



# The Supportal

Best Practices for Submitting & Responding to Tickets

Phillip Berg  
Executive Director  
MAIN PL Consortium  
Morristown, NJ



Jesse Jensen  
Manager, Application Support  
Innovative  
Liverpool, NY



## 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

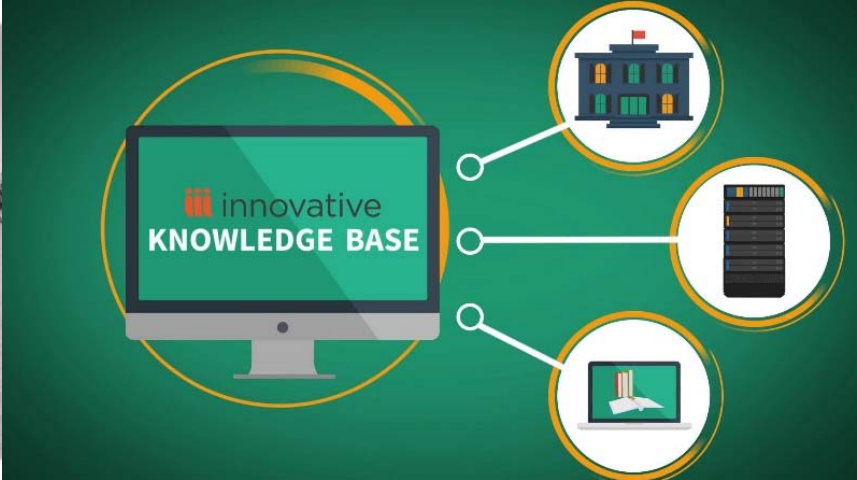


## Objectives

- 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?
- YES?** → REOPEN
- YES?** → CREATE





# Using Dropdowns to Your Advantage

**Customer**  
Morris Automated Info Network

**Contact**  
Morris Automated Info Network : Phillip Berg

**Email Recipients (add additional emails separated by commas or semicolons) \***  
phillip.berg@mainlib.org

**Open Ticket Title \***

**Full Description (text with the characters <>, {}, and % must be in attachments) \***

**Urgency**  
Medium

**Product Selection \***  
Please select from the following

**Attachments**  
Select or Drop Files...

**Submit** **Cancel**

When selecting  
“Polaris” ...

**Open Ticket Title \***

Please select from the following

- Acquisitions
- API
- Back-ups
- Cataloging
- Circulation
- Client
- Community Profiles
- e-Commerce
- eContent Integration
- Fusion
- INN-Reach
- Interlibrary Loan
- Licensing - Updates & Installations
- Leap
- MyLibrary
- NCIP
- Networking/Connectivity
- Notices
- PAC

- 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

Product Selection \*

Polaris

PAC

Please select from the following

- Please select from the following
- Children's PAC/Kids Online
- Community Profiles
- Enriched Content - Baker & Taylor
- Enriched Content - ChillFresh
- Enriched Content - Library Thing
- Enriched Content - NoveList
- Enriched Content - Syndetics
- E-sources
- Federated Search w/Muse Global
- Mobile PAC
- Patron Self-Registration
- PAC Unavailable
- RSS Feeds/Title Lists

Product Selection \*

Polaris

SIP

Please select from the following

- Please select from the following
- Bibliotheca/ITG
- Comprise
- EnvisionWare
- Evanced Solutions
- EZproxy
- Freegal
- OverDrive
- PC Cop
- SIP Service Configuration
- TALKINGtech

Product Selection \*

Polaris

System Management

Please select from the following

- Please select from the following
- Application Down
- Configuration Issue
- Database Crash
- Email/SMTP
- Error Logs
- Hardware
- OS Upgrade
- Server Issue
- Software Crash
- Software Key
- SQL Node Clustering
- Upgrade Problem

- 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

The screenshot shows the Innovative Customer Support Portal. At the top, there is a navigation bar with 'HOME', 'KNOWLEDGEBASE', and 'COMMUNITIES'. A search bar is present with the text 'Search for answers' and a 'Search' button. Below the navigation bar, there is a 'Welcome' message and a search bar. The user profile for 'phillip.berg@mainlib.org' is visible. The main content area is divided into several sections: 'Supportal Resources' with icons for 'Contact Us', 'Supportal Guide', 'Support Policies', and 'Supportal Roles'; 'Documentation and Downloads' with icons for 'Downloads' and 'Documentation'; 'Help Desk' with links for 'Add New Ticket', 'Add New Service Commitment', 'My Open Tickets', and 'My Closed Tickets'; 'Contacts' with a link for 'Manage Contacts'; and 'Latest Solutions' with links for 'Release Announcements and Notes', 'Resource Sharing 3.0 SPI Release Notes', and 'Enhancement: Print patron'.



# 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

#### Urgency

Medium	▼
<b>System Down</b>	
Critical	
High	
Medium	
Low	



## The Tale of the Bad Ticket



# The Tale of the Bad Ticket

## Open Ticket

### Customer

Test ABC Company

### Contact

Test ABC Company : Jesse Jensen

### Email Recipients (add additional emails separated by commas or semicolons) \*

jesse.jensen@iii.com

### Open Ticket Title \*

Staff receiving error

### Full Description (text with the characters <, {, and % must be in attachments) \*

We are receiving an error when we attempt to check an item out to a patron.

### Urgency

Medium

### Product Selection \*

Polaris

Networking/Connectivity

Please select from the following

### Attachments

Select or Drop Files...

Submit

Cancel





# The Tale of the Bad Ticket

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@ill.com

**Open Ticket Title \***  
Staff receiving error

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
We are receiving an error when we attempt to check an item out to a patron.

**Urgency**  
Medium

**Product Selection \***  
Polaris  
Networking/Connectivity  
Please select from the following

**Attachments**  
Select or Drop Files...

Submit Cancel

- 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

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@ill.com

**Open Ticket Title \***  
Staff receiving error

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
We are receiving an error when we attempt to check an item out to a patron.

**Urgency**  
Medium

**Product Selection \***  
Polaris  
Networking/Connectivity  
Please select from the following

**Attachments**  
Select or Drop Files...

Submit Cancel

- 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

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@ill.com

**Open Ticket Title \***  
Staff receiving error

**Full Description (text with the characters < >, ( ), and % must be in attachments) \***  
We are receiving an error when we attempt to check an item out to a patron.

**Urgency**  
Medium

**Product Selection \***  
Polaris  
Networking/Connectivity  
Please select from the following

**Attachments**  
Select or Drop Files...

Submit Cancel

- 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.



# The Tale of the Bad Ticket

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@ill.com

**Open Ticket Title \***  
Staff receiving error

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
We are receiving an error when we attempt to check an item out to a patron.

**Urgency**  
Medium

**Product Selection \***

- Polaris
- Networking/Connectivity
- Please select from the following

**Attachments**  
Select or Drop Files...

- 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



# The Tale of the Good Ticket

## Open Ticket

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company ; Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@iii.com

**Open Ticket Title \***  
Staff receive Result: c00e0027 File: UI\_DO\_Circ:

**Full Description (text with the characters <>, {}, and % must be in attachments) \***  
Staff are receiving an error when attempting to check out any items in the staff client. We have been able to replicate this with any patron/item combination, but the following barcodes could be used as examples:  
  
Item 39901000000103  
Patron 29900123406306  
  
A screenshot of the error has been attached to this ticket.

**Urgency**  
System Down

**Product Selection \***  
Polaris  
Circulation  
Check Out

**Attachments**  
Select or Drop Files...

1508417979934_CheckoutError.PNG	19.78 KB	Delete
---------------------------------	----------	--------



# The Tale of the Good Ticket

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@iii.com

**Open Ticket Title \***  
Staff receive Result: c00e0027 File: UI\_DO\_Circ.

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
Staff are receiving an error when attempting to check out any items in the staff client. We have been able to replicate this with any patron/item combination, but the following barcodes could be used as examples:  
  
Item 39901000000103  
Patron 29900123406306  
  
A screenshot of the error has been attached to this ticket.

**Urgency**  
System Down

**Product Selection \***  
Polaris  
Circulation  
Check Out

**Attachments**  
Select or Drop Files...

1508417979934\_CheckoutError.PNG 19.78 KB [Delete](#)

- 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

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@iii.com

**Open Ticket Title \***  
Staff receive Result: c00e0027 File: UI\_DO\_Circ.

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
Staff are receiving an error when attempting to check out any items in the staff client. We have been able to replicate this with any patron/item combination, but the following barcodes could be used as examples:  
  
Item 39901000000103  
Patron 29900123406306  
  
A screenshot of the error has been attached to this ticket.

**Urgency**  
System Down

**Product Selection \***  
Polaris  
Circulation  
Check Out

**Attachments**  
Select or Drop Files...  
  
1508417979934\_CheckoutError.PNG 19.78 KB Delete

- 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.



# The Tale of the Good Ticket

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@iii.com

**Open Ticket Title \***  
Staff receive Result: c00e0027 File: UI\_DO\_Circ.

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
Staff are receiving an error when attempting to check out any items in the staff client. We have been able to replicate this with any patron/item combination, but the following barcodes could be used as examples:  
  
Item 39901000000103  
Patron 29900123406306  
  
A screenshot of the error has been attached to this ticket.

**Urgency**  
System Down

**Product Selection \***  
Polaris  
Circulation  
Check Out

**Attachments**  
Select or Drop Files...

1508417979934\_CheckoutError.PNG 19.78 KB Delete

- 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.



# The Tale of the Good Ticket

**Customer**  
Test ABC Company

**Contact**  
Test ABC Company : Jesse Jensen

**Email Recipients (add additional emails separated by commas or semicolons) \***  
jesse.jensen@iii.com

**Open Ticket Title \***  
Staff receive Result: c00e0027 File: UI\_DO\_Circ.

**Full Description (text with the characters < >, { }, and % must be in attachments) \***  
Staff are receiving an error when attempting to check out any items in the staff client. We have been able to replicate this with any patron/item combination, but the following barcodes could be used as examples:  
  
Item 39901000000103  
Patron 29900123406306  
  
A screenshot of the error has been attached to this ticket.

**Urgency**  
System Down

**Product Selection \***  
Polaris  
Circulation  
Check Out

**Attachments**  
Select or Drop Files...

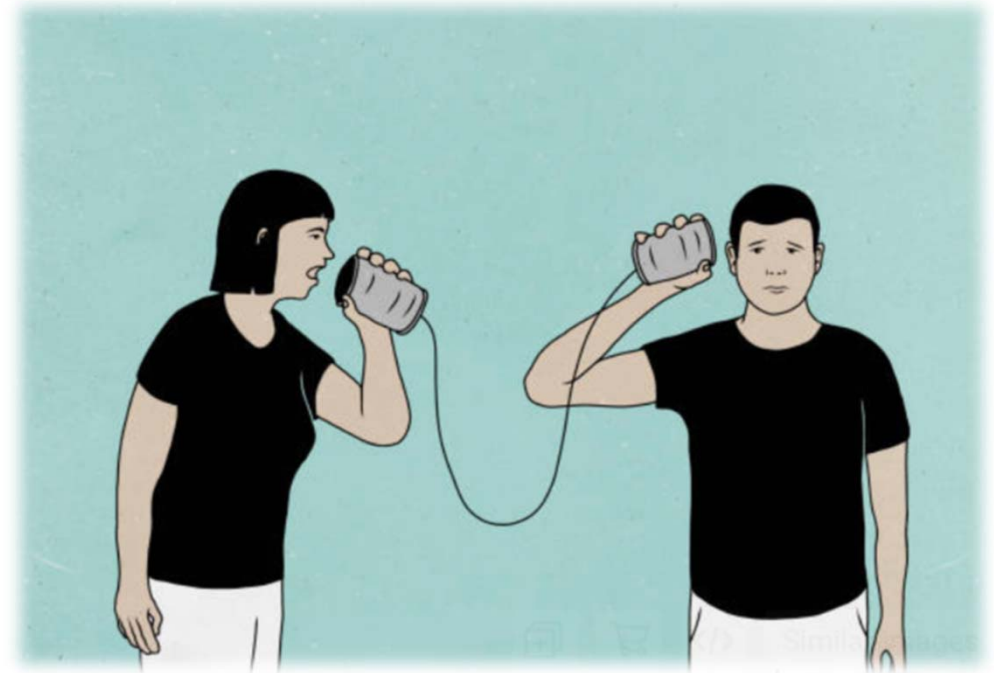
1508417979934\_CheckoutError.PNG 19.78 KB Delete

- 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)



## Further Support

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





# Further Support

Innovative Users Group

HOME ABOUT MEMBERSHIP CONFERENCES ENHANCEMENTS RESOURCES HELP IUG FORUM

IUG FORUM

Stay always connected!

Search ...

Forums Recent Categories Tags Users Badges

All Unresolved Resolved Unanswered Unread Latest

**Phil Shelby** In Sierra/ Millennium/ Encore  
**Biggest stumbling blocks to learning Sierra SQL?** 3 replies 100 views 0 Votes 3 Like

Junior Member  
Last activity was 3 days ago Laura Wright replied 4 hours ago  
If you use SQL with Sierra -- or if you've tried -- what have you found to be the most difficult? That could be things that weren't obvious at first, things that are more difficult than expected, things that aren't well documented, or whatever. This ...

SQL

**Dan Den** In Sierra/ Millennium/ Encore  
**Processing Offline Circulation files through remote access?** 0 replies 77 views 0 Votes 0 Like

No Ranking  
Last activity was 3 days ago  
Is there a way to process Offline Circulation files through remote access? The facility where our Consortium process offline files is not always accessible during weekend hours, where as the libraries that utilize circulation are open during weeke...

- IUG Forums

- ◆ <http://innovativeusers.org/index.php/iug-forum.html>



# Further Support

## Supportal Resources



Contact Us



Supportal Guide



Support Policies



Supportal Roles

## Training and Services



Brochures



Quick Start Guides



Workshops

## Product Release Notes and Enhancements



Release Notes Overview



Current Release Notes



Idea Lab

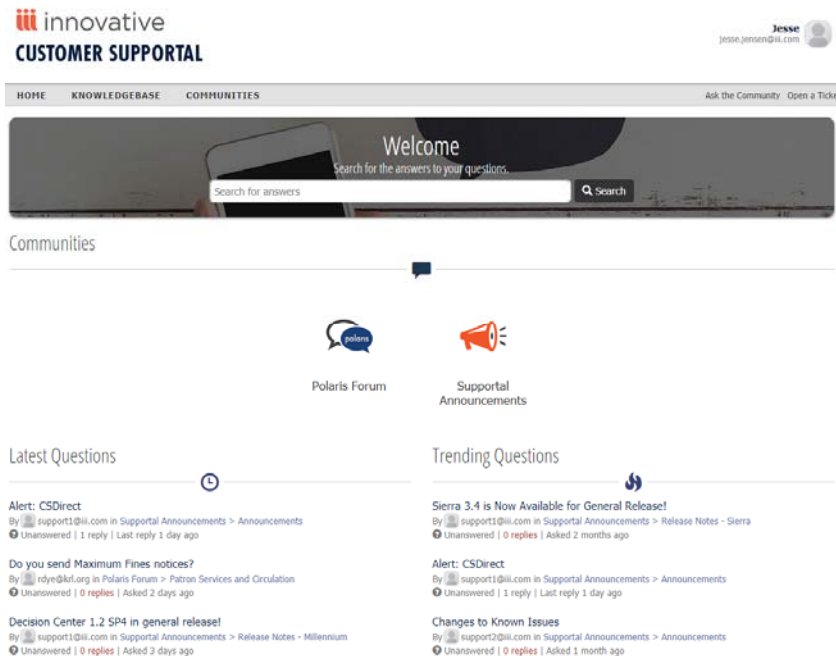


Innovative Webinars

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



# Further Support



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



# Q & A

