



SFX KnowledgeBase eService

Versions 3 and 4

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Overview

This guide provides detailed instructions for creating new SFX KnowledgeBase change requests via SFX and for configuring SFX to work with the CRM. This guide supplements the *eService Guide* and should be used in conjunction with it.

This guide is intended to assist staff members responsible for reporting and managing SFX KnowledgeBase change requests.

Until the fall of 2006, requests for SFX KnowledgeBase changes were submitted by SFX customers via the SFX Admin Center interface or by e-mail. All requests, including those initiated in the SFX Admin Center interface, were forwarded via e-mail to the SFX KnowledgeBase team for processing.

In order to improve and expedite the processing of SFX KnowledgeBase requests and to allow customers and managers to track the status of each request, it was decided to channel, store, and process all such requests in the CRM system. As a result, an integration mechanism between SFX and the CRM system has been developed.

The following are the main points of the system:

- The SFX KB has been defined as a separate product in the CRM system. It is included in the product drop-down menu when a new support incident is created in eService.
- Customers are able to submit their KnowledgeBase change requests to the CRM either via the SFX Admin Center or via eService.

- Customers are able to track and update their KnowledgeBase change requests via eService.
- Requests submitted via the SFX Admin Center are automatically transmitted to the CRM system. This requires an initial one-time configuration on the part of the customer.
- Customer requests are confirmed automatically by e-mail when submitted and again when closed.

Creating New Change Requests in the SFX Admin Center

There are two ways to create new SFX KnowledgeBase change requests via the SFX Admin Center:

- by clicking **KB changes via CRM** in the Troubleshooting section of the SFX Admin Center main menu
- by clicking **Send to Ex Libris** from the Edit Portfolio and New Portfolio dialog boxes

To create a new change request via the SFX Admin Center main menu:

- 1 In the Troubleshooting section of the SFX Admin Center main menu, click **KB changes via CRM**. The Send to Ex Libris dialog box is displayed:

Send to Ex Libris

* indicates a required field

***Contact name:** sarit ***Importance:** Normal

***Subject:** [Empty text box]

Target: -- Select Target --

***CRM Category:** -- Select Category -- ***CRM SubCategory:** -- Select subCategory --

Description: [Empty text area]

SEND CANCEL

Figure 1: Send to Ex Libris

- 2 Select a **Contact name** based on the setup in the `sfx_crm.config` configuration file (see [Configuring sfx_crm.config](#) on page 7 for more information).
- 3 In the **Importance** field, select a priority to indicate the urgency of the request.
- 4 In the **Subject** field, type a brief title that describes the request.
- 5 In the **Target** field, select the target relevant for the request. After selecting a target, the window is refreshed and a drop-down menu is displayed. Select the relevant sub-target from the drop-down menu.
- 6 In the **CRM Category** and **CRM Subcategory** fields, select the category and subcategory to which the request relates.
- 7 In the **Description** field, type a detailed description of the request. This description should contain as much pertinent information as possible.

- Click **SEND**. SFX sends the request to the CRM system and displays a confirmation message:



Figure 2: Confirmation Message

An e-mail message with details of your request is sent to the address defined in your user profile, confirming the submission of the SI. For example:

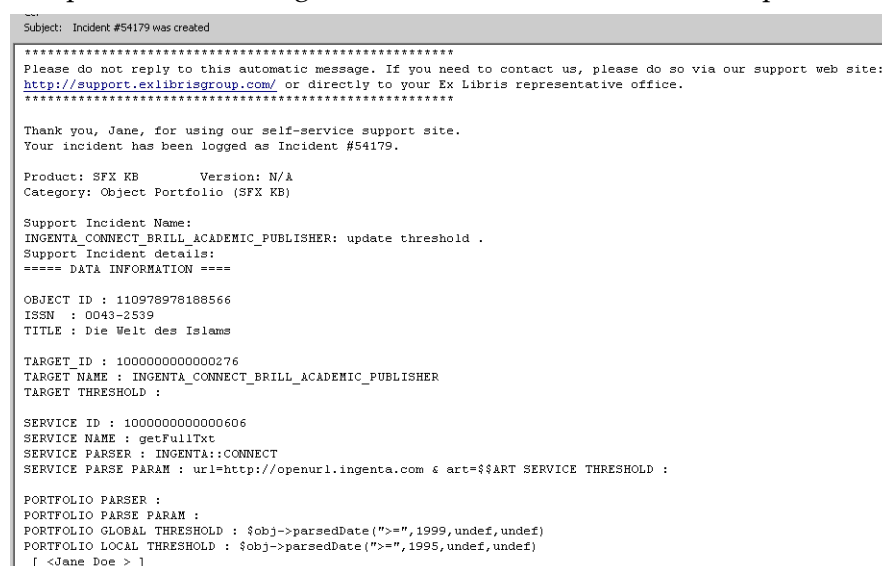


Figure 3: e-Mail Confirmation

This e-mail message is automatically generated by the system. Do not reply to this message.

To create new SFX knowledgebase change requests via the Edit Object Portfolio or New Object Portfolio dialog boxes:

- In the Edit Object Portfolio or New Object Portfolio dialog box, click **Send to Ex Libris**. The Send to Ex Libris dialog box is displayed (see [Figure 1](#) on page 5).
- Fill in the fields as described above. The **additional info** field includes the object portfolio information and is automatically generated by the system.
- Click **SEND**. SFX sends your request and the object portfolio details to the CRM system and displays a confirmation message. An e-mail message with details of your request is sent to the address defined in your user profile, confirming the submission of the SI.

Creating New SFX KnowledgeBase Change Requests Via eService

The *eService Customer Guide* provides an overview of Ex Libris support policy as well as detailed explanations regarding eService's major features. Refer to the **Creating a New Support Incident** section for information on how to open support incidents. Select **SFX KB** to submit an SFX KnowledgeBase change request.

Configuring SFX for Integration with CRM

Requirements

A user name and password are required to access eService. Contact your local support office to obtain an eService user name and password.

Installing the KnowledgeBase Update

Refer to the **SFX KnowledgeBase Update** section of the *SFX General User's Guide* for details on how to install the KnowledgeBase update.

Configuring the Files

The following two SFX files must be configured so that SFX can integrate with the CRM:

- `sfx_crm.config`
- `user_permissions.config`

Configuring `sfx_crm.config`

This file is located at:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/config/  
sfx_crm.config
```

It includes site-specific information such as contact CRM user names and encrypted passwords.

Each instance has its own configuration file. The configuration file can include multiple CRM contacts.

To configure `sfx_crm.config`:

- 1 Type `cn` (or `cd /exlibris/sfx_ver/sfx_version_3/<instance_name>/config`).
- 2 Type `vi sfx_crm.config` to edit the file.
- 3 Edit the file. The `sfx_crm.config` file includes three sections:

- Account type

Possible values are either CRM or LOCAL for internal use.

- CRM – KnowledgeBase change requests are submitted to the CRM system
- LOCAL – KnowledgeBase change requests are sent by e-mail to an internal party – for example, the consortium central administrator – who is then responsible for submitting the requests to Ex Libris.

The default setup is CRM.

If the account type is LOCAL, the **To** e-mail address must be defined in this section.

- `crm_info`

This section includes the CRM server URL and the system name. Do not change this information.

- Contacts

Configure this section to enable submission of SFX KnowledgeBase change requests via the SFX Admin Center interface.

Enter the following information:

- Contact name – the real name of the person submitting the SFX KnowledgeBase request. The contact name cannot include spaces in the configuration file. Write the full name with an underscore between the first and last name. In the contact name drop-down list, the full name without the underscore is displayed. The first contact set up in this section is displayed as the default in the contact name drop-down list. This field is mandatory.
- Contact e-mail address – Confirmation messages from the CRM system are sent automatically to the e-mail address set up in the CRM. Only if there is a problem connecting to the CRM does SFX use the e-mail address set up here to send a notification. The e-mail address can be personal or a group e-mail and must be placed in quotation marks. This field is mandatory if the account type is LOCAL. In this case, it is the **From** e-mail address.
- CRM user name – the user name issued by the CRM system. The user name is given to you by your local office or is sent automatically

from the CRM system. The CRM user name must be placed in quotation marks. This field is mandatory if the account type is CRM.

- CRM encrypted password – the contact's password for the CRM. The CRM encrypted password must be placed in quotation marks. This field is mandatory if the account type is CRM. Encrypt the password using the SFX Server Admin Utility. (For more information, refer to the **Generate Encrypted Passwords for Use in Configuration Files** section of the *SFX System Administration Guide*.)

NOTE:

All values (except the contact name) must be placed in quotation marks and separated by a TAB, for example, "contact_name", "email" "crm_user_name" "crm_encrypted_pass".

4 Type :wq to save the changes.

The following is an example of a `sfx_crm.config` setup.

```
Section "account_type"
#type can be CRM or LOCAL for internal use
#If type is LOCAL then the "to email address" must be
defined in this section
type          "CRM"          OR  "LOCAL"
              email         "library@university.edu"

EndSection

Section "crm_info"
server_url    "http://support.exlibrisgroup.com/
xmlservice.asp"
system_name   "Exlibris"
EndSection

Section "contacts"
#If the account_type is LOCAL the email below is the
"from email address"
#All values (except of contact_name) are quoted and
separated by TAB
#contact_name  "email"  "crm_user_name"
"crm_encrypted_pass"
John_Doe  "John_Doe@university.edu"  "JaoDa4933"
"2416f5d66313955553333"
EndSection
```

Configuring user_permissions.config

This configuration file includes the SFX admin user permissions. It is located at:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/config/  
user_permissions.config
```

To configure user_permissions.config:

- 1 Type `cn` (or `cd /exlibris/sfx_ver/sfx_version_3/<instance_name>/config/`).
- 2 Type `vi user_permissions.config` to edit the file.
- 3 Add the following line to the Administrator section:

```
CRM_SI_CREATION.WRITE    "Y"
```
- 4 Type `:wq` to save the changes.

Troubleshooting

- **Problem:** I have not received my User ID and Password for the CRM:
Solution: Contact your local Support office to obtain an eService user name and password.
- **Problem:** I am unable to log on to the CRM system:
Solution: Check for typing mistakes in your user name and password (uppercase and lowercase).
Verify that your browser is set to allow pop-ups.
- **Problem:** I am unable to send change requests via the SFX Admin Center:
Solution: Connect to the Ex Libris eService Web site and type in your user name and password. If you are able to connect, check the SFX configuration file.
- **Problem:** Whom should I contact if I cannot resolve the problem myself?
Solution: Contact your local Support office.
- **Problem:** How can I be sure that my SFX KnowledgeBase change request was submitted?
Solution: After clicking **Send**, the request is transmitted to the eService server. A dialog box is displayed with a confirmation message followed by an e-mail confirmation with the support incident number. You can also view your request in the CRM.

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- **Problem:** I received an e-mail saying that you need more information to continue working on my problem. What do I do?

Solution: This e-mail is generated when an analyst sets the status of your SI to 1st Line W4I (first line waiting for information). It means that additional information is required to process your request.

To provide the required information, log on to eService, access the specific support incident, and click **Add New Activity** at the bottom of the page.

Error Messages

- There is no account type defined in the `sfx_crm.config` file. Contact your local SFX administrator.

Solution: In the account type section of the `sfx_crm.config` configuration file, define the type.

- There is no e-mail address defined for the LOCAL type account in `sfx_crm.config` file. Contact your local SFX administrator.

Solution: In the Account type section of the `sfx_crm.config` configuration file, define the administrator e-mail address that is responsible for submitting SFX KnowledgeBase change requests to Ex Libris.

- There are no Contacts defined in `sfx_crm.config` file. Contact your local SFX administrator.

Solution: In the Contacts section of the `sfx_crm.config` configuration file, define the contact information.

- `<name>` is not a valid recipient e-mail address.

Solution: In the Contacts section of the `sfx_crm.config` configuration file, check the contact name and make sure it is not placed in quotation marks and that there is a TAB after the contact name.

- Contact name/e-mail is missing from the `sfx_crm.config` file.

Please update the configuration file.

Solution: This message appears when the account type is LOCAL. Check the contact name and e-mail address in the Contacts section of the `sfx_crm.config` configuration file. Make sure the contact name is not placed in quotation marks and that there is a tab between the contact name and the e-mail address.

- Problem with missing Contact information or User name/Password in `sfx_crm.config` file. Please contact your administrator.

Solution: This message appears when the account type is CRM in the Contacts section of the `sfx_crm.config` configuration file. Check the

contact name, e-mail address, CRM user name, and password. Make sure the contact name is not placed in quotation marks and that there is a TAB between the values.