

# Ex Libris Support Services - A Customer / Ex Libris Collaborative Review

Session 4.6, South School  
Monday, 15 September, 2014

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Habib Tabatabai, Interim Executive Director, Chambers Library, University of Central Oklahoma

- You can also find the [Questions and Answers](#) from this session at:

**Reach Salesforce Team at**  
[EL-SF.support@exlibrisgroup.com](mailto:EL-SF.support@exlibrisgroup.com)

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Customer Portal

https://exlibrisgroup--c.na4.visual.force.com/apex/Publish?sfdc.tabName=01r60000000EJzD

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## **Escalate your cases:**

<http://customercenter.exlibrisgroup.com/Pages/Escalation.aspx>

http://customercenter.exlibrisgroup.com/Pages/Default.aspx

Ex Libris System Status

Ex Libris Customer Center ...

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**Ex Libris News**

- Ex Libris Announces the Azriel Morag Award for Innovation
- ProQuest and Ex Libris Cooperate to Improve Research Workflows

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- Need to escalate a Support Case? Apr 01, 2014
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**Cloud Systems Status**

- Multi-tenant environments
- Single-tenant environments

**Documentation Center**

- SFX Target Configuration Guide.pdf Mar 31, 2014
- V4\_0\_SFX\_Update\_20141300 Mar 31, 2014
- V4\_0\_SFX\_Update\_20141300.pdf Mar 31, 2014

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**1. Highlight the issue with the assigned owner via the Ex Libris Support Center.**

**2. Escalate to the customer support manager responsible for the product affiliated with the incident, according to the list below:**



Product	Contact	E-mail
Alma	Judith Frankel	<a href="mailto:Almasupportescalation@exlibrisgroup.com">Almasupportescalation@exlibrisgroup.com</a>
Aleph and Alephino	Martin Büscher	<a href="mailto:ALEPHsupportescalation@exlibrisgroup.com">ALEPHsupportescalation@exlibrisgroup.com</a>
bX	Zvi Finkin	<a href="mailto:bXsupportescalation@exlibrisgroup.com">bXsupportescalation@exlibrisgroup.com</a>
DigiTool	Ayala Salant	<a href="mailto:DTLsupportescalation@exlibrisgroup.com">DTLsupportescalation@exlibrisgroup.com</a>
MetaLib Support and KnowledgeBase	Evgenia Polyachek	<a href="mailto:MLsupportescalation@exlibrisgroup.com">MLsupportescalation@exlibrisgroup.com</a>
Primo	Yael Shahar	<a href="mailto:PRIMOsupportescalation@exlibrisgroup.com">PRIMOsupportescalation@exlibrisgroup.com</a>
Primo Central Index (PCI)	Meni Toubul	<a href="mailto:PClescalationrequest@exlibrisgroup.com">PClescalationrequest@exlibrisgroup.com</a>
Rosetta	Ayala Salant	<a href="mailto:rosettaescalation@exlibrisgroup.com">rosettaescalation@exlibrisgroup.com</a>
SFX	Brian Noone	<a href="mailto:SFXsupportescalation@exlibrisgroup.com">SFXsupportescalation@exlibrisgroup.com</a>
SFX KnowledgeBase	Oren Gilboa	<a href="mailto:SFXKBsupportescalation@exlibrisgroup.com">SFXKBsupportescalation@exlibrisgroup.com</a>
Verde & USTAT	Yana Buzukashvili	<a href="mailto:VERDEsupportescalation@exlibrisgroup.com">VERDEsupportescalation@exlibrisgroup.com</a>
Voyager	Julie Bister	<a href="mailto:VOYAGERsupportescalation@exlibrisgroup.com">VOYAGERsupportescalation@exlibrisgroup.com</a>

### 3. Escalate to the regional support focal point:

Region	Contact	E-mail
North America	Yoav Eder	<a href="mailto:Yoav.Eder@exlibrisgroup.com">Yoav.Eder@exlibrisgroup.com</a>
Europe	Martin Büscher	<a href="mailto:Martin.Buescher@exlibrisgroup.com">Martin.Buescher@exlibrisgroup.com</a>
APAC	Nina Keren-David	<a href="mailto:Nina.Keren-David@exlibrisgroup.com">Nina.Keren-David@exlibrisgroup.com</a>

4. Escalate to the Global Support Director: Noam Kaminer - [Noam.Kaminer@exlibrisgroup.com](mailto:Noam.Kaminer@exlibrisgroup.com)

## Next levels of Escalation if needed.

### 3. Escalate to the regional support focal point:

Region	Contact	E-mail
North America	Yoav Eder	<a href="mailto:Yoav.Eder@exlibrisgroup.com">Yoav.Eder@exlibrisgroup.com</a>
Europe	Martin Büscher	<a href="mailto:Martin.Buescher@exlibrisgroup.com">Martin.Buescher@exlibrisgroup.com</a>
APAC	Nina Keren-David	<a href="mailto:Nina.Keren-David@exlibrisgroup.com">Nina.Keren-David@exlibrisgroup.com</a>

### 4. Escalate to the Global Support Director: Noam Kaminer - [Noam.Kaminer@exlibrisgroup.com](mailto:Noam.Kaminer@exlibrisgroup.com)

<http://status.exlibrisgroup.com/>

For multi-tenant environment  
With input from IGeLU and ELUNA,  
newly developed website displays the  
current and past 5 days status of SaaS  
Alma, Primo Total Care, Primo Central,  
and bX and scheduled maintenance  
windows.

http://customercenter.exlibrisgroup.com/Pages/Default.aspx

Ex Libris System Status

Ex Libris Customer Center ...

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http://status.exlibrisgroup.com/ Ex Libris System Status Oxford Programme 2014

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Find: Tabatabai Previous Next Options

# ExLibris System Status

[System Status](#) | [Privacy Policy](#) | [Security](#)

The Ex Libris System Status page presents the latest information on the availability of all multitenant Ex Libris 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: All Region: Europe

Remember my instances Reset

	Instances	Email Alerts	Current Status	Aug-30	Aug-29	Aug-28	Aug-27	Aug-26	Scheduled Maintenance
<input type="checkbox"/>	Alma EU00								2014-Aug-31
<input type="checkbox"/>	Primo TC EU00								2014-Aug-17
<input type="checkbox"/>	Primo MT EU01								2014-Aug-31
<input type="checkbox"/>	Primo TC EU01								
<input type="checkbox"/>	Primo TC EU02								
<input type="checkbox"/>	Primo TC EU03								2014-Aug-17
<input type="checkbox"/>	Primo TC EU04								
<input type="checkbox"/>	Primo EU 04								

If you mouse over on any “orange” indicator, it will show you minor detail of the problem.

The screenshot shows a web browser window at <http://status.exlibrisgroup.com/>. The page displays a table of service components. Each row represents a component, with a checkbox on the left and a series of status indicators (envelopes and checkmarks) to the right. The component 'bx CR01' has a yellow square indicator, which has triggered a tooltip. The tooltip text is as follows:

31-Mar-2014 UTC 11:59:04  
**Minor Inconsistency in Primo Central**  
  
Due to an update to our infrastructure, you may notice minor inconsistency on our platform. We apologize for the inconvenience.

Component	Envelope	Green	Green	Green	Green	Green	Green	Green	Green
<input type="checkbox"/> Primo NA 05	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo MT NA01	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA01	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA03	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA04	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA07	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA10	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA11	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA12	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA13	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> PC CR01	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> bx CR01	✉	✓	✓	■	✓	✓	✓	✓	✓
<input type="checkbox"/> MLPlus CR01	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA01	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA02	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA03	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA04	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA05	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA06	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA07	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA08	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA09	✉	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA10	✉	✓	✓	✓	✓	✓	✓	✓	✓

By clicking the email icon on the same page, you can subscribe to receive email notifications for status of effected services.

The screenshot shows a web browser window with the URL <http://status.exlibrisgroup.com/>. The browser's address bar shows the URL and several tabs are open: "ELUNA - Alma P...", "Ex Libris Syste...", and "Ex Libris the bridg...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". Below the menu bar, there are search and navigation icons, including a Google search bar and a "Sign In" link.

The main content is a table with the following columns: a checkbox, a service name, an email icon, and several status icons (green checkmarks and yellow exclamation marks). The services listed are:

Service	Email Icon	Status 1	Status 2	Status 3	Status 4	Status 5	Status 6	Status 7
<input type="checkbox"/> Primo NA 05	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo MT NA01	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA01	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA03	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA04	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA07	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA10	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA11	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA12	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> Primo TC NA13	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> PC CR01	✉	✓	✘	✘	✓	✓	✓	✓
<input type="checkbox"/> bx CR01	Enter your E-mail		Subscribe		✓	✓	✓	✓
<input type="checkbox"/> MLPlus CR01	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA01	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA02	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA03	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA04	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA05	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA06	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA07	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA08	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA09	✉	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/> SFX NA10	✉	✓	✓	✓	✓	✓	✓	✓

A red arrow points from the email icon in the row for "PC CR01" to the "Enter your E-mail" input field of the subscription form.

## Q: What about other Direct instances?

A. all other instances – Single Tenant Environment, such as Aleph, Voyager, Primo Direct and other Direct customers will be notified as before by publishing updates in the 'Cloud Status page' and by sending emails with scheduled maintenance notifications based on mailing lists in Salesforce.

<http://customercenter.exlibrisgroup.com/Pages/cloudstatus.aspx>

You can also access to both the above page through Customer Center” portal @

<http://customercenter.exlibrisgroup.com>



Another useful resource to find solutions is “**Developers Network**” at <https://developers.exlibrisgroup.com/>.

Developer Network Docs Tech Blog Code & Apps Forum Dashboard

Put Ex Libris products at the center of your library ecosystem.

Learn Code & Apps

Resources: **Primo** **Alma** **Rosetta** **bx** **SFX** **MetaLib** **Aleph** **Voyager**

**From the Tech Blog**

AUG 31 [Linked Library Data: Making It Happen](#)  
Shlomo Sanders

AUG 29 [New refworks.cgi for Voyager 9](#)  
Ken Herold

**Top Code & Apps**

[How we're building APIs at Ex Libris](#)

CODE & APPS ALMA PRIMO

[Creating a Student Portal with the New Alma APIs](#)

**Get Help**

Got Questions?  
The Ex Libris Developer Network Forum is the place to go. Search the forum for instant help, or ask a question and get help from knowledgeable customers and Ex Libris staff.

The Ex Libris **Developer Network Forum** is the place to go. Search the forum for instant help, or ask a question and get help from knowledgeable customers and Ex Libris staff. <https://developers.exlibrisgroup.com/discussions#!/forum/forums/list.page>

The screenshot shows a web browser window displaying the Ex Libris Developer Network Forum. The page features the Ex Libris logo, navigation links for Docs, Tech Blog, Code & Apps, Forum, and Dashboard, and a search bar. Below the navigation, there are links to various resources: Primo, Alma, Rosetta, bX, SFX, Metalib, Aleph, and Voyager. The main content area displays a table of forums under the heading 'Product Forums'.

Forums	Topics	Messages	Last Message
<b>Product Forums</b>			
<b>General Forum</b> A forum for discussing issues that are not product-specific	7	18	16/08/2014 14:29:26 meinbrodt →
<b>Alma</b> A forum for Alma developer community support	13	47	29/08/2014 14:02:49 diee →
<b>Primo</b> A forum for Primo developer community support	4	7	05/08/2014 12:04:54 masudk →
<b>Rosetta</b> A forum for Rosetta developer community support	2	4	31/07/2014 21:44:04 obrienbe →
<b>Aleph</b> A forum for Aleph developer community support	1	2	07/07/2014 16:52:24 dlibian →
<b>Metal ib</b>		No	

## How can New Staff Request Customer Center and Support Portal (SalesForce) Login? In Salesforce search for Article # 21549.

1. Create a single login for the Customer Portal and the Support Portal (SalesForce) for a new staff member by creating a personal Customer Center username and password using the Institutional Login to the Customer Center.
  - 1a. Go to: <http://www.customercenter.exlibrisgroup.com>
  - 1b. Enter a personal Institutional username and password, which is usually the Account Code (previously known as CompanyCode ) and a password.
  - 1c. Once logged in, complete the form to create a personal account for the new staff member.
2. Once the new Customer Center user is created, send an email to [EL-SF.Support@exlibrisgroup.com](mailto:EL-SF.Support@exlibrisgroup.com) with the new contact's full name, contact information, and the personal Customer Center username and password.
3. In approximately 24 hours the Salesforce administrators will create a single login for the Customer Center and the Support Portal, and send an email notifying the new user when access has been activated.
4. The staff member should test access by logging into the Customer Center at <http://www.customercenter.exlibrisgroup.com> . From the Customer Center, the user should be able to click the CRM button to connect to the Support Portal. It is also possible to link directly to the Ex Libris Support Portal via <https://support.exlibrisgroup.com> . If the new user experiences any login or functionality problems, or if there are any problems with Salesforce accounts or functionality, please send an email to [EL-SF.Support@exlibrisgroup.com](mailto:EL-SF.Support@exlibrisgroup.com) .

### Additional Information

\* Don't know:

\*\* the Ex Libris Account Number? Please contact Ex Libris Support.

\*\* the Customer Center Institutional Login, send an email to [EL-SF.Support@exlibrisgroup.com](mailto:EL-SF.Support@exlibrisgroup.com). Request the Institutional Login for the institution and include the Account Number (previously known as Company Code).

\* A description of this process (with screenshots) is available from Documentation Center > Cross-Product > Salesforce > Public files > How To Create A Customer Center User

# Questions / Comments

Thank you for being a part of this  
conversation.