



Q&A Panel Discussion on Ex Libris Support Services

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- **Submitting Cases**
How can customers help to ensure quick handling of cases?
- **Lifecycle of a Case**
What is happening with a Case while its handled by Ex Libris?
- **Survey on Support Services**
Can you share more details on the survey the Spanish and Italian User Groups (ITALE and EXPANIA) did?
- **Regional and National Requirements**
How does Ex Libris Support make sure that topics that are relevant only for a specific market are getting proper attention?
- **Feedback to Ex Libris Support**
What communication channels can customers use to provide feedback related to a Case?
- **Knowledge Center**
Can you share tips and tricks to search within CKC?



Submitting Cases - How can customers help to ensure quick handling of cases?

Tips before you are submitting Cases

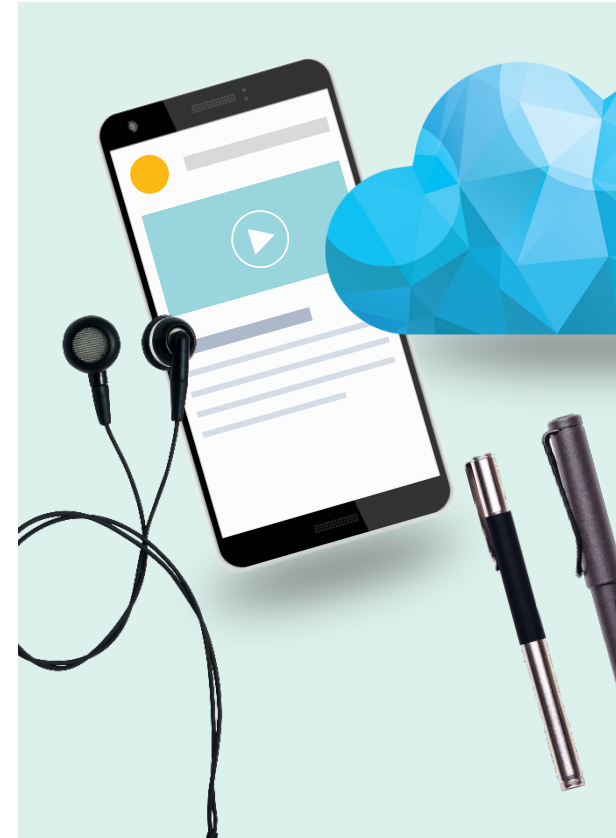
Knowledge Center

Knowledge Articles
Documentation/Training

Developer Network

API Documentation
Tech Blog / Forum

- Make sure you and your colleagues are familiar with the Support Portal, and all the Ex Libris knowledge resources (Knowledge Center and Developer Network).
- Consult these resources before submitting a Case.
- Don't hesitate to ask Support! Whether you have a basic question or a very involved technical matter to discuss, just send us a Case!



Customer Tips - Ex Libris User Community

- IGELU / ELUNA User Groups



- Engage with your fellow Ex Libris customers via IGELU/ELUNA meetings and mailing lists – they may know the answer:
<http://el-una.org/mailling-lists/>
- IGELU/ ELUNA/ members can participate in an enhancement voting process – see [Enhancement process - Common Q&A](#)
- Collaborate with other customers via Ex Libris platforms
 - [Developer Network](#)
 - [Ideas Exchange](#)



Submitting Cases – What should be included?

- Not sure what Asset (Product) to pick?
Report it where you see it.
- Limit yourself to one problem per case.
- Tell a story... include a scenario, describe expected vs actual behavior. Screenshots and screencasts may help especially if it's a performance issue or a complex workflow problem.
- Who is affected, and how? Describe the scope and impact.
- Does the problem happen all the time? If not, let us know.
- Mention the knowledge resources (articles, documentation...) that you have already consulted.
- Did you make a change and are now seeing unexpected behavior?
- If the problem relates to product functionality for signed-in users, provide a test user login so we can test/replicate.
- Have a big project or big plans in mind? Any timeline that is important to know? Share this in advance... tell us your goals, and we can recommend how to get there in time.
- More tips - see this article
[Troubleshooting Tips to help get Alma Case Solved Quicker](#)



Submitting Cases – Selecting the right Priority

- Case Priority:
You can decide between four Priorities.

Priority ▼

Low

Normal

High

System-Component Down

Description Information

Title

- Selecting the right Priority is important. Our analysts are handling your Cases according to the Priority that you have selected.
- Use **System-Component Down** priority only when the product is down, or the performance/functionality makes it unusable. Cases with this priority will trigger the 24x7 HUB immediately.
- If an issue or question is urgent or time-critical for you:
Mark the Case as **High** priority.
But: When all your cases are **High** priority, Support cannot tell what Case is most important to you.





Lifecycle of a Case - What is happening with a Case while its handled by Ex Libris

The Life of a Support Case

- New Cases will be directed to the appropriate Support Team
- An Analyst will take ownership, and send a first response according to the Ex Libris Initial Response SLA:

Priority	Description	Initial Response
System/Component Down	Service is not available An inoperable production module	1 Hour
High	Other production performance-related issues, typically a module feature working incorrectly	1 Business Day
Normal	Non-performance related incidents, including general questions, requests for information, Documentation questions	2 Business Days
Low	Low priority issues or questions	2 Business Days



Case Communication

- The Case status is always visible in Support Portal.
- For list of Cases status see:
[What is Case Status and What Does It Mean](#)
- Some Case statuses trigger an accompanying email.
 - *Pending Customer Reply*
When we request more information from you.
(You have 28 days to send a response before the case is set to status Resolved)
 - *Resolved*
When we provide a solution to your problem.
(You have 14 days to send a response to keep the case open and under investigation)

Development-Related Case Statuses

	Case Status: Pending Development	Defect confirmed. Creating a fix is part of our Development Work Plan, but we don't know when the fix will be available. <i>Once a Case goes to Pending Development Status, you can expect a longer interval before further updates are provided via the Case.</i>
	Case Status: Pending Release	Development has created a fix for the defect, and identified which upcoming product release will deliver the fix.
	Case Status: Resolved	After a product release, we usually set Pending Release Cases to Resolved status. They changed to Closed after 14 days.
	Case Status: Pending Customer Testing	Need more time to test a fix? Click the Pending Testing button. It will remain in Pending Customer Testing Status for 11 months.
	Case Status: Pending Work Plan	Case is under consideration, but not in our active development work plan (applies to defects where priority is not "High," and very few customers have reported the same issue). If after 2 years the Case doesn't move into the Development work plan, it will be set to ".



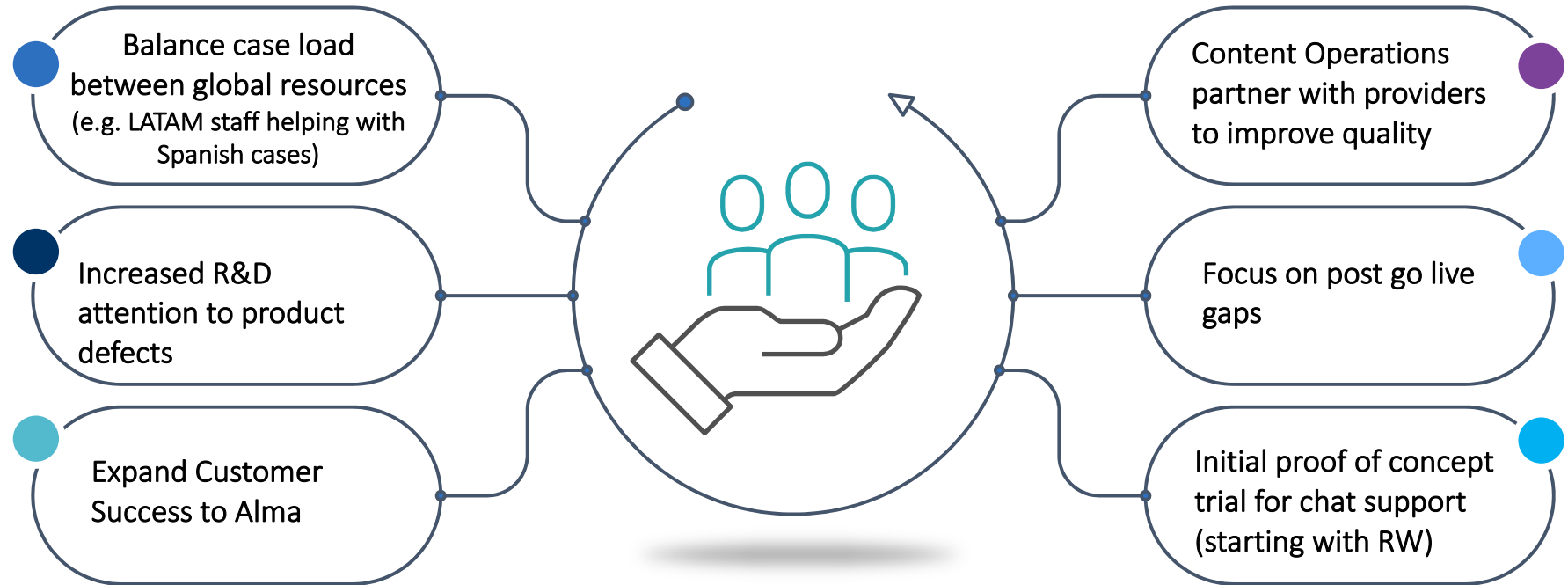
Survey on Support Services - Can you share more details on the survey the Spanish and Italian User Groups (ITALE and EXPANIA) did?

EXPANIA and ITALE Survey

- The Spanish and the Italian User Groups asked their members about satisfaction with Ex Libris Support.
- Main feedback:
 - Resolution and response time of cases handled by Tier 1, Tier 2 and R&D needs to be improved.
 - Customers prefer to communicate with Support staff in their native language.
 - In some situations communication via phone or chat may be preferred.



Strengthening Ex Libris Customer Experience





**Regional and National Requirements -
How does Ex Libris Support make sure that topics that are relevant
only for a specific market are getting proper attention?**

National and Regional Requirements

- Sometimes issues are relevant only for a specific market and not important for the global customer community. Examples:
 - CJK requirements
 - Support of Indigenous languages
- If a specific Support case is critical for your market, update the Support team so that Ex Libris is aware of the urgency and impact.
- Local requirements are forwarded to special channels to review.
- Ex Libris is always balancing between functions relevant for the whole community and functions that are critical only for part of the customers.





Feedback to Ex Libris Support - What communication channels can customers use to provide feedback related to a Case?

Case Escalation



- Follow our [Escalation Policy](#) to send an escalation email when you want to raise the urgency of an existing Case.
- Remember to include the Case Number and a description of why you need it escalated (so we fully understand the issue).
- Regional Support managers will respond, and work with the Case Owner to expedite your Case.
- The email address is monitored during Ex Libris office business days and you regularly should expect a response within 1business day.



In-Case Feedback

Feedback

- A option to share positive or constructive feedback about a Case that is in progress.
- When viewing a Case in the Support Portal, click the blue Feedback button. You will be prompted to pick a Category from a drop-down menu, and enter your feedback.
- Your feedback will be seen by the Case Owner, and reviewed by an Ex Libris Support Manager on a weekly basis.
- This doesn't replace the escalation procedure or Case Satisfaction Surveys – it's just another way to tell us how we're doing!



Case Satisfaction Surveys

- Email inviting you to participate sent when a Case goes to **Resolved** status.
- Click the icon representing how satisfied you were with how we handled your Case.
- Once you click, you will see a confirmation page, and have an opportunity to add comments.
- Your feedback is VERY Important... please participate, and please include your comments.



Dear Yorai,

Your case "Closing" (#00059235) is now closed. We would be very grateful to hear how satisfied you were with the way Ex Libris handled this case. This will only take a moment of your time. Please choose one of the ratings below:



[Very Satisfied](#)



[Satisfied](#)



[Dissatisfied](#)



[Very Dissatisfied](#)

Your feedback is very important to us. Thank you for helping us to improve the support Ex Libris provides to our customers.

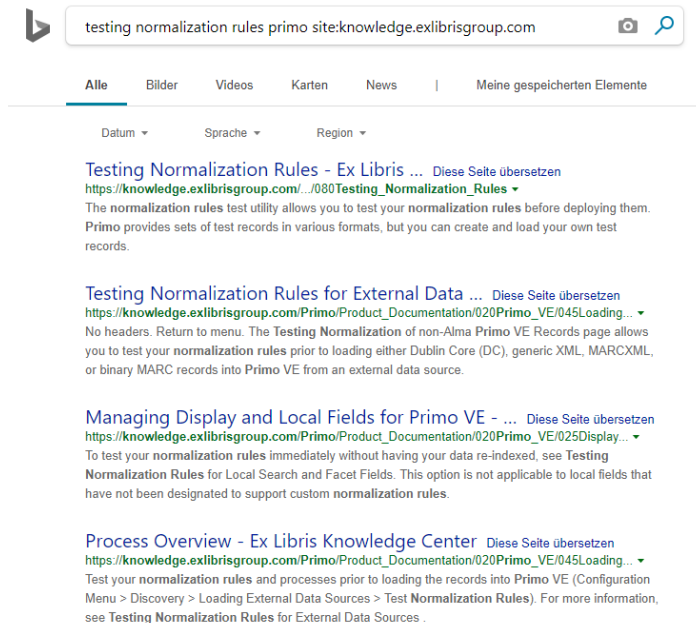
Thank you,
Ex Libris



Knowledge Center - Can you share tips and tricks to search within CKC?

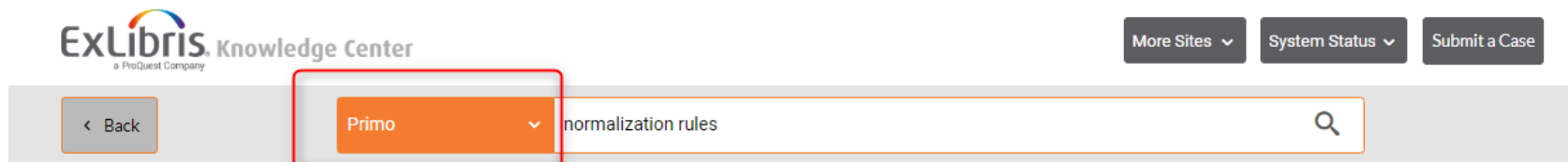
Using Search Engines

- The content of the Knowledge Center (CKC) is indexed by Google, Bing and other search engines, so you can use these, to search for Ex Libris resources.
- If using external search engines, you can limit the search to the CKC by using following syntax:
site:knowledge.exlibrisgroup.com

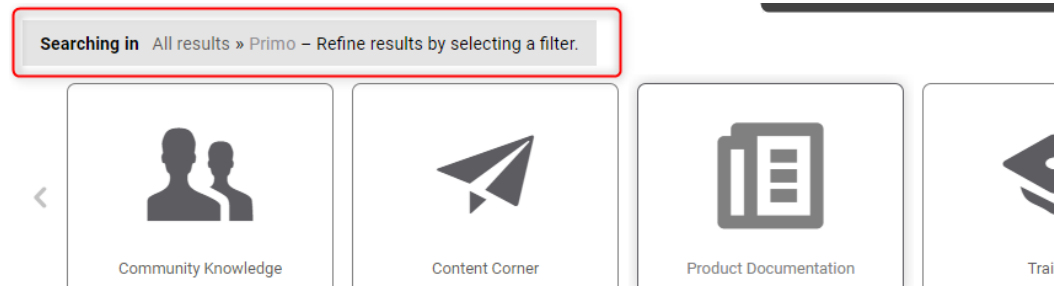


Searching within CKC

First, select the relevant product, using the drop-down menu left to the search box.

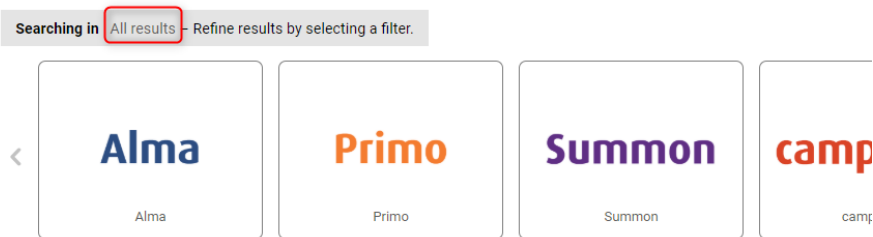


Once having the results set, note the breadcrumb path at the upper left corner of the page.

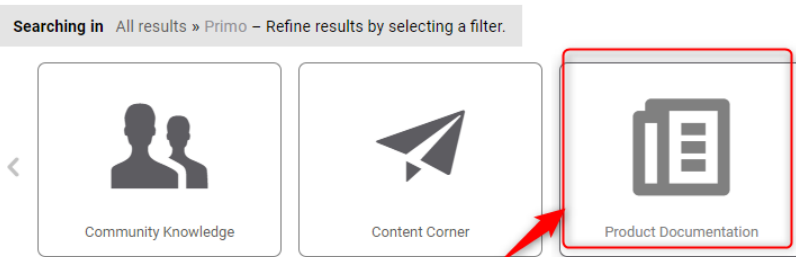


Searching within CKC

You can now either extend the results set to other products by clicking on "All results" in the breadcrumb.



Or you can filter the results to get only specific type of resources.



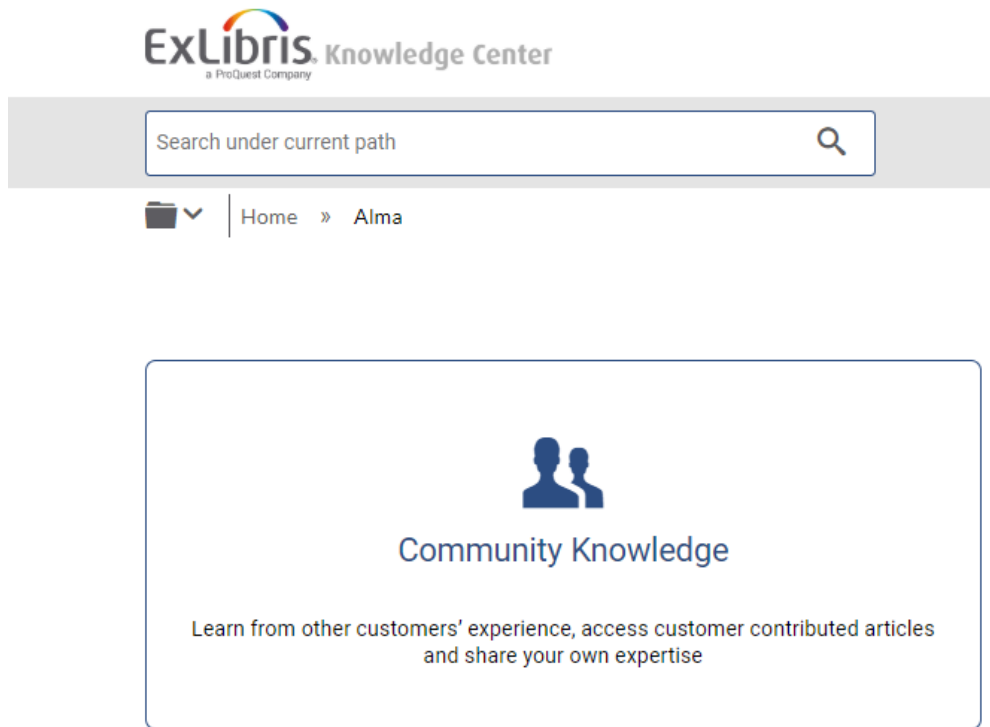
CKC Search Operators and Syntax

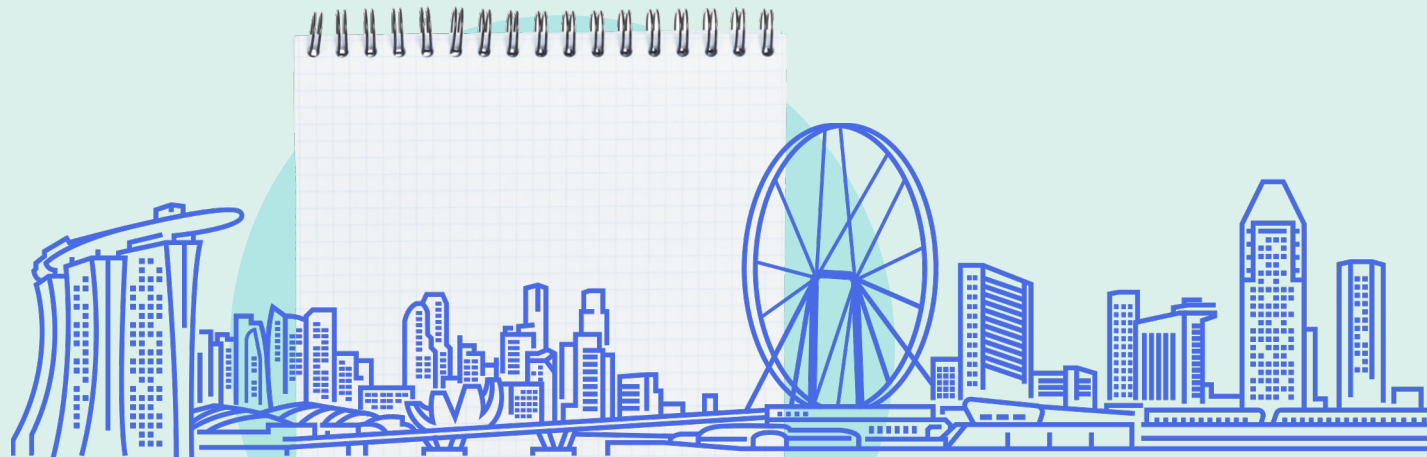
- The default operator is: OR
Other available operators (all in uppercase): AND, OR, and NOT
- For exact phrase search, use double quotation marks:
`"patron barcode"`
- Asterisk can be used as a wildcard. Search for `seg*` to search for "segment" along with "segregate", etc.
- When searching with multiple term, you can boost a specific term in the result, to give it higher priority in the search. Use the caret sign (^) for that:
`test^10 normalization`

And remember...

You can contribute
knowledge to the
Knowledge Center too!

See
[Customer contribution
on the CKC](#)





THANK YOU!

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