Support & Operations Update

Nina Keren-David

Melbourne February 4, 2013

THE UNIVERSITY OF ADELAIDE AUSTRALIA

SUB CRUCE LUMEN

UNSW

UNIVERSITY of OTAGO

SAPERE AUDE

Te Whare Wānanga o Otāgo

MACQUARIE UNIVERSITY

MONASH University

University of South Australia

RMIT UNIVERSITY

University of Western Sydney

Bringing knowledge to life

Curtin University of Technology

ExLibris Alma
Congratulations Swinburne University
1st Alma Go-Live in ANZ

Good job!

Operations & Support

Knowledge-Centered ExLibris

Global Operations Structure

Cloud Engineering	Cloud Operations	Global Customer Support	Data Services
"Design & Define" Designing infrastructure and Cloud tools	"Perform & Maintain" Capacity and performance, provisioning, planned and preventive maintenance	"Customer Centric" Supporting on Premise and Cloud solutions	Knowledgebase products and linking operations

Operations & MIS/IT

Planning & control, Information systems and IT

Knowledge-Centered ExLibris

Global Customer Support

Support Director

Nina Keren David

APAC Focal Point

- Channel for special issues and escalations
- Ongoing communication
- Internal advocate

Nina.keren-david@exlibrisgroup.com

ExLibris

Communication

- Support Portal (SalesForce)
- 24/7 Hub - System Down issues
- **Escalating path:**
  - Escalate to owner via Support Portal
  - Escalate to **Support Manager**
  - Escalate to Support Director, Nina Keren-David: nina.keren-david@exlibrisgroup.com, +972-547-204866

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Communication: 24x7 Hub

ExLibris

Escalation Path

Julia Goldshtein

Primo Global Support Manager

Julia.goldshtein@exlibrisgroup.com

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Escalation Path Alma

Judith Fraenkel
Alma Global Support Manager

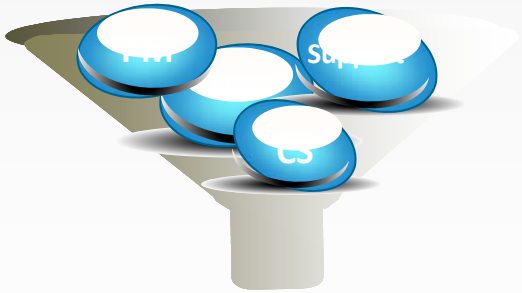
Judith.fraenkel@exlibrisgroup.com

ExLibris

Alma Support Calls

Helping customers become more successful in using Alma

- Ensure customer success with Alma post STP



Professional Services

Customer Support

Yisrael Kuchar

STP

ExLibris

Customer Support Highlights

Main achievements 2013

- Migrated from Pivotal to SalesForce CRM
- Introduced Knowledge-Centered Support (KCS)
- Conducting Case Driven surveys

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Case Driven Surveys

Survey trigger: Case status: closing/closed

Weekly phone surveys

Monthly executive reports

Launched: September 2012

782 calls (~50 average per month)

ExLibris

Goals

Gauge satisfaction with support services

Follow up on specific problematic issues

Identify problems and trends in support teams

Increase overall customer satisfaction

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Fenway Libraries Online

Survey Answers

Knowledge & Expertise	10
Professional Manner & Politeness	10
Quality of Communication	10
Speed of Resolution	10
Overall Satisfaction	10
Comments & Suggestions	Kelly's comment, "This is an example of the perfect 10. Everything was done right. The analyst was knowledgeable, polite, clear and FAST! I was even given a first response on the day I wrote in." She did add that it's clear that overall; the SFX support team is MUCH faster than the Voyager support team which is "often delayed in their replies and responses."
Created By	Nina Keren-David, 10/18/2012 7:59 PM

Edit Delete Clone

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Takeaways

- Main complaint: resolution time (too long)
- Communication frequency: "keep us updated!". Taking an action plan to contact customers every two weeks

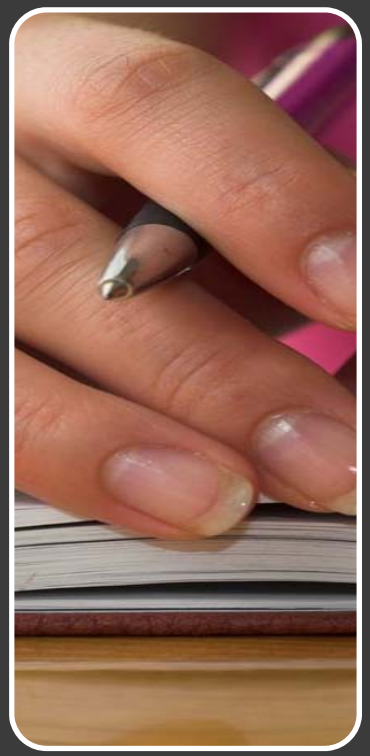
ExLibris

KCS

Knowledge Centered Support

Knowledge-Centered ExLibris

המטרות שלנו היום



What is KCS?

How can KCS help me?

How do I use KCS?

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What is KCS?

"KCS is the **industry best practice** for

capturing,

structuring,

reusing,

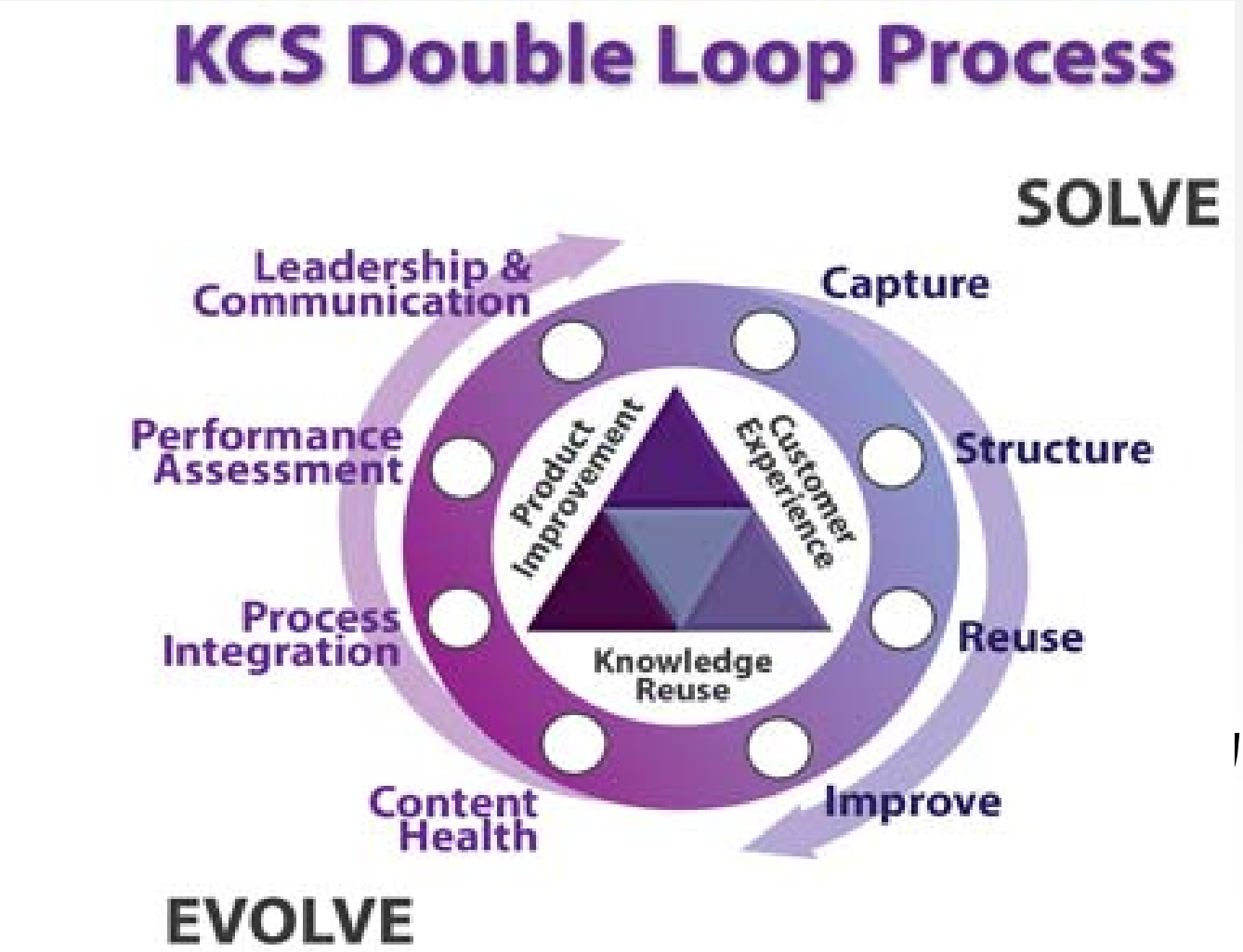
and improving knowledge

while delivering service and support."

Consortium™ for Service Innovation

Knowledge-Centered ExLibris

What is KCS?



Content from Consortium for Service Innovation
www.serviceinnovation.org

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KCS places ***knowledge*** as the key asset of the organization

http://www.serviceinnovation.org/

Improved customer success and **self-service**

Up to 50% **case deflection**

Content from Consortium for Service Innovation
www.serviceinnovation.org

KCS Article Types

Solution

Problem and Solution

How To

Goal and Steps to Achieving It

Q&A

Question and Answer

Non-KCS

Predates KCS use;

Will be converted into KCS Format

Knowledge-Centered ExLibris

Solution Article

Rate This Article (Average Rating: 5) Hide Properties

Publ

Last Mo

Publ

Problem Symptoms

Environment

Cause

Resolution

Audience

ts Aleph

Article Number 000021894

Summary

oading new patrons via PLIF (p_file_20) gives this error in logfile:

racle error: io_z305_write
RA-00001: unique constraint (XXX50.Z305_ID) violated

leph 20
leph 21
leph 22

he PLIF input file used by customer first includes "real" sub-library record for Z305 (sub-library ABC") and then XXX50-record for z305.

n Aleph when a "real" sub-library record is created, always the ADM-record (XXX50) is created utomatically at the same time with the same values. This is hardcoded and can not be configured. his means that at the stage PLIF is processing the XXX50-record from input file, it already exists because it was created while handling the ABC-record) and an Oracle error is produced.

o get rid off this message there are two options:

) Remove XXX50-records from input file as PLIF is creating them automatically while handling the ther z305. So it is not needed to include them explicitely.

b) Change the order and move in the XXX50-record prior to the ABC-record (this might be useful in case for any reason you want to create XXX50-record with other values than ABC-record).

Additional Information
Old KB Item number
Category
Subject
Product Aleph
Product Version
Attachment

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How To Article

Hide a MARC Field in the OPAC Printable View

Rate This Article (Average Rating: No Rating) Hide Properties

First Published	11/20/2013 4:40 AM	**Article Audience**		**Article Number**	000021628
Last Modified	12/10/2013 4:39 AM	**Products**	Aleph	**Summary**	
Last Published	12/10/2013 4:39 AM				

Desired outcome / Goal Hide a MARC field in the OPAC

Procedure
1. Move to the tab import directory for the BIB library
cd ./xxx01/tab/import/
2. create new generic fix named delete_xxxxxfield to delete the MARC field:
vi delete_xxxxxfield
3. add the following line

Additional Information Example for deletion of a field
see example Four in attached ppt show 'homefix.ppt'

Old KB Item number

Environment Aleph 20

Category Web OPAC - ALEPH

Subject General - ALEPH

Product Aleph

Product Version 20

Attachment homefix.ppt

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Question & Answer Article

SMS service / Where to start? Printable View

Rate This Article (Average Rating: No Rating) → Rate This Article (Average Rating: 5)

First Published	12/6/2013 5:17 AM	**Article Audience**		**Article Number**	000021819
Last Modified	12/6/2013 5:17 AM	**Products**	Aleph	**Summary**	
Last Published	12/6/2013 5:17 AM				

Question

We are looking into the SMS Messaging service and whether it would be of interest to us and our users. We are not sure where to start.

Answer

We suggest to consult the following documentation:

- Ex Libris Documentation Center > Cross-Product > Technical Documentation > SMS Proxy > SMS Proxy User Guide
- Ex Libris Documentation Center > Aleph > Support > How To from Support by subject > Miscellaneous > SMS Messaging in Aleph.ppt
- KCS article 000001823 (this KB has an attached document with a sample configuration)

Ex Libris is not able to work as service provider for SMS for you. In any case you have to directly contact a provider to get an account for sending SMS.

By default, the SMS proxy supplies two adapters. Each adapter supports sending SMS messages via one of the following providers:
- SimpleWire www.openmarket.com
- Clickatell www.clickatell.com

Customers may add their own adapter for other providers.

Additional Information

Old KB Item number

Environment Aleph 21
Aleph 22

Category

Subject

Product Aleph

Product Version 21

Attachment

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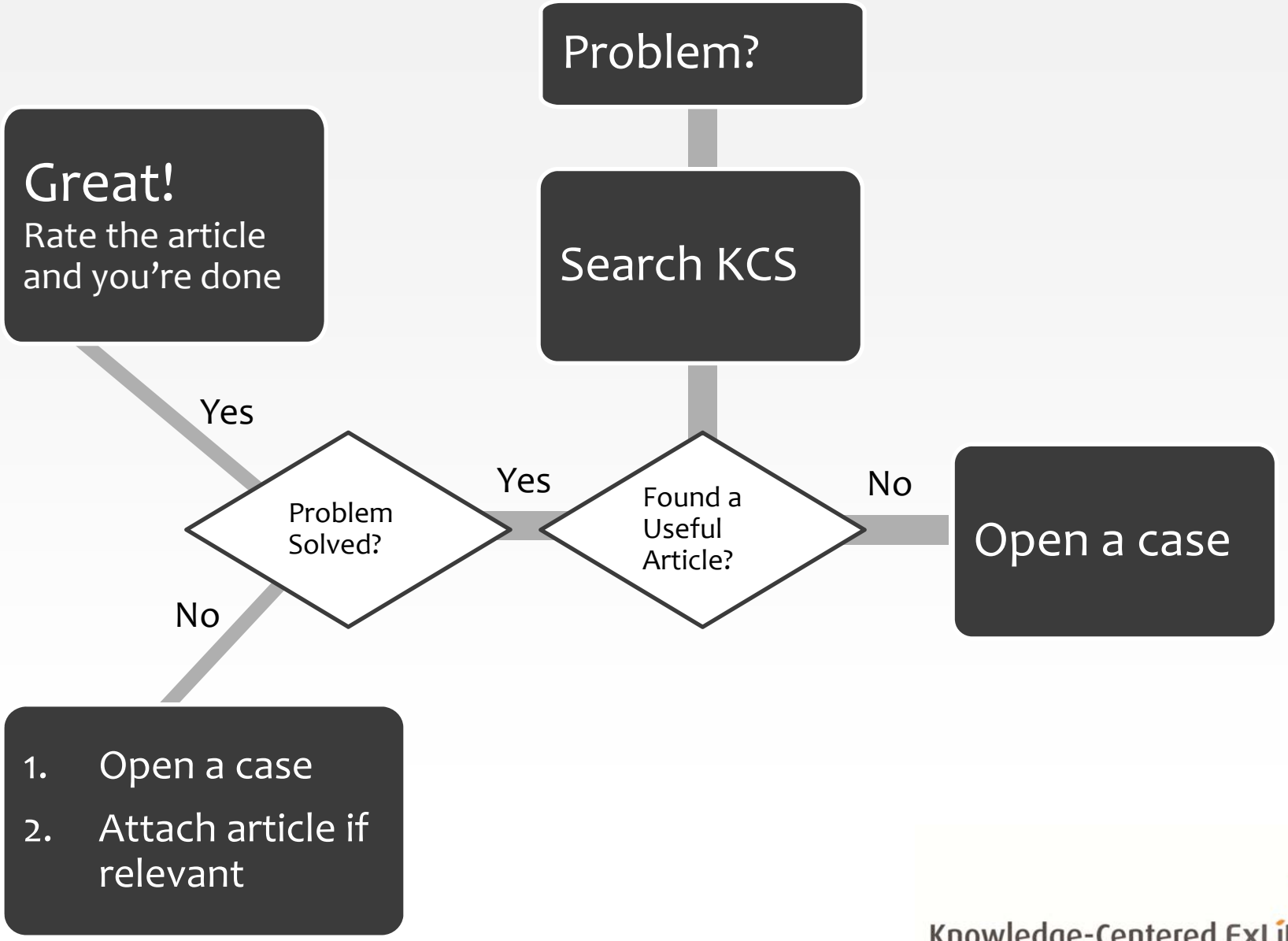
KCS Workflow



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Where can I Search KCS?

Primary Search in Salesforce: from the "Articles" Tab

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How can I Search KCS *Effectively?*

Primary ' Tab

ExLibris

Cases | Search Cases

Search

Search

Search Only Article Types

- KCS How To
- KCS Q&A
- KCS Solution
- Non-KCS Article

Go | Clear Search

Filter Your Results

Products

--No Filter--

Clear Filters

Search

Search

Search Only Article Types

- KCS How To
- KCS Q&A
- KCS Solution
- Non-KCS Article

Go | Clear Search

Filter Your Results

Products

--No Filter--

Clear Filters

Logged in as Ran Levi

Publish | Account Assets

w older articles, specify a search term or filter.

	Type	Published Date
	KCS Solution	12/20/2013
gin for a new staff member?	KCS Q&A	12/20/2013
	KCS How To	12/20/2013
sing	KCS Solution	12/20/2013
	KCS Solution	12/20/2013
	KCS Solution	12/19/2013
	KCS How To	12/19/2013
	KCS How To	12/19/2013
	KCS Q&A	12/19/2013
IP Range	KCS Solution	12/19/2013

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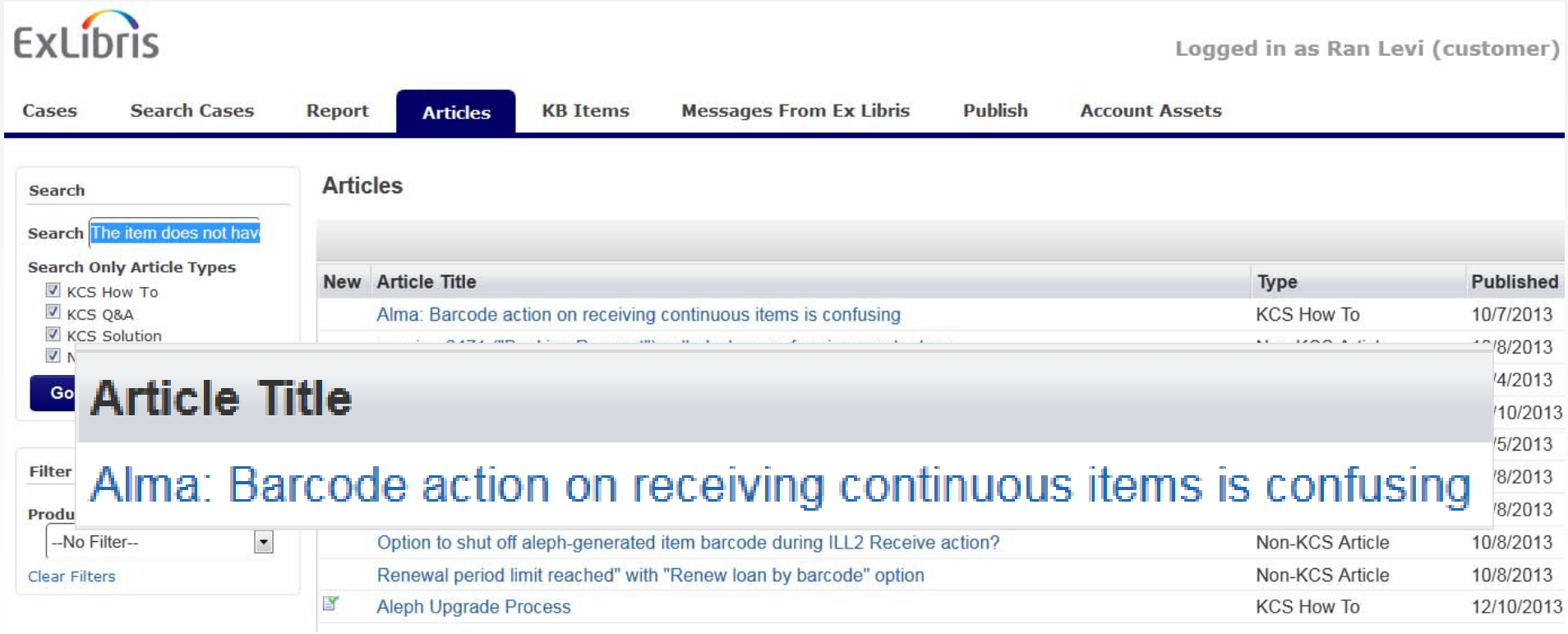
Search Results

Example error message:
"The item does not have a barcode. Are you sure you want to perform this action?"



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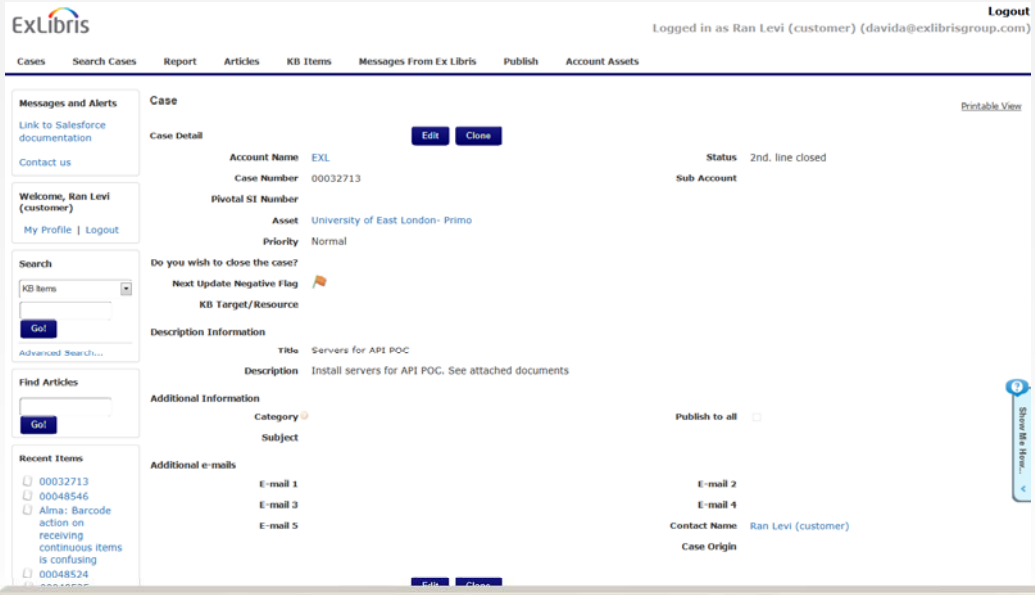
What if I've already opened a case?

Search from within the main page of any case



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Just Created a Case

Opening a case automatically trigger a KCS search based on the Case title

A new case was opened for you: 00048546
A service representative will get back to you shortly. In the meantime, we found some articles that may help you.

Search Alma- Message: "The ite
Search Only Article Types
- KCS How To
- KCS Q&A
- KCS Solution
- Non-KCS Article

Go Clear Search

A new case was opened for you: 00048546
A service representative will get back to you shortly. In the meantime, we found some articles that may help you.

Case Detail

Case Number	00048546	Status	New
Date/Time Opened	12/19/2013 3:18 AM		
Title	Alma- Message: "The item does not have a barcode. Are you sure		

Article Results

Attach to Case | Attach and Go to Case | Columns

New	Article Title	Type	Published Date	Ratings	Most Viewed	Article Number
	Alma: Barcode action on receiving continuous items is confusing	KCS How To	10/7/2013			000001817
	What notices and letters are sent (and when) to patrons from Alma?	KCS Q&A	10/8/2013			000005079

Article Title

Alma: Barcode action on receiving continuous items is confusing

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Attaching an Article to a Case

ExLibris

Logout

Logged in as Ran Levi (customer) (davida@exlibrisgroup.com)

Cases | Search Cases | Report | Articles | KB Items | Messages From Ex Libris | Publish | Account Assets

Search Again

Search Alma- Message: "The ite

Search Only Article Types

- KCS How To
- KCS Q&A
- KCS Solution
- Non-KCS Article

Go Clear Searc

Filter Article Resul

Products

--No Filter--

Clear Filters

A new case was opened for you: 00048546

A service representative will get back to you shortly. In the meantime, we found some articles that may help you.

Case Detail

Article Results

Attach to Case | Attach and Go to Case

New	Article Title
☑	Alma: Barcode action on receiving continuous items is confusing

Columns

Article Results

Attach to Case | Attach and Go to Case

New	Article Title
	Alma: Barcode action on receiving continuous items is confusing
	What notices and letters are sent (and when) to patrons from Alma?
	Resource Request Hold Shelf Slips are not printed, no error message
	Why are all my e-mails from Alma sent with empty text?

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ExLibris Alma
Congratulations Swinburne University
1st Alma Go-Live in ANZ

Once an Article is Attached to a Case

ExLibris

Logout

Logged in as Ran Levi (customer) (davida@exlibrisgroup.com)

Cases | Search Cases | Report | Articles | KB Items | Messages From Ex Libris | Publish | Account Assets

Messages and Alerts

Link to Salesforce documentation

Contact us

Welcome, Ran Levi (customer)

My Profile | Logout

Search

KB Items

Go!

Find Article

Go!

Recent Ite

00048546
00032713
Alma: Barcode action on receiving continuous items is confusing
00048524
00048525
How do I request a Customer Center and Support Portal (Salesforce) login for a new staff member?
Hide a MARC Field in the OPAC
Alma Analytics - Zero Loans Report
00036990
00045225

WalkMe for Salesforce

Case

Printable View

Case Detail

Edit | Clone

Account Name	EXL	Status	New
Case Number	00048546	Sub Account	
Pivotal SI Number			
Asset	EXL- Alma		
Priority	Normal		

E-mail 1 | E-mail 2
E-mail 3 | E-mail 4
E-mail 5 | Contact Name: Ran Levi (customer)
Case Origin

Edit | Clone

Case Comments

Add Comment

No records to display

Case History

Date	User	Action
12/19/2013 3:18 AM	Ran Levi (customer)	Changed **Case Owner** from Ran Levi (customer) to **Yoel Kortick**. Created.

Attachments

Attach File

No records to display

Articles

Find Articles

Action	Article Title	Modified Date
Detach	Alma: Barcode action on receiving continuous items is confusing	10/7/2013

Always show me more records per related list

Articles

Find Articles

Action	Article Title
Detach	Alma: Barcode action on receiving continuous items is confusing

Knowledge-Centered ExLibris

Primo 4.5 - Highlights

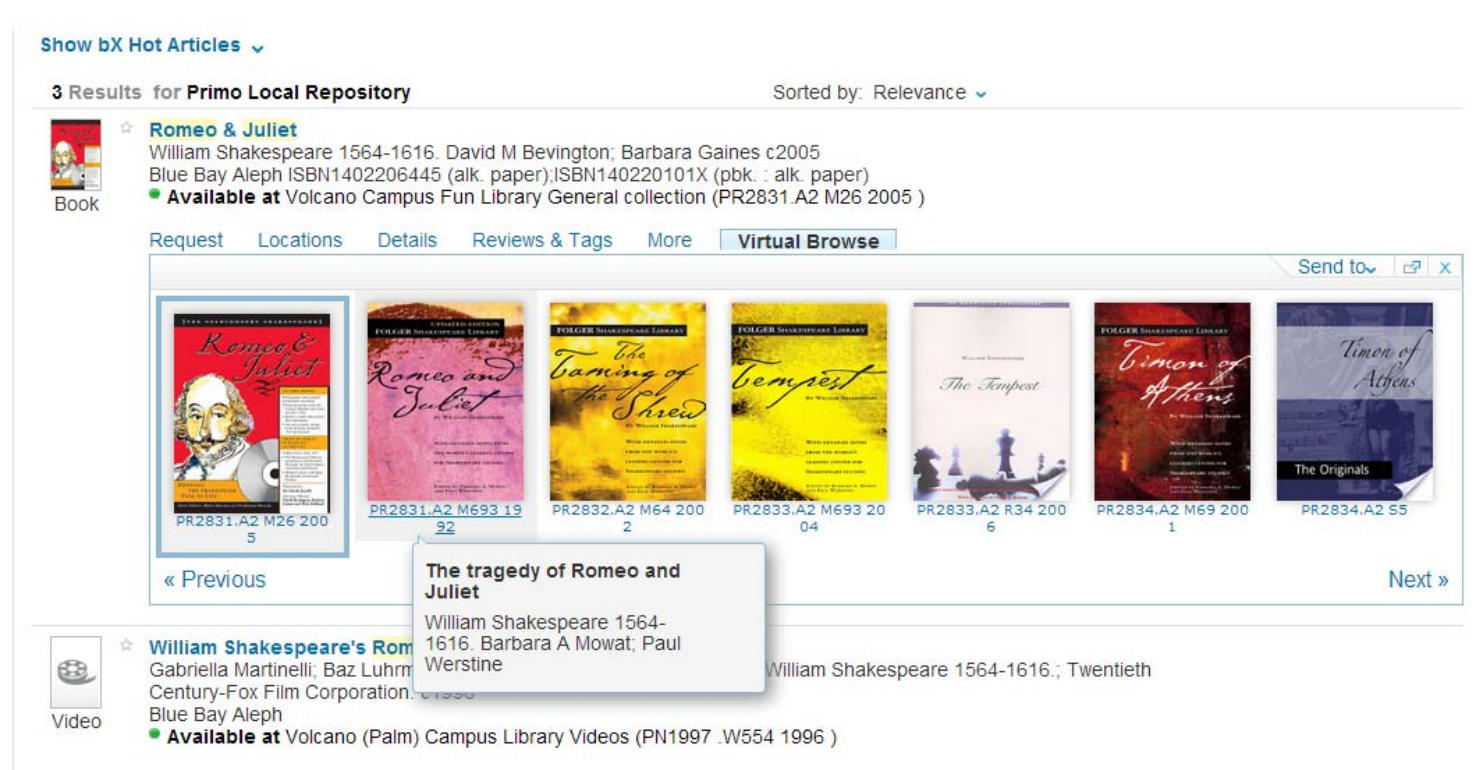
Search and ranking

Improvements introduced in Primo Central in recent months now available for local searches.

Primo 4.5 - Highlights

Virtual Browse—viewing an item in a visual context

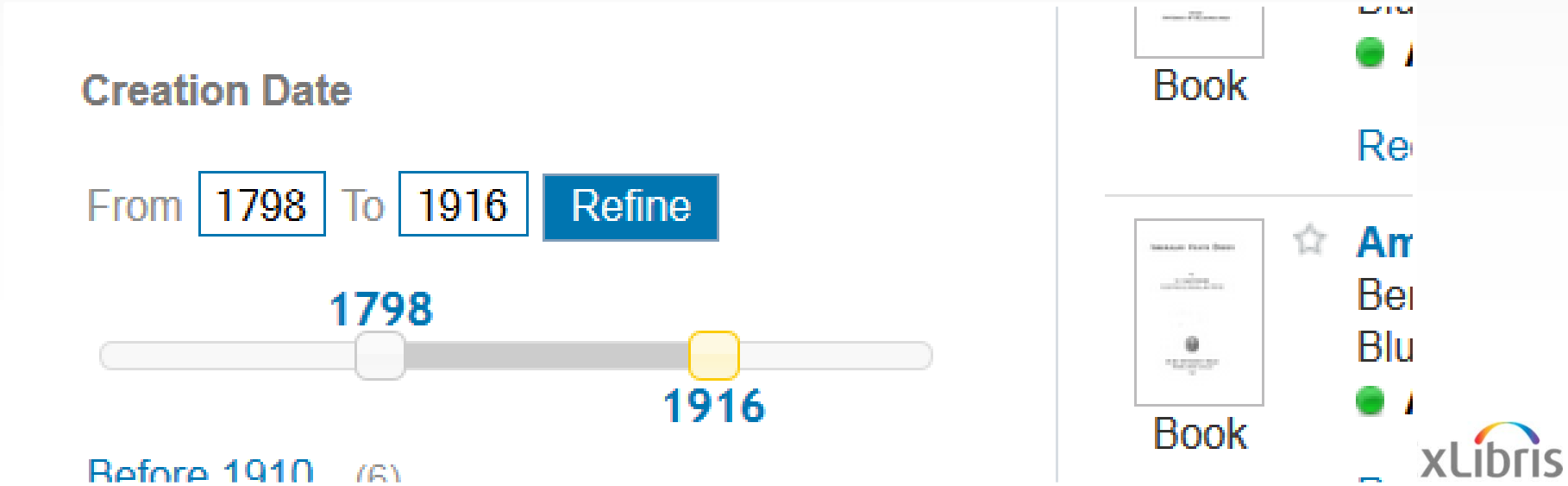
Taking browse functionality one step further, users enjoy visual browsing, by call number, of the library shelves.



Primo 4.5 - Highlights

More intuitive refinement of search results by date

By using a slider or typing in the years, users can easily focus on a specific date range.

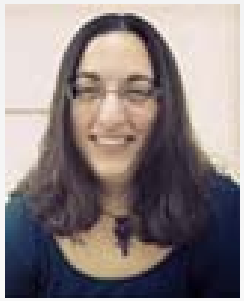


Meet The Alma Global Support Team!

Judith Fraenkel
Alma Global
Support Manager

Dina Fridman

Yisrael Kuchar



Lili Daie

Igor Tavrog

Judith Mamou

Marina Penzin

Mirko Thiessen

Sandra Balzer

Cinzia Colacicco

ExLibris