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Support for Your Ex Libris Product(s): What Ya Gonna Do? Who Ya Gonna Call?

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Support for your Ex Libris Product(s)

What ya gonna do?  Who ya gonna call?

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Information is everywhere!

- What is your problem?
- Document your problem
- Enter a case
- Go to the Ex Libris Knowledge Center
- Use the product listserv
- Other resources to find help
What is your problem?

- If your **product** is down
  - Check the network - Could it be a campus or internet problem?
  - If not, enter a **system down** case in Sales Force immediately and
  - THEN CALL the 24x7 hotline! 1-877-445-5693 and press 9

- If a whole **module** is down
  - Enter a case in Sales Force and with a **system down** case for the module.
  - If you don’t hear from them within 15-30 minutes—CALL the 24x7 hotline.
Ex Libris System Status

http://status.exlibrisgroup.com/

This page covers most of the Ex Libris products in the cloud.

PC CR01 is the Primo Central Knowledge Base.

Search the Ex L Knowledge Center for “Monitoring Real-Time Status of Ex Libris Cloud Instances” for more information.
Define your problem

- Where does the problem occur?
  - Does it happen in a particular module?
  - Does it appear in any other product?

- Is it repeatable?
  - Does it happen no matter who is doing the task?
  - Does it happen for all data of a particular type?
  - Does it happen at a particular time or part of the day?
  - Does it happen for one library only? Or location or patron group or vendor?

- Who does it affect?
  - All staff or all public users
  - All users of one module or critical part of module?
Document your problem

- Write down the steps in the workflow
- Take screen shots or snip-its and put them in a Word document
- Include specific examples—records, data types, users for examples
- If it only happened once and you can’t find the example, look harder for the example!
- Any which way you can make the problem clear to your audience
  - Ex Libris
  - Listserv members
  - Closest product confidant ☺
Type the information into the description part of the form.

- Describe the problem.
- List the steps you took,
- Describe the results and the desired results.
- This was mostly cut and paste.
This is page 1 of a 5 page Word document.

Use Snipping tool or screen capture and text in a word processing document to show what is happening.

You can use Tools or Export in Alma or Analytics to capture a list in Excel list of examples, or configuration rows.

You can submit PDFs too.
Ex Libris Customer Support System

- Click on the [Submit a Case] button on the Ex Libris Knowledge Center Page to get to the Ex Libris Support Portal.
  - You can get to the Support Portals from the Knowledge Center page too!
  - ProQuest products have their own portal.

- Check with your systems librarian before registering to submit cases yourself.

- Search for "What is Ex Libris Escalation Policy?" article to see that procedure when a case is not getting the attention it needs.

- You can also click on the [Submit a Case] button on the Ex Libris Knowledge Center Page to get to the Ex Libris Support Portal.
Enter a Support Case

- Fill out all the boxes at the top
- Give the case a title that describes what is happening
- Explain the problem
  - List the steps in the workflow
  - Any other details that are consistent, like time of day, who is affected, browsers used
- Include email addresses of staff you want updated on case
- Attach documentation
  - Word document with screen shots of examples
  - Excel document generated from analysis or Tools/Export
Support Case Form
Support Case tips

- If you find more examples or information, add them to the open case as you find them.
- Check the Support Portal regularly to see if they have the case flagged for you to test or respond to a question.
- If you don’t hear from Support a week after their initial response, poke them!
- You can refer to another user’s related case by number when you open a new case or see it is related when reading your product listserv mail.
- If your case has a status of “Closing”, it isn’t too late to go in and edit the status to keep it open. Add a comment on why you want it to stay open.
- If a case is Closed and you need to reopen it, open a NEW case and refer to the old case number.
- If you solve the case yourself, enter a comment and close the case.
Support Case Statuses

- New
- Tier 1 Analysis
- Pending Customer Response
- Pending Customer Testing
- Waiting for Process
- Tier 2 New
- Tier 2 Analysis
- Tier 2 W4I
- Tier 1 Answer to Tier 2
- Tier 2 Closed

- Pending Work Plan
- Development
- Pending Release
- Pending Customer Testing
- Shared with PQ
- Waiting for Vendor Input
- Product Manager Review
- Closing
- Closed

Search for this article: "What is Case Status, and What Does It Mean"?
But before you submit that case...

- Visit the Ex Libris Knowledge Center
  - Re-read the latest Release Notes
  - Read the documentation
  - Search for knowledge articles
  - Check for training video on subject

- Use the product listserv
  - Search the listserv archives
  - Describe your problem in an email message
Ex Libris Knowledge Center

- [https://knowledge.exlibrisgroup.com/](https://knowledge.exlibrisgroup.com/)
- Start with the product group—Alma, Primo, SFX, Voyager ...
- Try a keyword search
- Check the Documentation for the process
- Look at information on recent releases
Screen Shots of ExL KC 😊
Product Home Page
Documentation

It also comes in French and German!
Training

01 Primo Back Office Overview

- Login and Basic Layout
- Configuring Primo Front End
- Configuring Publishing Platform Pipe Flow
- Monitoring Primo Status
- Primo Configuration Levels

Duration: 17 min.

Description: The Primo Back Office is where all configurations to the Primo Front End and the rest of the system are made.

Target Audience: Staff responsible for maintaining Primo.

Prerequisites: Basic familiarity with the Primo Front End.

Primo Administration

This Training Program describes in depth how to configure Primo from the Back Office. Main topics covered are publishing, normalization rules, and Front End configurations.

- 01 Primo Back Office Overview
- 02 Primo Administrative Structure
- 03 Primo Publishing Platform
- 04 Publishing Platform: Pipes Configuration
- 05 PNX
- 06 Normalization Rules Overview
- 07 Normalization Rules Configuration
- 08 Normalization and Delivery Template Mapping Tables
- 09 Local Search Scopes
- 10 Primo Views
- 11 Updating Display Labels
Each product has its own way of documenting what is new and some will announce webinars for demonstrating enhancements.
Not all products have this section, but when you are migrating, the information is very helpful.

# Implementation Guides

## Implementation and Migration

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There are so many articles for us to display. Below are some suggested articles, but please feel free to search for more specific results using the above search box.

Featured Articles:
- Introduction to the Knowledge Center
- Knowledge Center Questions and Answers
- Ex Libris Voyager Patron Directory Services (PDS) Security vulnerability patch
- 9.2.1 Implementation Guide
- Fiscal Period Close resources and FAQs in Voyager
- Resources and FAQs for Patron Utilities in Voyager
- Could not retrieve field order configurations” when open Cataloging after upgrade to 9.2.0
- Resources and FAQs for ODBC drivers for Prepackaged Reports
Product Listservs

- [http://el-una.org/mailing-lists/](http://el-una.org/mailing-lists/)
  - where other users can help you with these problems
- Membership in ELUNA not required to use product listservs
- Queries, Analyses and Reports
- Alternative workflows
- Configuration puzzlements
- What’s going on?
  - Trouble with a server, but you aren’t sure
  - Strange happenings after a new release
Ex Libris YouTube Channel

- [https://www.youtube.com/user/ExLibrisLtd](https://www.youtube.com/user/ExLibrisLtd)

- Here you will find lots of goodies
  - Recorded webinars
  - Short videos on products
Ex Libris Idea Exchange

- http://ideas.exlibrisgroup.com/
ELUNA/IGeLU - Enhancements

- Join ELUNA to have a vote in the enhancement process for your products
- Review enhancements and vote on NERS
  - Enhancement voting is by product
  - Each institutional member has 1 ballot. A consortium member will have 1 vote for the consortium. (Usually 100 “votes” to assign to the enhancements that will benefit your institution or consortium the most.)
- Users submit enhancement requests on NERS system
Other ELUNA Benefits

- Discount registration for annual meeting
  - Technical Seminar  2 days before ELUNA
  - Developers Day    1 day before ELUNA
  - 3 day conference (Anyone can participate in conference, but ELUNA membership is required for other events.)

- Access to all presentations after the meeting
- Access to the ELUNA Document Repository
- Participate in Working Groups for your product(s)
- Participate in Regional Users Group like eBUG
- Participate in Special Interest Groups
- Run for seat on the Steering Committee
Ex Libris Support Portal
Email Preferences

Dear Tari,
In this page you can manage your email preferences and subscribe to relevant mailing lists. Personal details, such as email address, can be edited under My Profile.

Available Mailing Lists

Product Specific Support Messages®
- Alma (includes subscription to corresponding System Status Page notifications)
- Alma Data Services
- Primo
- Prime Central (includes subscription to corresponding System Status Page notifications)
- SFX
- SFX KB

Ex Libris News and Information
- Articles
- Messages for Ex Libris customers (e.g., availability of local offices during holidays, etc.)
Browser Bookmarks – organize them!

Not sure why this took me so long to figure out. My bookmarks list used to go on forever! Putting them in folders and re-ordering them saves time.

Firefox to the left, and Chrome above have great bookmark organization options. Internet Explorer and Edge are similar to Firefox, with the list on the side.

This is my last bit of wisdom to share today. 😊
Questions?