



Working with Ex Libris Support

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Introduction to Support

Tiered Support for Alma & Primo

- **NA Tier 1 Support**

- Customer Focus
- First point of contact for your Cases
- Understand your problem/question
- Work toward resolution or diagnosis

- **NA Tier 2 Support**

- Product Focus
- Software defect verification
- In-depth analysis of complicated Cases
- Work with Development (Tier 3) to prioritize defect fixes

- **Strong collaboration and knowledge sharing between Tiers**

Contacting Support

- **Submit a Case via the Support Portal**

- This is your first step for reporting any problem or question
- Go to the Ex Libris Knowledge Center <http://knowledge.exlibrisgroup.com> & click the Submit a Case button

- **Call us to discuss Cases**

- Toll-Free: 877-445-5693
- A Support Analyst will put you in contact with your Case Owner

- **Options for reporting a System Down**

- Submit a Case with priority: System/Component Down
- Email 24x7hub@exlibrisgroup.com
- Call Toll-Free 877-445-5693, and press 9 when prompted
 - When calling or emailing, make sure to include your contact info, institution, product name, and problem description
- Search for “24x7 support” in the Ex Libris Knowledge Center to access the 24x7 System Down Support FAQ



Customer Resources

Ex Libris Knowledge Center <http://knowledge.exlibrisgroup.com>

- OPEN access to all product documentation, knowledge articles, training videos, and more!
- Search across resources, or browse/search by Product
- Click to Submit a Case, or link to Developer Network, Idea Exchange, and the Ex Libris homepage
- Find searching tips in the Featured Topics section
- Click Contact Us to report any problems accessing or using the Knowledge Center
- Share your Feedback – click the feedback button

The screenshot shows the Ex Libris Knowledge Center homepage. At the top left is the Ex Libris logo with the tagline 'Knowledge Center'. To the right are navigation links: 'Training', 'Documentation', 'Knowledge Articles', 'Developer Network', and a 'More Sites' dropdown menu. Below the navigation is a large grey banner with the text 'What can we help you with?' and a search bar. Under the search bar are two buttons: 'System Status' and 'Submit a Case'. Below the banner is a section titled 'Browse by product:' with a row of product names: Alma, Primo Verde, Rosetta DigiTool, SFX campusM, Aleph, Voyager Leganto, and MetaLib. Below this is a section with two columns. The left column has an owl icon and the text 'Search Knowledge Articles' with a sub-description: 'Search our extensive knowledge base for answers to commonly raised questions'. The right column has a document icon and the text 'Find Product Documentation' with a sub-description: 'Access the latest documentation for Ex Libris products'. On the right side of the page is a 'Featured Topics' section with two items: 'Introduction to the Knowledge Center' and 'Tips for Advanced Document Searching in the Customer Knowledge Center'. At the bottom right of the page is a 'feedback' button.

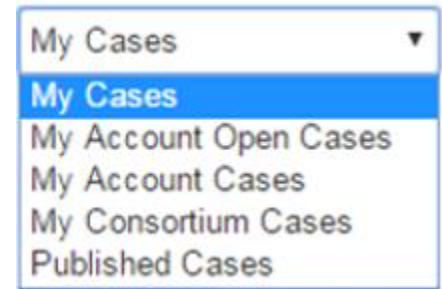
Keep up with Ex Libris news via our Initiatives Blog & Twitter Feed!

<http://initiatives.exlibrisgroup.com>

<http://twitter.com/ExLibrisGroup>

Support Portal

- **Need a login for a new staff member? See the Knowledge Article:**
 - [How do I request a Support Portal Login for a new staff member?](#)
 - **Need help?** Send an email to: Information.Systems@exlibrisgroup.com
- **Search Cases**
 - Perform advanced searches for Cases by Product, Asset, Category, Subject, Opened date range, etc.
 - Expand the results to include your Account, or your Consortium's Cases
 - Create a list of Cases based on your search results, and export it to Excel
- **KB Items**
 - Want Ex Libris to add a new resource to the Alma/SFX KB?
 - [Exlibris Policy for Adding New Resources to the Alma/SFX Knowledgebase Using KB Items](#)
 - [Searching and Promoting \(Voting\) KB Items](#)



Support Portal

- **Account Assets**

- Displays the Assets (products) for submitting Cases
- Find the Instance name for hosted environments tracked via our System Status page <http://status.exlibrisgroup.com>

Account Asset Detail			
Asset Name	EXL- Primo	Active Version	2015
Account	EXL	Service Level	Multi-Tenant-Direct
Status	Implementation		
Subscription- Start Date			
Subscription- End Date			
Expiration Date			
Instance name on Status Page	Primo MT NA03		

- **Email Preferences**

- Subscribe to Product Notifications, including environment notifications from the System Status page.
- Subscribe to Messages to Ex Libris Customers to receive notices such as NA Support holidays, and other customer notifications

Support Portal

Email Preferences

Dear Ex Libris,

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

Select All

Product Specific Support Messages 1

- Aleph
- Alma
- DigiTool
- MetaLib
- PC via Primo
- Primo (includes subscription to corresponding System Status Page notifications)
- SFX
- SFX KB
- Voyager

Ex Libris News and Information

- Articles
- Messages for Ex Libris customers (e.g. availability of local offices during holidays, etc.)

Save

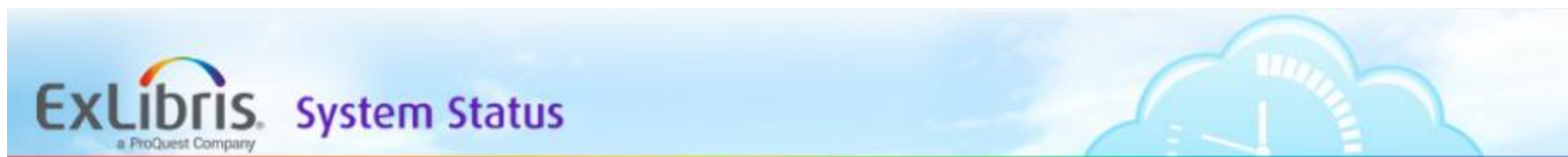
System Status

Multi-tenant environments

Single-tenant environments

Single-Tenant: Notifications of major events affecting multiple dedicated environments (WACTC Primo)

Multi-Tenant: Status tracked via the System Status Page (WACTC Alma, Primo Central)



[System Status](#)

[Privacy Policy](#)

[Security](#)

The System Status page presents the latest information on the availability of all multitenant instances. You may check this page at any time to see the current status information, or subscribe to be notified via email of interruptions to any individual service. If you are experiencing a real-time, operational issue that is not indicated below, please inform us by opening a customer support request.

System:

Region:

Remember my instances

Reset

	Instances	Email Alerts	Current Status	Aug-16	Aug-15	Aug-14	Aug-13	Aug-12	Scheduled Maintenance
<input type="checkbox"/>	Alma NA02								2016-Aug-14
<input type="checkbox"/>	PC CR01								

Service is operating normally

Information/Service Alert Information

Performance issues

Service disruption

Scheduled maintenance

Ex Libris portal for development-minded customers

- **API Docs:** Comprehensive API/integration docs & tech guides
- **Codes and Apps:** an advanced portal for sharing, experimenting. Hosted by Github
- **Tech Blog:** Advice, technical guidance, and best practices from fellow customers & Ex Libris development team members
- **Forums:** Online forums to share ideas, questions, and answers about how to get the most value from Ex Libris APIs
- **API Console:** API testing tool connected to your sandbox

Note: Please submit a Case to Support to request assistance setting up the API Console for Alma or Primo

Ex Libris Users of North America (ELUNA)

- **Engage with your fellow customers via product-specific ListSerts**
 - **Alma-L** <https://listserv.nd.edu/cgi-bin/wa?SUBED1=alma-l&A=1>
 - **Primo DISCUSS-L** <http://listserv.nd.edu/cgi-bin/wa?A0=PRIMO-DISCUSS-L>
 - Complete Mailing List: <http://el-una.org/mailling-lists/>
(don't forget to search the archives!)
 - You can also engage with other customers via the Ex Libris Developer Network and the Ideas Exchange
- **ELUNA Members are eligible to participate in a an enhancement voting process organized by the individual Product Working Groups**
 - [Enhancement process - Common Q&A](#)

Ex Libris Idea Exchange

- Allows users to share, support, and discuss ideas with the Ex Libris user community
- Anyone can participate – just provide your name and an institutional email address
- Complements the ELUNA / IGeLU “NERS” enhancement voting process

The screenshot shows the Ex Libris Idea Exchange website. At the top left is the logo "ExLibris idealexchange". To the right is a navigation bar with links: "Ex Libris", "Knowledge Center", "Contact Support", and "Developer Network". The main content area has a blue background with the text "Have an idea for Ex Libris?". Below this are three icons with text: a lightbulb icon for "Share your ideas", a thumbs-up icon for "Support your favorite ideas", and a speech bubble icon for "Get feedback on popular ideas". Below the icons is a welcome message: "Welcome to Ex Libris Idea Exchange! *We'd love to hear your ideas for us.* To suggest an idea, please select one of the following forums". Below the message are four buttons for different forums: "Alma" (blue), "campusM" (red), "Primo" (orange), and "Rosetta" (red), each with a right-pointing arrow. At the bottom is a dark grey footer with links: "Terms of Use", "FAQ", "Ideas Posting Guidelines", "Privacy Policy", and "Contact".

- Go to <http://ideas.exlibrisgroup.com> and click the FAQ link for more information



Submitting Cases

Submitting Cases

- **Consult Resources**

Knowledge Center

Developer Network

ELUNA ListServs

A solution to your problem may already exist!

- **Submit a Case**

- Not sure what Asset (Product) to pick when reporting a problem?

Report it where you see it

- Describe the scenario, & include expected vs actual behavior
- Define scope and impact of the problem
- Does the problem happen all the time? Under set conditions?
- Have you made recent changes that you think are related?
- Provide a test patron login for problem replication / testing
- Have a big project or planning to implement new functionality?
Submit a Case in advance. Tell us your goals, Support will give you recommendations

Submitting Cases

Reporting Linking Problems

Failure to connect to Full Text? Incorrect Resources in Resolver Menu? Incorrect FT Availability?

- **Starting Point**

- Did you find an article via Primo, or via another OpenURL enabled Source?
- Include the Article information (article title, issn/isbn, etc. etc.) – copy/paste, screenshot

- **Resolver URL**

- Copy/Paste the Alma U-Resolver / SFX Menu URL into your Case
- Tip: Right-click “Open Source in a new window” in Primo to copy/paste the link into Case

- **What Went Wrong?**

- Failure to connect to the right Full Text Article? Primo showing incorrect FT Availability? Resolver Menu missing links to valid Targets... or offering links to invalid Targets?
 - Describe what you expected to happen, and what actually happened

- **Have a clear e-resource metadata issue?**

- See an incorrect ISSN in our knowledge base / community zone?
- Found a title that is missing/doesn't belong in an Alma Collection / SFX Target?
- Found a coverage period (threshold) that doesn't match what the vendor/publisher package provides?

Alma Customers...Submit a Case under the Alma Data Services Asset
SFX Customers... Submit a Case under the SFX KB Asset

The Life of a Case: Tier 1

- New Cases will be directed to the NA Tier 1 Support Team
- An Analyst will take ownership and send you a first response to let you know we are starting our investigation

Ex Libris Initial Response SLA Commitment

Priority	Description	Initial Response
System/ Component Down	Service is not Available An inoperable production module	1 Hour
High	Other production performance-related issues, typically a module feature working incorrectly	1 Business Day
Normal	Non-performance related incidents, including general questions, requests for information, Documentation questions	2 Business Days

The Life of a Case

- The Support Analyst will...
 - Review the Case description
 - Replicate the problem
 - Check documentation and Knowledge Articles
 - Communicate with the customer
 - Work towards one of the following conclusions:
 - **Resolution:** question/problem resolved
 - **Enhancement:** product working as designed – update customer to provide instructions on pursuing an enhancement
 - **Data Services:** transfer appropriate Primo Central or KB data issues to relevant data services team & update the customer
 - **Defect Diagnosis:** problem related to new/existing defect, Case transferred to Tier 2 Team with defect analysis, update customer
 - **Diagnosis not reached:** Transfer to Tier 2 for further investigation, update customer

The Life of a Case

- The Tier 2 Analyst will take ownership of the Case and:
 - Review the analysis done by Tier 1
 - Perform additional checks to validate the defect analysis
 - Handle ongoing communication with the customer
 - If the analysis is confirmed, handoff the Case to Tier 3
- Tier 3 (Development) will review the defect analysis and:
 - Confirm the defect
 - Decide where the defect fits into the development work plan

See the Article “[What is Case Status, and What Does It Mean?](#)”
for a description of the different Case statuses

Visibility for Development Cases

➤ **“Pending Release”** is used when a defect fix has been embedded into the code of a future release

➤ Two weeks after we release a SP/release, cases resolved by the release will have their status changed from **“Pending Release”** to **“Closing”**

➤ For further testing, status can be changed to **“Pending Customer Testing”**

➤ **“Pending Work Plan”** indicates cases which are under consideration to be included in a future work plan

➤ Not used for cases where Priority is set to **“High”** by the customers, nor to cases which impact several institutions



Case Escalation Options

- Send an email to...
 - almasukportescalation@exlibrisgroup.com
 - primosupportescalation@exlibrisgroup.com
 - For a full list of Escalation email addresses, go to <http://customercenter/Pages/Escalation.aspx>
- Please provide a brief description of why you want the Case Escalated.
- Just want a status update to a Case, but an Escalation is not necessary?
 - Add a Case Comment to request an update

Customer Case Satisfaction Surveys


- Surveys sent to Case Contact when Case status changes to Closing
- Click the icon to indicate how satisfied you were with the way Ex Libris handled the Case
- Once Clicked, you will get a confirmation screen with an option to add your Comments


**Your Feedback is VERY Important...
Please Participate!!**


One Click Feedback


Dear Udi,

Your case "**test please ignore**" (#00059313) is now closed. We would be very grateful to hear how satisfied you were with the way Ex Libris handled this case. This will only take a moment of your time. Please choose one of the ratings below:


 Very Satisfied

 Satisfied

 Dissatisfied

 Very Dissatisfied

Voice of the Customer



Your feedback is very important to us. Thank you for helping us to improve the support Ex Libris provides to our customers.

Thank you,
Ex Libris



Join us in the Support Corner!

- Quarterly webinar with NA Ex Libris Support
 - Support Presentations
 - Product Q &A Sessions
 - Updates on Customer Resources
- Interact directly with NA Support Analysts
- Expand your product knowledge

Session details and registration at
<http://exlibrisgroup.com/category/NA/SupportCorner>



Tips for Customer Success

Tips for Alma Success

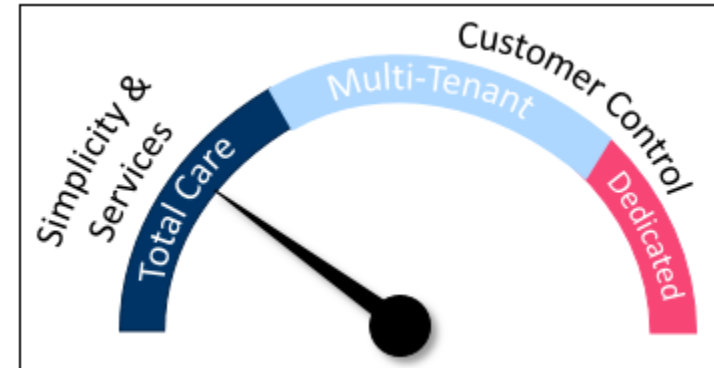
- **Work with Alma for a while before making major changes**
- **Stay organized around a clear mission**
 - Setup a process to periodically review/improve key workflows, review new features
 - Choose someone to review & share important Alma news to all stakeholders
 - Create a process to get regular feedback from staff
 - Consortia should check periodically to see if new features/configurations would benefit from central management via the Network Zone
- **Use your Sandbox**
 - Explore/test new functionalities before they appear in Production
 - Test Normalization Rules on a small set of records
 - Test letter changes (if Alma can't work with a letter, it may not send the email)
- **Activate Job Notifications**
 - It's important to be aware when jobs may fail (EDI, SIS loader, etc.)
 - Contact Support promptly for assistance (some logs unavailable after 30 days)
- **Get familiar with the Fulfillment Configuration Utility**
 - Example... use Advanced Tools for troubleshooting loan due dates

Resources for Alma Success

- **Alma Releases & Roadmap**
 - [Alma Roadmap Highlights](#)
 - [Alma Monthly Release Notes](#)
- **Alma Sandbox**
 - [Alma Sandbox Environments](#)
- **Job Notifications** (Alma Online Help)
 - [How to receive email notifications for a scheduled job?](#)
- **Fulfillment Configuration Utility**
 - [Training Video \(Ex Libris Knowledge Center\)](#)
- **Purchase Order Knowledge Articles**
 - [POL: order sending failed, order stays In Review](#)
 - [Disable claim letters sent to vendors](#)
 - [No e-mail to vendor after renewing subscriptions](#)
- **Migrating Digital Resources to Alma** (Initiatives Blog)
 - [Migrating Your Digital Resources to Alma](#)

Tips for Primo TotalCare Success

- **Understand the scope of Primo TotalCare**
 - Simple Primo implementation, with periodic services
 - Access to Primo Back office for Primo Analytics and selected Primo Utilities – see the article: [Primo Back Office Access for Total Care Customers](#)
- **Stay organized around a clear mission**
 - Get familiar with Primo TotalCare services
 - Stay up-to-date with Primo release notes and news
- **Engage with students and faculty... get feedback!**
- **Share information on Primo Searching**
 - Set and share the expectation....Primo will NOT return search results like your previous OPAC or Discovery tool
 - Share the [Primo/Primo Central Searching and Search Results Evaluation](#) Knowledge Article
 - “How did Primo get these results” is a complicated question to answer
 - A question back... were the results not helpful, or just different from expectations?
 - If not helpful... get specifics, and consult with Support about search configuration



About the New Primo User Interface

- **First rollout of the new UI in the August 2016 Release**
 - The interface will NOT automatically change – YOU decide when it goes Live
 - August release includes features such as the Advanced Search, Mobile View, bX recommender, and others; additional functionalities will be implemented during subsequent releases.
- **The new UI can be accessed by using this URL template:**
http://<server>/primo-explore/search?vid=<your_view>
- **NOT a new Primo Version or new Primo instance... just a new user interface**
- **Configuration changes made on your behalf via TotalCare service requests will affect both the new and the old UI.**
 - Aesthetic changes made via the Customization Package will only affect the new UI
- **TotalCare Customization**
 - **Planning to Go Live with the new UI between August and November 2016?**
 - Submit a Case with our Go Live target date – the Ex Libris Delivery Team will work with you directly to perform this move.
 - **All Primo customers have the option of customizing the new UI themselves**
 - [View Documentation and Training Videos](#)

Resources for Primo Success

- **General Primo Information**

- [Primo Release Notes](#)
- [Primo Back Office Access for Total Care Customers](#)

- **Primo New UI Information**

- [What you should know about the New Primo UI](#)
- [New Primo UI: Frequently Asked Questions](#)
- [New UI Documentation](#)
- [Configuring the Primo New UI](#) (training video)

- **Ex Libris Search/Ranking Information**

- [Primo/Primo Central Searching and Search Results Evaluation](#)
- [Primo Search and Ranking](#)
- [How does Primo Blending Work?](#)

- **Primo Usability Studies by ELUNA members**

- Post a question to the Primo DISCUSS-L listserv to ask how other Primo customers have handled usability studies, how they engaged faculty, etc.
<http://listserv.nd.edu/cgi-bin/wa?A0=PRIMO-DISCUSS-L>

Core TotalCare Services

When submitting a Case, please specify if you are requesting a TotalCare Service, or reporting a problem to Support

Core Primo TotalCare Services

- Pipe & Indexing monitoring / correction
- Normalization updates
- Weekly statistics reports
 - Primo Back Office access to Reports available upon request
- Primo Central profile updates
- Monthly changes upon request
 - Update static html (or links to customer-maintained css/html)
- Quarterly changes upon Request
 - Customize additional data sources to create additional indexes; display local fields; change order of display fields; change field captions & labels
- Semi-Annual changes upon request
 - Institution-specific updates including scopes & libraries; updates to search/delivery restrictions



THANK YOU