Consortium Case Sharing in Support Center

Some institutions who have a consortium setup with Ex Libris, need the ability to collaborate and share cases with each other when working with Ex Libris Support.

To accommodate this need, we require a setup on the consortium level and on the user level. In addition, for each case the case contact would need to opt in for consortium visibility.

In this article we will describe the processes regarding this functionality.

How does this work?

Once case sharing configuration was set up for your consortium, you will see an additional field on your cases – “Share Case With”:

- **My Institution** (default value) – case will be visible to users from your institution only
- **Consortium name** – case will be visible to users from other institutions in the consortium as well

You can select the case sharing level when creating the case and edit it at any point in time if needed.

Who has visibility to consortium cases?

Visibility to shared cases requires special Salesforce licensing. For that reason, shared cases are only visible to users who were set up to see them.

Ex Libris will periodically review this access level and verify its relevancy.

Adding a new user with consortium case visibility

1. If the staff member has no Support Center user:
   a. Ask them to self-register to the Support Center
   b. After completing the registration process, grant them permissions using the Additional Actions > Grant Permissions
2. Reach out to the regional Support Director:
<table>
<thead>
<tr>
<th>Region</th>
<th>Contact</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>Alon Botvinik</td>
<td><a href="mailto:Alon.Botvinik@clarivate.com">Alon.Botvinik@clarivate.com</a></td>
</tr>
<tr>
<td>Latin America</td>
<td>Oscar Caballero</td>
<td><a href="mailto:Oscar.Caballero@clarivate.com">Oscar.Caballero@clarivate.com</a></td>
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<tr>
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<tr>
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<td>Kevin Cao</td>
<td><a href="mailto:Kevin.Cao@clarivate.com">Kevin.Cao@clarivate.com</a></td>
</tr>
</tbody>
</table>

Removing shared case access

If you need to revoke access to consortium shared cases from a user, please contact us at exlibris-support@exlibrisgroup.com

Does this change the Super User functionality?

No. Consortium managers (AKA Super Users) can still open and manage cases on behalf of all consortium members.

Setting up your consortium for case sharing

If your consortium requires case sharing, this is typically discussed and set up during your Ex Libris product implementation.

However, if you are already working with Support and require case sharing, please reach out to your regional Support Director listed above.