IGeLU conference
Session 4.6 Ex Libris Support Services - a Customer / Ex Libris collaborative review

Martin Büscher, Head of European Support, Ex Libris
Pascal V. Calarco, Associate University Librarian, Research & Digital Discovery Services, University of Waterloo
Theo Engelman, Senior ICT consultant, Utrecht University Library, IGeLU SC
Adi Fubini, Support Manager, Ex Libris
Habib Tabatabai, Interim Executive Director, Chambers Library, University of Central Oklahoma, US

Graphics to help visualize the topics dealt with in the questions below are available on:
http://igelu.org/wp-content/uploads/2014/09/4.6-visuals.pdf

Please discuss the new tiered support model for Ex Libris. What have you achieved from this, and how are you measuring success?
Adi:
The Tier module has worked for a few months now, with one layer allowing customer contact with first line of support. The customer is always in focus. The concept should allow faster progress allowing a first response. As a result a Tier 1 layer has been created in the major regions: North America, Europe and Headquarters. The Tier also allows for standardization of all procedures, although recognizing an awareness of regional differences.

The Tier 1 system will support Alma, Primo, SFX, thus reducing difficulties with interoperability across systems. It will also decrease the need for customers to be moved between teams. The support teams have a long of support and knowledge in regions, where the customers are seen as a whole.

Martin:
Tier 1 staff will be more customer focused, but Tier 2 staff are also customer facing but will be more involved in giving more detailed support. More detailed assessment and analysis will be undertaken by Tier 2 staff, whereas Tier1 staff address simpler cases. This division should allow time for Tier 2 staff to undertake longer cases.

Question from public:
The customer feels that Tier 1 staff have no idea of what the customer is talking about so it takes days before it gets escalated, and so he feels that it is important to give Tier 1 staff training

Martin:
The main task of Tier 1 is resolution without losing quality control, so as soon as case is identified as complex it should it be moved to Tier 2. If the analyst does not understand problem he will ask for more info before he can refer the issue. However as this should be the exception if this issue is happening often then it is not good. There should not be ping pong with customer.

Adi:
Tier 1 should collect all the information together in case they need to transfer the case. Therefore they are instructed to ask for all information before transferred. If the Analyst cannot understand the issue, they can contact customer by phone, thus reduce communication back and forth with the customer.

Theo:
Agreed it is better to have phone contact where necessary.

Adi:
Phone calls will not be possible for all cases, but will be used where there is the possibility of miscommunication or where they need more information.

Question from public:
Do Tier 1 staff have access to log files on servers? The customer knew what they saw but they could not replicate the issue two weeks, so therefore wanted the log files checked.

Adi:
Staff do have access to log files.

Question from public:
Will this Tier strategy expand beyond Alma, Primo and SFX?

Martin:
It is not planned to expand beyond these products, particularly as the other products have very strong support teams and the nature of the typical problems of these products are less suitable for a Tiered support structure.

Could you talk about the communication process that the support teams have with the Product Manager and the product development teams? From a customer perspective, this could often be improved.

Martin:
Understand that people feel that issues are put into a black hole if they are moved into development and they realize they need to improve on this. Tier 2 contains product experts and the structure allows for direct contact between support and development/Product Managers. Regular updates are provided including prioritization of issues that need to be fixed in upcoming Service Packs.

The new CRM provides a much better interface between development and support as there is a convenient API between Salesforce (used by support) and Jira (used by development). It is important to increase the visibility of development cases.

For Alma enhancement requests: There is a direct connection between Alma Product Management and support to prioritize enhancements. Other products rely on NERS-enhancement processes (IGELU/ELUNA) as best way to get the idea of the customer requirements.

What is the number of current global support staff? How is this workforce distributed?

How has that changed in the last 3 years?
How does this number correlate to the changing number of customers?
In your opinion, have you added adequate support personnel in relation to the number of customers you have added? Is there a criteria/measurement/ratio for these?

Adi:
Support numbers are growing every day.

Current numbers:

54 Headquarters, 27 North America, 11 Europe, 2 APAC
  T1 – 21 globally
  T2 – 24 globally

  33 for the other products
  14 people in Data service,
Many of the staff have worked for many years for Ex Libris. While there are 92 support staff the concept that having everybody being seen to be involved in support involves a change in mindset change. This includes the staff in Development where a requirement for them to be seen to be focusing on the customer is very important.

As customer satisfaction is very important random phone surveys will be conducted to assess customer satisfaction around cases.

Constant measurement occurs to check they have enough staff for the number of institutions.

Measures include: how many cases are opened; how many are able to be handled; whether any changes are required for the different products; response time; resolution time. This allows decisions on extra recruitment , or to shift people across regions.

Salesforce, with its dashboards, allows measurement to occur more accurately. Every 2 hours the manager is able to check that everything is working OK, and the load is not too heavy across teams, with enough support across teams.

Previously Primo and SFX support had not been provided from Hamburg but this is now about to occur.

While there are no people specially assigned to interoperability, all support staff are trained on interoperability issues for the relevant products. Ex Libris also improves interoperability knowledge in the teams by shifting staff for example from Aleph support to Primo support and vice versa.

Tier 1 staff gets the case so they are the ones that initially see the issue, so it is important that Tier 2 undertake a responsibility for the flow of knowledge to Tier 1, including training of Tier 1 staff about issues.

How many support engineers are assigned to each application (Aleph, Alma, Primo, SFX, Voyager, others)? How many are focused on interoperability?
See above

We appreciate the improved Cloud Systems Status pages. Can you explain the time gap between the identification of a cloud service disruption and the publication of it on this service? What is happening in 15 minutes?

Adi:
With the system monitoring problems can be detected often before the user sees any problems. Then it depends on how quickly the details of the problem can be identified. This is required so the problem or issues aren't magnified if they can be resolved earlier.

In the 24x7 Hub it can take a few minutes to see what is happening and the magnitude and identify how many customers affected. They do their best to understand what issues and what customers are affected. While they would be happy to identify issues within seconds, it does take time to access problems.

They do monitoring system downtime and the time this was posted and the time before notification was made has decreased. They are careful to be as sure as possible, including further monitoring checks, including checking from people who are working on the problem. It is important to not make a posting on status page which would mislead people

Do you consider to add Push technology to the Cloud Systems Status pages, for instance active notification (Email, SMS, RSS or any instant messaging tool) customers that register for such a service pointed to the system(s) their software is running on?

Adi:
Email notification is available only. There are no current plans to add other options.

The implementation of the Salesforce Support Portal is complete now and reception by the customers is quite positive. How does Support Services benefit from Salesforce in contrast with the previous system? What is the status of enhancement requests that the user community submitted and what is on the roadmap for Salesforce? The initial bumps have been worked out, and customers are now satisfied.

Martin:
Salesforce is a big improvement as it is a state of art cloud-base system which allows options which were impossible in Pivotal.

The Report functionality allows the use of dashboards by support mgrs., allowing the team leader to see dashboards for their team, this allowing them to check issue of team , which gives them a much better insight of organization. In addition individual analysis is available

as they can gain a much better idea of open cases. Staff are also able to get a better idea of the open access, indicating age and priority of cases. This allows them to work on older cases first so they can reduce backlog.

The KB is able to display articles about issue, and staff are able to check whether the customer has found any relevant articles that relates to their problem. It is noted that with new versions they do need to update support about any changes. All staff in Support can access the Jira system to research what is happening.

Salesforce is also used by Sales, so the customer data is more up-to-date and this makes life easier for Support.

With a dedicated enhancement process for Salesforce which involves the collecting ideas from customers, some of which have been implemented already, including better support for consortia. Also there were too many emails sent with incorrect subject heading. They are also working on a customer interface allowing Support to create new customers, reset passwords, instead of this work being done by the MIS team. There are other things on the roadmap for 2015.

Question from public:
Are there plans for basic reporting on customer side?

Martin:
The new search interface allows the export data which can be used how you like but is not really dashboard. There are no plans for this on the roadmap and he is unaware this has been raised in the enhancement process.

Theo:
It is suggested this should be raises in the next round of customer enhancement.

We like the new Developer Network, it's a valuable successor of the El Commons. Can you explain why some documentation on Interoperability is located in the Documentation Portal where similar documentation is located on the Developer Network? Do you have a clear vision on the criteria for offering documentation on one place or the other?

Martin:

The general idea is that the Developer network is the home of API documentation with Ex systems and other systems whereas the Documentation Portal contains functional information about Ex Libris systems. However historically we know some documentation is still on the Documentation Portal. New information is updated and loaded onto the Developer Network, and there are no plans to move the old information over.

The separate developer network session will give more info.

Theo:
Maybe this could be a project?

Martin:
He would prefer better search interface so it doesn't matter where things are located.

When incidents get escalated to headquarter (Jerusalem office), some customers believe that these are going into a "black hole." What does Ex Libris intend to do to try to improve communication and response time on incidents that fall into this category?

Adi:
The intention is to improve the visibility of cases that go to development. They are still investigating the details of how this will work but this is the vision and is on the roadmap.

With Primo it should be very fast to move from Tier 1, to Tier 2, and to Development if required.

Support is able to spend more time on analysis, allowing Development to get more time on development. The visibility should better with the strategy of reduce the time spent on analysis.

Martin:
It is not always able possible for cases to be resolved within 1-2 days, but customers should be updated on what is happening, including update if it is a difficult case.

Question from public:
What is happening to Voyager/Aleph issues disappearing to black hole?

Martin:
The Tier structure is for Alma, SFX and Primo.

The Aleph backlog is decreasing. Any Product Manager backlog is because the Product Manager relies on the enhancement voting process.