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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?



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

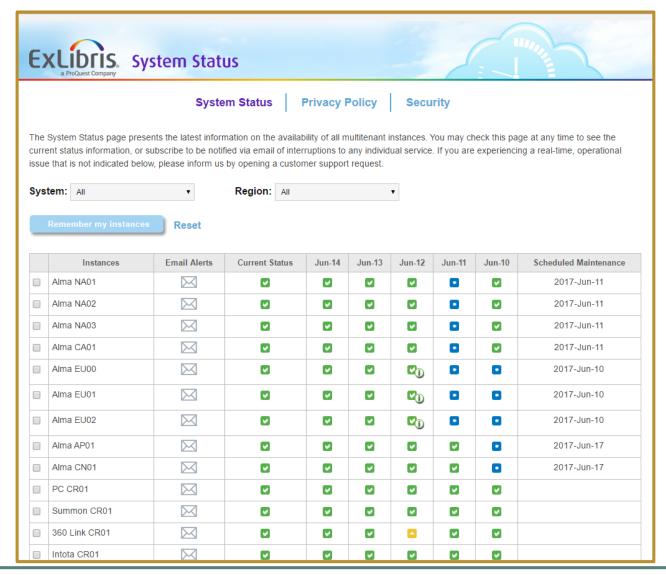


What is your problem?

- If your product is down
 - Check the network Could it be a campus or internet problem?
 - If not, enter a <u>system down</u> ▼ 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 <u>system down</u> ▼ 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

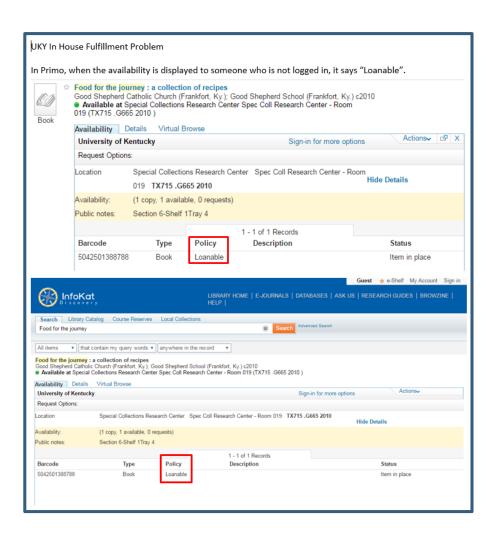
Documentation - Type it in

```
Title Failed attempts are making Clickable Logo in New UI
             I am trying to make my logo clickable and link to a fresh search. I've added the text in #1 of the
             instructions in the New UI Customization to my custom1.css -
             /* Call the clickable logo */
             prm-logo div.product-logo {
             display:none:
             prm-logo div.product-logo-local {
             display: flex;
             prm-logo .logo-image, prm-logo img {
             max-height: 100%;
             Then I added #2 section to my custom.js
             // Add Clickable Logo
             app.controller('prmLogoAfterController', [function () {
             var vm = this;
             vm.getIconLink = getIconLink;
             function getIconLink() {
             return vm.parentCtrl.iconLink;
Description
             app.component('prmLogoAfter',{
             bindings: {parentCtrl: '<'},
             controller: 'prmLogoAfterController',
             template: '<div class="product-logo product-logo-local" layout="row" id="banner"
             tabindex="0" role="banner">' +
             '<a href="[target's URL]"><img class="logo-image"
             alt="{{::('nui.header.LogoAlt' | translate)}}" ngsrc="{{$
             ctrl.getIconLink()}}"/></a></div>'
             });
})();
             --- And now my logo doesn't show in the interface, let along be clickable. :-(
             I am attaching my zip file, which uploaded successfully into my Sandbox test view:
             https://saa-kentucky-primosb.hosted.exlibrisgroup.com/primo-explore/search?
             vid=UKY SANDNIU&sortby=rank&lang=en US
             I need help. I really don't want to have to keep the extra button for New Search in my header.
             Thanks for your help.
```

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.

Documentation - Attachment



- 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.



Ex Libris Corporate
Ex Libris Support Portal
Developer Network

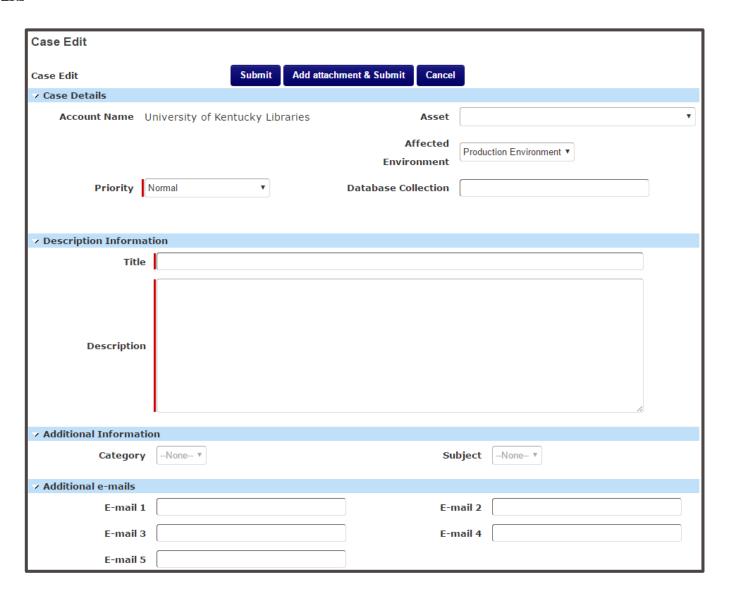
More Sites ▼

- Developer Network Ideas Exchange System Status PQ Support Center
- 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

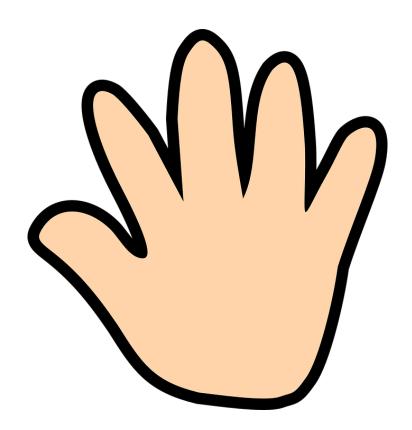
- New
- Tier 1 Analysis
- Pending Customer Response
- Pending Customer Testing
- Waiting for Process
- Tier 2 New
- Tier 2 Analysis
- Tier 2 W4I
- Tier 1 Answer to Tier 2
- Tier 2 Closed

- 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 listsery archives
 - Describe your problem in an email message



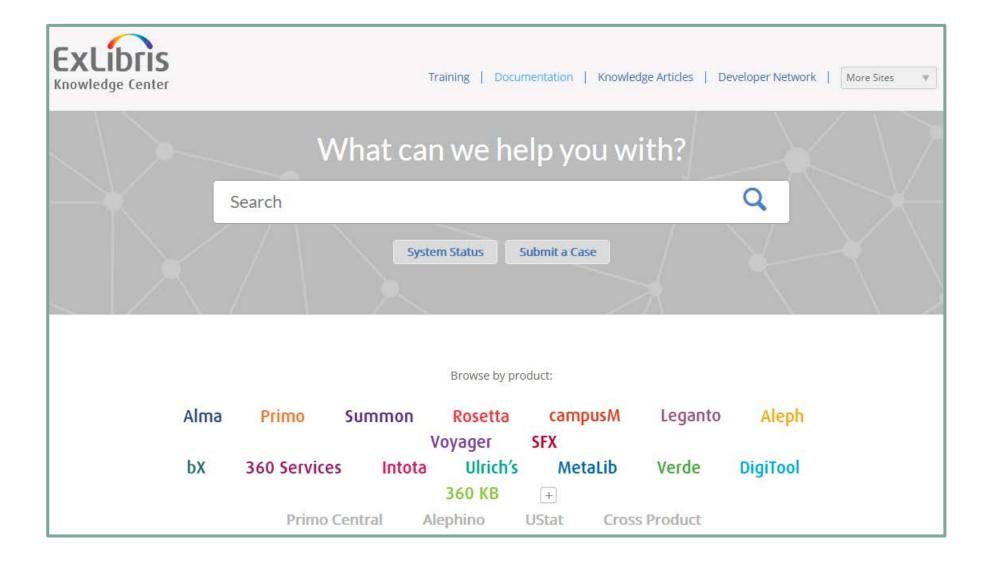


Ex Libris Knowledge Center

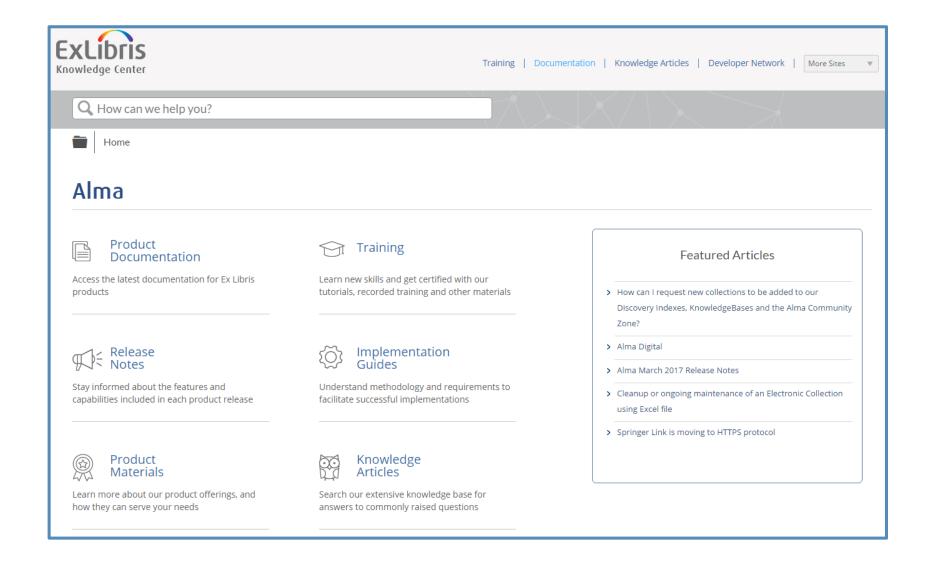
- https://knowledge.exlibrisgroup.com/
- Start with the product group—Alma, Primo, SFX, Voyager ...
- Try a keyword search
- Check the Documentation for the process
- Look at information on recent releases



Screen Shots of Exl KC

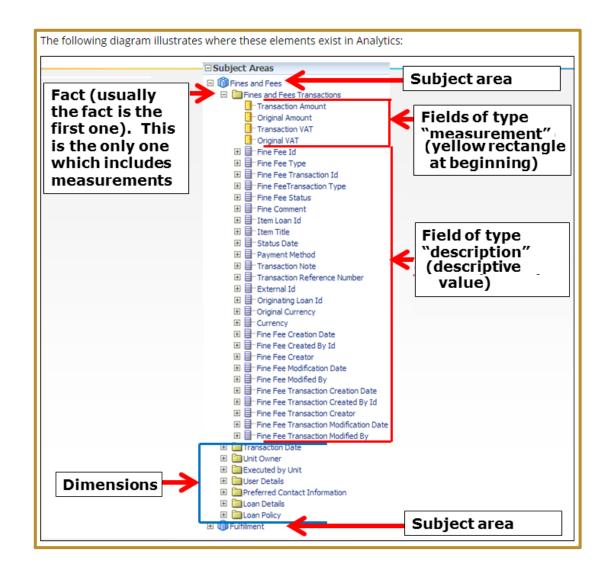


Product Home Page



Documentation

It also comes in French and German!

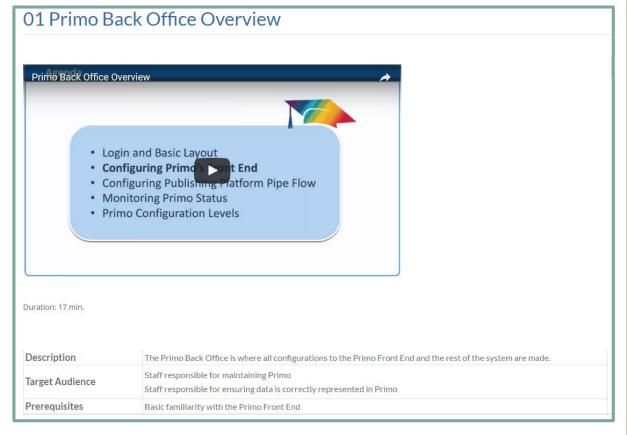




Alma Glossary



Training



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.

- 1 01 Primo Back Office Overview
- 02 Primo Administrative Structure
- 🗎 03 Primo Publishing Platform
- a 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



Release Notes



Release: May 2017 Highlights:

Export to BibTex -

As requested and voted via the ideas Exchange, we are now adding the option to export to BibTex format. This option is being added to the other actions that are already available for the records from the results set and for the full record.

User Tags

User tags are supported for all customers both in the classic interface and in the new interface. Because user tags are indexed and searchable, users can share reading lists and expand other user's lists.

Preferred Record Configuration -

Previously, the hierarchy for the selection of the preferred record in cases of the deduplication was hardcoded. In the new release, you can now control the precedence via the new Treferred Record-Delivery Category Priority' mapping table at the institution level. Changes to this table require you to run the pipe process.

Syndetics Book Covers -

As part of the ProQuest–Exilibris integration and cooperation, we are now offering Syntedics books covers to all our Primo customers. There is no need to activate them. They will be available after the upgrade.

New Primo User Interface -

We are now in the final stages of delivering the missing features from the classic interface in the new UI. In this release you will find Browse functionality, Alma E-Journal search, Session Search history, and Fetch Items (Citation Linker).

The default of the new interface presents the facets on the right side of the results. In customer usability tests, users found this logical and intuitive. However, we know that some libraries prefer to present facets on the left side of the results, so we have added an easy option to configure this without the need for customization. If you have already implemented such a customization, we recommend that you remove it in order to use the new configuration.

This was a very busy release and these are just the main highlights. You can find much more in the Highlights documentation including the new Exploration group in Primo analytics, support for the new interface for the Times cited service, and more...

Documentation and Webinars:

More information about the May release can be found in the Ex Libris Knowledge Center:

- Knowledge Center > Primo > Release Notes
- Knowledge Center > Primo > Product Documentation > Highlights
 Updated versions of both documents will be published on April 28, 2017.

Each product has its own way of documenting what is new and some will announce webinars for demonstrating enhancements.

Ex Libris Confidential



Implementation Guides

Not all products have this section, but when you are migrating, the information is very helpful.

Implementation and Migration

Implementation Guides

- Alma and Primo Cutover Process
- Getting Ready for Alma and Discovery Implementation
- Technical Requirements for Alma and Discovery Implementation
- Other Implementation Guides and Alma Configuration Form

Migration Guides

- Alma Migration Considerations for Consortia
- Alma Migration Combining or Separating Source Databases
- **Electronic System Migrations**
- ILS Migrations
- Testing Migrated Data



Knowledge Articles



Home » Voyager

Knowledge Articles

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

Search by keywords to find articles

Featured Articles - Most Popular - Highest Rated - Recently updated - Recently added

Product Listservs

- 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



Education. Networking. Advocacy.

Ex Libris YouTube Channel

- https://www.youtube.com/user/ExLibrisLtd
- Here you will find lots of goodies
 - Recorded webinars
 - Short videos on products









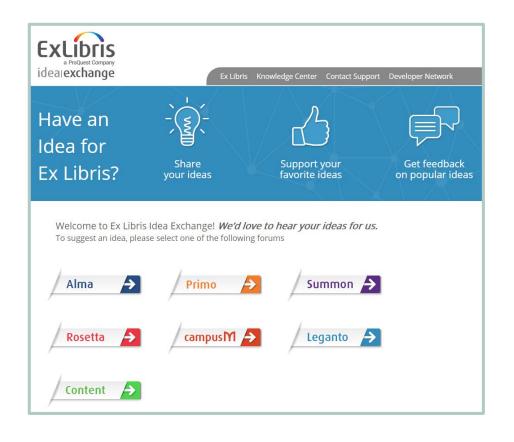


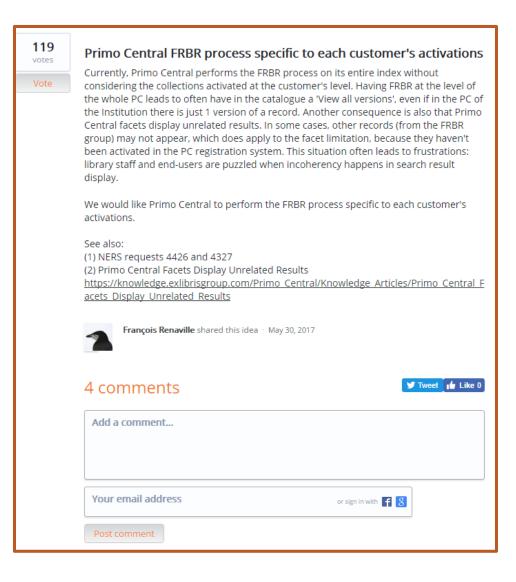




Ex Libris Idea Exchange

http://ideas.exlibrisgroup.com/

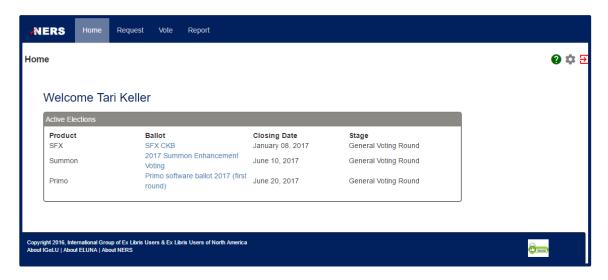






ELUNA/IGeLU - Enhancements

- 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

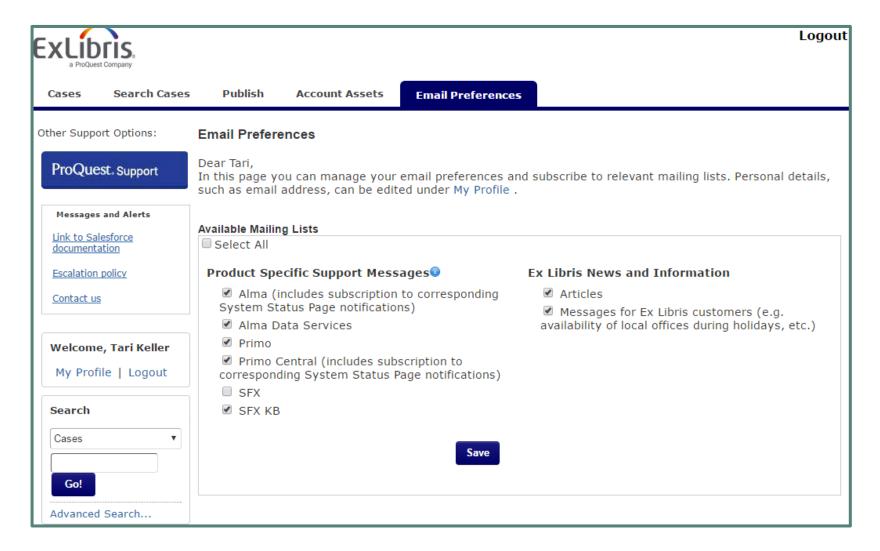


Other ELUNA Benefits

- Discount registration for annual meeting
 - Technical Seminar 2 days before ELUNA
 - Developers Day1 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



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?

