Road To

Version 10.5.0

Ex Libris

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Table of Contents

Chapter 1 **Voyager Release Methodology** **5**
Major Release - For Example, 10.0.0 5
Minor Release - For Example, 10.5.0 5
Service Pack - For Example, 9.2.1 5
Chapter 2 **Why Upgrade?** **7**
Defect Fixes 7
New Enhancements 7
Unsupported Versions - Voyager 8 or Earlier 8
Chapter 3 **Getting Started** **9**
Options for Upgrading to 10.5.0 9
Voyager Installation Kit 9
Scheduling an Upgrade with the Installation Team 10
Opening an Upgrade Case 10
Chapter 4 **Basic Upgrade Planning** **13**
Versions 13
Review Documentation 14
Decisions 14
Timing 15
Patron SIF and Tag Tables 15
Ex Libris Preview Server 15
Upgrade Worksheets 16
Primo Interoperability 16
Questions 16

1

Voyager Release Methodology

This section includes:

- **Major Release - For Example, 10.0.0** on page **5**
- **Minor Release - For Example, 10.5.0** on page **5**
- **Service Pack - For Example, 9.2.1** on page **5**

Major Release - For Example, 10.0.0

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

Minor Release - For Example, 10.5.0

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

Service Pack - For Example, 9.2.1

Service packs usually include bug fixes only, but they 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 8 or Earlier** on page 8

Defect Fixes

Defects fixed in previous releases are rolled up in Voyager 10.5.0. For example, if a problem was fixed in Voyager 10.0.0, the fix would be available in Voyager 10.0.0, 10.1.0, 10.2.0, 10.3.0, 10.4.0, and 10.5. More information about defects fixed in previous releases is available in the Voyager Release Notes available in the Knowledge Center under Home > Voyager > Release Notes > version number. Therefore, for example, if you are upgrading from Voyager 10.0.0 to 10.5.0, you would want to review the Release Notes from 10.0.0, 10.1.0, 10.2.0, 10.3.0, and 10.4.0.

New Enhancements

The Voyager 10.5.0 minor release delivers new features and functionality to enhance your library's workflows and operations such as additional computed fund balances, separate staff and OPAC settings to include the index column in search results, updates to the MARC 21 standards, 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 improve the user experience, increase staff productivity, and lower your total cost of ownership when using Voyager. The best way you can benefit from the enhancements to Voyager functionality is to upgrade to the latest release.

Detailed information about enhancements available in Voyager 10.5.0 are available in the Release Notes available in the Knowledge Center under Home > Voyager > Release Notes > 10.5.0.

Unsupported Versions - Voyager 8 or Earlier

Ex Libris Voyager Customer Support supports the current major release and one release back. Therefore, any customer running any Voyager 10.x (10.0.0 - 10.5.0) or Voyager 9.x (9.0.0 - 9.2.1) is supported.

Voyager 8 is the previous major release and Voyager 8.x or earlier is not supported. If you are on an unsupported version, Customer Support assists with cases provided that an upgrade to the latest software release has been scheduled. If a defect is found in an unsupported release and cannot be replicated in a supported release, the fix will be to upgrade. If a defect is found in an unsupported release and is replicated in a supported release, Support sends an Issue report to Development.

3

Getting Started

This section includes:

- **Options for Upgrading to 10.5.0** on page **9**
- **Voyager Installation Kit** on page **9**
- **Scheduling an Upgrade with the Installation Team** on page **10**
- **Opening an Upgrade Case** on page **10**

Options for Upgrading to 10.5.0

- 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 Knowledge Center in Home > Voyager > Product Documentation > Voyager Installation Kit > VIK - 10.5.

Voyager 10.5.0 runs on Oracle 19c. In order to upgrade, the VIK will export your Voyager schemas and read-only users from your existing database and then install a new Oracle 19c database.

Scheduling an Upgrade with the Installation Team

The Installation Team's Upgrade Engineers are available for integrating new software releases for our customers. They are technical professionals who are well-versed in Sun Solaris and Linux operating systems as well as Oracle and Voyager integration issues that can provide technical expertise for software upgrades.

The Installation Team can perform all 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 expected to be handled by your site and are not included in the upgrade:

- Customization updates, including WebVoyáge skin files
- Operating system patches
- Site-specific modifications/additions and fine-tuning

Opening an Upgrade Case

Use the Ex Libris Support Portal to open an upgrade case with Ex Libris.

Be sure to include your preferred dates (at least three possible dates) for the upgrade. Upgrade Engineers are typically available to begin upgrades on Mondays and Tuesdays (upgrades may take several days to complete).

Fill out and attach the Voyager Installation Activity Form (found in the Knowledge Center under Home > Voyager > Implementation Guides > Installation Request Forms) to the Upgrade Case. If this form cannot be filled out for any reason, then include the following in the Case:

- Any special connection instructions
- Contact Name (someone with access to the server during and after business hours) if different from the person logging the case
- 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**
- **Patron SIF and Tag Tables** on page **15**
- **Ex Libris Preview Server** on page **15**
- **Upgrade Worksheets** on page **16**
- **Primo Interoperability** on page **16**
- **Questions** on page **16**

Versions

Voyager 10.5.0 is a minor release. This release contains 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 after 01 April 2024 will be upgraded to Voyager 10.5.0. Exceptions can be made for sites that have installed a previous, supported version on their test server. Other exceptions must be approved by the Support Manager. Use the Ex Libris Support Portal to open an Upgrade Case following the instructions provided in **Opening an Upgrade Case** on page **10** to request an exception to this rule.

Review Documentation

Sites upgrading from any release prior to Voyager 10.0.0 should review the *Release Notes* for each interim release. For example if you are upgrading from Voyager 9.2.0 to 10.5.0, you would want to review the *Release Notes* from 9.2.1, 10.0.0, 10.1.0, 10.2.0, 10.3.0, 10.4.0, and 10.5.0.

Review the *Installation and Upgrade Requirements* document in the Knowledge Center under Home > Voyager > Implementation Guides > 10.5.0. This document includes information regarding server and client requirements (such as PC, browsers, and third-party software) as well as upgrade planning/ worksheets. (For example, Before Your Upgrade section includes Process the global headings change queue, Process all reports and notices).

Review each updated core and/or extension module of Voyager documentation (such as the *Voyager 10.5.0 Acquisitions User's Guide)* for new information. The Reason for Reissue section in the About this Document chapter provides page numbers to new feature details and any changes to the documentation.

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 WebVoyáge or the new WebVoyáge 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.
- Before an upgrade to Voyager 10.5.0 begins, the global headings change queue must be processed.

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

- If upgrading from a version prior to Voyager 9.1.0, all reports and notices must be processed through Reporter prior to upgrade.

NOTE:
The SIF format for reports and notices has been updated for Voyager 9.1.0. Any unprocessed .inp files from prior to upgrade cannot be processed after upgrade.

- Training databases are refreshed at upgrade. If you would like to retain your existing training databases, alert your Upgrade Engineer.

- In a single-server, multidatabase 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 Knowledge Center for more information regarding timing estimates for the upgrade process.

Patron SIF and Tag Tables

Changes to Patron loading are made for the XML Patron utilities, introduced in Voyager 8.2.0. The Patron SIF, used for the SIF method of patron update/extract, has NOT changed in Voyager 10.5.0. There is no need to make any changes to patron update/extract procedures at your institution if you are using the Patron SIF method for Patron Update.

The MARC 21 tag tables have been updated as a result of MARC 21 Update 35 (December 2022), Update 36 (June 2023), and Update 37 (December 2023). Refer to the Voyager 10.5.0 Release Notes for more information about tag table changes.

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 Knowledge Center under Home > Voyager > Implementation Guides > 10.5.0 for details.

Upgrade Worksheets

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

Primo Interoperability

Sites that integrate Voyager with Primo should review the configuration and settings on the Voyager server prior to upgrade, and again when the upgrade is complete. See the article, "Upgrading Voyager and also have Primo?" in the Knowledge Center for details.

Questions

If you have any questions about Voyager 10.5.0 or the process of the upgrade, use the Ex Libris Support Portal to open a Case with Ex Libris.