

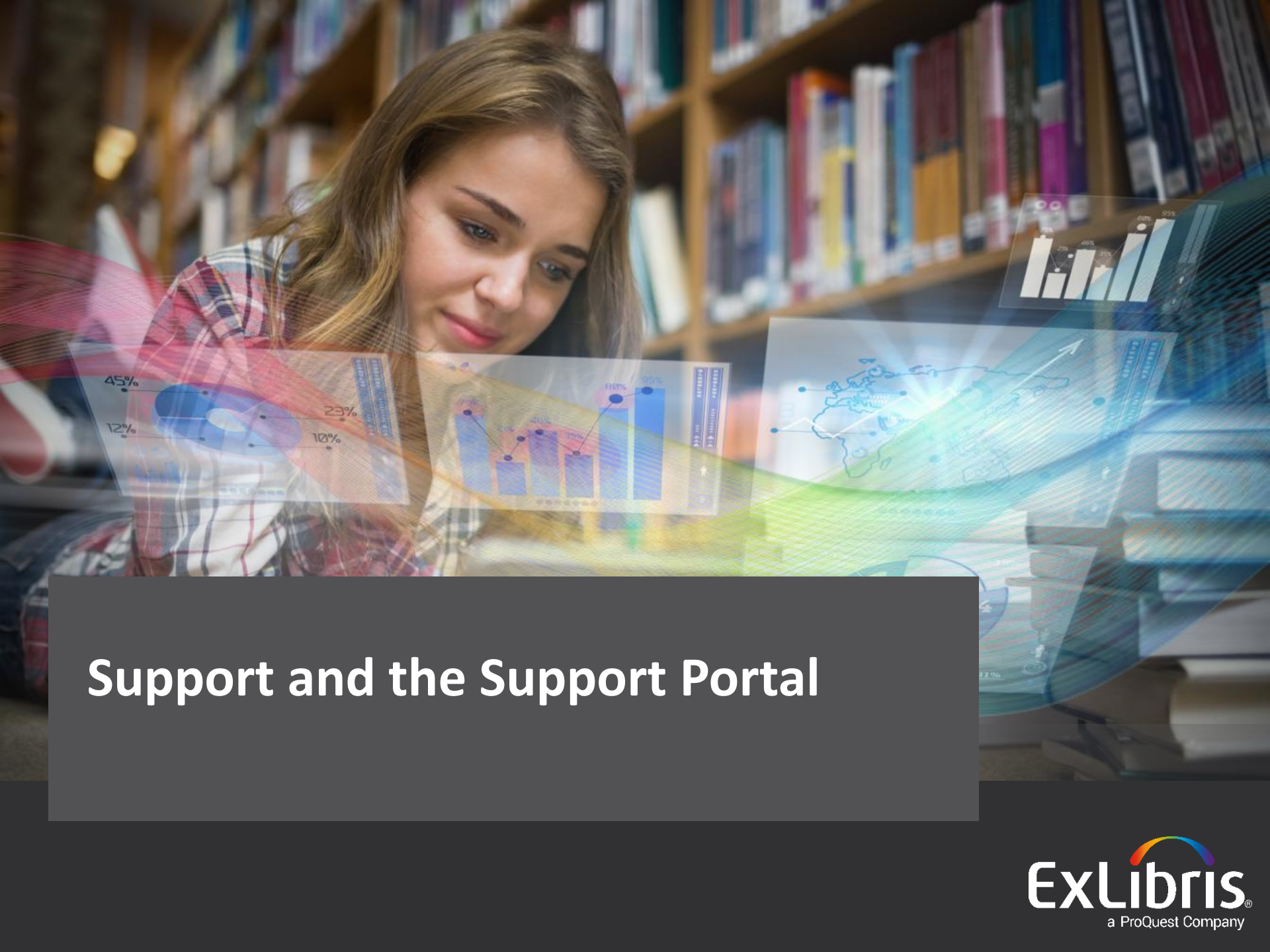


Working with Ex Libris Support

Agenda



- **Support and the Support Portal**
- **Knowledge Resources**
- **Submitting Cases**
- **Tips for Customer Success**



Support and the Support Portal

Tiered Support for Alma & Primo

- **NA Tier 1 Support Team**
 - 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

Support Portal: Cases

- Users from the same Account can Read their Cases, and their Account's Cases
- All Users from the same Account can EDIT their Cases AND other User's Cases



Cases Search Cases KB Items Publish Account Assets Email Preferences

Messages and Alerts
Link to Salesforce documentation
Escalation policy
Contact us

Welcome, Ex Libris
N.American E-Product Support
My Profile | Logout

Portal - My Open Cases ▾

Create New Case ↕

<input type="checkbox"/>	Act...	Case Number ^	Title	Asset	Date/Time Ope...	Status
<input type="checkbox"/>	Edit	00203153	Activate Primo OBI Analytics on ...	EXL- Primo	2/15/2016 2:08 ...	Tier 1 Analysis
<input type="checkbox"/>	Edit	00218569	Rosetta-Supported Topologies in...	EXL- Primo	4/29/2016 7:30 ...	Tier 2 W4I

Support Portal: Create a Case

Case Edit

Case Edit

Submit

Add attachment & Submit

Cancel

Case Details

Account Name EXL

Asset EXL- Primo

Affected Environment

Primo MT NA03 - Production

Priority Normal

KB Target/Resource

Description Information

Title Enter a brief but informative title

Description

Enter a detailed Case Description.

- * Describe the scenario, & include expected vs actual behavior
- * Define scope and impact of the problem
- * Does the problem happen all the time? Is it random, or does it appear 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? Tell us your goals, Support will give you recommendations

Do you have screenshots or other files to share?

Click Add attachment & Submit instead of the Submit button, and you will be prompted to upload your attachments

Below... Select a Category and Subject (recommended, but optional)

Want to arrange for a colleague to receive any Case update emails you receive? Enter their email address in the Additional e-mails section.

Additional Information

Category Publishing platform

Subject Normalization

Additional e-mails

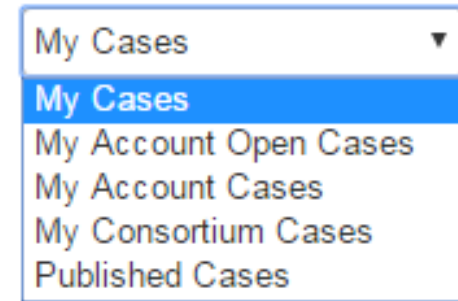
Submit

Add attachment & Submit

Cancel

Support Portal: Search Cases

- All users can search their Cases or Account Cases by Asset, Product, Category, subject, Date Opened, Case Number, and more
- All Users can search Published Cases from any customer who has elected to Publish
- Consortia can search across sites with My Consortium Cases
- Case search results can be exported to Excel



The screenshot shows the 'Search Cases' interface. At the top, there are navigation tabs: Cases, Search Cases (active), KB Items, Publish, Account Assets, and Email Preferences. On the left, there are sections for 'Messages and Alerts' (with links to Salesforce documentation, Escalation policy, and Contact us), 'Welcome' (with My Profile | Logout), and 'Search' (with a dropdown set to 'Cases' and a 'Go!' button). The main search area is titled 'Search Cases' and includes fields for Category (dropdown: --None--), Subject (dropdown: --None--), From Date (calendar icon: [7/15/2016]), To Date (calendar icon: [7/15/2016]), and Case Number. To the right, there are fields for Product (dropdown: --None--), Asset (dropdown: All), Status (dropdown: All), Account Name, and Account Number. Below the search fields, there is a 'Cases Options' dropdown (highlighted in the image) with the same menu items as the one in the callout above, and a 'Records Per Page' field. At the bottom, there is a 'Search Title or description' input field, a 'Clear Search' button, and an 'Export To Excel' button.

Support Portal: Email Preferences

- Subscribe to Product-specific notifications for Ex Libris products
 - Product News, Upcoming Release info
 - Release install date notices & maintenance Alerts from the Ex Libris System Status Page
- Subscribe to Ex Libris News & Info Notifications
 - Articles – targeted notifications to highlight valuable & timely knowledge articles & documentation
 - Messages to Ex Libris customers – notifications from Support about holiday hours

The screenshot shows the Ex Libris Support Portal interface. At the top, the Ex Libris logo is on the left, and the user is logged in as 'Ex Libris/PQWS Customer (eproduct1212@sf.com)'. A navigation bar includes links for 'Cases', 'Search Cases', 'KB Items', 'Publish', 'Account Assets', and 'Email Preferences' (which is highlighted). The main content area is titled 'Email Preferences' and contains a welcome message, a 'Select All' checkbox for 'Available Mailing Lists', and two columns of checkboxes for selecting specific notification categories. A 'Save' button is located at the bottom right of the preferences section.

Ex Libris
a ProQuest Company

Logged in as Ex Libris/PQWS Customer (eproduct1212@sf.com) [Logout](#)

[Cases](#) [Search Cases](#) [KB Items](#) [Publish](#) [Account Assets](#) **Email Preferences**

Messages and Alerts

- [Link to Salesforce documentation](#)
- [Escalation policy](#)
- [Contact us](#)

Welcome, Ex Libris/PQWS Customer

[My Profile](#) | [Logout](#)

Search

Search All

[Go!](#)

[Advanced Search...](#)

Recent Items

- [00232080](#)
- [00232079](#)
- [00223079](#)
- [00203153](#)

Email Preferences

Dear Ex Libris/PQWS,
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

- Aleph
- Alma
- CampusM
- 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](#)

Support Portal: Account Assets tab

- View a list of Assets for which YOU can submit Cases
- “Multi-Tenant” Asset pages will also list your Instance Name on the Ex Libris System Status Page

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		

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a ProQuest Company

Logged in as Ex Libris/PQWS Customer (eproduct1212@sf.com) [Logout](#)

[Cases](#) [Search Cases](#) [KB Items](#) [Publish](#) **Account Assets** [Email Preferences](#)

Messages and Alerts

[Link to Salesforce documentation](#)

[Escalation policy](#)

[Contact us](#)

Welcome, Ex Libris/PQWS Customer

[My Profile](#) | [Logout](#)

Search

Search All

[Advanced Search...](#)

All [Printable View](#)

View:

[<Previous Page](#) | [Next Page>](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) **All**

Asset Name

EXL- Primo

EXL- SFX

EXL- SFX KB

EXL- Summon

EXL- UStat

EXL- Voy InterLibrary Loan

EXL- Voyager

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) **All**

[<Previous Page](#) | [Next Page>](#)

System Status for Hosted Environments

System Status ▾

Multi-tenant environments

Single-tenant environments

Click the System Status button on the Ex Libris Knowledge Center

- **Multi-Tenant Environments**

Alma, Primo, Primo Central, other products are tracked via the System Status Page



[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-23	Aug-22	Aug-21	Aug-20	Aug-19	Scheduled Maintenance
<input checked="" type="checkbox"/>	Alma NA02								
<input checked="" type="checkbox"/>	PC CR01								
<input checked="" type="checkbox"/>	Primo NA08								

Service is operating normally

Information/Service Alert Information maintenance

Performance issues

Service disruption

Scheduled

More About the Support Portal



- [Support Portal Documentation](#)
- [How do I request a Support Portal Login for a new staff member?](#)
- [Setup Email Preferences to Subscribe to Ex Libris Mailing Lists](#)

- **Need help accessing Support Portal?**
Send an email to: Information.Systems@exlibrisgroup.com



Knowledge Resources

SELECT A PRODUCT ▾

Search...



Browse by product:



Welcome to the Ex Libris Customer Knowledge Center. Here you will find the latest information on all Ex Libris products, including documentation, knowledge articles, training, and more.

Featured Topics

- Subscribe for CKC pages updates, using RSS feeds
- Calling on the Alma community to suggest creative ideas for Alma's 2018 login screen theme!
- 2017 Technical Seminar
- SFX: How to localize the new Journal search and AZ List
- Tips for Advanced Document Searching in the Customer Knowledge Center
- Summon Roadmap

New UI with improved product-based searching, easier navigation, and a new option... RSS feeds on every page!

Access to product documentation, knowledge articles, release notes, product materials, and more

Mouse over the box to get quick-click access to commonly used material for each resource

Use the improved product-based searching, or search all the CKC content via Google

Let us know how you like the updated Knowledge Center! Just click

[feedback](#)

The screenshot shows the ExLibris Knowledge Center homepage. At the top, there is a search bar with the text "Search under current path" and a magnifying glass icon. To the right of the search bar is a button labeled "Alma". Above the search bar, the ExLibris logo and "Knowledge Center" are visible. To the right of the logo are three buttons: "More Sites", "System Status", and "Submit a Case". Below the search bar, there is a breadcrumb trail: "Home > Alma". The main content area is a grid of six tiles. The first tile is "Product Documentation" with a document icon and the text "Access the latest documentation for Ex Libris products". The second tile is "Introduction to New Alma Us..." with a list of links: "Alma Essentials (New UI)", "Alma Essentials (Nouvelle I...", "Alma Essentials", and "Implementation Tutorials", and a "Show all topics" button. The third tile is "Release Notes" with a megaphone icon and the text "Stay informed about the features and capabilities included in each product release". The fourth tile is "Implementation and Migration" with a gear icon and the text "Understand methodology and requirements to facilitate successful implementations". The fifth tile is "Product Materials" with a trophy icon and the text "Learn more about our product offerings, and how they can serve your needs". The sixth tile is "Knowledge Articles" with an open book icon and the text "Search our extensive knowledge base for answers to commonly raised questions". Below the grid is a "Featured Topics" section with a list of links: "Calling on the Alma community to suggest creative ideas for Alma's 2018 login screen theme!", "Linking to Proquest HTTPS Gateway", "Request new collections to be added to Alma Community Zone", and "Alma Roadmap".

Click the links below for more information about the CKC!

[Introduction to the Knowledge Center \(6-minute video\)](#)

[Tips for Advanced Searching in the Customer Knowledge Center](#)

[How To Setup Knowledge Center RSS feeds](#)

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 ELUNA Email Lists**
 - **Alma** <https://exlibrisusers.org/listinfo/alma>
 - **Primo** <https://exlibrisusers.org/listinfo/Primo>
 - 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 “NERS” enhancement voting process



Ex Libris Knowledge Center Contact Support Developer Network

Have an Idea for Ex Libris?

Share your ideas Support your favorite ideas Get feedback on popular ideas

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



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

Ex Libris Idea Exchange for Content

- Tell us what collections and data you want Ex Libris to add
- You can suggest:
 - New collections for Discovery (Primo Central and Summon)
 - New collections for the Knowledgebase (Alma CZ, SFX KB and 360 KB)
 - New authority files to be added to the Community Zone
 - Enrichment of Community Zone bibliographic records for certain collections

How can we improve Content?

Enter your idea

Hot ideas

Top

New

Category

Status

My feedback

46

votes

Vote

Target: Journal of Visualized Experiments (JoVE)

Please add the collection
{KBI Migration}

0 comments · New Collection

45

votes

Vote

Target/Collection: Knowledge Unlatched Books Open Access

Please add the collection
{KBI Migration}

1 comment · New Collection



UNDER REVIEW

Liron Klein Levy (Admin, Ex Libris) responded

Vendor has been contacted

38

votes

Vote

Target/Collection: Project Gutenberg

Please add the collection
{KBI Migration}

0 comments · New Collection

More Knowledge Resources



- [Ex Libris Initiatives Blog](#)
- [Ex Libris on Twitter](#)
- [Ex Libris YouTube Channel](#)
- [Ex Libris Users of North America \(ELUNA\)](#)
- [International Group of Ex Libris Users \(IGELU\)](#)



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

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
Low	Low priority issues or questions	3 Business Days

The Life of a Case

- The Tier 1 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
 - **Data Services:** transfer to appropriate Data Services Team
 - **Enhancement:** explain options for pursuing an enhancement
 - **Defect Diagnosis:** transfer to the Tier 2 Team
- The Tier 2 Analyst will
 - 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, present the issue to Development

Visibility for Development Cases

Case Status: Development	Ex Libris has confirmed that a defect exists. Creating a fix is part of our Development Work Plan, but we don't know when the fix will be available
Case Status: Pending Release	Development has created a fix for the defect, and identified which upcoming product release will deliver the fix
Case Status: Closing	A few weeks after the fix is released, we usually set Pending Release Cases to Closing status. They remain in that status for 14 days until changing to Closed
Case Status: Pending Customer Testing	If you need more time to verify the fix has addressed your issue, login to Support Portal, go to the Case and click the Pending Testing button. This will place the Case into Pending Customer Testing status for 11 months
Case Status: Pending Work Plan	Case is under consideration to be included in a future work plan. Used for Cases where priority is not "High," and very few (if any) other customers have reported the same issue. If after 2 years the Case doesn't move into the Development work plan, it's closed

Case Escalation Options

- Send an email to...
 - almasupportescalation@exlibrisgroup.com
 - primosupportescalation@exlibrisgroup.com
- For a full list of Escalation email addresses, go to the Knowledge Article: [What is Ex Libris Escalation Policy?](#)
- 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!!**



Dear Yorai,

Your case "Closing" (#00059235) 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

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

More About Submitting Cases



- [What is Case Status, and What Does It Mean?](#)
- [What Are the Common Causes of Full Text Linking Problems, and How Can Linking Be Improved?](#)
- [What procedure should be followed to alert Ex Libris of a system down?](#)
- [Can a closed Salesforce case be re-opened?](#)



Tips for Customer Success

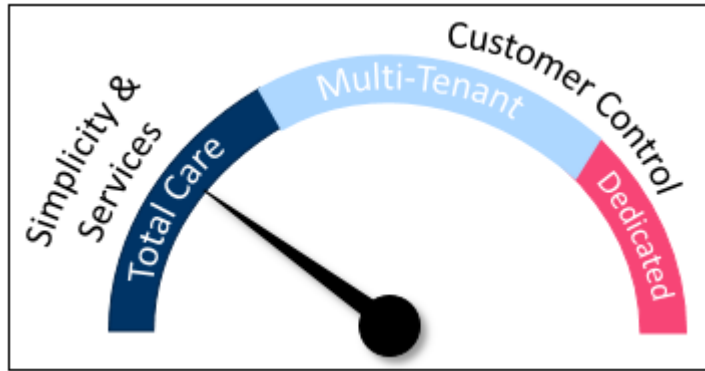
Tips for Alma/Primo Success in the next 6 months...

- **Focus on getting accustomed to how Alma/Primo works**
 - Hold off any plans for significant changes
 - Stay safe – if you aren't sure what will happen, consult with Support before you do it
- **Make sure you and your stakeholders review Release Notes for each release**
 - Look for the “Make the Most of This Release” section and review the Action Items
 - Some customers designate a specific individual responsible for sharing product news, highlighting important changes/issues for specific stakeholders, etc.
- **Monitor and address knowledge gaps among staff members**
 - Some customers arrange periodic knowledge sharing sessions where more experienced staff can help others get up to speed
 - Take advantage of training materials and documentation in the Knowledge Center
- **Setup a process to receive and review staff/end-user feedback**
 - Give staff a mechanism for providing Alma / Primo feedback
 - Get Primo UI feedback from end users, setup usability studies
 - Engage with faculty to assess how Primo can better meet their needs

Resources for Alma Success

- **Alma Releases & Roadmap**
 - [Alma Roadmap](#)
 - [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](#)

Primo TotalCare Overview



- Simple Primo Implementation with periodic TotalCare Services
- Access to the Primo Back Office to:
 - Create & schedule Primo Analytics reports
 - Update the Primo New UI via the UI Customization Package Manager

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

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

Resources for Primo Success

- **General Primo Info**
 - [Primo Release Notes](#)
 - [Primo New UI - All the resources in one page](#)
 - [Primo Back Office Access for Total Care Customers](#)
- **Primo 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. Post a question to the Primo DISCUSS-L listserv to ask how other Primo customers have handled usability studies, how they engaged faculty, etc. <https://exlibrisusers.org/listinfo/Primo>
- **Primo Usability Study Article** (from the Ex Libris Initiatives Blog)
 - [Ex Libris User Studies: How Do Users Search and Discover?](#)
- **Shared Materials for Usability Studies**
 - [Search@UW \(Primo-Alma\) Usability Testing Materials](#)



Thank you!

Brian Noone
Senior Support Manager
brian.noone@exlibrisgroup.com