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## **LibAnswers: A Solution for eResource Ticketing and Workflow Management**

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# LibAnswers w/LibChat

A Solution for eResource Ticketing and Workflow Management

American Library Association Midwinter Conference 2016

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<http://springshare.com/libanswers/>

LibAnswers w/LibChat

The Market-leading Reference Platform. Ensure Patrons Get Their Answers - Always.

Home / LibAnswers / Overview

## A Single Platform For All Your Online Reference Needs

Used by over 1,200 Libraries worldwide, LibAnswers is an end-to-end online reference platform. It helps you ensure that patrons get fast and accurate answers from their librarians - always!

- > Email, Chat, SMS & Twitter channels
- > Full Reference Statistics
- > Create Unlimited FAQs
- > Embed Answers & Chat *anywhere*
- > Searchable Public Knowledge Base
- > Mobile and Tablet-friendly out of the box

<http://libanswers.eku.edu/>

39 Answers   Browse: All Groups Topics

Contact Us

- E-mail us your question
- Call us: 859-622-6594
- @ekulibrariesref
- Text us: 859-903-0848

Popular Recent Featured

**I tried to login and got an error message. Help?!**  
Last Updated: Nov 13, 2015 | Topics: Technical Help Resources | Views: 32

**Does the library have a fax machine?**  
Last Updated: Nov 15, 2015 | Topics: Technology Services | Views: 22

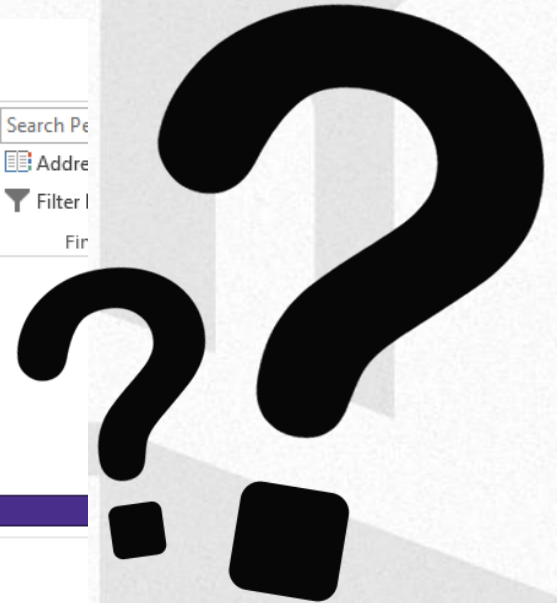
**How do I get an NFPA code?**  
Last Updated: Dec 17, 2015 | Topics: Resources | Views: 17

Consortial cost: \$2,400/year + \$99 per additional queue





# Why did we need this tool?



Library, ElectronicResources - Problems Pending - Library, ElectronicResources - Outlook

FILE HOME SEND / RECEIVE FOLDER VIEW

Ignore Clean Up Delete Reply Reply All Forward Meeting IM More

Forward to: Team Email Reply & Delete To Manager Done Create New Move Rules Unread/Read Categorize Follow Up

Search Pe Address Filter Fir

Search Library, ElectronicResour...

All Unread Newest

Library, Ele... RE: Links for Jo... 11/20/2015

Arneson, Je... Re: FW: video l... 11/17/2015

Edwards, L... RE: video links 11/17/2015

Edwards, L... RE: EBSCO Limi... 11/13/2015

Edwards, L... FW: EBSCO Li... 11/13/2015

Edwards, L... RE: EBSCO Limi... 11/13/2015

Library, Ele... RE: Form subm... 11/9/2015

Edwards, L... Link not displa... 11/9/2015

OCLC Custa...

Reply Reply All Forward IM

Fri 11/13/2015 9:22 AM

Edwards, Laura

RE: EBSCO Limiters - Journal Subset Question

To: Gilbert, Karen; Arneson, Jens

Cc: Library, ElectronicResources

For Laura

Hi Karen,

Thank you for reporting. I will report this to our EBSCO rep and keep you posted on what he determine their categorizations, but they do take feedback; and if this is an error on their pa

~Laura

From: Gilbert, Karen

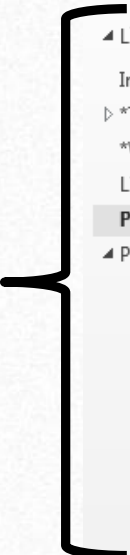
Sent: Thursday, November 12, 2015 5:08 PM

To: Arneson, Jens <Jens.Arneseon@eku.edu>; Edwards, Laura <Laura.Edwards@eku.edu>

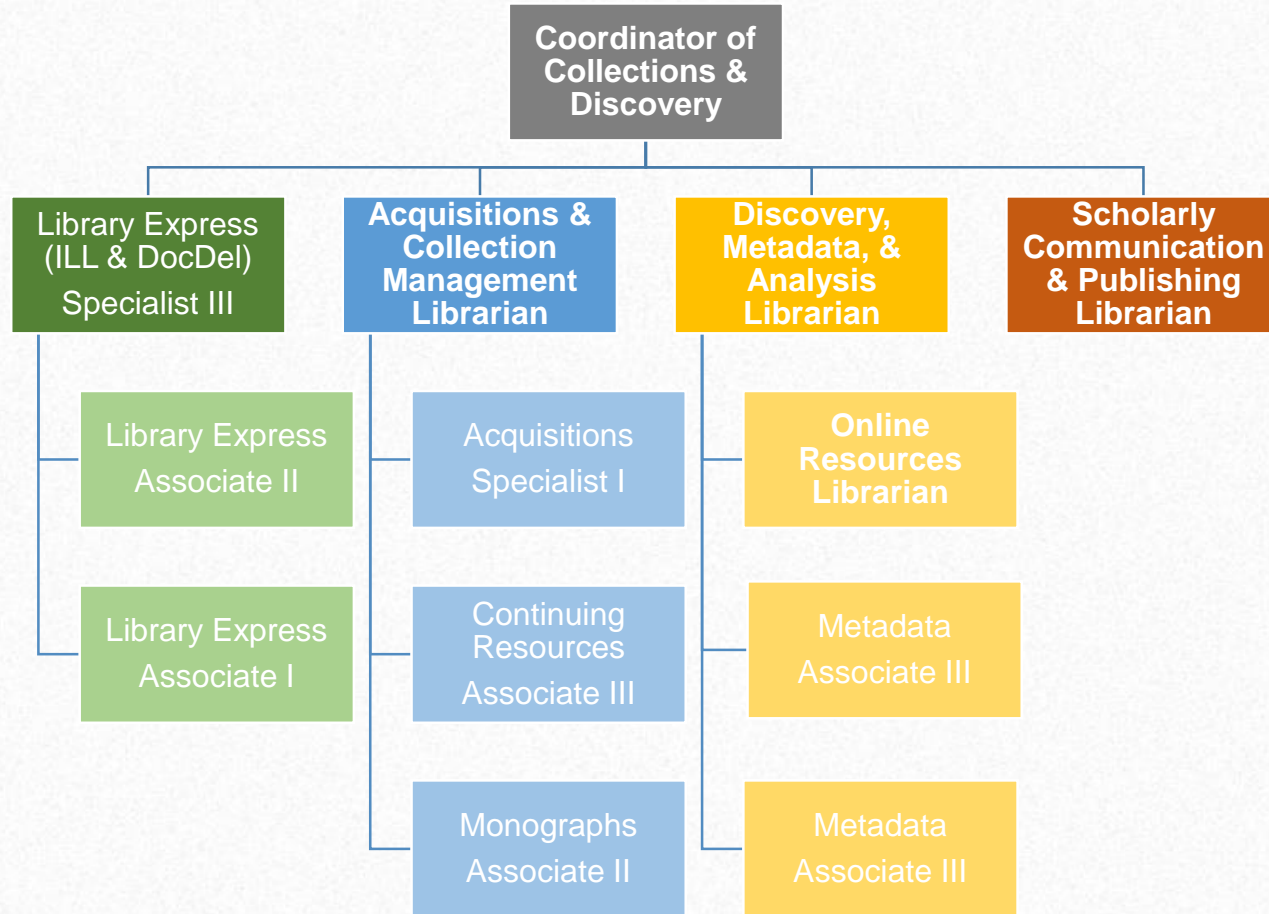
Subject: EBSCO Limiters - Journal Subset Question

Hi,

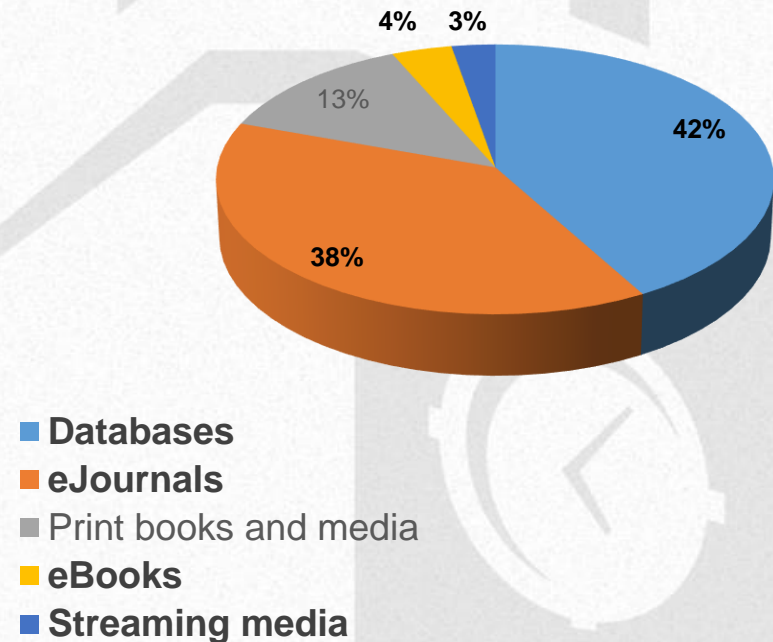
This is an odd one, and I hope you can read the attachment which looks a



# Why did we need this tool?



### Collections Expenditures - \$1.4 Million





The screenshot shows the LibAnswers dashboard navigation bar. The main menu items are: LibAnswers, Dashboard, Answers, Stats, Ref. Analytics, LibChat, Status Mgmt, Admin, and Help. The following dropdown menus are open:

- Answers**: FAQ Entries, Create FAQ Entry, Tickets, Create Ticket
- Stats**: General, FAQ Entries, Query Spy, Tickets, SMS
- Ref. Analytics**: Add Transaction, View/Edit Transactions, Statistics, Cross Tab Report
- LibChat**: Connect, Transcripts, Statistics, Missed Chat, Canned Messages, Chat Widgets
- Admin**: Customize, System Settings, Queues, Groups, LibChat Set-up, Systems Status Management, Ref. Analytics, Manage, Accounts, Assets, Views, Macros, Metadata, Widgets & API

## ❑ Answers

- *Tickets* are problems or questions submitted via webform, email, Twitter, SMS, manual staff entry, etc. and managed in one staff interface
- *FAQs* are public-facing and can be generated from tickets or manually created

❑ **Stats** include basic data about numbers of questions answered

❑ **Analytics** are more customizable, based on locally defined metrics

❑ **LibChat** is the chat service provided with LibAnswers

The screenshot shows the LibAnswers dashboard with a navigation bar at the top containing 'LibAnswers', 'Dashboard', 'Answers', 'Stats', 'Ref. Analytics', 'LibChat', 'Status Mgmt', 'Admin', and 'Help'. The user 'kelly.smith2@eku.edu' is logged in. A sidebar on the left lists navigation options: 'LibApps', 'LibGuides', 'LibAnswers & LibChat' (highlighted), 'LibCal', 'LibSurveys', and 'LibInsight'. A red notification box states 'LibChat is Offline: Go Online' with buttons for 'Enter Stand-by Alerts mode' and 'Send an SMS'. A large blue announcement banner reads 'LibAnswers 2.6.5 Update Now Live' and provides details about the update, including a new chat builder interface and an 'Away' status, with a link to 'Read LibAnswers 2.6.5 Update.'. Below this is an 'Administrative Announcement' section with the message: 'There are no new announcements at this time. Have an admin-level account? Edit this box by clicking on Admin Staff > System Settings (or just click here)'. At the bottom, there are filters for 'Open Tickets (13)', 'Pending Comments (0)', 'Pending Ideas/Votes (0)', 'Errors (0)', 'Spam (0)', and 'Status Posts'. A search and filter area includes a 'Queue' dropdown set to 'EKU eResources Queu...', a 'Source' dropdown set to 'All Sources', a 'Status' dropdown set to 'Not Closed', and an 'Owned by' dropdown set to 'View All'. There are also input fields for 'Name' and 'Email', a 'Filter' button, and a '(clear)' link.

Tickets 1 - 12 (of 12)

Id	Status	Queue	Question	Last Message From	Owner	Updated ↓
705822	New	EKU eResources Queue	<a href="#">University of Chicago Press Journals</a> Kelly Asked via Staff Entry Subscription - change of pub/platform or title	Patron	Rebecca Stinnett	Jan 04 2016, 01:33pm
674686	Pending	EKU eResources Queue	<a href="#">Journal of Advanced Nursing record has links to unrelated journal Dermatology Nursing</a> OCLC Support (support@oclc.org) Asked via Staff Entry Linking - Discovery   Metadata update	User	Laura Edwards	Jan 04 2016, 01:31pm
683900	Open	EKU eResources Queue	<a href="#">Maney Publishing acquired by Taylor and Francis</a> Jens Asked via Staff Entry Subscription - change of pub/platform or title	Patron	Jens Arneson	Jan 04 2016, 01:30pm
684423	Pending	EKU eResources Queue	<a href="#">Access Interruption to music in print</a> Jens Asked via Staff Entry Awaiting Vendor Fix   Product:Music in Print Series	Patron	Jens Arneson	Jan 04 2016, 01:30pm



Creating a ticket by staff entry

Asked By: Anon ⓘ

< Original question Can be edited/updated >

✕ Edit  
✕ Merge

No replies to this ticket.

Post an Internal Note Assign/Transfer

Internal Note

Email Note to

Add to Analytics

✕ Edit Question

Question

Details

Asked by

Email

Tags

- te
- Implementation testing
- Metadata update
- Open access content
- Platform problem - missing content
- Platform problem - system down
- Product:Library Website
- Technical support - browser
- Technical support - faculty laptop connectivity
- Technical support - media player
- Technical support - other

## Example Ticket screen capture – page 1

You have claimed this question.

QID: 674439    Status: Closed    Queue: EKU eResources Queue    Owned by: Kelly Smith

Asked By: Kelly testing the chat feature (kellysmith72@gmail.com)    Asked On: Nov 23 2015, 09:50am    Last Updated: Jan 04, 2016    Turnaround: 10:23:45

**Chat turned into a ticket**

Need to create a canned message

09:48:25 **Kelly Smith:** Enter your EKU library credentials  
09:48:55 **Kelly Smith:** There's more info at this page <http://libanswers.eku.edu/faq/99195>  
09:49:06 **Kelly is testing the chat feature:** Cool! Thanks for the help  
09:49:22 **Kelly Smith:** NP. Is there any other way I can help?  
09:49:37 **Kelly is testing the chat feature:** No, I'm good. Thanks! Bye!

Asked By: Kelly testing the chat feature ⓘ

Note from Kelly Smith (Nov 23 2015, 09:50am):  
FAQ for logging in from off campus needs to be turned into a canned message

Tags  
Implementation testing

## Example Ticket screen capture – page 2

Note from *Kelly Smith* (Nov 23 2015, 09:51am):

follow up on this

[Status changed to *Pending*.]

Reply from *Laura Edwards* (Dec 04 2015, 09:35am):

When accessing the Libraries' databases and other online resources, you will be prompted to log in with your E-Key (EKU email) to make content available to you that is not free on the open web.



Eastern Kentucky University

Central Authentication Service (CAS)

Enter your Username and Password

Username:

john\_doe21

Password:

\*\*\*\*\*

Warn me before logging me into other sites.

For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

Languages:

[English](#) | [Spanish](#) | [French](#) | [Russian](#) | [Nederlands](#) | [Svenskt](#) | [Italiano](#) | [Urdu](#) | [Chinese \(Simplified\)](#) | [Deutsch](#) | [Japanese](#) | [Croatian](#) | [Czech](#) | [Slovenian](#) | [Catalan](#) | [Macedonian](#) | [Polish](#)

Technical support - other

Add Tag

Add

► Reuse Answers

Recommendations from your system (FAQs) (10): [hide](#)

- #99285: I tried to login and got an error message. [Help?! copy](#)
- #99210: How do I create a persistent link to a library resource? [copy](#)
- #99437: How do I download an eBook? [copy](#)
- #102769: How do I log in to LearningExpress? [copy](#)
- #107597: Tips for managing a eResource troubleshooting ticket [copy](#)
- #105444: Problem



## Example Ticket screen capture – page 3

E-Key login examples:

- Student (john\_doe21)
- Faculty/Staff (doej)

Once you login, you should be seamlessly connected to our online resources.

If your login does not work, first make sure you have entered your username correctly. Only use the first part of your email—do not include the domain part of your email address.

Correct: john\_doe21

Incorrect: john\_doe21@mymail.eku.edu

If you are entering your username correctly and still can't login, [contact IT](#) to make sure your E-Key information is up to date. If IT confirms that your login information is correct, and you are still having problems logging in, please [contact us](#) so we can troubleshoot this problem.

Emailed to: "Kelly testing the chat feature" <kellysmith72@gmail.com>, "Laura Edwards" <laura.edwards@eku.edu>

Note from *Laura Edwards* (Dec 04 2015, 09:37am):

Kelly - I created a macro "Logging in to Library Resources from Off-Campus". Copied and pasted from the FAQ to see how it looks on the patron side.

Emailed to: "Kelly Smith" <kelly.smith2@eku.edu>

Note from *Kelly Smith* (Jan 04 2016, 01:34pm):

[Queue Transfer from: ECU Reference Queue to ECU eResources Queue]

of Style [copy](#)

- #105245: What is my login for the library computers? [copy](#)
- #99447: I downloaded an eBook to my computer but I can't open it. Help?! [copy](#)
- #99237: How do I get an NFPA code? [copy](#)
- #99257: How do I find an ANSI standard? [copy](#)

Recommendations from your system (private) (8): [show](#)

Copy an Answer

## Example Ticket screen capture – page 4

The screenshot displays a ticket management interface with the following elements:

- Navigation:** Three tabs at the top: "Create a Reply" (highlighted), "Post an Internal Note", and "Assign/Transfer".
- Macro Application:** A section titled "Apply a Macro to this Ticket" with a dropdown menu currently set to "No Macro" and an "Apply" button.
- Macro Selection:** A search box with a magnifying glass icon and a close button (X) is open, showing a list of macro options:
  - No Macro
  - System-Wide**
  - Logging in to Library Resources from Off-Campus
- Rich Text Editor:** A text area with a toolbar containing "Styles" and "Format" dropdowns, and various text formatting icons.
- Right Sidebar:**
  - Load Answer:** A button at the top.
  - Helpful Tools:** A section with a search box set to "LibAnswers (pub)", a "Search" button, and the note "(Results open in a new window)".
  - Web Shortcuts:** A section with a link to "Academic Search Complete" and the note "(Results open in a new window)".
- Bottom:** Two empty sections labeled "Add Links" and "Files (0)".

## Example Ticket screen capture – page 5

The screenshot displays a ticket management interface. At the top, the 'CC Answer to' field shows the contact 'Laura Edwards' with the email address <laura.edwards@eku.edu>. Below this is an 'Add Email' button and a text area with instructions: 'Emails in the list will receive notifications of replies and be allowed to post replies. Emails removed from the list will no longer be able to add replies to the ticket.'

On the left side, there are sections for 'Add to FAQ Group' and 'Add to Analytics'. A dropdown menu is open, showing options: 'Submit as New', 'Submit as Open', 'Submit as Pending', 'Submit as Closed', and a highlighted 'Submit as Closed' button.

The main action area has three tabs: 'Create a Reply' (highlighted), 'Post an Internal Note', and 'Assign/Transfer'. The 'Assign/Transfer' tab is active, showing a 'Transfer to' dropdown menu. The current selection is 'Queue'. The dropdown list is open, showing 'Select the queue to transfer to' (twice), 'EKU eResources Queue' (highlighted), and 'EKU Reference Queue'. Below the dropdown is an 'Internal Note' text area.





# Under the hood... Chat

LibChat Dashboard **Chatting as:** Kelly Smith

Status: **Connected**

[Go OFFLINE](#)

ⓘ Don't forget to sign off of LibChat at the end of your shift/day. ✕

Chat Activity



Chatting:

**Name:** Test patron #3  
**Staff:** Kelly Smith  
**Department:** ECU Libraries

20 seconds ago

Monitored Departments

- Kelly
- ECU Libraries

Test patron #3



**Test patron #3:** testing again

15 seconds ago

You are now connected with Test patron #3

**Kelly Smith:** This is the staff side of LibChat

just now

Canned Messages

Send

Press ENTER to send

QID: 674367    Status: New    Owned by: Kelly Smith    [Unclaim](#)

Asked By: Kelly Testing (kelly.smith2@eku.edu)    Asked On: Nov 23 2015, 09:16am    Last Updated: Nov 23, 2015    Turnaround: 00:00:00

I'm generating a chat. Please ignore. I will delete later

09:14:17 **Kelly Smith**: Thanks for contacting us. I'm responding to your chat.  
09:14:31 **This is Kelly**: Thanks for your help today.  
09:14:48 **Kelly Smith**: Bye.

Asked By: [Kelly Testing](#) ⓘ

**This is a chat session that was turned into a ticket.**

**If an end user's issue cannot be resolved and needs follow up, this is a great way to manage that.**

**Chat history is included in the ticket.**

Note from *Kelly Smith* (Nov 23 2015, 09:16am):

Generating a ticket from a chat

[Create a Reply](#)

[Post an Internal Note](#)

[Assign/Transfer](#)

Rich text editor toolbar with options for Styles, Format, Font, Size, text formatting (A, B, I, S, I<sub>x</sub>), and various icons for undo, redo, link, unlink, list, and source.

Tags

Implementation testing

Add Tag

Add

▶ Reuse Answers

## Manage Metadata

Switch to Group:

Topics

Keywords

Tags

### **EKU Reference Group Topics**

For Distance Learners  
For Faculty  
Printing  
Research Help  
Resources  
Services  
Spaces  
Technical Help  
Technology

### **Collections (eResources) Group Topics**

Discovery  
Enhancement Request  
EZProxy / Authentication Problem  
Link Resolver  
Metadata  
OCLC System Outage  
Subscription Problem  
User Technical Issue  
Vendor Platform Problem  
Workflow Mangement

### **Tags - apply to all queues in system**

\* Urgent \*

Awaiting Vendor Fix  
Help - Directional  
Help - Research  
Implementation testing  
IP / EZproxy  
Linking - A to Z list  
Linking - Discovery  
Linking - link resolver  
Metadata update  
Open access content  
Platform problem - access denied due to excessive downloading  
Platform problem - incorrect metadata  
Platform problem - missing content  
Platform problem - system down  
Subscription - activation needed  
Subscription - canceled  
Subscription - change of pub/platform or title  
Subscription - coverage change  
Subscription - lapsed  
Technical support - browser  
Technical support - faculty laptop connectivity  
Technical support - media player  
Technical support - other  
Unresolved - problem cannot be duplicated  
Unresolved - referred elsewhere  
User error  
Workflow - cancelation  
Workflow - new resource  
Workflow - renewal



## Knowledge Base Explorer: Tickets

Tickets

Dates & Times

Source & Form Fields

Answerer & Turnaround

Referrer

Export Stats

ID  Full Text  Source  Status

Asked from  to  Updated between  and  Owner

Queue  Tag  Limit by Day  Limit by Time between  and

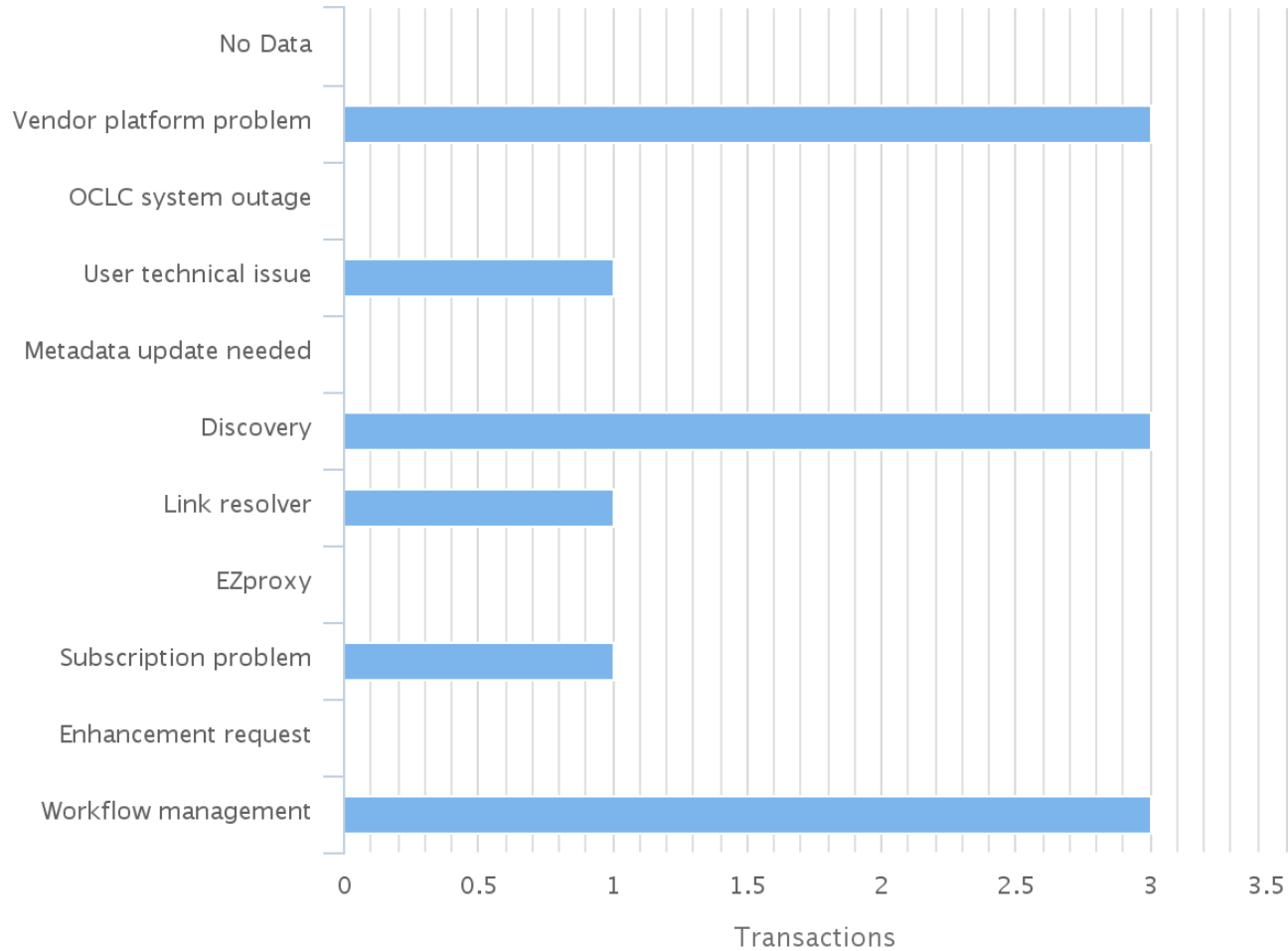
Turnaround (hours)  Name  Email  [Filter](#) [\(Clear filter\)](#)

Showing statistics for 36 (out of 36) Tickets

### Monthly Breakdown

Queue	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
EKU eResources Queue	0	0	0	0	0	0	0	0	1	4	4	19	1
EKU Reference Queue	0	0	0	0	0	0	0	0	0	2	2	3	0
<b>Total</b>	0	0	0	0	0	0	0	0	1	6	6	22	1

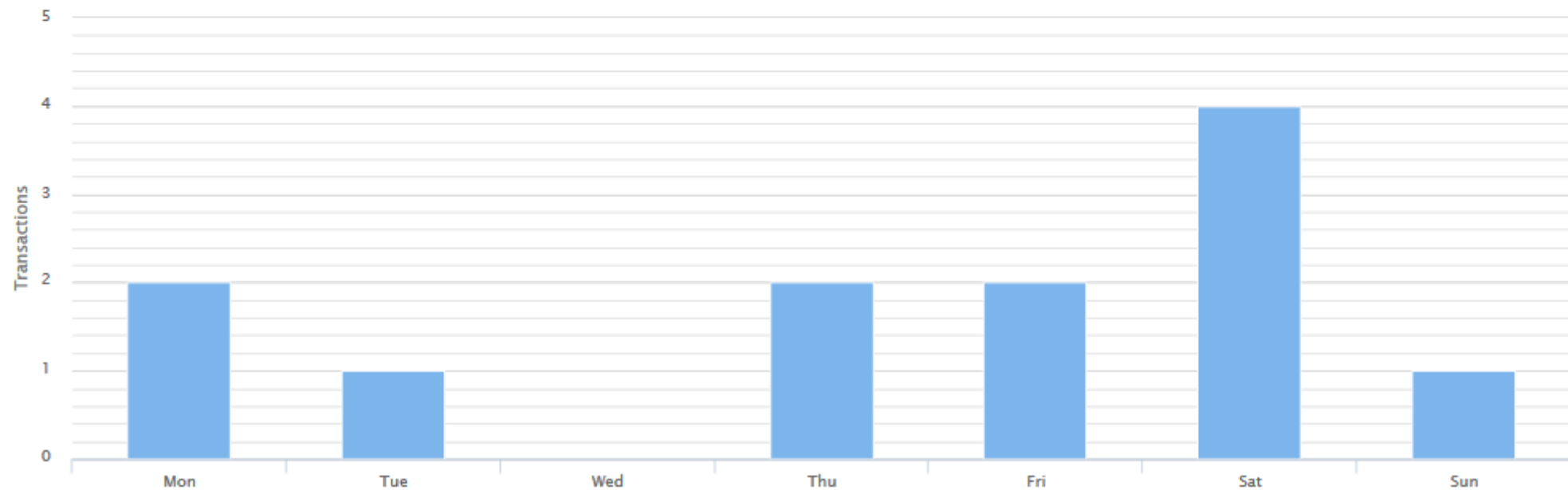
Type of Issue Statistics



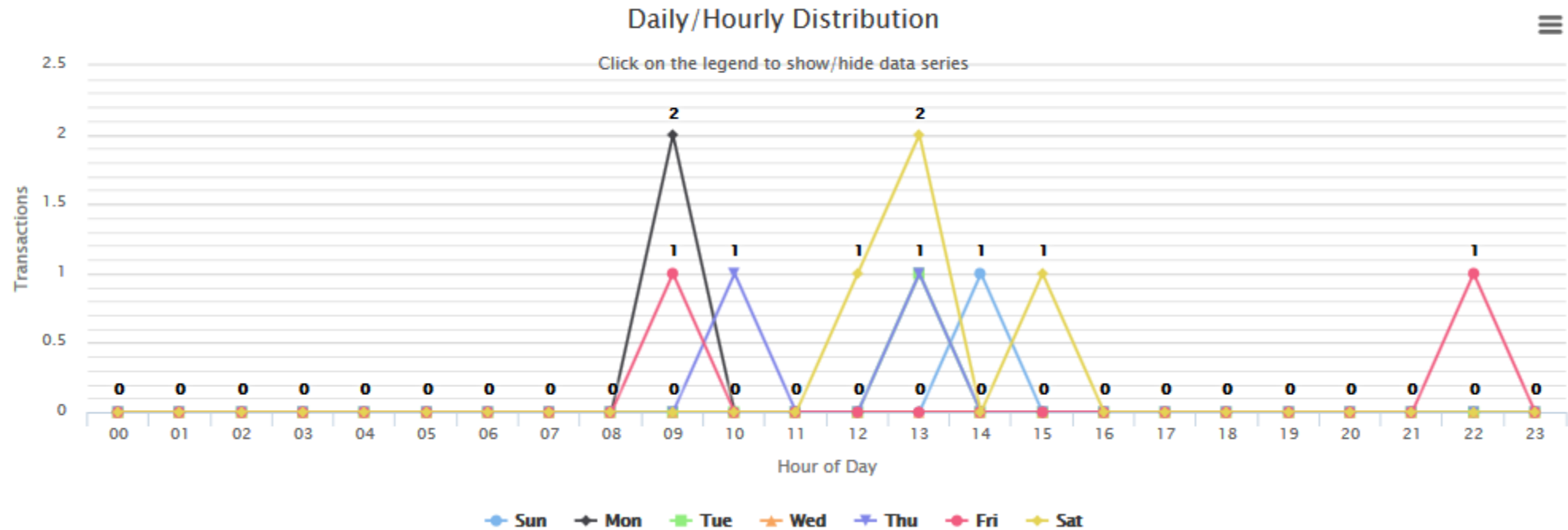
## Daily Distribution (on what days are the questions asked)

MON	TUE	WED	THU	FRI	SAT	SUN
2 17%	1 8%	0 0%	2 17%	2 17%	4 33%	1 8%

### Transactions By Day of the Week









# Under the hood... Other Features

## Resource Status Update Widget

Status

✔ All databases are working normally!

---

Having issues logging in?  
Clear your cache (CTRL + SHIFT + DEL) and try again.

## Twitter Integration

683195 🗑️	Thx @EKULibResources & @ekulibraries! Neuroscience display for Tali Sharot "Optimism Bias" #EKU Thur Dec 3 @ekupsy <a href="https://t.co/F4a80oZanN">https://t.co/F4a80oZanN</a> Asked via Twitter Queue: EKU Reference Queue Status: No Response Site URL / Related Link: No Response Department or Class (e.g., ENG 102): No Response More Detail / Explanation: No Response	ErikLiddell (@ErikLiddell)
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EKU Libraries / LibAnswers / Collections Group

**Internal Staff FAQ** LibAnswers: eResource Troubleshooting

7 Answers   Browse: All Groups Topics

Contact Us

Text us: 859-903-0848

Topics

- EZProxy / Authentication Problem
- Metadata
- Subscription Problem
- User Technical Issue
- Vendor Platform Problem**
- Workflow Mangement

Popular Recent Featured

**WMS link to eBook incorrect?**  
Last Updated: Nov 14, 2015 | Topics: Vendor Platform Problem | Views: 2

**How do I report a problem broken open access link in an OCLC record that I can't change myself?**  
Last Updated: Nov 15, 2015 | Topics: Metadata | Views: 0

**Problem accessing Chicago Manual of Style**  
Last Updated: Nov 14, 2015 | Topics: User Technical Issue | Views: 0

**RKMA eBook Package 2016**  
Last Updated: Nov 14, 2015 | Topics: Workflow Mangement | Views: 0

**Access denied to All the World's Primates**  
Last Updated: Nov 15, 2015 | Topics: Subscription Problem | Views: 0



I tried to login and got an error message. Help?! [Edit](#)

Group: EKU Libraries Owned By: Kelly Smith Created: Sep 30, 2015 Updated: Nov 13, 2015

Reuse Answers

Answer Files (0) Links (0) Media (0) Comments (0) Notes (0)

Rich text editor toolbar with options for Styles, Format, Font, Size, Bold, Italic, Underline, and other text formatting tools.

There are a few common problems you might encounter when logging in to the Libraries' resources.

**EZproxy Server Error**

*EZproxy Server Error - Please tell your server administrator to check messages.txt/ezproxy.msg for a MaxVirtualHosts error*

body

Save Answer Text

Tweet this answer:

Topics

- Technical Help
- Resources

Assign A Topic Add

Keywords

Add Keyword Add

Statistics

Helpful Tools

Search in LibAnswers (public) for Search

(Results open in a new window)

Q. I tried to login and got an error message. Help?!

Ask Another Question  Type your question.

Search

Browse: All Groups - Topics -

Answered By: Kelly Smith

Nov 13, 2015 32

There are a few common problems you might encounter when logging in to the Libraries' resources.

**EZproxy Server Error**

*EZproxy Server Error - Please tell your server administrator to check messages.txt/ezproxy.msg for a MaxVirtualHosts error*

This message indicates that all access to online library resources is down. If you see this MaxVirtualHosts error note, please submit this as a question so we can fix the problem as soon as possible!

**Broken Link**

*Oops! This link is broken. Please copy this error message and paste it in the chat box to the right or email it to systems.library@eku.edu so the Library can fix it. The problem will be addressed within one business day.*

If you select a link to an online library resource and you get an "Oops, this link is broken" message, simply copy the error message and send it to systems.library@eku.edu so we can fix it.

**CAS Login Errors**

*The credentials you provided cannot be determined to be authentic.*

If you are trying to login via the Central Authentication Service (CAS) screen and get this error message, make sure you are entering your username correctly. Do not include the email domain part.

Correct: john\_doe21

Incorrect: john\_doe21@mymail.eku.edu

If you are entering your username correctly, and your password has not changed, contact IT to make sure your account is up

Related Topics

Technical Help Resources

Contact Us

E-mail us your question

Call us: 859-622-6594

@ekulibrariesref

Text us: 859-903-0848

## Ask Us!

37 Answers

logi

**FAQs are suggested as end user types in a question**

Search

Browse:

All

Topics ▾

RSS

How do I login to use library databases and other resources?

I tried to login and got an error message. Help?!

What is my login for the library computers?

How do I get an NFPA code?

How do I find an ANSI standard?

How do I renew a book?

**Customizable end user ticket submission form**

### Ask Us

Sorry, chat is

Search our Knowledgebase and/or submit your question

**Embedded Chat widget**

Question

### How can we help you?

*Search help? Tell us about your topic and assignment.*

*Reporting an issue? Include details about where you started*

*your search, exact steps taken, onscreen messages, etc.*

*Provide relevant links to a specific problem resource, if applicable.*

**Question / Issue \***

**More Detail / Explanation**

**Site URL / Related Link**

Attach a file

Popular

Recent

Featured

### I tried to login and got an error message. Help?!

Last Updated: Nov 13, 2015 | Topics:

Technical Help

Resources

Views: 26

### Does the library have a fax machine?

Last Updated: Nov 15, 2015 | Topics:

Technology

Services

**Browsable FAQs with locally customized tags.**

### How do I find scholarly online resources?

Last Updated: Nov 15, 2015 | Topics:

Resources

Research Help

Views: 11

### How do I get an NFPA code?

Last Updated: Nov 15, 2015 | Topics:

Resources

Views: 11

### How do I find an ANSI standard?

Last Updated: Nov 15, 2015 | Topics:

Schedule An Appointment

# **EKU** Benefits

1. Ease of implementation
2. Customizability
3. Integration with existing Libguides
4. Intuitive interface
5. Ability to transfer tickets / assign ownership
6. Ability to merge tickets
7. Centralized management of ERM
8. Unique FAQ functionality