and supported by the VIK are upgraded and working after the completion of the VIK.

## 6.8 Restore Voyager (xxxdb) Custom Files

This step copies your reports, Tomcat skins, and some other custom files from each xxxdb in /m1/voyager to the new xxxdb directories created by step 6.6. If the restoration fails due to insufficient space, clean up unnecessary files in xxxdb/rpt, xxxdb/local, xxxdb/edi, and any old Primo exports under xxxdb/primo. You may then re-run this step.

## 6.9 Upgrade Voyager (xxxdb) directory

This step archives your existing xxxdb directories to /m1/upgrade/version/preVersion/voyager/xxxdb. It then installs the new xxxdbs created in step 6.6 and configured in steps 6.8 and 6.9.

## 6.10 Upgrade the Voyager (xxxdb) Schema

For the Voyager release (major or minor) to which you are trying to upgrade, this step performs all schema updates, data adjustments, and configuration scripts necessary to update the Oracle database contents for each xxxdb.

This step only runs for the databases previously selected in the [6.3 Configure the Upgrade](#) step.

## 6.11 Apply the Service Pack

This step runs the service pack that was downloaded during step 2.4. The service pack applied is the latest service pack available. If another version of a Voyager service pack is preferred, this service pack must be downloaded and executed manually.

## 6.12 Apply the Hot Fix

If a hot fix was downloaded by step 2.8, this step runs this hot fix. If a Service Pack was downloaded, this step depends on the successful completion of step 6.13. The hot fix provided will not apply to an older or newer version.

## 6.13 Check / Setup Authority Heading Index(es)

To ensure that Authority Headings Keyword is configured and working, this step ensures that the necessary Oracle objects are in place. If it does not find the required objects, it sets them up for you.

## 6.14 Setup Voyager Regens

This step sets up the necessary regens by identifying the version of Voyager from which you are coming and to which you are upgrading.

## 6.15 Run Voyager (xxxdb) Regens

Due to database schema changes during the upgrade, bug fixes, and the passage of time, a full index regeneration is required at upgrade time. This ensures that your indexes are structured correctly and that Voyager is in the best possible condition. This step runs the required regens necessary to have the data changes appropriately propagated throughout the database.

For a list of the required regens, refer to the *Voyager Road To* guide and locate the version of Voyager from which you are upgrading.

The regen times for any given database can vary greatly based on the size of the database, the performance of the hard disks, and the types of regens performed.

During this step, all databases selected have their regens performed. You receive a progress meter for each database and its regen being performed. The VIK performs all regens for a single database. When it has completed, it continues to the next database until the regens have been completed for all databases.

Each index regen is run in the background. If your connection to the server fails, you can follow the progress of the current regen by tailing the file `/m1/voyager/utility/version/xxxdb/regen.xxxdb.log`. You will then have to manually run any remaining index regens.

Once all database regens have been completed, you return to the VIK menus. You are not able to proceed with the VIK until control is returned to the VIK menu.

## 6.16 Run Voyager (xxxdb) DBCompare

This step compares the current Voyager schema with a known schema provided by Ex Libris. If it finds any views missing or indexes, this utility attempts to fix them. It reports if it was successful or a failure. If it reports a failure, contact Ex Libris Support immediately for further analysis.

## 6.17 Tune Voyager Application

This step tunes the Voyager application to the recommended standard. It ensures that WebVoyage meets the minimum recommended tuning levels.

## 7 Post-Installation Tasks

---

**NOTE:**

root access is required to complete some of the post-installation tasks.

Oracle access is also required to complete some of the post-installation tasks.

---

```
7. Complete the postinstallation tasks
-----
- 1. Install updated .profiles for Voyager and Oracle Users
- 2. Install / Upgrade the Start / Stop Scripts
- 3. Restore Voyager Permissions
- 4. Update Apache Configuration
- 5. Enable Oracle Archive Logging
- 6. Start Apache
- 7. Start Oracle
- 8. Start Voyager
- 9. Update utility scripts
- 10. Setup System Statistics & Accounting
- 11. Create / Recreate Voyager (xxxdb) Read Only Users (oracle)

Maintenance
-----
- 12. Remove endeavor group
- 13. Cleanup Regen Directories (voyager)
- 14. Cleanup Local Software Repository
- 15. Cleanup Old Voyager Binaries, Libraries and Upgrade files
(voyager)
- 16. Uninstall old Oracle files (oracle)
- 17. Reboot the Server
- 18. Run System Check Script - Post Upgrade
- 19. Test WebVoyage and list regen warnings
```

```
Enter an Option (q to Quit)[q]:
```

## 7.1 Install the Updated Profiles for Voyager and Oracle Users

This step installs the updated user profiles for the Voyager and Oracle users. With a new release, changes to these files are possible. It is important to ensure that you have the latest `.profiles` installed.

If your institution has any customizations set up in either profile you need to ensure you update the user `.profiles` with your custom settings and configurations.

## 7.2 Install/Upgrade the Start/Stop Scripts

This step creates the main startup/shutdown scripts in the `/etc/init.d/` directory if required. Refer to Chapter 3 of the *Technical User's Guide* for more information regarding startup/shutdown scripts.

Required links for automatic startup and shutdown of Voyager and the database (when rebooting) are also created, if necessary.

---

**NOTE:**

If the startup mechanism already exists, VIK only updates files in the `/etc/init.d/` directory and checks if relevant files/links in the system directories exist.

---

## 7.3 Restore Voyager Permissions

This step restores the permissions snapshot that was taken in 5.7. If the snapshot was not taken, it cannot restore permissions.

## 7.4. Update the Apache Configuration

This step updates or sets up a new apache configuration that must be done at the end of the upgrade.

## 7.5 Enable Oracle Archive Logging

If Oracle archive logging was enabled prior to the upgrade, this step re-enables Oracle archive logging.

## 7.6 Start Apache

This starts the Apache processes that were stopped during the upgrade.

## 7.7 Start Oracle

Prior to testing the application, it is necessary to ensure that Oracle is up and working. This step starts the Oracle database when it is installed on this server.

## 7.8 Start Voyager

This starts the Voyager software processes that were stopped during the upgrade.

## 7.9 Update the Utility Scripts

This step updates the `/m1/utility` directory with updated scripts and utilities. Most importantly it delivers the latest `dailybackup` script that is released for your operating system.

---

**NOTE:**

The `dailybackup` script is archived and replaced with a new version.

If you have made any changes to your `dailybackup` script in the `/m1/utility` directory, you might need to either review your changes and insert them into the new `dailybackup` script, revert to your previous one, or use the new one without any of your customizations.

---

## 7.10 Set Up the System Statistics and Accounting

This step sets up of some statistics gathering and accounting. It helps Ex Libris evaluate how the application is performing and gives Ex Libris information for feature changes to the software.

The aggregate of this information can be effective for troubleshooting difficult technical problems.

## 7.11 Create/Recreate the Voyager (xxxdb) Read-Only Users

When regens have been performed as part of a Voyager upgrade, read-only users may no longer function correctly. This step refreshes read-only users that are used with the Microsoft Access report database. It attempts to automatically determine the read-only users for each database. In most cases you can press return to accept the defaults, and all read only users will be refreshed. If you select 'n' at the prompt you can chose an alternate read only user to refresh.

This step can be run without any impact on your Voyager database.

```
Refresh 'ro_xxxdb' for xxxdb? [Yn]
Creating user ro_xxxdb from xxxdb...
```

---

**NOTE:**

If running reports in Microsoft Access or another tool that uses the read-only user and password begins to fail after the installation, use this step to ensure that the read-only users are set up correctly.

---

## 7.12 Remove endeavor Group

This step cleans up the endeavor group from your server.

## 7.13 Cleanup Regen Directories

This step cleans up your regen directories and recovers space that was consumed during the regen process during the VIK upgrade process.

The directories affected are the `/m1/voyager/utility/<VERSION>/db` directories used for the regens.

## 7.14 Clean Up Local Software Repository

This step cleans up the local software repository directory. It deletes unnecessary files and packages that were extracted during the upgrade processes.

The directory affected is `/m1/incoming/v920` or the local software directory defined in step 1.1.

## 7.15 Cleanup Old Voyager Binaries, Libraries, and Upgrade Files

This step deletes all binary, library, and upgrade files that have been left on the server from previous service packs, upgrades, and work performed by Ex Libris. It recovers space used by files no longer used by your Voyager application.

The directories affected are:

- `/m1/voyager/bin/<OLDVERSIONS>`
- `/m1/voyager/lib/<OLDVERSIONS>`
- `/m1/voyager/utility/<OLDVERSIONS>`

---

**NOTE:**

The only way to recover files cleaned up by this step is by restoring from your backup.

---

## 7.16. Uninstall Old Oracle Files (Oracle)

This step removes all files related to your previous Oracle installations.

---

**NOTE:**

The only way to recover files cleaned up by this step is by restoring from your backup.

---

---

**NOTE:**

If Analyzer is installed on the same server as Voyager, or if you have any other programs or scripts configured to use the old ORACLE\_HOME, do not uninstall the old Oracle files until those programs are upgraded or reconfigured to use the new Oracle 12 install.

---

## 7.17 Reboot the Server (Root)

This step ensures that your server starts up correctly after the upgrade has been completed.

If there are problems after the server reboot, open an SI using e-Service and assistance can be provided.

## 7.18 Run the System Check Script (Post Upgrade)

This step is run just like the step in the pre-installation checks. This step is to ensure that all of the requirements are met and complete.

## 7.19 Test WebVoyage and List Regen Warnings

This step performs basic tests for OPAC functionality and ensures that results are returned. It also reviews the regen logs for anything that may need to be brought to your attention.

---

**NOTE:**

The testing of the OPAC performed in this step should not replace a full application testing. This step ensures that ports are responding appropriately prior to accessing the OPAC via a Web browser.

---

# 4

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## After Running the VIK

This section includes:

- **Custom Backup Scripts** on page 51
- **Download the Clients** on page 51
- **Log into Each Module and Test** on page 51
- **WebVoyage Files** on page 52

### Custom Backup Scripts

The upgrade to Voyager 8.2.0 and later updates the endeavor group to exlibris. Therefore, if you have any backup scripts/tools that rely upon the endeavor group as a display text, you need to ensure that they are updated to use exlibris.

### Download the Clients

Upon completing the VIK, Voyager clients need to be installed on each PC that uses the new version of Voyager. You can find these clients on your Voyager server in `/m1/voyager/clients/<version>`. You must use either an FTP or SFTP client depending on your server's configuration. The clients can also be found in the Ex Libris Documentation Center in the Download Center section.

If your institution is upgrading from Voyager 8.0.0 or higher, Client Autoupdate is a feature that can automatically update your staff PCs with the new client software. See the *Voyager Technical User's Guide* for more details.

### Log into Each Module and Test

Log onto Cataloging, for example, and do a keyword, left-anchored, and headings search. Save a bib, mfhd, and item record to the database.

Log onto Acquisitions and create and approve a PO and Invoice.

Log onto Circulation and charge an item, create a patron record, and place a hold.

In WebVoyage, do each type of search, log onto a patron account, and place a request.

## Backup Files

When the VIK is run and updates application, system, and custom files, these files are archived for reference after the upgrade.

All files can be found in `/m1/upgrade/version/preversion`.

## WebVoyage Files

Customizations for Classic WebVoyage are restored and work immediately following your upgrade.

If you are upgrading from a release of Tomcat WebVoyage earlier than Voyager 8.0.0, customized skins are not restored and are not available for immediate use after the upgrade. Customizations to WebVoyage must be applied manually. Use of the preview server is recommended prior to the upgrade. This helps ensure that downtime is minimal upon upgrading to your production environment. After the upgrade, you can find your old xxxdb files under `/m1/upgrade/version/preversion/voyager`.

Refer to the Voyager Upgrade Release Planning section of the Ex Libris Documentation Center for documents (for each version) that identify the WebVoyage files that have changed in the skin directories (*WebVoyage <version>-<version> GR Changed Files*) and a description of the changes in the skin files (*WebVoyage Changes to Skin Files from <version> to <version>*).

## Post VIK Clean-Up and Disk Space Recovery

After you upgrade you may want to clean up extra files to make more disk space available.

**To perform a clean up and disk space recovery:**

- 1 Perform a full system backup, in case you delete a file unintentionally during the clean up.
- 2 Run the following steps from the VIK:

- **7.13 Cleanup Regen Directories** on page 49
  - **7.14 Clean Up Local Software Repository** on page 49
  - **7.15 Cleanup Old Voyager Binaries, Libraries, and Upgrade Files** on page 49
  - **7.16. Uninstall Old Oracle Files (Oracle)** on page 50
- 3 Review and manually delete the following directories:
- /m1/incoming/vik
  - /m1/incoming/v920/\*
  - /m1/upgrade/<VERSION>



# Glossary

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<b>App Server</b>	The server in a split server environment that actually runs Voyager, as opposed to Oracle and Apache, that could technically be run on separate servers.
<b>DB Server</b>	The server in a split server environment that runs Oracle, as opposed to Voyager and Apache, that could technically be run on separate servers.
<b>dba group</b>	The group that the oracle user belongs to. Membership in this group allows sysdba access to Oracle.
<b>endeavor group</b>	Until Voyager 7.2, this was the default Unix group that the voyager user belonged to.
<b>exlibris group</b>	Starting with Voyager 7.2, this is the default group that the voyager user belongs to.
<b>Fully Qualified Domain Name (FQDN)</b>	The hostname plus the network domain name. Examples include: <ul style="list-style-type: none"><li>■ <code>voyager.college.edu</code></li><li>■ <code>library.university.ac.uk</code></li><li>■ <code>catalog.research.company.com</code></li></ul>
<b>Hostname</b>	The name of your server. This is often printed on the command prompt. You may use this to refer to the machine in conversation with IT. Examples include: <ul style="list-style-type: none"><li>■ <code>voyager</code></li><li>■ <code>library</code></li><li>■ <code>catalog</code></li><li>■ a character from mythology</li></ul>

<b>IP Address</b>	The four, dot-separated numbers that locate your server on the network. If you have different internal and external IP addresses, use the internal one (usually starts with 10. or 172.).
<b>Local Software Repository Directory</b>	The location to download packages for installation. The standard has been <code>/m1/incoming</code> for years so this is a safe choice for almost everyone.
<b>Schema</b>	The logical layout of tables and columns in a database or a particular instance of Voyager in the Oracle database.
<b>Shell</b>	The Unix process that presents a command prompt and interprets your input. It can also run scripts written for it. The default shell for voyager is Korn Shell (ksh). The default shell in Linux is Bash (bash). As a result, many people are more familiar with it. However, the voyager and oracle users must have ksh set as their default.
<b>VOYAGER_BASE</b>	The base installation directory for all Voyager components. This is almost always <code>/m1/voyager/</code> , but in rare cases, can be slightly different.
<b>Web Server</b>	The server in a split server environment that runs Apache, vwebv, and sometimes vxws, as opposed to Oracle and Voyager, that could technically be run on separate servers.