IUG
2018
ORLANDO

The Supportal

Best Practices for Submitting & Responding to Tickets

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Innovative
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Agenda

- Introductions
- Group Share
- Identifying Stakeholders
- Reopening vs. Creating Tickets
- Using Dropdowns to Your Advantage
- Crafting Your Ticket
- Classifying Priority
- The Tale of the Bad Ticket
- The Tale of the Good Ticket
- The Art of Following Up
- After-Hours Support
- “Innovative, we have a problem…”
- Further Support
- Q & A

Objectives

- Hear what our peers have experienced
- Learn some best practices
- Ideas to improve on current processes
- Decrease ticket turnaround time
- Identify when a problem becomes a pattern; and then how to deal with it

Group Share

Identifying Stakeholders

- Who provides ILS support at your organization?
- Who has access to the Supportal?
- Make sure Innovative knows who these people are
- Potential quarterly checkpoint to compare Supportal experiences
- Notify Innovative of vacations

Identifying Stakeholders

- Ensure permissions are assigned correctly
- Know the Innovative representatives assigned to your account
- What does each person actually do?
- Hang direct contact information on your wall
- Ask to be notified when they go on vacation and know who is covering for them

Solution

There are seven Supportal roles available: Administrator, Regular, Limited, Regular Plus, Ticket Administrator, Limited Tickets, and Knowledgebase Only. These act as the permissions for Supportal users.

The ticketing abilities associated with each role:

Supportal Role	View Own Tickets	Edit Own Tickets	Create Tickets	View All Tickets	Edit All Tickets
Administrator	Yes	Yes	Yes	Yes	Yes
Ticket Administrator	Yes	Yes	Yes	Yes	Yes
Regular	Yes	Yes	Yes	No	No
Regular Plus	Yes	Yes	Yes	Yes - Read Only	No
Limited Tickets	No	No	No	Yes - Read Only	No
Limited	No	No	No	No	No
Knowledgebase Only	No	No	No	No	No

NOTE: Limited Ticket users can only view all tickets, they cannot update or open tickets. The update options in the ticket view are greyed out

Contact management permissions:

Supportal Role	Edit Contact - Own	Edit All Contacts	Add New Contact
Administrator	Yes	Yes	Yes
Ticket Administrator	Yes	No	No
Regular	Yes	No	No
Regular Plus	Yes	No	No
Limited Tickets	Yes	No	No
Limited	No	No	No
Knowledgebase Only	No	No	No

NOTE: Only the Administrator role can create new contacts or modify other contacts at their library. Administrators can reset Supportal passwords for other staff members.

Knowledgebase capabilities:

Supportal Role	Submit Service Commitment Form	Search Knowledgebase	Post in Forums
Administrator	Yes	Yes	Yes
Ticket Administrator	Yes	Yes	Yes
Regular	Yes	Yes	Yes
Regular Plus	Yes	Yes	Yes
Limited Tickets	No	Yes	No
Limited	No	Yes	Yes
Knowledgebase Only	No	Yes	No

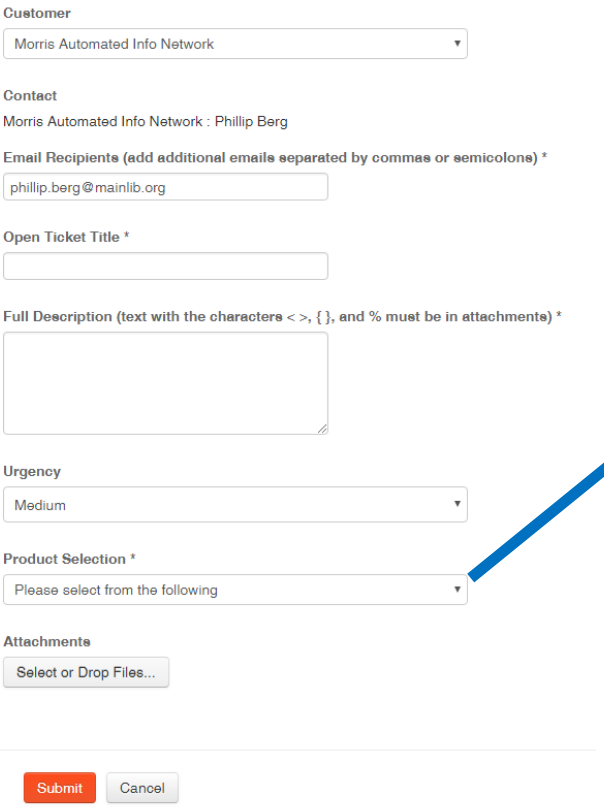
Reopening vs. Creating Tickets

Mental Checklist:

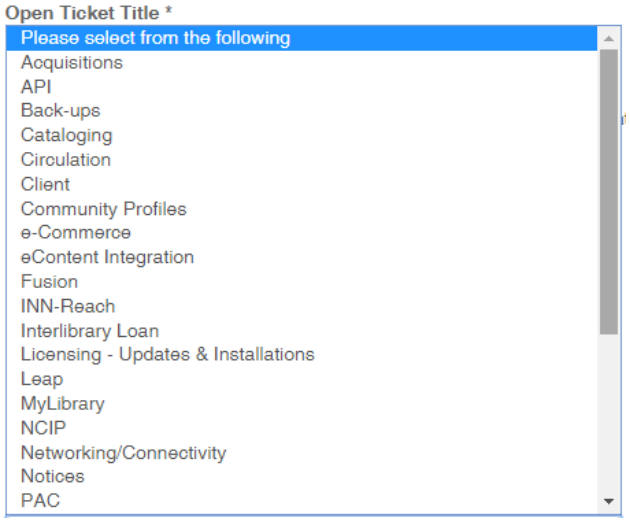
- Is this an update to an ongoing issue?
- Are you providing another example of an occurrence?

- Has this problem happened before?
- Does another ticket contain pertinent information to the current problem?

Using Dropdowns to Your Advantage

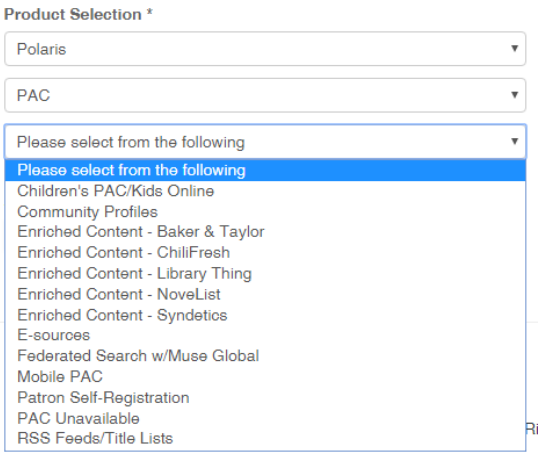


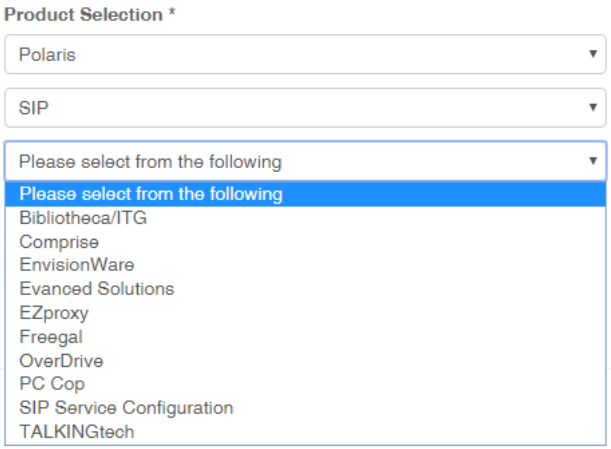
When selecting "Polaris"…

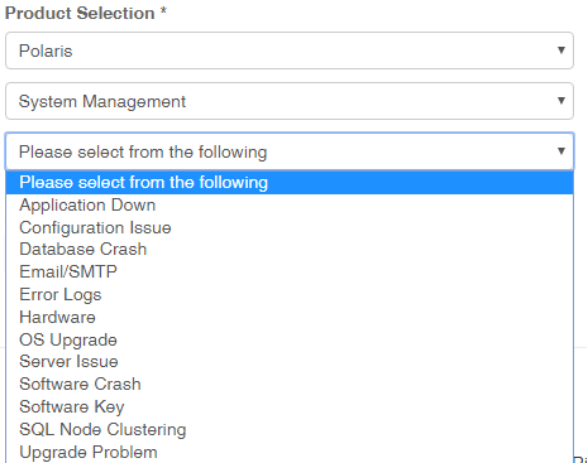


- Consider dropdowns before writing descriptions
- Your selections determines which Support Staff Member or Team your ticket will be routed to
- Don't forget to scroll!

Using Dropdowns to Your Advantage







- Often many choices
- But none of these options pertain to me!
  - Select the topic which is as close as possible
  - Spend extra time describing the problem in the ticket
  - Consider not selecting any
- Suggesting additional choices

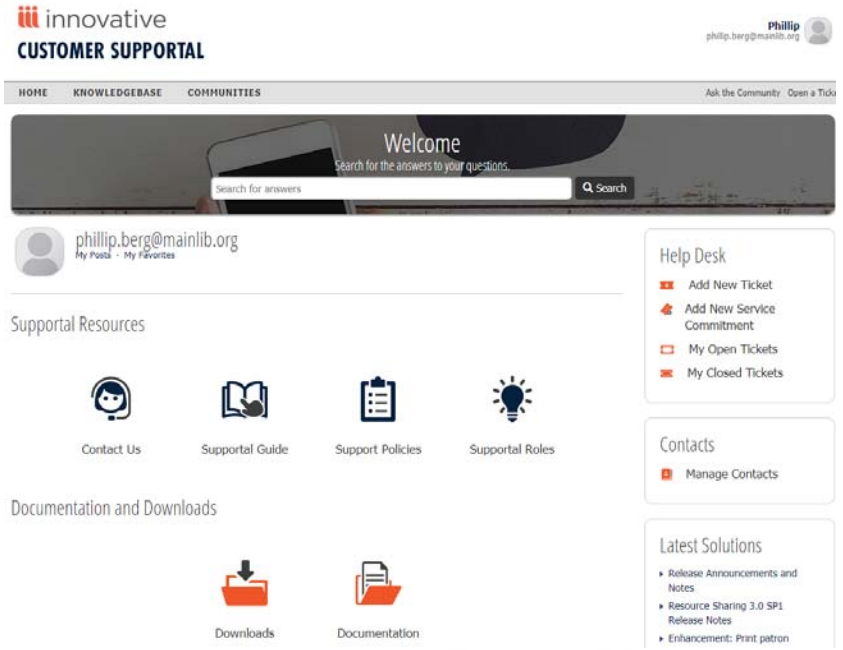
Crafting Your Ticket

General Tips:

- Consider maintaining your own template
- Avoid colorful/prosaic language, non-iii acronyms
- Sign your name at the end
  - Indicate your schedule & any days off

Attachments:

- Screenshots are your best friend
- Consider PPT for multiple screenshots
- Maximum file size of 3 MB
- Certain file types will be rejected by the ticket
  - Follow up with an email that contains attachments or request an alternative means of file transfer



Crafting Your Ticket

Writing a Description:

- Maintain consistency and chronology
- Telling a story
  - What led up to this problem?
  - How often does it happen?
  - What steps have been taken already?
  - Always state the basics: OS & browser
- Briefly explain importance or scope
- Consider listing an expected turnaround time

Giving a Title:

- Avoid puns or other familiar language
- Short and sweet

Classifying Urgency

Basic Guidelines:

System Down

- One of more critical subsystems are unavailable
- Library has one workstation and it is down

Critical

- One or more major component are not working

High

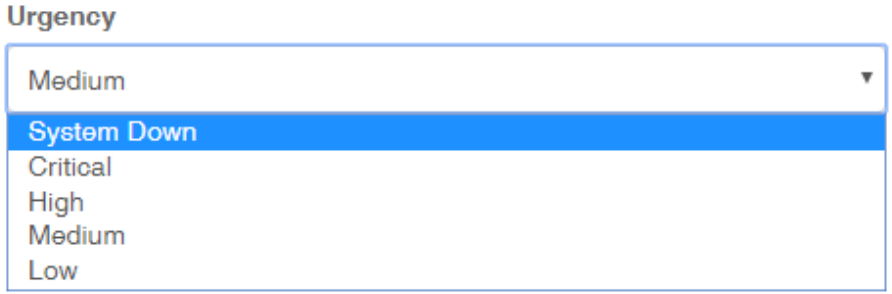
- System is not working as expected

Medium

- Functionality question

Low

- Request for information



The Tale of the Bad Ticket

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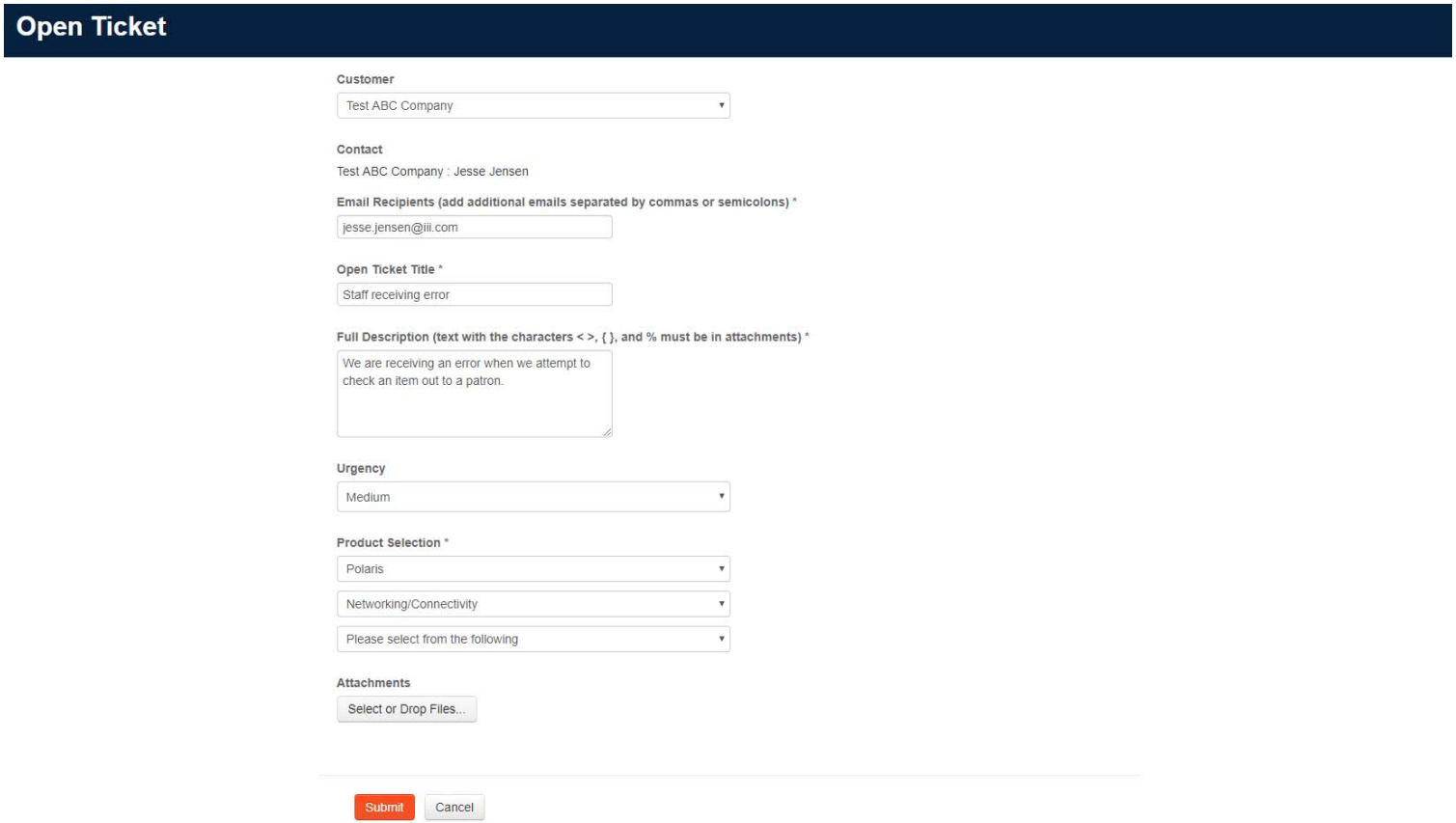

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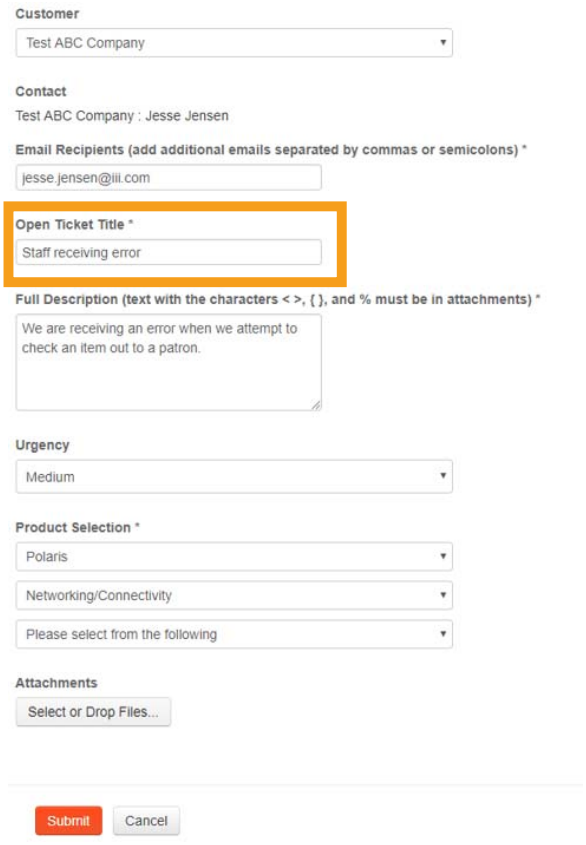
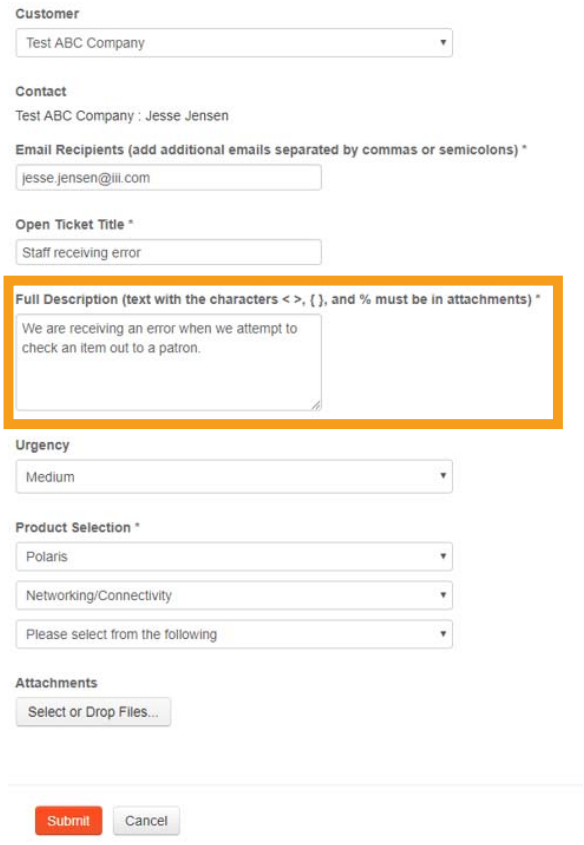


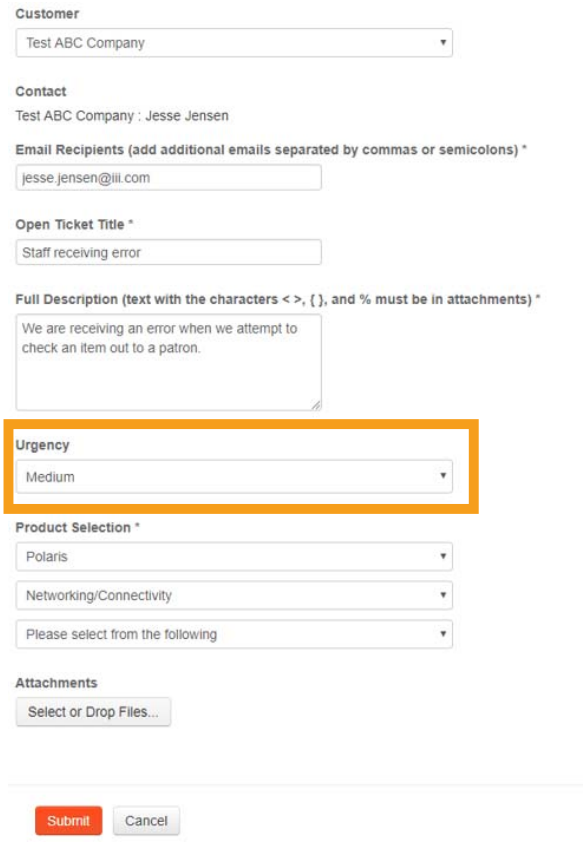
- The ticket title does not contain enough keywords
  - Keywords in the title are used when searching for solutions. Not having good keywords could mean that you are missing out on information that could allow you to self-solve an issue.
  - Keywords in the title of a ticket can help the Support team quickly locate tickets in their queue and ensure that they have been routed to the correct staff member or team to be worked on.

The Tale of the Bad Ticket



- The ticket does not contain examples of the problem and/or what the library would like to see resolved
  - Providing as much detail and as many examples as possible in the description of the ticket reduces the amount of time Support staff need to asking you for examples or clarification. The more information provided up front means that Support staff will be able to begin digging into your ticket that much faster.
  - This information can be provided as either a very detailed description, through the use of screenshots or other attachments, or a combination of both. If you have specific records, please list those as examples.

The Tale of the Bad Ticket



- Make sure that the level of Urgency is set correctly
  - Support staff use the value set in the ticket's Urgency field to help organize their ticket queues and find what they should be working on next.
  - Because it may not be possible for Support staff to understand the urgency of the issue being reported, we recommend that the library be sure to check that the level of urgency selected matches that of their issue and is not just set to the default of Medium.
  - Using our example, if the library entering the ticket was unable to circulate from any circulation workstation due to this error, the ticket should be entered as a System Down, rather than leaving the Urgency at the default of Medium.
    - If a ticket is entered with an Urgency of Critical or System Down, we highly recommend a call be placed to the Support team to ensure they are able to act quickly.

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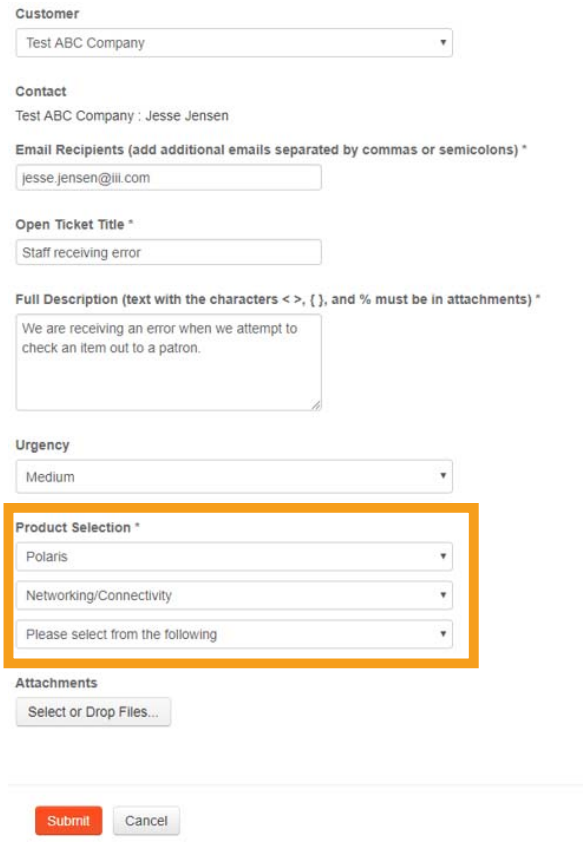

- Make sure the proper options have been selected in the Product Selection dropdowns
  - The options selected in these dropdowns are used by the ticketing system to automatically route the ticket to the right staff member or team.
  - If the wrong description is selected in the dropdowns the Support team will have to re-route the ticket manually, increasing the amount of time to get the ticket to the person who can answer it.

The Tale of the Good Ticket

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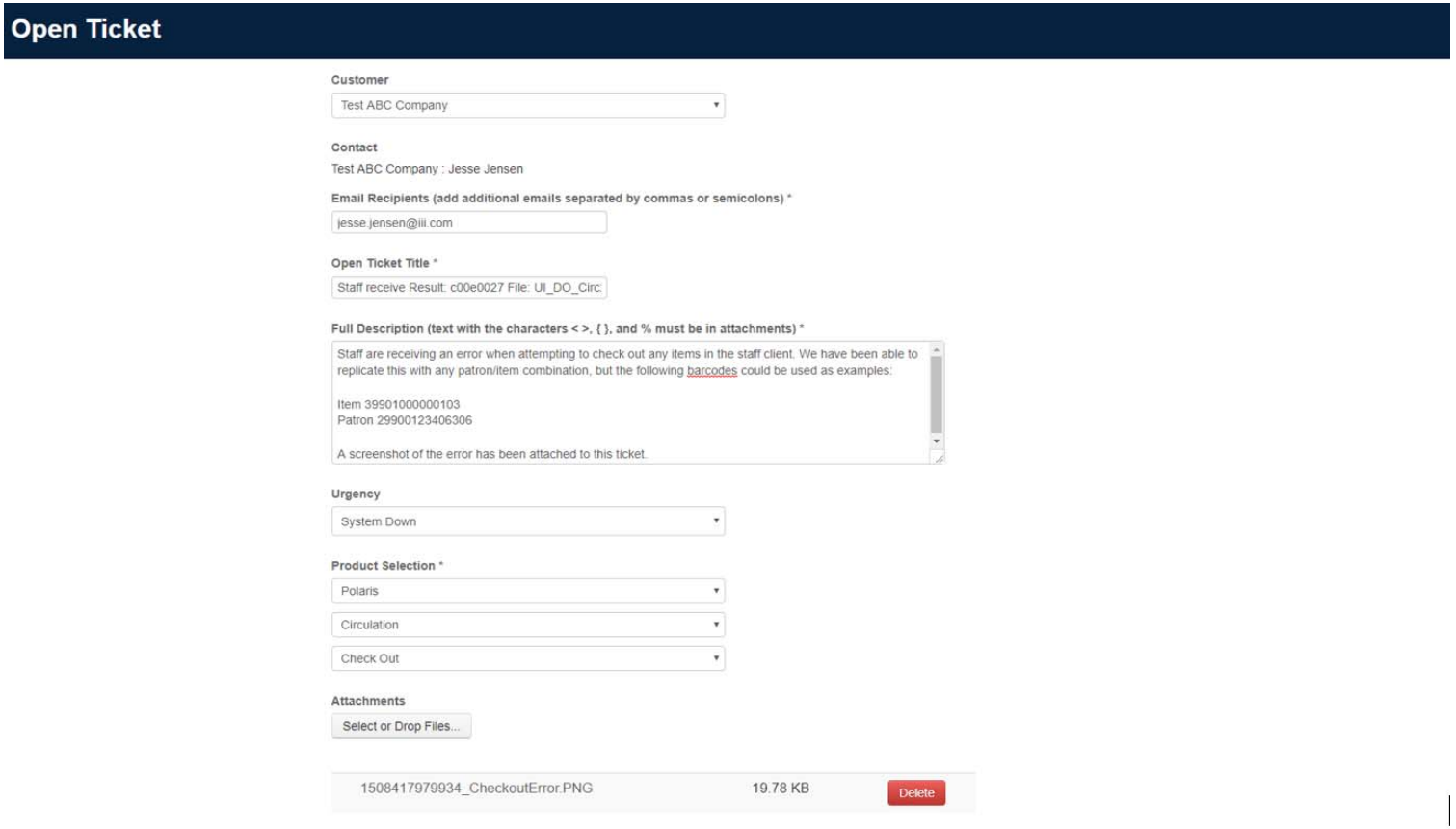

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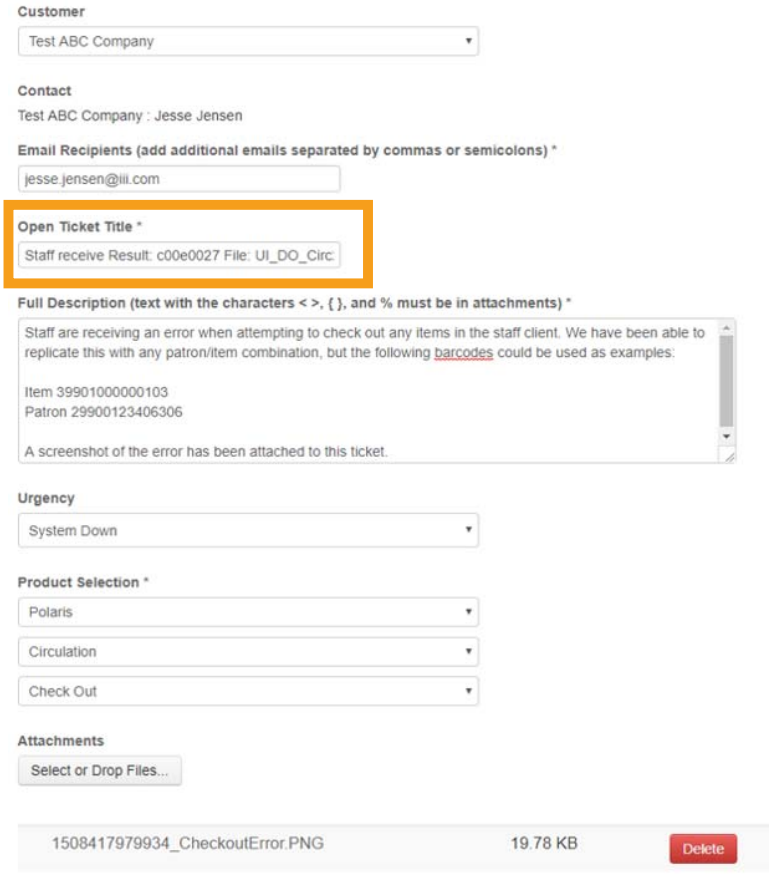
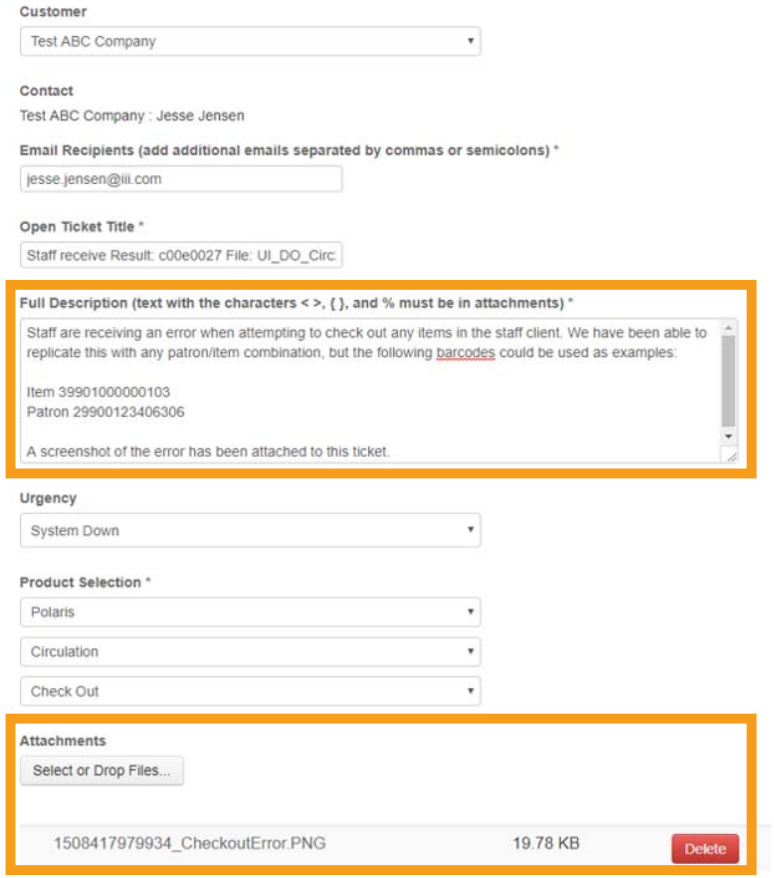


- The title not only contains keywords, but the text from the error itself.
  - Staff receive Result: c00e0027 File: UI_DO_Circ2.cpp Line: 631 error at checkout
  - Because the title is used when searching for solutions, it is possible that if this error had already reported and resolved, adding the text of the error message may help direct you to a solution.
  - Not only will the keywords in this title help the Support team quickly locate the ticket in their queue, including the error will ensure that the ticket has been routed to the correct staff member or team.

The Tale of the Good Ticket



- The ticket not only contains examples of the problem and/or what the library would like to see resolved, but it also includes a screenshot of the where the library is seeing the error
  - Because the ticket includes the text of the error message, the location where staff are seeing the error, example barcodes support staff can use to replicate the error, and a screenshot of the error, the support team will be able to take quick action and may not have to follow up for additional information or clarification before beginning to work on the ticket.

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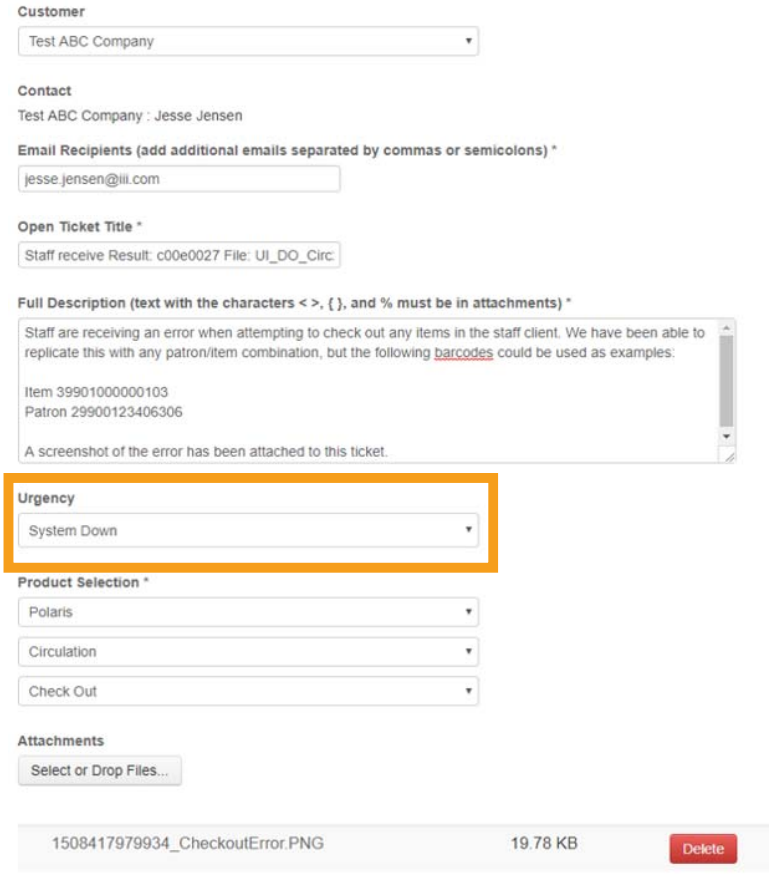

- The level of Urgency has been set to System Down, which is appropriate since the library is unable to circulate at any circulation workstation
  - Marking this ticket as System Down places it as high priority in the Support queue, ensuring that it will get the prompt attention that it needs.
    - Even with the ticket set to System Down, we recommend that the library make a call to the Support team to ensure that they have everything needed to take action.

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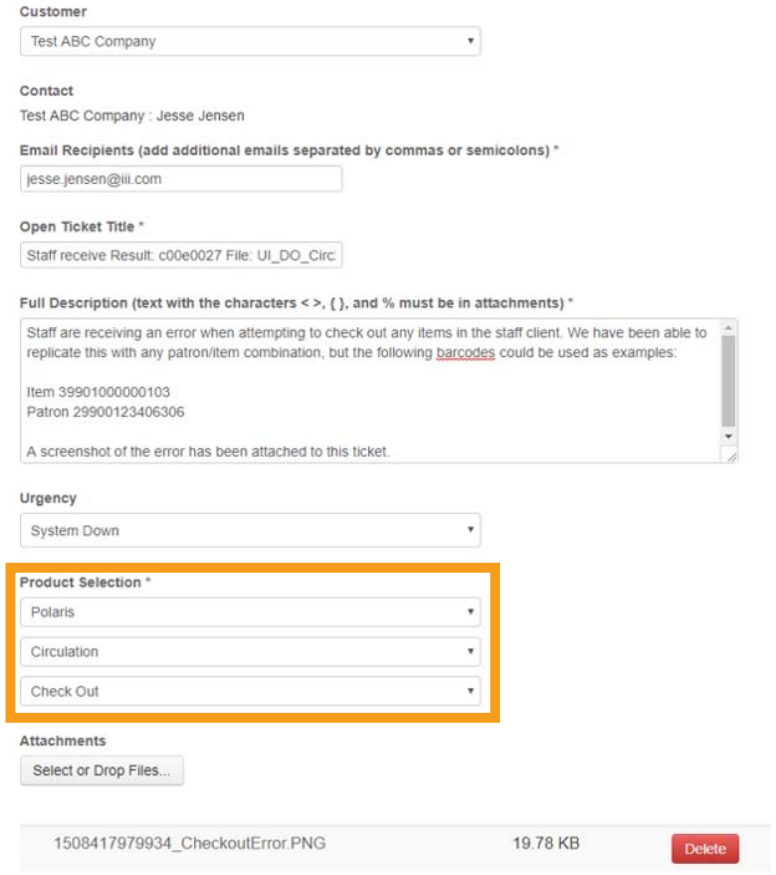
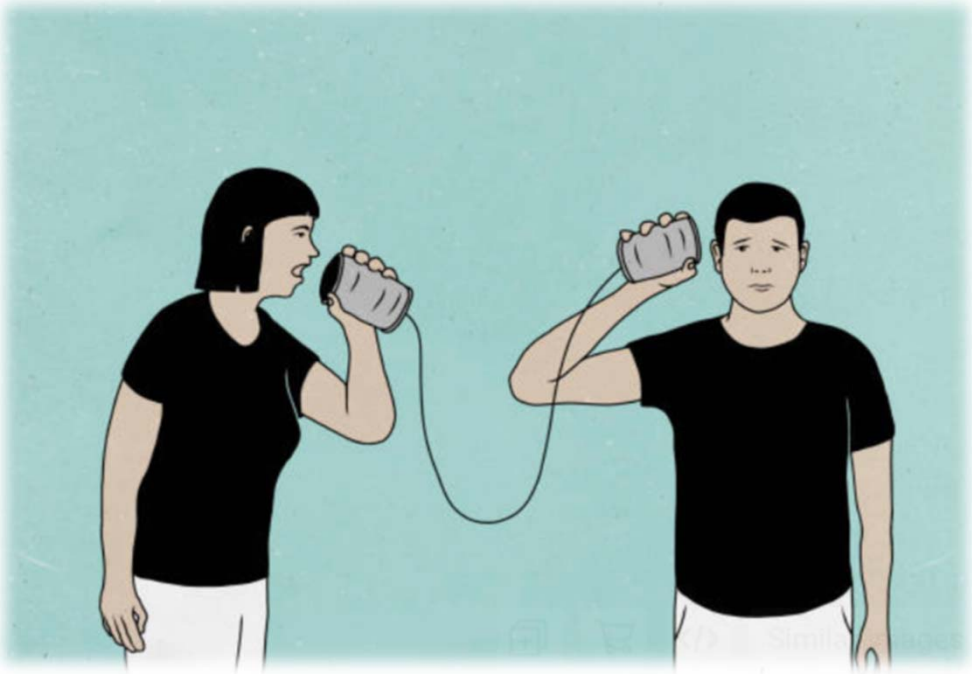


- The proper options have been selected in the Product Selection dropdowns
  - The options selected in the dropdowns will ensure that the ticket is routed to the correct staff member or team, making it so the ticket does not have to be manually re-routed by the Support team.

The Art of Following Up

- Customer Support follows guidelines to prioritize tickets

- We work together to foster this relationship by:
  - Keep lines of communication open
  - Respond to Support's questions
  - Time follow-up to a ticket's urgency
  - Note patterns of behavior
  - Periodically review open tickets



After-Hours Support

- 24-hour emergency support available for all System Down situations
- Application Support hours may vary, but generally coincide with U.S. hours
- Visit the “Information and Contact Us” of the Supportal for ILS-specific guidelines
- The one phone number which always works:
  - (510) 450-6344
- Have a phone number (or 2) where you can be contacted by Support

“Innovative, we have a problem…”

Identifying the Problem

- Feeling ignored?
- Turnaround times not meeting expectations?
- Keep everything documented
- What are the trends?
  - Certain time of day/day of week?
  - Only one particular employee?

Next Steps

1) Contact your supervisor
2) Let a supervisor talk to the Customer Support Management team
3) If still no improvement, contact Hilary Newman (Sr. VP of Customer Support & Success)

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Further Support

Name	URL
Supportal Solutions Knowledgebase	https://iii.rightanswers.com/portal/ss/?tabname=knowledgebase
IUG Forums	http://innovativeusers.org/index.php/iug-forum.html
Supportal Guide	https://iii.rightanswers.com/portal/app/portlets/results/viewsolution.jsp?solutionid=160202200750885
Polaris Brochures	https://iii.rightanswers.com/portal/ss/?tabid=2&taxonomypath=Downloads%2F%2FPolaris%2F%2FBrochures#t=kbResults
Polaris Training Videos	https://iii.rightanswers.com/portal/ss/?tabid=2&taxonomypath=Downloads%2F%2FPolaris%2F%2FVideos#t=kbResults
Workshops	https://bookwhen.com/innovative
Release Notes Overview	https://iii.rightanswers.com/portal/app/portlets/results/viewsolution.jsp?solutionid=160629163705283
Current Release Notes	https://iii.rightanswers.com/portal/ss/?tabid=2&taxonomypath=Solutions%2F%2FRelease%20Notes%2F%2FCurrent#t=kbResults
Previous Enhancements	https://iii.rightanswers.com/portal/ss/?tabid=2&taxonomypath=Enhancements%2F%2FPolaris#t=kbResults
Idea Lab	https://www.idealab.iii.com/
Webinars	https://iii.rightanswers.com/portal/app/portlets/results/viewsolution.jsp?solutionid=170207104646422

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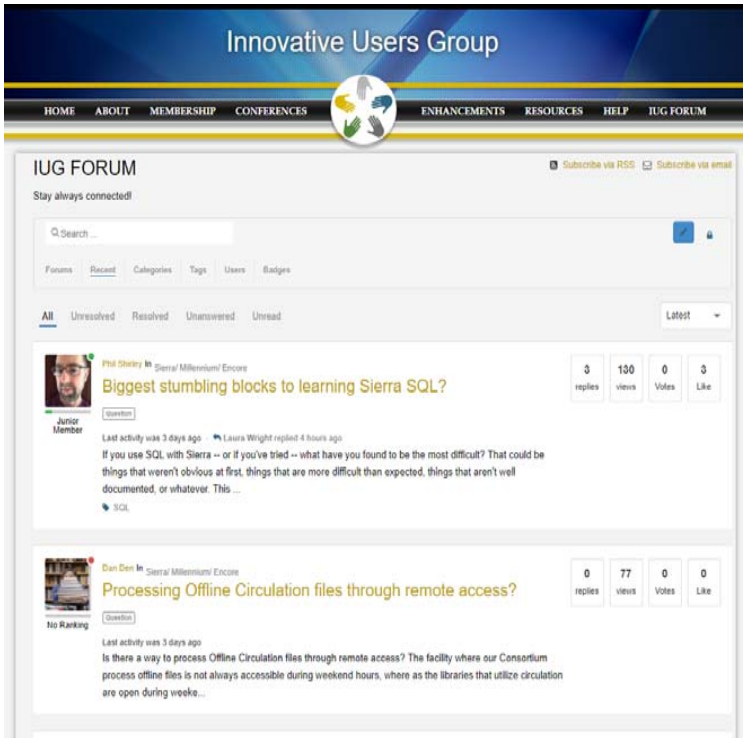
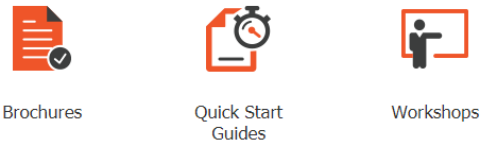


- IUG Forums
  - http://innovativeusers.org/index.php/iug-forum.html

Further Support

Supportal Resources

Training and Services



Product Release Notes and Enhancements

- IUG Forums
  - http://innovativeusers.org/index.php/iug-forum.html
- Supportal Solutions knowledgebase
  - https://support.iii.com
  - Helpful Supportal Shortcuts

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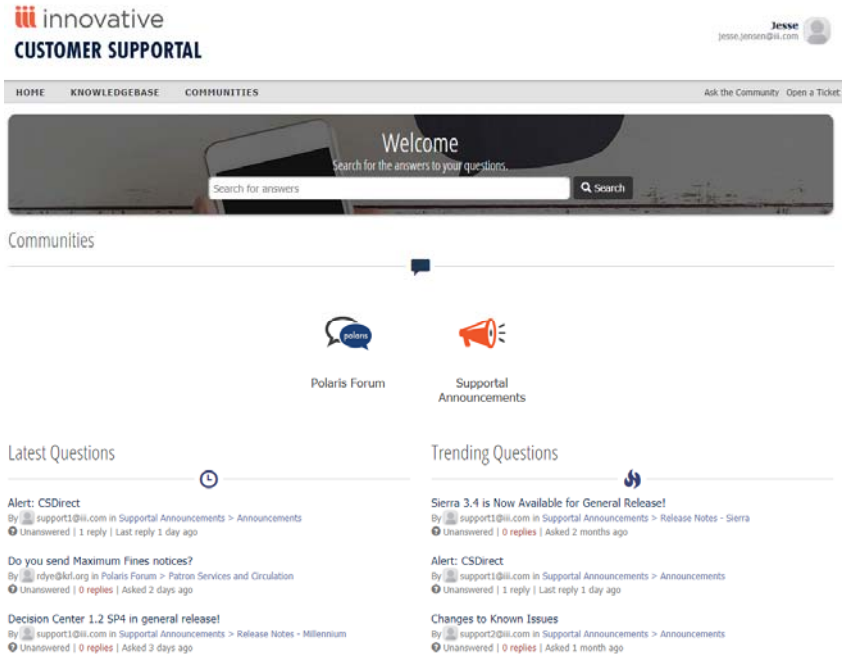

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  - Helpful Supportal Shortcuts
- Supportal Communities
  - Forums
  - Supportal Announcements

Q & A