



Premium Services



Optimize



Extend



Educate

If you are interested in discussing how Ex Libris can help you address your organization's needs, we'd love to have a conversation with you.

Email us at Premium.Services@exlibrisgroup.com



Overview of Services

To support the evolving needs of libraries, and in addition to the vast set of free resources and services available to all our libraries, Ex Libris offers an array of Premium Services for libraries that are in production with Ex Libris solutions. These services will help you to improve efficiency, deploy new features or services, and learn more about functionality.

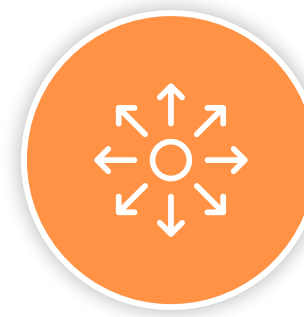
While we do offer the three main services described in this booklet, Premium Services are not limited to these areas. Are you interested in something other than what is listed here?

Email us at Premium.Services@exlibrisgroup.com and we will be happy to work with you to meet your specific needs.



Optimize

Need to review and improve your current use of the system? Ex Libris consultants will combine their deep product knowledge with an analysis of your library needs to highlight opportunities to improve efficiency or deploy new services.



Extend

Need to roll out a new feature or integration? Ex Libris consultants will use their product knowledge to define configuration and advise on best practices. With their support, you can ensure a smooth rollout as you move beyond core functionality.



Educate

Need to learn more about a feature or functionality? Ex Libris consultants will use their deep knowledge of Ex Libris product functionality to help your library deepen your product knowledge and help you to gain more confidence in day-to-day operations of the system by delivering training based on your specific needs.



Optimize



Extend



Educate



Optimize

Our Optimize service identifies new ways to streamline your use of Ex Libris systems. A consultant will analyze processes, build a recommendation, and deliver configuration and training so that you can be confident you're getting the most out of your investment.

Methodology

To ensure that recommendations align with your needs, all optimize services begin with an analysis phase. Your consultant will identify the key challenges and opportunities, then build an agenda for the service. Once the agenda is approved, the consultant will meet with your library to discuss current workflows and make recommendations for how to improve those workflows. An engagement summary is provided after the session is complete with instructions on how to implement the recommendations, focusing on configuring the system and preparing staff to manage and improve their work going forward.

Required resources and roles

To make the best use of the service, plan to allocate the following roles.

Project Manager: The Project Manager will help outline the scope of the project, review the analysis and action plan, and communicate with the relevant library staff.

Subject Matter Experts: Library staff familiar with the workflows will contribute to the initial analysis, train on new workflows, and manage ongoing configuration.

Consider the Optimize service...

- ...when you need to rethink your material flows during acquisitions.
- ...to streamline fulfillment policies.
- ...to consolidate your e-resource management lifecycle.

Milestones and deliverables

A typical service consists of:

Review

- Understand current workflows, processes, and assets
- Manage staff expectations
- Set agenda for the service

Optimize

- Discussions of workflows and best practices
- Demonstrations and trainings on workflows and configuration

Engagement summary

- Activities and training performed
- Configurations performed and recommended



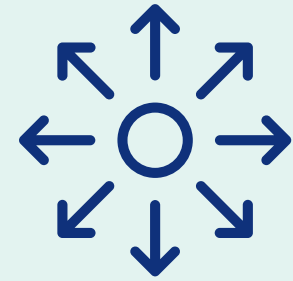
Optimize



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Extend

You may be aware of new or unused system functionality, but need help setting it up. If so, the Extend service is right for you. An Ex Libris consultant will demonstrate the configuration, integration or product feature, help define policies and workflows, then train your staff in using and maintaining the functionality.

Methodology

An Extend engagement delivers a combination of configuration and training. To prepare for this service, an Ex Libris consultant will work with your Project Manager to clearly define the need and the appropriate scope of the service. The consultant will verify and tune the requirements with the appropriate staff before working with them to configure the system and train on new features, workflows and ongoing administration.

Required resources and roles

To make the best use of the service, plan to allocate the following roles.

Project Manager: The Project Manager will describe and validate local requirements and goals, as well as manage communication with the relevant staff.

Subject Matter Experts: Library staff familiar with the workflows will train on the new workflows and manage ongoing configuration.

Consider the Extend service...

- ...to set up a new resource sharing partnership.
- ...to integrate with your financial system for payment requests and confirmations.
- ...to configure a new DDA program.

Milestones and deliverables

A typical service to implement new functionality could consist of:

Planning

- Clarify intended outcomes
- Review requirements and current workflows

Consultation and configuration

- System configuration
- Training on workflows and administration of the new function

Engagement summary

- Activities and new features implemented
- Configurations made during the project



Optimize



Extend



Educate



Educate

The Educate service helps your library strengthen your knowledge of Ex Libris product functionality. Training sessions can be chosen from a menu of available sessions or an Ex Libris consultant will work with you to design and deliver targeted training based on your specific needs.

Methodology

The Educate service delivers training sessions on Ex Libris products, including Alma, Primo VE, and Analytics, customized to your library. You may create a customized suite of training sessions by choosing from menus of available topics. If your desired focus areas are not yet available in our menus, an Ex Libris consultant will work with you to identify the functional areas requiring training and design training sessions targeted to your specific requirements. Depending on your training needs, these sessions can be delivered remotely, onsite, or through a combination of the two options.

Required resources and roles

To make the best use of the service, plan to allocate the following roles.

Project Manager: The Project Manager will describe and validate local training needs and goals, as well as manage communication with the relevant staff.

Library staff: Any Library staff needing a refresher on product functionality can participate in the training.

Consider the Educate service...

...when you've hired new employees
...to expand and advance your knowledge.

Milestones and deliverables

A typical service to implement new functionality could consist of:

Planning

- Planning and scoping with project manager
- Subject areas and specific questions to answer

Training delivery

- Content and target audience
- Demonstrations and training on workflows and configuration

Engagement summary, if applicable