

## Troubleshooting Tips to help get Alma Case Solved Quicker

Created By: Tari Keller  
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1. Gather as much data as you can about the problem. (Create Word or Excel documents you can attach to case)
  - a. List specific steps in the process, including path to screen, if possible
  - b. Include problem records or data from analysis
  - c. Be sure to take screenshots or screencasts whenever possible to attach to your case. “A picture is worth 1,000 words.”
  - d. User IDs of people who encountered problem
  - e. Dates/times when it happened
  - f. Any details you can think of that relate to the issue
2. Do quick Google search for Ex Libris documents that relate to problem/process that is not working correctly.
3. Open case in Salesforce.
  - a. Be honest in your priority of problem (Setting everything too high can be like crying wolf)
  - b. Be as specific as you can with Alma/Primo terminology in your subject line and include error codes if you see them
  - c. Starting the subject with the module affected
  - d. Include as much information from #1 as you can, including record numbers—anything to give them an entry into Alma to see the problem
4. Continue to add information to the Salesforce case as you are able
  - a. CHECK your open cases REGULARLY for questions or requests for more information from Ex Libris. Look for the **red flags** in your cases listing and follow up as quickly as possible.
  - b. Encourage your staff to keep feeding you examples you can add to the case.
  - c. Questions you have that might trigger their attention
  - d. If a case is closed, but the problem comes up again later, re-open the case, or open a new one and reference the old case number.

5. Depending on how dire the need, escalate the case.
6. Provide feedback on the resolution of the issue to make it more useful for future troubleshooting and helping other customers.
7. Remember that on the other end of the process sits a real person. Be kind and considerate.

## Working with Support (Ex Libris PowerPoint that covers many aspects of the process)

<https://knowledge.exlibrisgroup.com/...pdf?revision=1>

**Escalation Policy link:** [https://knowledge.exlibrisgroup.com/Cross\\_Product/Knowledge\\_Articles/Escalation\\_Policy](https://knowledge.exlibrisgroup.com/Cross_Product/Knowledge_Articles/Escalation_Policy)

## IMPORTANT LINKS

**System Status:** <http://status.exlibrisgroup.com/> (If your system is down and it isn't communications, open a case first, then call with the case number In hand.)

**Idea Exchange:** <https://ideas.exlibrisgroup.com/>

**NERS:** <https://ners.igelu.org/index.php?action=login>

## When adding to **Idea Exchange** or **NERS**,

Please look for similar ideas or enhancements before adding a new one.

Be as specific as possible on the need, benefits and expected outcomes of your suggestion.

Last revised 12-6-2018 Contributors included: Leona Hughes, Janice Christopher, Keren Stiles, Alan Manifold and Laura Guy

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