# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

**Meeting URL**

Join Zoom Meeting

https://us06web.zoom.us/j/86323646219?pwd=IMQTYovh6VwoIp9c3tGBHRjwxwpO9z.1

Attendees: Alex Forest, Wendy Ellis, Jessica Hartwigsen, Emily Kelly, Alexandra Marshall, Karen Glover, Claudia Heinemann, MD Galvin, Ann-Louise Skager, Liya Louis

**Zoom recording** - Passcode: q1e^UC?K

**For each meeting we will include**
Agenda
Attendance/chair/notetaker
Action items/decisions
Brief notes for Website
Links to Full Notes
Link to Zoom recording

**Links to documentation and Project Tools**
Group members
Shared drive – Google Docs
Terms of Reference (ToR)
Full notes
Temporary file of ExLibris specific questions
Basecamp
IGeLU Website
ELUNA Website

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

## Meeting -#7 - 29th August, 2024

Full notes
[Zoom recording](#) - Passcode: q1e^UC?K
Brief notes
Actions/Decisions

**Present:** Alex Forrest (co-chair IGELU), Karen Glover (co-chair ELUNA), Wendy Ellis, Mary Galvin, Jessica Hartwigsen, Claudia Heinemann, Emily Kelly, Liya Louis, Alexandra Marshall, Ann-Louise Skjager

Apologies: Dave Allen

Chair: Alex Forrest
Note taker: Wendy Ellis

| Item | Description | Who |
|------|-------------|-----|
| 1 | Group admin <br> ● ***PRESS RECORD ON ZOOM SESSION!!*** <br> ● Appoint note taker <br> ● Please add your names as 'Present' above | All |
| 2 | **Six month review of Group working practices** <br><br> We have been working in quite a loose, serendipitous way as we find our feet. This has led to some great discussions, but also a bit of confusion (apologies for contributing to that!).  There's a strong feeling that we now need to be more structured.  Especially about the tools we use and some of our admin. <br><br> *It would be good to talk about what you've found is working well and what could be improved.* <br><br> **Membership of the group** – we should have representation from six ELUNA and six IGeLU Customers. We have lost a couple of people over the months so we should review our membership.  We need to appoint new members to fill the gaps. <br><br> **Structure of meetings** – Karen and I planned to alternate chairing the meeting and setting agendas. If we aim to have an agenda out by the Monday before each meeting does that give you enough time. We'll try to remember to put a call out | |

| Item | Description | Who |
|------|-------------|-----|
|  | for agenda items the week prior. <br><br> **Scheduling** –*would pushing the meeting back by one hour work better?* <br><br> **Meeting Notes –** The running notes were hard to navigate.  We will keep full notes for each meeting as separate files. They will include links to the zoom recording.  On the running notes/agenda we will put brief notes and group actions/decisions. We can re-use these brief notes for the website. Is this a good plan? <br><br> **Website updates** <br><br> Have a look at what's there. https://igelu.org/support-advisory-group/ <br><br> We are linking to this site from the ELUNA website so we don't duplicate work.*Is there more information you would like to add?* <br><br> **Basecamp, Google docs**…. <br><br> Basecamp is great for discussions. *Do we think the fact that ExLibris can see everything is hindering conversation?* <br><br> We don't have a documented process for what each tool is used for so it would be good to talk about how we can improve. <br><br> **Comms with community** – how will we invite questions or suggestions from the community? Should we publish our mail list? Do we have anywhere we could advertise as a 'white board' for comments? <br><br> **Monitoring listservs** – should we be capturing any Support Related topics from the listservs? |  |
| 3 | Subgroups  - please add your initials next to tasks below. <br><br> **We will have some specific projects for the group over the next six months – how will we manage the work? Should we appoint one member from the group to oversee each one? Should we work in subgroups?** <br><br>    1.  Capturing questions which have come up in our discussions – what |  |

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| Item | Description | Who |
|---|---|---|
| | questions do we have for ExLibris and what questions do we have for the Community. [Questions]<br>2. Creating a survey for the community<br>3. Known Issue Platform: Co-ordinating tests; working with ExLibris on documentation to make sure there are no surprises with functionality added or missed; sign off for UAT (User Acceptance Testing) by the group.(JH)<br>4. Follow up on Question set 1. Do we have more to discuss and feedback to ExLibris – we need to build a 'sign-off' process into question sets.<br>5. Review the Terms of Reference and pick smart goals for the next six months. Add out of scope section. (mdg)<br>6. Prepare and deliver reports/open sessions at IGeLU and ELUNA Conferences.<br>7. Review of any ExLIbris application or process changes made at our request (full project visibility for change requests including in scope/out of scope; review procedures; sign-off)<br><br>General tasks:<br><br>8. Monitoring listservs for general support issues (JH- Tracking issues in a Google Doc when I see issues posted to the listservs)<br>9. Website updates and news items.<br>10. Creating a form to collect comments from the community. (AM) | |
| 4 | AOB | |
| 5 | | |

## Meeting #6 - July 25, 2024

Present:
Apologies:

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

Chair: Alex Forrest
Note taker:

## AGENDA

| Item | Description | Who |
|------|-------------|-----|
| 1 | Group admin<br>• ***PRESS RECORD ON ZOOM SESSION!!***<br>• Appoint note taker<br>• Check schedule for recurring meetings - is the time ok?<br>• Access to drives/basecamp etc - all ok?<br>• Need notes for June 6 and July 18 | All |
| 2 | Communications<br>• website updates<br>• email out to the community to notify them of the changes to "Pending Customer Input" period. | KG/AF |
| 3 | IGeLU2024 - photos of group members - for those who are attending - meeting in person? | ALL |
| 4 | Known Issues System - discussion about the last session with ExLibris | ALL |
| 5 | Any other business | ALL |

**Actions/Decisions:**

**ACTIONS - JULY 2024**

1. The group will start a spreadsheet to capture outstanding questions and use cases. Available on Basecamp so that ExLibris colleagues have visibility (AF)

2. The group will start to capture requirements for a customer survey while we look at survey tools and survey design (KG).

3. The group will continue to collect questions/suggestions about KI Systems (ALL)

4. Team admin to be reviewed/improved - make it easier to manage. (AF/KG)

5. Get the website up to date (including brief reports based on meeting notes) (AF)

6. Standardise the Agenda/Notes - the rolling notes aren't working well. Causing some confusion. Provide link to full notes and only include brief rolling notes/actions to carry forward ?  (AF/KA)

**Full notes 25th July**
**Recording** of Zoom session **-** Passcode= i&.5Ps$i

**Brief Notes**

## Meeting Joint - July 18 2024

**Topic - Update from Luda on Known Issues System.**
**Full notes**
**Recording** of Zoom session **-** Passcode: =Nrvn0%F

Present:
Apologies: `Dave Allen <Dave.Allen@slq.qld.gov.au>; Marshall, Alexandra <am1441@leicester.ac.uk>;`

Chair: Alex Forrest
Notetaker:

**AGENDA**

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting
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| Item No | Description | Who | |
|---------|-------------|-----|---|
| 1 | ExLibris update on Known Issues progress | Luda Soffer | |
| 2 | *Configuration change for 'Pending Customer Input' status. Change from two to four weeks. Comms to the Community.* | Luda Soffer | |

**Actions/Decisions:**

| |
|---|
| **Email to the community for 'Pending Customer Input' change to be sent from the CSAG.  (AF/KG)** |

**Full Notes**

| |
|---|
| **IGeLU/ELUNA Customer Support Advisory Group – Joint meeting with ExLIbris**<br><br>**2024-July-18**<br><br>Main topic of the call - **ExLibris update on their Known Issue System.  And update on 'Pending Customer Input' change from two to four weeks.**<br><br>**Present:** Luda Soffer <luda.soffer@Clarivate.com>; Osnat Vilenchik <Osnat.Vilenchik@Clarivate.com>; 'Udi Porat' <udi.porat@clarivate.com>; Zvi Vogel <Zvi.Vogel@Clarivate.com>; Martin Buescher martin.buescher@clarivate.com MD Galvin <mdgalvin@umd.edu>; Griffith, Jason M. <Jason.Griffith@uky.edu>; Glover, Karen <karen.glover@library.gatech.edu>; Hartwigsen, Jessica <jhartwigsen@calstate.edu>; Claudia Heinemann <claudia.heinemann@slsp.ch>; Liron Klein Levy <Liron.klein@clarivate.com>; Orit Gilad <Orit.Gilad@Clarivate.com><br><br>**Apologies:** Dave Allen <Dave.Allen@slq.qld.gov.au>; Marshall, Alexandra <am1441@leicester.ac.uk>;<br><br><br>Luda presented ExLibris' Business Analysis and decisions made so |

far.  Including a mockup of what the new Known Issues platform might look like.

Business Analysis was collected from:

· Staff from ExLibris teams (including Product, Development, Customer care and Support)

· CSAG discussion on Known Issues

· Industry standard examples e.g. salesforce.com was used as an example of Known Issue/Problem Management good practice.

· Tool Evaluation and Selection meetings

Details so far. The aim is to have:

· A usable interface which supplies all necessary information to customers. To be searchable by filters and keywords.

· A standard process for Known Issues (including Content)

· Good knowledge base for users to be able to identify similar issues and add their institution using a 'Report same issue' button.

· A comprehensive system which includes any issues which require a cold fix code change or have a published workaround. It will not include hot fixes.

· Content related issues pending provider with no short-term fix date.

Questions from group:

· How will escalation happen? Based on impact/number of cases or number of institutions affected. How will that work for Consortia who are logging calls on behalf of e.g. 500 institutions.

· Will there be escalation triggers

· Will there be a searchable archive – we would like to search closed cases.

· How will prioritisation work.

· Do we need to work on triage processes – more standardisation of capturing information from incidents. Having a checklist of all

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## Rolling Notes and Agenda

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   necessary information (e.g. screenshots, error messages,
   platform, module)

Roadmap -  The first product to be included will be Alma.

·  Q3 2024 – ExLibris will continue to work on implementation.

·  Q4 2024 – Implementation and collaborative testing with the CSAG
   and others as necessary

·  Q1 2025 – Go live/soft launch to the community.

·  Expanding to additional products and scope.



Recording of Session:

https://us06web.zoom.us/rec/share/vVGOXxK1U-P96OqXvk6i3WtpSj0LeZnxD
rTHHpZ_54seq4yw404HWc2InUqYrQk2.nSOzMYtDasVJ2mRz

Passcode: =Nrvn0%F
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## Meeting #05 - June 27 2024

**[Recording](#) of Zoom session:** Passcode: &E9Q.w1h
**Full notes**
**Brief notes for website**

Present:
Apologies:

Chair:

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# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

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Notetaker:

## AGENDA

| Item No | Description | Who | |
|---|---|---|---|
| 1 | Known Issues Discussion | | |
| 2 | What do we want to ask the community for the survey? | | |
| 3 | What type of information would be helpful for Known Issues list? | | |
| 4 | | | |
| 5 | | | |

## Actions/Decisions:

**add actions and decisions here**

## Full Notes

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Next meeting with Ex – discuss what is needed from a Known Issues
perspective
      ·  What to ask Community in a survey
            o Insights on Known Issues progress
                  § Content
            o High Level – what other issues
            o Other topics
      ·  Content Known Issues
            o Is there is something that is easier to get to and read
            – must click through and download the huge spreadsheet

What type of information would be helpful for Known Issues list

      ·  Sample Salesforce Known issues platform – example of what
      we're looking for
            o What are the privacy issues from known issues from the
```

```
            old KI doc?
          o Ability to search in Alma
                § Not need to go to a different location to download
                § Something webbased, searchable with tags from
                categories
          o How searching
                § Content – by vendor name
                § Narrow by product/functional area then search for
                keywords
                § Needs descriptive or Summary name
                        · Ex.  CDI not indexing
          o Would like to see issues that have both been raised
          from the community & the ones identified by ExL
                § If can't get both, at least ones identified by ExL
                § Would like info on how ExL classifies issues
                            o Based # of cases submitted, or some
                              other criteria
          o Ability for for insts to endorse or "Me too" issues
          o Question about owner column – not sure what this is
          related to in the Content KI spreadsheet
          o Separate Section for issues reported after a Feature
          Release
                § These
                § Also good for regressions – issues that were fixed
                and recur
          o Need an archive of resolved or completed cases (Keep
          closed and fixed issues tab, similar to Content KI)
                § Sometimes takes a while for information to be
                trickled down, would be good to be able to review
                older ones
          o Not relevant for Content but for other platforms
                § What platform
                § Which functional area in Alma
                § What server – NAXX
                        · Usually related to performance issues
                              o Could be long lasting
          o Include Workarounds
                § Can link to article if available
          o Include Analysis
          o Status – where is at ExLibris Support
                § Tier 1, T2, Development. etc
          o Priority
          o Include # of inst reporting the issue

What do we want to ask the community for the survey?

     ·  Would having a known issues document solve most problems?
     ·  How long it takes to solve issues
```

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                    o Lifecycle of support
                    o Seems like there are no updates on cases unless it's
                      escalated (don't want to abuse/cry wolf for most cases),
                      or wait to get updates from
            ·  Acknowledgement of case
            ·  Needing to repeat the issue
                    o Asked for examples, screenshot when one is already
                      provided
            ·  How is chat used?
                    o What level of support is solved via Chat – Would like
                      to know what chat should be used for
            ·  How much research is done before submitting a ticket?
                    o For consortia – do cases go through a central support
                      office to be vetted first
                    o For local institutions – is there an IT or support
                      office that helps troubleshoot issues
            ·  Do you find that cases are closed before being fixed?
            ·  Do you get responses on cases with documentation that is
            outdated?

    For Exlibris

            -     What pieces of information does ExL need from a case –
            let us know that specific
            -     Is there a checklist/rubric of what should be included
                    o Let customer know exactly what is needed upfront

    Next meeting – July 11 @ 8am ?

    ere
```

## Meeting Joint - June 6 2024

**Full notes**
**Recording of Zoom session**
**Brief notes for website**
**Actions/Decisions**

Present:
Apologies:

Chair:
Notetaker:

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

**AGENDA**

| Item No | Description | Who | |
|---|---|---|---|
| 1 | Introductions | | |
| 2 | A quick discussion about how we work<br>● Basecamp<br>● Comms plan | | |
| 3 | Change to four week automatic call closure for inactive calls (waiting customer response) | | |
| 4 | Summary of feedback received for questions:<br>● What works best for Chat-based support or what does not work? What options should we keep, discontinue, etc.<br>● Will this group function for testing and feedback to represent the community for ExLibris changing or deploying new tools for support such as AI-based tools, Support Center functions, etc. ?<br>● How is anyone using the Ex Libris Content Issues in Progress https://knowledge.exlibrisgroup.com/Cross-Product/Providers_Page/Content_in_Ex_Libris_Products/Ex_Libris_Content_Issues_In_Progress | | |
| 5 | | | |

**Actions/Decisions:**

| |
|---|
| **add actions and decisions here** |

**Brief notes**

| |
|---|
| Type full notes here |

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting
# Rolling Notes and Agenda

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Meeting #04 - May 30th 2024

**Full notes**
[Recording](#) **of Zoom session** - Passcode= 2u?7C?@3

Present:
Apologies:

Chair: Karen Glover
Notetaker: Wendy Ellis

**AGENDA**

| Item No | Description | Who | |
|---|---|---|---|
| 1 | Group admin<br>● ***PRESS RECORD ON ZOOM SESSION!!***<br>● Appoint note taker<br>● Check schedule for recurring meetings - is the time ok?<br>● Access to drives/basecamp etc - all ok? | All | |
| 2 | ● Update on ExLibris colleagues/meeting schedules<br>● Meeting tbc - *is everyone free next Thursday 6th June at the same time?* | KG/AF | |

**Actions/Decisions:**

| add actions and decisions here |
|---|

**Full Notes**

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

Meeting next Thursday, June 6 @ 8am with ExL

Based on meeting with ExL - Luda

Three weeks is industry standard for closing cases

Launch after ELUNA and review afer IGELU – 6 months

Rolling out Known Issues Tracking – wants to know exactly what we want from this

· Me too button gone, but want something better. Want to know impact
· When will it be available to look at.
· Desired: be able to identify cases that are

Other ELUNA support improvements

· Some options for ticket sharing – but only in consortia – piloted to share within a Consortia
· SLSP piloted program, haven't been able to test yet. Need to coordinate account management.
· Nice to have a view to see all the cases and identify patterns

Any ideas from this group as to what we would like as agenda topics for the meeting next Thursday.

· Case Lifecycle transparency
o How many cases get escalated.
§ There is a perception that cases only get quickly addressed when escalated
· How are support teams trained, what is the level of support from T1

· **Top issues working well**
o SalesForce – being able to CC people in a case – to get support from others
o Escalate straight from the ticket
o Tier 1 try hard to support us
o General willingness & intention to solve problems
§ Willingness to let us know that they have no intention to fix a problem
o Communication in case between publisher and vendor – especially metadata, can see the back and forth
o Meetings with ExL- very helpful
· **Top issues not working well**
o Response times – many cases older than 3 months with no response
§ Lack of communication
o Predefined text on a case – templates uses lose impact over time – not useful

o   Once cases get to T2 or Development, the cases bog down
o   Closing cases that haven't been fixed
§   Wait for confirmation as to whether the "fix" actually worked before closing
o   Related to metadata fixes – need to switch gears and go to try to work on a different approach.
o   Will get responses on cases with documentation that is outdated
o   Unevenness across different areas about responses – if Alma or Primo, answer is pretty quick.  If an API or other, they linger, not clear.
o
·       Communications from call management products, would be nice to be consistent and targeted.
o   Higher visibility stating the specific product
o   Notifications are wordy – more concise language
·       Documentation – dates and currency on information
o   40% of calls that come in are about how to do something
o   Searchability needs to be improved – need to know what it's being called
o   Would be good to have this support gave have representation on the documentation group – Karen G. to ask about the Documentation group
o    Documentation needs to be updated
§   Alma API – shortcut query that allows you to search by barcode, but is only listed in blog, not in documentation
·       Get a Basecamp page to capture use cases for these type of issues
·       Would like to have something to report out in Fall
o   What are you not getting from Support
o   ExL needs actionable items
·       Suggestions
o   OK to close cases early if identified as not worked on – got to known issues list
o   Be mindful of own visibility – let folks know about Advisory groups
·       Will be setting up monthly website page, & monthly updates
·       For updates to outside groups
o   RUGs
o   Working Groups
o   Communities of Practice
o   Communication methods
§   Surveys
§   Burning Questions – not for individual cases
§   Look at TOR to see if there is information about our scope

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Meeting #03 - April 25 2024

**Present:**
**Full notes**
**Recording of Zoom session**

Present:
Apologies:

Chair:
Notetaker:

## AGENDA

| Item No | Description | Who | |
|---------|-------------|-----|---|
| 1 | Review Terms of Reference | ALL | |
| 2 | ***AOB*** | | |

**Actions/Decisions:**

| |
|---|
| **add actions and decisions here** |

**Full Notes**

- Examine known issues and how to best report them with the support application

  TEMP DISCUSSION - ExL maintain issues. Known Issues…self help. Possible differences for Consortia.ExLib more information about Problem Management. Knowledge base - how is it managed for Support Team. Lifecycle of Known Issues - may involve a workaround. Impact is only managed on the listservs?
  Need more info from ExL about Problem Management roadmap.

- Advise on how customers discover problems (in the ITIL sense), known defects/bugs/issues and report their instances of these identified problems

DISCUSSION - maintain history and links to jira.
"Just googled ITIL problem management, and the steps are problem detection-problem logging-investigation and diagnosis-workaround-create know error record-resolution-closure" Categorize by functional area.

- Document the content and software support ticket lifecycle and create features within the support application to be more informative on where customer tickets sit before being resolved.

DISCUSSION: Known issues for content? Lifecycle of incidents. Need a Decision Tree for different types of calls. Including known issues/problems. Bugs?? Salesforce comms templates?

- Advise on enhancements to the support application

    DISCUSSION – Consortium cases - email copy for case comments. Could it work more like Teams so people added as email contacts - for people with no Salesforce login. Consortiums e.g. 80 members.*Can email include all case comments and chat history.*

- Survey the following service metrics within the IGeLU and ELUNA communities (survey results to be confidential to the Advisory Group, Ex Libris, and Steering Committees because Clarivate is a publicly traded company):
    - Overall and Ticket Customer Satisfaction Scores (CSAT)
    - Service Level Expectations (Customer expectation - How long should this ticket take, sit in a particular queue?)
    - Overall resolution rates (not closure rate, but customer/vendor agree that issue is resolved),
    - Net promoter score (overall loyalty to Ex Libris as an organization)
    - Satisfaction metrics of communication
        - First non-automated response satisfaction
        - Satisfaction of closing solution
    - measures of customer effort (CES) - (On a scale of 1-7, how much effort was involved in answering your question?)
    - Customer rating of support staff understanding of problem
    - Average ticket handling time

LEFT DISCUSSION FOR LATER DATE

- Discuss ways to address issues referred to in the NERS enhancement process or idea exchange.

DISCUSSION - no established workflow for end to end process. 'After review we have decided not to include in Roadmap".  Important distinction between defects and enhancements. How can we escalate issues as a community? Not just number of users affected. Impact for worst affected user. Impact scores? Can we do more with group logins in Salesforce (Regional/Community/Language).
Ideas Exchange - where no solution - closed immediately. We need more information on why the decision was made not to pursue.  Need more transparency for other customers with the same need.Keep original discussions….better reporting in Ideas Exchange.  Opt in news on Ideas Exchange traffic? Proactive way of knowing what people are asking for. Rather than searching in IE interface.

- Examine areas/scenarios where customers are reopening tickets after issues have been resolved by support.

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> - Discuss improvements in communication for requested functionality that will not get resolved or developed.
> - Examine how the document center is integrated with the support center. Identify areas where Ex Libris might be able to identify areas of self-service over requiring support tickets.

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## Meeting #02 - March 28th 2024

Recording of Zoom session -Passcode: =0yg#LDZ
Full notes

**Present**: Emily Kelly (Harvard), Karen Glover (ELUNA), Claudia Heinemann (SLSP); Craig Rosenbeck, Dave Allen (IGeLU), Jason Griffith (ELUNA), Jessica Hartwigsen (CSUCO), MD Galvin (USMAI), Wendy Ellis (FLVC), Liya Louis (Qatar), Alex Forrest (IGeLU), Ann-Louise Skjager (BIBSYS)

**Apologies:** Alex Marshall (Leicester)**,**  Kevin H (HK), Szymon Cierpisz; Allen Jones (ELUNA)

**Note taker:** Alex Forrest

**Agenda**

| Item No | Description | Who | |
|---|---|---|---|
| 1 | Group admin <ul><li>Check schedule for recurring meetings</li><li>Appoint note taker</li></ul> | All | |
| 2 | Focussed Discussion -  **Question set #1** <ul><li>Compiling answers</li><li>Scheduling a call with ExLibris to discuss specific</li></ul> | All | |

| Item No | Description | Who | |
|---------|-------------|-----|---|
| | questions | | |
| 3 | General Discussion - Communication planning<br>● How will the group feedback to other groups? (Working Groups, Communities of Practice) | ALL<br>TBC | |

**Actions/Decisions:**

| |
|---|
| **add actions and decisions here** |

**Full Notes**

| |
|---|
| **Questions from ExLibris**<br><br>**QUESTION 1: Chat functionality - feedback**<br><br>General Recommendation - to ask ExLibris what they expected the service to cover.  And what access to the full set of support tools do Clarivate Staff have access to? e.g. error logs for Alma jobs. Can we have more information in general about lifecycle of calls?<br><br>What do we think it's good for.<br>    ○ Karen G, Emily K - More useful for new users?<br>    ○ Craig R - Chat gets tickets seen more quickly? When working with api specifically.<br>    ○ Use cases - log checking (e.g. publishing jobs) - can tier one support be given access to some of those tools?<br>    ○ Triage for new calls to capture incident details.Saves time mailing to and fro to capture replication steps.<br>Who are we all giving access to Chat? Is it all Staff or only some?<br>    ○ Is it the case that we all enable for Subject Matter Experts and Sys support only?<br>    ○ Liya L - different setup - more centralised for Consortium? |

- - ○ SLSP don't use chat at all - no additional benefits.  Need a 'Consortial View' which is on ExLibris roadmap for Support Cases in general.  Will the same access to a consortial view apply to Chat?

**QUESTION 2: Known Issues for content - are we using it? Is it useful**
[https://knowledge.exlibrisgroup.com/Cross-Product/Providers_Page/Content_in_Ex_Libris_Products/Ex_Libris_Content_Issues_In_Progress](https://knowledge.exlibrisgroup.com/Cross-Product/Providers_Page/Content_in_Ex_Libris_Products/Ex_Libris_Content_Issues_In_Progress)

Some of us waiting for feedback from E-Resource Managers on how they are using it.

Not sure if people are using and for what purpose.
Can it be provided in a smart format for searching? Or providing alerts on specific issues?
- Could we tie the Jira number to release notes?
- Can we talk about it in relation to Problem Management?
- Might be a good use for Chat? or CHatbot? To 'me too' or assign incidents to Problem Management.

**Known issues - was there an Alma known issues page?**

Sites are mainly using listservs for problem management - in place of 'Me too' so we can show the impact of incidents.

Good customer examples - CARLI, Harvard
[https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Alma+Known+Issues](https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Alma+Known+Issues)
[https://www.carli.illinois.edu/products-services/i-share/alma-primo-ve-known-issues](https://www.carli.illinois.edu/products-services/i-share/alma-primo-ve-known-issues)

Would we like to see an interface like Ideas Exchange for Problem Management -  to show status of Problems. So that sites can search for themselves.  Would we then be able to add a 'me too' vote?

**QUESTION 3:  Automatic closure of calls**

Can we advise on 4 weeks as a trial. To be implemented and announced at ELUNA 2024 and reviewed at IGeLU 2024. Giving a six month's trial.

Do we want to provide our customer feedback on formats/wording of automated mailers? Some mails might be shorter with more emphasis on actionable content?

# 2024 – IGeLU/ELUNA Customer Support Advisory Group Meeting Rolling Notes and Agenda

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| END of Notes - Meeting #02 - 28th March 2024 |
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## Meeting #01 – 29th February 2024

Full notes
Recording of Zoom Session

Present:
Apologies:

Chair: Alex and Karen
Note taker: Alex Forrest

Outstanding actions

| Item No | Description | Who | |
|---|---|---|---|
| 1 | Welcome and introductions | All | |
| 2 | Allen and Dave – explain the inception of the group, how it came about and what our remit is. | | |
| 3 | **Team Admin** - <br> • **Meeting schedules** of group and group+ExLib <br> • **Tools** - Document storage, mail list, zoom etc <br> • **Basecamp** for the group to look at specific tasks given to us by ExLibris. <br> • Communication plan - how will the group feedback to IGeLU/ELUNA groups? | AF <br> AF <br> KA <br><br> ALL | |
| 4 | **Discussion about how we will work.** | | |

| Item No | Description | Who | |
|---|---|---|---|
| | <ul><li>A mixture of general discussion and specific task and finish questions</li><li>ExLibris will provide specific topics for discussion.</li><li>We will identify areas the user community find problematic and which are working well.</li></ul> | | |
| 5 | <mark>Agree the ToR – action points</mark><br><br>**Call handling and Support Center interface**<br><br><ul><li>**Known issues** - Examine known issues and how to best report them with the support application</li><li>**Problem management** - Advise on how customers discover problems (in the ITIL sense), known defects/bugs/issues and report their instances of these identified problems</li><li>**Call Lifecycle** - Document the content and software support ticket lifecycle and create features within the support application to be more informative on where customer tickets sit before being resolved.</li><li>**Closed call management** - Examine areas/scenarios where customers are reopening tickets after issues have been resolved by support.</li><li>**Support Center application** - Advise on enhancements to the support application</li></ul>**User satisfaction**<br><ul><li>**Survey the following service metrics** within the IGeLU and ELUNA communities (survey results to be confidential to the Advisory Group, Ex Libris, and Steering Committees because Clarivate is a publicly traded company):<ul><li>Overall and Ticket Customer Satisfaction Scores (CSAT)</li><li>Service Level Expectations (Customer expectation - How long should this ticket take, sit in a particular queue?)</li><li>Overall resolution rates (not closure rate, but customer/vendor agree that issue is resolved),</li><li>Net promoter score (overall loyalty to Ex Libris as an organization)</li><li>Satisfaction metrics of communication<ul><li>First non-automated response satisfaction</li><li>Satisfaction of closing solution</li></ul></li></ul></li></ul> | <mark>ALL</mark> | <mark>Ongoing</mark> |

| Item No | Description | Who | |
|---|---|---|---|
| |     o   measures of customer effort (CES) - (On a scale of 1-7, how much effort was involved in answering your question?)<br>    o   Customer rating of support staff understanding of problem<br>    o   Average ticket handling time<br>● Discuss ways to address issues referred to in the NERS enhancement process or idea exchange. | | |
| | **Communication plans (ExLibris Support/Customers)**<br>● Discuss improvements in communication for requested functionality that will not get resolved or developed. | | |
| | **User education and document centre**<br>● Examine how the document center is integrated with the support center. Identify areas where Ex Libris might be able to identify areas of self-service over requiring support tickets. | | |
| | Specific questions given to us by ExLibris VPs.<br><br>Question set 1 - February2024 | **ALL** - ask for feedback locally and update Basecamp | |
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