Support Portal User Guide

Introduction

The goal of this document is to introduce the Support Center (SalesForce) and provide guidance for using the interface.

How do I access the Support Portal?

You can get to the Support Center via the Ex Libris Knowledge Center by going to https://knowledge.exlibrisgroup.com and clicking the Submit a Case button, or clicking the More Sites button and choosing Ex Libris Support Center. You can also link to the Support Center directly at https://support.proquest.com.

How do I create a new case?

Click the Submit a Case tab:

Submit a Support Case

If you’re stuck, we’re here to help! If you are unable to find an article seeking out Support Center or Ex Libris Knowledge Center or are unable to locate the article, we will try our best to assist you. However, if you have any questions regarding the use of your personal data, please refer to the Ex Libris Data Protection Policy.

Select the platform:

If you are submitting an Ex Libris case, select the Asset:
Fill out the form:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Select a Category (populated based on the Asset selected) and Sub-Category</td>
</tr>
<tr>
<td>Sub-Category</td>
<td>(populated based on Category you have entered) from the drop-downs. Making</td>
</tr>
<tr>
<td></td>
<td>selections in these fields is optional, but recommended.</td>
</tr>
<tr>
<td>Affected Environment</td>
<td>Choose the Affected Environment. By default, the production environment is</td>
</tr>
<tr>
<td></td>
<td>chosen, but you can change it in case the issue regards another environment</td>
</tr>
<tr>
<td></td>
<td>(such as the Sandbox environment).</td>
</tr>
<tr>
<td>Database Collection</td>
<td>If submitting a case for one of our ProQuest Support or Content teams</td>
</tr>
<tr>
<td></td>
<td>regarding a specific Collection or Resource, enter it in the Database</td>
</tr>
<tr>
<td></td>
<td>Collection field.</td>
</tr>
<tr>
<td>Case Type</td>
<td>Select a Case Type to let us know which type of case you are reporting.</td>
</tr>
<tr>
<td>Priority</td>
<td>Select the Priority.</td>
</tr>
<tr>
<td>Subject and Description</td>
<td>Enter the Subject and Description. Fields marked with a red asterisk are</td>
</tr>
<tr>
<td></td>
<td>required.</td>
</tr>
</tbody>
</table>

What should be included in the Subject and Description?

- A brief but informative Subject is recommended. Your case Description should be as detailed as possible.
- Describe the scenario, & include **expected vs actual behavior**.
- Define **scope** (who is affected) and **impact** (severity) 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 test patron logins for troubleshooting problems related to logged-in user functionality.
- Have a big project or planning to implement new functionality? Describe the goal you want to achieve, and Ex Libris Support will provide recommendations.

Additional Emails for Case Updates

If you wish, you can then add **Additional e-mails**:
Additional e-mails allows you to enter e-mails of colleagues/additional contacts. These addresses will receive the same e-mail notifications from the Support Center as you do for this case. This is useful, for example, if you are working with others on an issue or about to go on a well-deserved vacation.

If you have an attachment to include, check the box next to "Please check this box if you want to add attachments to this Case".

After you click Next, the Support Center sends a confirmation email and displays the following message:

Your Case 06020643 was created successfully.

Click the link to view the case that you just submitted.

If you checked the 'Add Attachments' box, click Upload Files to browse on your PC for attachment, or drag and drop files from your PC into the marked frame.

When all files have been attached, click Finish.

What are list views used for?

Views are a quick and basic way of filtering your list of cases in the Support Center. You have several views to choose from in the My Cases tab.

- **My Institution's Cases (Support Center)** allows you to see all cases for your institution, including cases opened by one of your colleagues.
- **My Institution's Open Cases (Support Center)** allows you to see all cases for your institution that are not in a status of Closed.
- **My Cases (Support Center)** allows you to see all cases opened by you.
- **My Open Cases (Support Center)** allows you to see all cases opened by you that are not in a status of Closed.
• **Cases Waiting on Me (Support Center)** allows you to see cases that are in status Pending Customer Input.
• **Recently Viewed Cases** allows you to see cases which you have viewed recently.

Choose a view from the drop-down to view it.

Some list view options:

• You can pin a list to make it your default

![Cases Waiting on Me (Support Center)](image)

• You can change column width, wrap or clip text, and sort by certain columns by clicking on them.

![Recently Viewed Cases](image)

• You can use the 'Search this list' box to search within the list view for cases that are relevant to your search term.

Customize your own list views

You can create your own custom list views to see a list of cases based on your custom needs.

• Clone an existing list view if you want to modify it, or create a New one to create your own filters from scratch.
• Chose a name for your list view.
• Using the Filters panel, add, modify or remove any filter. You can also add boolean (AND/OR) filter logic. The modified filters will only take affect once saved.
• Select Fields to Display will allow you to customize the fields that will be shown on the list.
• Delete a list if you no longer need it.
How can I contact Ex Libris about an open case?

You may need to update the case in order to add a question, comment or update, answer a question asked by a Support analyst, request a status update, close the case, or contact the analyst about the open case for any other reason.

Click the My Cases tab to view the list of recently viewed cases, or search for the case.

Click the Case Number to open it.

There are several tabs on the case.

- **Case Comment** allows you to read any comments that have been added to the case.
  - Click the 'New' to add information, questions or other notes for the Support Analyst. A text box will be presented; enter your comment and click Save.
- **Case Attachments** allows you to view files already attached to the case or upload additional ones.
- **Knowledge Articles** will include any Knowledge Articles added by the ProQuest analysts.
- **Linked Knowledge (Ex Libris)** will include any relevant resources from the Customer Knowledge Center to the case the Ex Libris analyst linked to the case.
- Use **Close Case** to set the case to a status of Closed if the case has been resolved.
- Use **Pending Customer Testing** to keep a case open once a defect has been repaired if you would like additional time to move to the release with the fix before the case closes, or you want additional time to evaluate the change to confirm that it has addressed the problem you experienced. Case Status will change to Pending Customer Testing, and it will remain in that status for 11 months before changing to Closed status.
- Use **Escalate** if you would like to raise the urgency of the case. You will be prompt to add a comment, telling us why you would like to do so. See also our Support Escalation Policy here.
- **Printable View** will open the case in a new tab where you can print the case details or Save to PDF.
- The **Clone Case** button will appear for cases in status Closed. Use this button if you need to report back some additional work. You will be asked to add a comment indicating why you are cloning the case. The new case will have a link to the original one in the Parent Case field.

How can I search for cases?

When you know the number of the case you’re looking for use the search box on the top of the page. Use the Cases facet to narrow down to cases.

You can also use the 'Search this list' available on the right side of the case list view.

What is the Request Training tab?

You can request training for ProQuest products by submitting the Request Training form. Fill in the form with as much detail
as possible, and one of our Training and Consulting Partners will get back to you.

For Ex Libris products, please continue using learn@exlibrisgroup.com for training requests.

**What is the Grant Permissions tab?**

Support Center users can use the Grant Permissions tab to provide a colleague from their institution the ability to open cases on behalf of the institution, and view cases submitted by colleagues in the institution.

To grant permissions to a new colleague, ask them first to self-register to the Support Center (https://support.proquest.com/s/register)

When they completed the registration:

1. Log into the Support Center
2. Click the Grant Permissions tab
3. Enter your colleague’s First Name, Last Name and Email
4. Click Next

After clicking Next, you will see a message confirming that the permissions were granted.

**What is the Phone tab?**

For products that offer phone support, click this tab to get the phone numbers.

**What is the Chat tab?**

Click this tab to chat with one of our Support analysts.

Note that chat support is available only for some products.

Chat for the Higher Education Platform products is available from within the platform.

**What is the Support Mailing Lists tab?**

To receive updates from Ex Libris about your Ex Libris products and other updates, you can opt in to messages of your choosing. For example, if you wish to receive updates about SFX, you can now elect to receive those updates by updating your preferences in the Support Portal.

See also, Setup Email Preferences to Subscribe to Ex Libris Mailing Lists.

**How do I change my Support Center password?**

You can change your password by clicking your username on the top corner of the screen and going to Settings.

**What if the Support Center is inaccessible or my login isn’t working?**

If you are having problems logging in, just go to the Support Center login page at https://support.proquest.com and click the ‘Click here if you are having issues logging in’ link.
Additional Information

A list of all statuses assigned to cases, and their definitions, can be found here: What is Case Status, and What Does It Mean?

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