

Introduction to Supportal

**IX Polish Users' Group Meeting
Lublin, 9-10 June 2016**

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What is Supportal?

Since October 2015 is the support portal for Innovative (Virtua) customers and since January 2016 for (Sierra/Millennium) customers:

“ Knowledge Base

- . It stores answers provided to customers! questions/requests. You can pre-select by product: Millennium, Sierra or Virtua.

“ Ticket Management

- . Create, update tickets and also view closed tickets.

“ Contacts Management

- . Add new contacts and update existing ones. These functionalities are controlled by user roles.

“ Forums

- . Coming soon

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How to access: support.iii.com

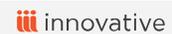
“ Each registered contact can access, using their email address and provided password.

Permissions (Roles):

- “ **Administrator:** can modify all tickets and all contacts and create new contacts.
- “ **Regular:** can modify their own tickets and their own contact.
- “ **Limited:** Has no access to tickets or contacts.

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CUSTOMER SUPPORTAL

Supportal Login

Please login to see our complete support knowledgebase

If you are a registered library contact, please login to access full online content and the ticketing system

Email Address :

Password :

[Login](#)

Announcements

There are no current announcements

Links

- [Innovative Homepage](#)
- [Innovative Users Group](#)

Innovative on Social Media

Stay in touch with Innovative and your fellow Innovative libraries by joining us around the web!

? Frequently Asked Questions

- [How do I contact Innovative Customer Support?](#)
- [How do I reset my Supportal password?](#)

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The screenshot shows the 'Customer Support Portal' for innovative. At the top right, it indicates the user is logged in as 'Silvia Guiverau' and provides links for 'LOGOUT', 'Preferences', and 'Help'. The main navigation area includes a 'Hi Silvia! How can I help?' chat bubble, a 'Select a Browse Category' dropdown menu, and a search bar with a 'SEARCH' button. Below this are sections for 'Support Desk' (with links for 'My Open Tickets', 'My Closed Tickets', and 'Add New'), 'Contact Management' (with a link to 'Click here to manage contacts'), and 'Announcements' (stating 'There are no current announcements'). A 'Shortcuts' section is also visible. The footer contains the text 'CONFIDENTIAL', 'Your Partner for Library Success', and the innovative logo.

How to search the Knowledge Base: search by category

The screenshot displays the 'Knowledgebase' search interface. On the left, there are 'Filters' for 'Attributes' (Innovative User Group, Conferences, Software versions) and 'Collections' (Virtua, Vital). Below these are 'My Recent Searches'. The main search area shows 'Filter By' with 'Solutions' selected. A dropdown menu is open, listing various categories such as 'Acquisitions', 'API', 'Authentication', 'Back-ups', 'Cataloging', 'Chamo', 'Circulation', 'Client', 'Database Administration', 'Discovery', 'Email/SMTP', 'Fastrac', 'Hardware', 'Networking/Connectivity', 'Notices', 'Online Help', 'PAC', 'Performance', 'Planned Shutdown', 'Profiler', 'Reporting', 'RFID', 'Scheduler/Task Builder', 'Self-Check & Materials Management', 'Serials', 'SIP', 'SQL Tips', 'Supportal', and 'Systems'. The 'All Classifications' dropdown is set to 'All Classifications' and 'Sort By' is set to 'Relevance'. The search results show 'Showing 1-18 of 483 Results' and a list of articles with titles like 'How to remove Chamo "Add to Cart"', 'How to solve "ORA-01653: unable to...', and 'MySQL JDBC driver for VITAL5.2 or...'. The footer includes 'CONFIDENTIAL', 'Your Partner for Library Success', and the innovative logo.

How to search the Knowledge Base: search by keyword

Below are some answers that might help.

template SEARCH HELP
[Reset](#) | [Show Advanced Search](#)

Knowledgebase Forums

Filters

Attributes

Software versions

Chamo

1.139

Virtua

15.0

15.1 SP1

2012.2.2

2014.1.x

2014.3

2014.3 SP1

Vital

6.0

6.3

Filter By

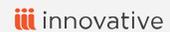
Solutions > All Titles > All Classifications

Showing 1-10 of 13 Results for "template" Sort By | Relevance

- Problem when adding spine labels to a customized labels template** ★★★★★
 template We have a problem converting... template. When we run the Mail merge... template are the following. Please note Description of procedure on how to import spine labels into a Microsoft Word document and into a spe ...
- Setting the Default Valet Template** ★★★★★
 Valet Template When I use the URL... configuration, can I set which template is shown by default? Vital; Valet; template; URL. When I use the URL to our Valet without specifying a view configuration, can I set which template is ...
- How to customize a workflow** ★★★★★
 ; cataloging; template; customization
 I would like to customize a workflow. How can I do that?
- How to add the due date field to the purchase order template** ★★★★★
 the due date field to the purchase order template..., Acquisitions, purchase order, due date, template... templates, like: engonprintpo.utf We would like to add the Due Date to all our purchase orders

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How to search the Knowledge Base: advanced search (1)

Below are some answers that might help.

+supportal "contact management" SEARCH HELP
[Reset](#) | [Hide Advanced Search](#)

Find solutions that have...

all these words:

this exact wording or phrase:

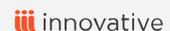
one or more of these words:

But do not show solutions that have...

any of these unwanted words:

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How to search the Knowledge Base: advanced search (2)

Filter By

Solutions > All Titles > All Classifications

Showing 1-10 of 11 Results for "+supportal *contact management"

Sort By Relevance

Did you mean: support contact management

- Supportal contact roles, including primary contacts** ★★★★★
Supportal, contact management, contact role...160202210228428 Supportal contact... found in the contact form when using Contact
Explanation of what the contact roles mean
- Password requirements for the Supportal** ★★★★★
for the Supportal Supportal, password, customer portal, Contact Manager, Login, log in, contact management Password
Password requirements for the Supportal
- Supportal Guide for Virtua** ★★★★★
Contact Management Page 6... in under the Contact Management section... in to the Supportal, you will see the Contact
A quick reference guide to using the Supportal
- How do I update my Supportal password?** ★★★★★
management portlet. See Support Roles... go to the Contact Management portlet... on the Contact Management link. Click
Instructions on how to update your Supportal password
- Adding a contact with access to multiple libraries** ★★★★★
member. Supportal, contact management... a new Supportal contact using contact management, but now I need that staff
How to link a contact to multiple library records
- Supportal Walkthrough 06: Contact Management** ★★★★★
06: Contact Management Supportal... from the contact management list. I'll also add... from the contact management list. I'll
The sixth video in the Supportal Walkthrough series. It explains how to create, update, and manage ...

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Helpdesk: tickets management

Support Desk

My Open Tickets My Closed Tickets Add New

- ~ My open tickets
 - . see current status, update ticket or claim ticket
- ~ My closed tickets
 - . See current status and reopen if not resolved.
- ~ Add new ticket

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Ticket management: open and closed tickets

- “ Filter by date; last 60 days as default (from opening date).
 - . Other options are:
 - “ Last 120
 - “ Last year
 - “ All open tickets
- “ Limit search by title keyword
- “ Show 10, 25, 50 or 100 entries

opened in the

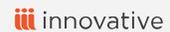
entries Search:

Status	Contact	Customer	Title	Date Opened
Needs Attention	Alex Sanchez	Test ABC Company	Broken Link resolved	6/9/2016 1:38 pm
Needs Attention	Jennifer Pelton	Test ABC Company	SC: Update Scopes	5/26/2016 1:37 pm
Re-Opened	Ray Pettibon	Test ABC Company	Testing the reminder email workflow for Retire	5/5/2016 4:10 pm

entries

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Ticket management : update, claim, close and re-open a ticket

Update Ticket

Ticket Number
378511

Status
Needs Attention

Title
Broken Link resolved

Update Status

In Progress

Comentarios

Adjuntos

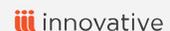
Select or Drop Files...

Update Status

In Progress
In Progress
 Re-Opened
 Closed

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Ticket management: Open ticket

- “ Customer name and contact are there by default
- “ Brief but meaningful title
- “ Description: detailed information with examples, steps to reproduce, logins...
- “ Urgency: medium by default
- “ Product selection: select a product, 2-3 levels are compulsory
- “ Attachments (select or drop files)
- “ You can also add a ticket from a Solution

Contact management

Contact Management

[Click here to manage contacts](#)

- “ Contacts can not be deleted, they can only be disabled

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Charo	Diez	Administrator	+34607391553	

Contact management

- “ Supportal user: Can see tickets of all contacts and add new ones
- “ Support contact: will receive Innovative communications
- “ Primary contact: only one by type
- “ Password: 15 characters max. and can not contain [<>%()]

Contact Details

Title <input type="text"/>	Salutation (eg: Miss, Mr) <input type="text"/>	Password * <input type="password"/>
First Name * <input type="text" value="Silvia"/>	Middle Name <input type="text"/>	Last Name * <input type="text" value="Guiverau"/>
Phone * <input type="text"/>	Mobile Phone <input type="text"/>	Home Phone <input type="text"/>
Fax <input type="text"/>	Email * <input type="text" value="silvia.guivernau@iui.com"/>	
Primary Contact? <input type="checkbox"/> Primary Support Contact <input type="checkbox"/> Primary Billing Contact <input type="checkbox"/> Primary Executive Contact	Contact Role <input type="checkbox"/> Supportal User <input type="checkbox"/> Support Contact <input type="checkbox"/> Billing Contact <input type="checkbox"/> Executive Contact	Supportal Role <input checked="" type="radio"/> Administrator <input type="radio"/> Regular <input type="radio"/> Limited
Address <input type="text"/>		Comments <input type="text"/>
<input type="button" value="Remove Address"/> <input type="button" value="Add New"/> <input type="button" value="Update"/>		

Shortcuts

Shortcuts

Documentation Repository	IUG Presentations	Downloads	IUG Homepage	Support Passwords	Supportal Walkthrough
<p>What's New in the Supportal</p>					

And more...

 Favorites - Edit My Favorites >	 FTP Directory - Click here for access to Customer Service FTP	 Recent Forum Posts - Go to Forums >
 My Recent Searches - <ul style="list-style-type: none">"supportal walkthrough"creating a generic login for supportal+supportal "contact management" templateservice commitment	 Frequently Asked Questions - <ul style="list-style-type: none">How do I contact Innovative Customer Support?How do I reset my Supportal password?	 Links - <ul style="list-style-type: none">Innovative HomepageInnovative Users Group

Thank you!



The Library is
OPEN