
MetaLib v4 Upgrade Information for North American customers

- **Article Type:** General
 - **Product:** MetaLib
 - **Product Version:** 4
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Description:

This KB article provides information on the upgrade process for customers in the US and Canada. Note this information applies to customers in those countries ONLY.

Resolution:

The following information is critical for the success of the upgrade process.

1. Getting ready for MetaLib Version 4. Please refer to the attached document "Getting Ready for MetaLib Version 4" for tips and hints on what to do to prepare for the upgrade.

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2. How to schedule an installation with the Boston office of Ex Libris. Whether you plan to install MetaLib version 4 on a new server or on the same server as version 3.13, the first step to schedule an installation is to fill out one of the attached forms and send it to metalibupgrade@exlibris-usa.com.

MetaLib Version 4 on New Server - to be used if installing v4 on an entirely new server

MetaLib Version 4 on Existing Server - to be used if installing v4 on a server currently running MetaLib.

This form will provide the information needed for Ex Libris staff to generate a version 4 license as well as to schedule a week in which your institution can run the MetaLib Installation Kit (MIK). As stated previously, the MIK is a self-installation process, but we are 'scheduling' customers in small groups to ensure that Ex Libris staff is available for assistance.

We will process your form and schedule your installation week on a first-come, first-served basis. We will try our best to schedule your first choice. Please note that the actual completion time for the MIK is a few hours, but we have provided a full week to answer your questions or address the needs of your institution. If your installation is not finished in a week, we will continue to work with you beyond your starting week until your installation is completed. The Upgrade Express Kit (UE) can be started shortly thereafter and run at your own pace. Because we anticipate the completion time will vary widely by institution, we will not schedule specific times for you to run the UE. Instead, Ex Libris staff will be available to answer your UE questions as they come up.

After your form has been processed, we will send you an email identifying your assigned week. Shortly before your assigned week, we will send you another email providing your license and FTP information to download the MIK.

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3. Training materials and support. All training for the upgrade is provided with recorded webinar sessions posted to the CRM. To access them, go to the Literature section of the CRM. Choose "MetaLib" as the product, hit the Search button, and you should find the six modules listed on the screen.

Every week, North American Support and Implementation staff will host a conference call where customers can discuss issues or questions about the installation and upgrade processes. General questions about Version 4 functionality can also be raised in the weekly call.

Access information for the call is:

Telephone: 1-866-779-0774

Meeting Number: *1933830*

If you join the call, please be prepared to identify yourself and your institution. Ex Libris staff will be looking out for customers who may need more personalized attention during this process, so distinguishing yourself will be to your benefit.

If at any time you would like to have a one-on-one call with Ex Libris staff, please open a SI in the CRM briefly outlining the issues you'd like to discuss (so we can figure out the best staff on our end to help you). We'll contact you as soon as we can with information about our availability.

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4. Services to assist with the upgrade. Please review the attached document describing services and pricing available to assist you through the upgrade process. If interested in any of these services, please email susan.stearns@exlibrisgroup.com or open a new Support Incident.

Additional Information

north american, upgrade

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