



Welcome!

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources



CARLI

“I’LL TAKE VOYAGER, ALMA, & PRIMO VE
POTPOURRI FOR \$1000, ALEX”

OCTOBER 22, 2020

Agenda – 10/22/2020

- Voyager and SFX Servers Shut Down Oct. 30
- CARLI Files Server Update
- November Release Updates
- Ongoing updates to CARLI Alma & Primo VE Documentation
- Ex Libris Idea Exchange
- Participant Q & A

Voyager, Library Catalogs, and SFX will be turned off at 5pm on Friday, October 30

What this means for Voyager:

- Library staff will no longer be able to log into any Voyager client.
- Both Voyager MS Access reporting and Web Reports will no longer be accessible.
- CARLI Staff will maintain the files of past Voyager annual statistics, but will not be able to run any new or additional reports after 10/30.



What this means for Voyager (continued):

- All web addresses for VuFind 0.6, New VuFind, and WebVoyage will be redirected to <https://i-share.carli.illinois.edu/>
 - Update [OCLC WorldCat, FirstSearch, and WorldShare to search Primo VE](#) before Oct. 30
 - Libraries using Voyager SIP2 for e-book service authentication will soon be cutover to an alternative service. No service interruption is expected. More details soon.
- CARLI staff will run these additional reports and place them in each I-Share Library's Box folder:
 - [Inventory With Circulation Statistics By Charge Year](#)
 - [UB Stat 6](#) for FY2019 and FY2020
- Library staff may Uninstall Voyager applications from library and personal computers.

- CARLI can provide a copy of your data from Voyager upon request to support@carli.illinois.edu
- The data Originated from an Oracle database, but will be exported in .csv (comma delimited) format for portability. There will be no indexes or logical relationships between the tables.
- The files will be in a zip archive located on the CARLI FTP server with name `XXX_Voyager_Data.tar.gz` (where XXX is your institutional code)



- 256-bit encryption will be used to protect the data.
- File sizes will range from 2 GB for our smallest institution to 11 GB for our largest.
- The files can be unzipped with most compression commands/software.

SFX Ending October 30

What this means for SFX:

- Export any collection/target or portfolio information your library wishes to retain.
- Generate and save any SFX usage data your library requires.
- Move any embedded OpenURL links in other electronic resources to the Alma/Primo VE link resolver.
 - https://www.carli.illinois.edu/products-services/i-share/discovery-interface/embed_links

Please email CARLI Support with any questions.

CARLI Files Server

- This change is of interest to institutions that use the **files.carli.illinois.edu** SFTP server.
- Date/Time: Wednesday, Nov. 4 at 9:00pm CST
- The server's IP address changes from 192.17.55.196 to 3.22.214.105
- If your institution relies on (egress) firewall configuration settings in order to access files.carli.illinois.edu, please alert your networking department staff of this upcoming IP address change.
- With the migration to vendor-hosted Alma and PrimoVE, it is no longer cost effective for CARLI to run its own hardware; all remaining CARLI servers are being migrated to the Amazon Web Services (AWS) cloud.

The November Release is scheduled for Sunday, November 1.
The regular Release Update is on Sunday, November 8.

- Alma Release Notes:
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2020/Alma_2020_Release_Notes
- Primo VE Release Notes:
https://knowledge.exlibrisgroup.com/Primo/Release_Notes/002Primo_VE/2020/010Primo_VE_2020_Release_Notes
- Dates and links to documentation in CARLI Event Calendar.

A Few Changes to Highlight:

- Fixes for CARLI Known Issues
 - The Primo VE Services Page, Alma link resolver, and its delivery options were very slow. After Nov. 1, please report any response time issues via the [I-Share Response Time Reporting form](#).
 - In Primo VE, Available Online (electronic) links that appear in search results and then disappear in full record views should be improved. More improvements coming in December.
 - The Ful Hold Shelf Request Slip Letter should now also be used for AFN/I-Share materials on hold, in addition to local on hold materials.
- New Alma UI Layout becomes the Default, but you can opt out for an individual user until March 2021.
 - Layout training video: <https://youtu.be/hXrWOVB1BNo>
- Analytics Update

- Ex Libris is upgrading the platform that Analytics runs on for NA06 (where I-Share libraries are hosted) starting November 1, work should be completed November 8.
- November 1-8 is a “freeze period”.
- **Any reports created and any changes made to existing reports in any folder during the “freeze period” will not be migrated.**
- **All current Analytics reports will be migrated, except those in “My Folders”.** These are reports that are only accessible to the specific logged in user.
- Follow [the instructions](#) posted on the CARLI Website to copy any reports saved in “My Folders” **before November 1.**

- CARLI's [Alma and Primo VE Known Issues page](#) has been updated with “anticipated fix” dates. New entries will be added at the top of the page.
- The [Best Practices: Alma Hold Shelf Maintenance](#) have been included within the “How To: Staff workflows for Alma Requests” page.
- [P2E Clean up Documentation](#) has been posted. The first section is on deleting duplicate active portfolios. More sections will be added soon, including grouping local portfolios into collections, and linking local collections to the CZ but maintaining your Voyager bib records.
- A step-by-step guide to [basic Monograph Ordering](#) has been shared.
- The Collection Management Committee created a guide to [Analytics Training and Resources for Collection Development](#) that is now linked from the [Analytics page](#).

Ex Libris Idea Exchange

<https://ideas.exlibrisgroup.com/>

- The Ex Libris Idea Exchange allows library staff at institutions using Ex Libris products to:
 - Share ideas for enhancement/development.
 - Vote to support your favorite user-submitted ideas.
 - Add comments to provide weight and additional use cases to your favorite user-submitted ideas.
- Any and all library staff members at your institution can have their own individual account.
- Please read the [FAQ](#) and [Guidelines](#) before you begin.
- The CARLI Office, and your CARLI Library Colleagues, may periodically send announcements for ideas they'd like you to consider supporting.



Thank you!

Join us November 5
at 2pm for another
Office Hour



You can always contact CARLI at support@carli.Illinois.edu