



Comprise Customer Support Guide

The information in this guide applies to:



Comprise Technologies
1041 Route 36, P.O. Box 425
Navesink, NJ 07752

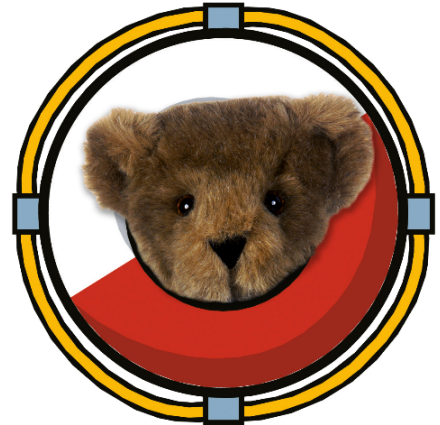
CCSG_112

Technical Support: 800-531-0132
Sales: 800-854-6822
www.CompriseTechnologies.com

TOP 5 LIST OF THINGS THAT IMPACT COMPRISE PRODUCTS

1. ILS UPGRADES/MIGRATIONS

Please give us at least 2 weeks' notice before you upgrade or migrate your ILS product and/or ACS Server. We use that time to prepare your Comprise Products and to ensure that your patron services are not impacted by the change.



2. INTERNET PROVIDER/NETWORK CONFIGURATION

When you change your Internet Service Provider your external IP address in most cases will also change. In most cases we use the IP Address to access your server for in-depth technical support issues and for upgrades. In some cases, for larger library systems, changing your ISP causes your IP Range to change which will impact patron services.

Network changes can also have a dramatic impact on Comprise Products. IP Ranges, routing tables, etc. all must be configured with Comprise Products in mind. If you think your major network configuration change might have an effect, it probably will. Please call us to schedule an appointment to make sure everything runs smoothly.

3. HARDWARE

Hardware changes refers to many things, but specifically, let us know before you change your firewall, filter appliance, printers, or copy equipment to ensure your change goes smoothly.

4. OPERATING SYSTEM/APPLICATION/INTERNET BROWSER

As with any software, changes to the operating system on your patron and staff computers can have an effect on your Comprise Products, and in particular Internet Browser will impact SAM. Please give us a call to find out before attempting any major operating system or software changes or upgrades.

5. STAFF TRAINING

We find that many issues result from staff not being completely confident when the initial training is over or that there has been a significant staff turn-over since the product was installed. We offer remote training and in some cases will come on-site when training is necessary. **In most cases training is offered at no cost!** Please contact Customer Support to schedule an appointment.

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IMPORTANT NOTICES

PRODUCT DEVELOPMENT

Comprise pursues a policy of ongoing product development. Release product version may vary from description herein. Comprise reserves the right to modify and or discontinue product features at any time without advance notice.

OPERATING SYSTEMS

Not all product features function with or are applicable to all Microsoft Windows Operating Systems. Please consult your Comprise Representative for further details regarding specific features and your operating system.

HARDWARE MODELS

Not all hardware features may be implemented or applicable to all installations. Please contact your Comprise Representative for more information.

ILS PRODUCTS

Comprise product documentation describes what our product(s) are capable of doing. However, different ILS products provide more or less support for these capabilities. Please consult your Comprise Representative for further details regarding specific features and your ILS Product.

VERSION/ENHANCEMENT SUPPORT

Comprise product versions are released to be backward compatible with earlier versions. With each new release Comprise provides support for that product version, plus the then current release in general distribution. Older versions will not be supported. Custom enhancement requests will not be distributed unless the newest version of the product is currently installed.

SUBCONTRACTOR SUPPORT

Comprise is responsible for the performance of its subcontractors. Comprise will assign management resources to assure that subcontractor performance meets or exceeds the standards described in this guide.

PROGRAM GUIDELINES

Comprise provides support services in a diligent and professional manner and will devote the energy and attention to the performance of such services as are reasonably necessary to perform in a timely manner. Customer agrees to timely and diligently perform all that shall be required of it in aiding the support process. Customer acknowledges that any delay in its performance may result in greater than a day for day delay in *Comprise*' performance due to resulting scheduling and prior obligation conflicts. Customer agrees to observe the business policies, procedures and security requirements of *Comprise*.

Unless specifically stated elsewhere no promise to provide future upgrades, modifications, enhancements or improvements to or for the Software is made except pursuant to *Comprise*' standard development agreement and shall be subject to payment of appropriate maintenance fees for the Software.

Implementation of the *Comprise* Software shall be deemed complete when the mutually acceptable functionality is reasonably available for Customer's use and any mutually acceptable functionality test has been successfully passed. The Software shall not have to be 'bug' free to be deemed complete.

Each Party shall protect the confidentiality of information provided by the other Party that either has been identified as confidential by the disclosing Party or by its nature warrants confidential treatment.

All materials originated pursuant to this Program shall be the exclusive property of *Comprise* including trade secret, patent, title to copyright in all copyrightable material, title to all intellectual property and any other protectable rights or interests under state, federal, or international law. It may be used by *Comprise* in any manner whatsoever, and shall be held in strict confidence not to be disclosed to any third party by Customer.

Subject to the terms and conditions of the License Agreement, the Customer may use the *Comprise* Software solely in the conduct of the business of the Customer.



SUPPORT PROGRAMS

Comprise pursues a policy of total customer satisfaction and we want you to expect nothing less from us. In order meet that goal we have developed separate guidelines for handling requests for technical support, product enhancements, and upgrades. These guidelines provide our support representatives with a structured method for handling your inquiry.

AT COMPRISE A REQUEST FOR:

TECHNICAL SUPPORT OF ANY PRODUCT VERSION REFERS TO:

- ✓ **instructional inquiries**
- ✓ **a defect in the way our product functions**
- ✓ **a functional variance between the way the product works and its documentation.**

PRODUCT ENHANCEMENT OF CURRENT-RELEASE PRODUCT VERSION REFERS TO:

- ✓ **a change in the intended functionality of the product**
- ✓ **a use that exceeds the product's design**
- ✓ **new functionality, adding uncertified 3rd party hardware, etc.**
- ✓ **the unscheduled release of a product feature as soon as it is ready**

UPGRADE OF CURRENT-RELEASE PRODUCT VERSION REFERS TO:

- ✓ **the release of a product version to support a new Microsoft operating system**
- ✓ **the regularly scheduled release of a new product version**
- ✓

Sometimes customers call with issues that don't meet any of these criteria. We view those calls as opportunities to expand our knowledge base and demonstrate service commitment. These calls will be directed to a Customer Service Manager.

AT COMPRISE IT IS OUR POLICY TO:

- ✓ **diligently fix any defect or variance in the way our product functions.**
- ✓ **document each inquiry with a ticket number and resolution commitment.**
- ✓ **encourage enhancement suggestions because they make our product(s) better.**
- ✓ **provide you with an opportunity to approve changes before they are implemented.**

GUIDELINES FOR TECHNICAL SUPPORT

Please designate two coordinators (Public Service and IT) who will be authorized to contact us. You can use the Contact Form in this manual to keep us current of changes to your coordinators. While it is important that Comprise does not receive redundant or conflicting information, it is essential that both coordinators are aware of support requests and the action(s) taken.

Comprise will provide comprehensive technical support of our product **AS IT WAS DESIGNED AND WHEN IT IS BEING USED AS INTENDED**. Customer must allow remote Internet access to the server(s) and/or computers on which our software is installed. We will need full maintenance rights to the Comprise software, applicable database, MS Windows directories, filter server (if any), and unrestricted file transfer ability. We will attempt to diagnose your issue and provide immediate assistance. If it is not resolved over the phone you will be assigned a support ticket. Your ticket will be directed to a member of our staff who has the expertise to address it. We will do whatever it takes to fix the issue.

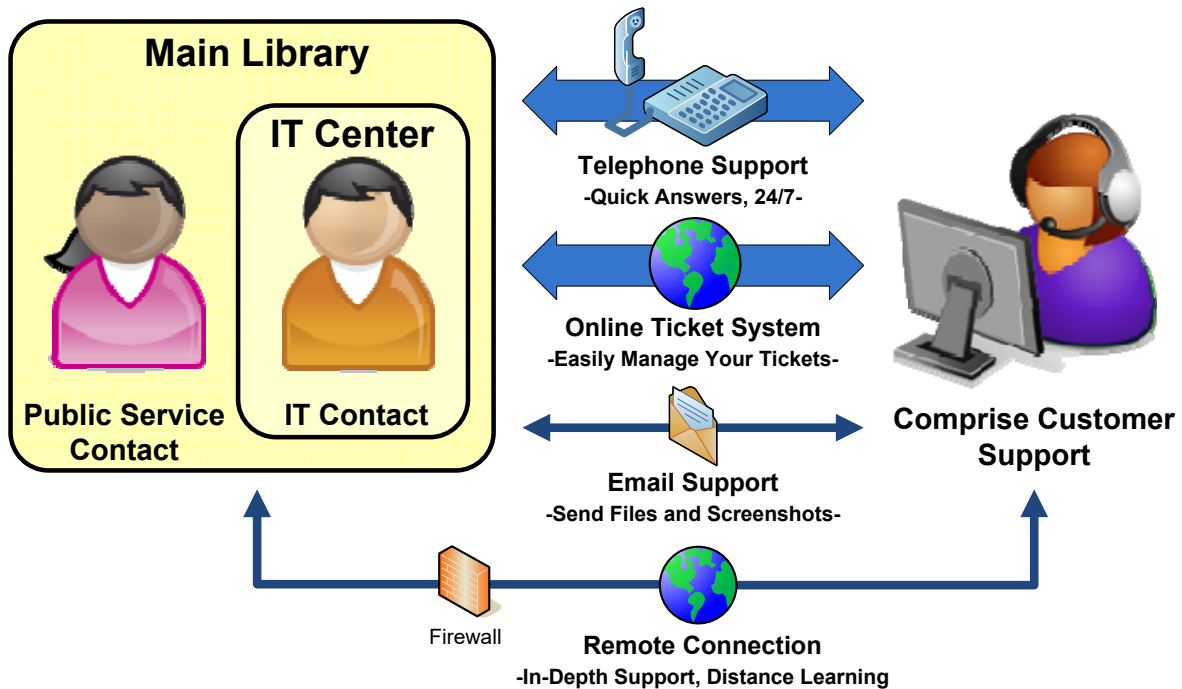
Requests for technical support are handled on an impact priority basis, and not necessarily in the order in which they are received. Our representative will advise you of the severity impact level associated to your issue as well as our performance commitment; an email confirmation will also be sent for your record. You can request that the manager-on-duty review the assessment of your issue.

IMPACT	DESCRIPTION	EXAMPLES/SYMPTOMS	SUPPORT HOURS
Critical	System not operational or severe loss in functional capacity.	SmartServer is down. No one can log on. No one can print. Filter Failure (SAM). No one can process a payment (SMM, SP, ST) Transactional reporting (SMM, SP, ST)).	24 Hours/ 7 Days
Moderate	System operational, but 1 or more functions are moderately degraded. There is a manual workaround available.	Staff Interface functions. Some users can't logon. Isolated printer(s) problems. Sign-up/Reservation issues. APM/LPC/Copy Controllers. Money handling hardware. Activity reporting.	Weekdays 7:00am to 9:30pm Eastern Time
Minor	System operational, no immediate impact on performance.	Admin interface. Appearance items. User error.	Weekdays 9:00am to 5:00pm Eastern Time
Other	System is periodically affected by a problem that is not understood.	ILS Link Internet Information Services. Server Memory.	7 Days, 7:00am to 9:30pm Eastern Time

IF YOUR REQUEST IS:

- ✓ **Critical:** we will work non-stop until it is resolved.
- ✓ **Moderate:** we will prioritize it with other same severity issues and communicate status to you at least weekly until it is resolved.
- ✓ **Minor:** we will work on it as resources permit, but keep in mind that minor requests are often grouped together and addressed in the next product release.
- ✓ **Other:** we will direct it to a Customer Service Manager.

HOW DOES OUR SUPPORT PROGRAM WORK?



SUPPORT RESPONSE TIMES

The following response guidelines will help you characterize the severity of the issue:

Severity Impact Level Response Times *			
Problem Phase	Critical	Moderate	Minor
Phone resolution or action implemented	4 Hours	1 Business Day	4 Business Days
Resolution/work around provided and/or request sent to engineering	1 Day	7 Days	10 Days
Engineering solution or action plan developed	3 Days	30 Days	30 Days or FIFR**
Status provided to you	Daily	Weekly	Per Action Plan

* Response time begins when with the provision of complete problem documentation.

** FIFR – First in First Resolved – Minor Problems are worked on a first in first out basis.

THERE ARE THREE WAYS TO REQUEST TECHNICAL SUPPORT:

TOLL FREE SUPPORT CENTER: **800-531-0132**

ONLINE SUPPORT CENTER: **WWW.COMPRISETECHNOLOGIES.COM**

EMAIL SUPPORT: **TECHSUPPORT@COMPRISETECHNOLOGIES.COM**

PRE-REQUEST CHECK LIST

In order to provide you with the fastest possible service, we need certain information:

- ✓ **Description:** please be able to explain the issue you are having. If the issue is with SAM, please use the SAM Troubleshooting Report in the Appendix and Forms Section before calling Technical Support.
- ✓ **Re-creation:** please be able to re-create the issue or be able to explain the time of day and situation where the issue occurs. This is essential to fixing many issues and for you to be able to verify its correction.
- ✓ **Supporting information:** Error messages, bar code numbers of affected patrons, other affected applications, and the operating system of the computer or computers. For SAM issues please see the SAM Troubleshooting Report for further information.

PHONE SUPPORT: 800-531-0132

Please be sure to review the Pre-Request Checklist above before calling and if it's a SAM issue review the SAM Troubleshooting Report in the back of this guide.



Calling our toll-free support line is a great to get quick answer answers 24/7 and the fastest response program for critical issues. SAM Customers don't forget to check out the SAM Troubleshooting Report before you call!

ONLINE SUPPORT: WWW.COMPRISETECHNOLOGIES.COM

Support Tickets can be created and managed online through our website at www.CompriseTechnologies.com. If you do not already have a login, please contact Technical Support either by email or Phone and they will provide you with one. Support Tickets created for you by Comprise can be viewed and managed online through the same system.

If you create your own support ticket you will receive a phone call to discuss your issue within 24 hours. ***IF YOUR ISSUE IS CRITICAL, PLEASE CALL US IMMEDIATELY.***

EMAIL SUPPORT: TECHSUPPORT@COMPRISETECHNOLOGIES.COM

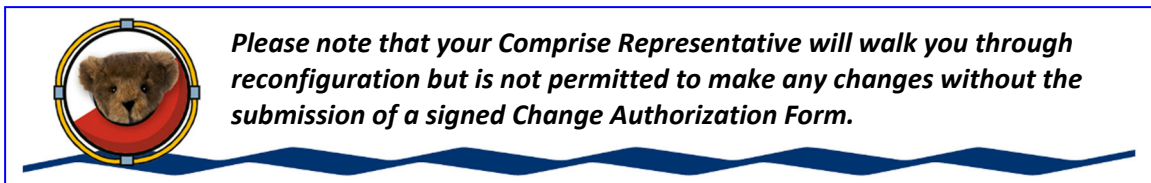
Comprise considers E-mail Support a supplemental tool to include attachments, screenshots, and other files or information that cannot be given through the Online Support website. We prefer you try our Phone Support and Online Ticket System before submitting support requests by email. Along with the information in the Pre-Request Checklist, please be sure to include your location and a phone number where you can be reached. ***IF YOUR ISSUE IS CRITICAL, PLEASE CALL US IMMEDIATELY.***

PROBLEM RESOLUTION

Comprise' problem resolution process is determined by severity and installation date. Critical failures, rare as they are, receive immediate and undivided attention until resolved.

Problems with the link to circulation software are immediately referred to the library's provider.

The first approach for problem resolution will be to verify that product settings, functional controls, and other selections in the Administrative interface are correct and compatible with each other. Your Support Representative will work with you through this process.



If you do request a change that is beyond your control Comprise will require that a Change Authorization Form in this manual be completed and signed by you before any change to your server or client software will be made.

If a problem requires a code revision of any kind it is referred to the appropriate software engineer. The support coordinator will notify the customer of an anticipated schedule. All code changes require Quality Control so the time required is usually from three to ten days.

Problems with third party products provided by Comprise are referred to the vendor as soon as received. Comprise maintains a supply of all hardware we support...it is not unusual for us to provide a "loaner" during the problem resolution period.

CLOSING A TICKET

Customer Service will maintain your ticket "Open" as long as the problem is not resolved. Resolved tickets will be closed with your knowledge and permission. Because some problems are hard to re-create, sometimes you might want to keep a resolved ticket open; we will maintain this status for up to 30 days.

You can also close your ticket using our Online Ticket System at www.comprisetechologies.com. If you do not have a login for the site, please contact Comprise by email: techsupport@comprisetechologies.com or 800-531-0132.

TRAINING SERVICES

Comprise is committed to making sure your staff is fully trained on our products. Two events usually necessitate new training; employee turn-over and the introduction of new product features. If you feel that your staff is not sufficiently trained or you need a refresher course on any product features please call to schedule training.

Call our toll-free support line at 800-531-0132 and schedule a remote training session. During the scheduling process, a Comprise Support Representative will go over which parts of the product you and your staff want to learn and a time that works best for you.

ILS UPGRADES/MIGRATIONS/ACS SERVER

Comprise requests 2 weeks' notice before upgrading or migrating your ILS Product or ACS Server. **NOT INFORMING COMPRISE ABOUT ILS UPGRADES CAN HAVE A DETRIMENTAL EFFECT ON THE WAY YOUR COMPRISE PRODUCTS OPERATE.** In a best case scenario we ask that a test server, patron cards, and connection information to the upgraded server be available. By informing Comprise ahead of time, the link between the Comprise products and your ILS can be cut before the upgrade is started. This prevents any loss in patron services.

HARDWARE SUPPORT REQUESTS

The Comprise Support Center is your single point of contact to coordinate repair and/or replacement of any and all system components provided by Comprise. A Customer Service Representative will work with you to determine the best course of action to put you back into operation. Our Customer Service Representatives are empowered to utilize the appropriate resources to resolve your problem; this usually means filing a claim directly with the manufacturer. Wherever possible we have arranged for claims to be serviced under a "Depot" exchange program through which a replacement part is shipped prepaid to you, and you ship the faulty part back using the packaging and label provided.

HARDWARE MAINTENANCE AND REPAIR/REPLACEMENT

All components provided by Comprise shall be maintained by us against defects in workmanship or functionality for a period of twelve (12) months from the date of their first use by the Customer.

Some third party hardware/software, for example payment terminals, money handling equipment, and Internet filter appliances are warranted separately by their respective manufacturer. Typically warranties are for one year. Most permit you to ship covered products to their service facility* for repair or replacement at no charge; your Customer Service Representative will advise you.

Extended Coverage for Comprise proprietary components and applicable third party products (servers, filter appliances, money handling equipment) is included in your Annual License Renewal charge. Extended coverage means that if the covered equipment fails within the maintenance period(s) it shall be replaced or repaired via Comprise Depot Services within three (3) business days, Monday through Friday. This service shall be at no cost to you unless those components or parts have failed due to actions of your staff or by other system users. Extended coverage is not offered for these consumables: cables, bar code readers, keyboards, cash drawers, or card reading terminals.

*Replacement Smart Terminals used for debit card transactions shall be provided to the applicable Security Service Provider for PIN injection; Comprise does not control the time required for PIN injection by these service organizations.

HARDWARE END OF LIFE

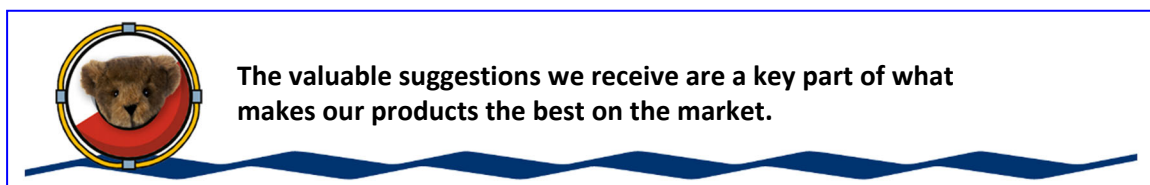
We recommend that you consider three to five years as the anticipated life cycle for any physical product or component part provided to you by Comprise. With this expectation you can plan for the orderly replacement of necessary equipment.

Comprise will continue Extended Coverage beyond the anticipated life cycle for all hardware/software as long as spare parts are available and provided the manufacturer has not issued an end of life notice. Upon the occurrence of either of these conditions Comprise will notify you that Extended Coverage can no longer be offered and the amount of your

Annual License Renewal applicable to the affected equipment will not be included in subsequent renewal billing. We value your business so when spare parts are no longer available or a manufacturer issues an end of life notice, Comprise will make every effort to make replacement equipment available on favorable terms.

GUIDELINE FOR ENHANCEMENT REQUESTS

Comprise actively encourages customers to suggest enhancements that improve the way our product(s) work or expand their role within the library. We have included an Enhancement Request Form in the back of this manual that provides you with an easy way to submit your suggestions. Our review team meets weekly to evaluate enhancement requests. You are entitled to a reply to your suggestion that describes our intention concerning it. Many suggested enhancements will be incorporated into the next product release. Often the enhancement is modified, scaled up or down, or combined with other related improvements based upon the feedback from multiple customers. In this way, valuable product improvements are automatically made available to all Comprise customers.



At your option, enhancements can be ordered exactly to your specification and on a timeline that reflects a project-dedicated effort. In this instance, you will be put in contact with your Comprise Sales Representative who can discuss our development process with you, prepare a cost proposal, and submit an Accelerated Development Agreement for your consideration. Please note that customized enhancements may not be supported in future product releases.

Customers must designate two employees (Public Service Contact and IT Contact) who will be authorized to make enhancement requests. Suggestions from other staff members should be coordinated by that employee so that Comprise does not receive redundant or conflicting information or instructions.

GUIDELINE FOR UPGRADES

Comprise provides for the systematic upgrade of our products in two ways; the first is an annual upgrade, the second is a non-regularly scheduled release of a feature that significantly improves the value or utility of our product in a library.

Annual Upgrades form the backbone of our program to offer customers the latest product innovations. We strive to make them easy-to-implement so libraries keep pace with product changes. Our program starts two to three months prior to an upgrade release when we contact customers to make them aware of the upgrade's functional contents and objectives. When the customer is ready, the upgrade is loaded onto its Comprise server. Our Upgrade Manager will then coordinate the distribution of the new software to the client PCs. Comprise upgrades are, with rare exception, backward compatible, and we provide support for the current and two previous product versions. Upgrades are scheduled for:

Product Category	Specific Products	Upgrade Schedule
PC and Print Management	SAM / SmartALEC	September – November
Internet Financial Product	SmartPAY	December – February
Onsite Financial Products	Smart Money Manager / Smart Kiosk / Smart Terminal	March – May
Reporting; Resource Booking	Smart Reports / Smart Booking	June – August

Feature Releases are a way for us to offer customers product improvements as they are published. The process is basically the same as with annual upgrades. We notify our customers with a Feature Release Note; interested libraries contact us; we install the product improvement.

Requests for upgrades can be made during normal business hours by calling Justin Spaeth, Upgrade Manager, at **800-531-0132 X235** or emailing **UPGRADES@COMPRISETECHNOLOGIES.COM**

COMPRISE SERVICE RECORD

The “Comprise Service Record” located on your server is an initiative which commenced April of 2008. It is a record that Comprise Representatives use to keep track of all changes made to that server by Comprise. This includes logging on to the server to establish connectivity, as well as any other operations that are performed on your server by a Comprise team member.



The Comprise Service Record keeps track of every change made on the server where the record resides and should only be edited by Comprise.

This can be viewed by you at any time, but may not be edited. It will be in a directory on your server called **C: / [Name of Your Comprise Product] / Comprise Service Record** and the filename is **CompriseServiceRecord.rtf**.

Below is a sample of the Customer Service Record.

Comprise Service Record

Entries in this document are made by Comprise Customer Service Representatives only.

Date	Time	File Name	Operation	Comprise Tech	Ticket #
2/8/08	10:33am	Clntinfo.ini	SAMPLE - Renamed and replaced file.	JS	44589
2/7/08	11:33am	defuser.ini	SAMPLE - Deleted old Replaced New	CH	32145



All the forms and charts you need in one location. It's best to copy the forms and charts...don't use the original in case you need to use it again.

CUSTOMER CONTACT FORM

The Customer Contact Form is used for updating Comprise on new staff members at your location or replacement staff members. To serve you best we need current contact information for Primary Public Service Contact, Primary Technical Contact, and Primary Business Contact.

COMPRISE CHANGE AUTHORIZATION FORM

The Comprise Change Authorization Form must be completed, signed, and received at Comprise Support Center before we can make any changes to your server or client software. Changes include but are not limited to software installation, file uploads, database edits, product configuration, device activation, rules, profiles, etc. The Change Authorization form is not needed in instances where you make the changes (with our guidance).

ENHANCEMENT REQUEST

If you have a suggestion for an improvement or enhancement with the way any of our products operate, please fill out the SAM Enhancement Request Form. This is not an order form, and submission does not guarantee acceptance, completion and/or establish a time frame for development. Enhancement Requests are subject to review and approval by our Product Development Team.

SAM QUICK SUPPORT CHART

The Quick Support Chart can be copied and hung up near your Smart Server or any location where it will be handy!

SAM TROUBLESHOOTING REPORT (FOR SAM CUSTOMERS ONLY)

The SAM Troubleshooting Report is an important tool to diagnose your problem. Many problems with logging in, sign-up, and printing can be resolved by going through the SAM Troubleshooting Report. If you find that you still need support, fax us this report and we can quickly assess what your problem is and how to address it.

SERVER STOP SIGN

Hang this sign as a reminder for calling Comprise before making changes to your server that may impact Comprise Products.

COMPRISE CUSTOMER CONTACTS

Please complete this form, so that we may update our records. Fax this back to (732) 291-3699. Thank you!

Library System (if applicable): _____

Library Branch Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

DIRECTOR:

Name: _____

Email: _____

Phone: _____ Fax: _____

FINANCIAL MANAGER (OR EQUIVALENT):

Name: _____ Title: _____

Email: _____

Phone: _____ Fax: _____

PRIMARY BUSINESS (RESPONSIBLE FOR COMPRISE CONTRACT):

Name: _____ Title: _____

Email: _____

Phone: _____ Fax: _____

PRIMARY TECHNICAL:

Name: _____ Title: _____

Email: _____

Phone: _____ Fax: _____

PRIMARY PUBLIC SERVICE:

Name: _____ Title: _____

Email: _____

Phone: _____ Fax: _____

COMPRISE CHANGE AUTHORIZATION

This form must be completed, signed, and received at Comprise Support Center before any changes can be made to server or client software. Changes include but are not limited to software installation, file uploads, database edits, product configuration, device activation, rules, profiles, etc. Please fax this form back to 732-291-3699.

Library Name or Location: _____ Date/Time: _____

Authorized by: _____ Phone: _____

Fax: _____ Email: _____

Describe in detail the changes authorized below:

Change authorization will not be processed unless sign by Customer and Comprise Support:

Customer Signature: _____ Date: _____

Print Name: _____

Comprise Support: _____ Date: _____

Print Name: _____

COMPRISE OFFICE USE ONLY

Ticket #: _____

All involved parties must sign and date before implementation can take place.

Operations: _____ Date: _____

Administration: _____ Date: _____

Programming Authorization: _____ Date: _____

COMPRISE ENHANCEMENT REQUEST

Important: This form must be submitted by an Authorized Comprise Contact. Please fax this form back to 732-291-3699.

Instructions: This form is a way for you to propose a modification that exceeds the design or functionality of our product as it is currently implemented. Enhancement Requests are subject to review and approval by our product management. This is not an order form, and submission does not guarantee acceptance, completion and/or establish a time frame for development. Often enhancements are modified, scaled up or down, or combined with other related improvements based upon feedback from multiple customers. In this way, valuable product improvements are automatically made available to all Comprise customers.

At your option, enhancements can be ordered exactly to your specification and on a timeline that reflects a project-dedicated effort. In this instance, you will be put in contact with your Comprise Sales Representative who can discuss our development process with you, prepare a cost proposal, and submit an Accelerated Development Agreement for your consideration. Please note that customized enhancements may not be supported in future product releases.

Library Name: _____

Requestor's Name: _____ Phone: _____

Email: _____ Fax: _____

Please describe your enhancement request: ☐ Smart Money Manager ☐ SmartPAY ☐ Smart Terminals ☐ Smart Kiosk

SAM Customers please indicate the feature for which you are requesting an enhancement:

- | | | | |
|---|---|---|---|
| <input type="checkbox"/> Authentication | <input type="checkbox"/> PC Sign-Up | <input type="checkbox"/> Session Management | <input type="checkbox"/> Internet/Filtering |
| <input type="checkbox"/> Print/Copy | <input type="checkbox"/> My Account (Funds) | <input type="checkbox"/> Reports | <input type="checkbox"/> Staff Interface |
| <input type="checkbox"/> Peripheral Equipment | <input type="checkbox"/> Other | | |

COMPRISE OFFICE USE ONLY

Request Status: ☐ Accepted ☐ Declined ☐ Referred for future release

Explanation: _____

By: _____ Date: _____

Customer Notified by: ☐ Email ☐ Fax ☐ Phone By: _____

Please post a copy of this chart at the server and anywhere else it will be handy.

TOLL FREE SUPPORT CENTER: **800-531-0132**

ONLINE SUPPORT: **WWW.COMPRISETECHNOLOGIES.COM**

EMAIL: **TECHSUPPORT@COMPRISETECHNOLOGIES.COM**

ONLINE SUPPORT CHART

Pick a Category		Choose the specific description and appropriate severity level.	
Problems and Severity Levels			
Support Categories	Critical	Moderately Severe	Minor Problems
Authentication	<u>No One</u> can log on	1. Some patrons cannot log on. 2. New users cannot log on. 3. Visitors cannot log on 4. "Safe Mode" behavior 5. ILS Link problems	1. ILS Upgrades 2. Visitor card changes 3. Authentication Policy changes 4. ILS Link changes
PC Sign-Up	<u>No One</u> can sign up	1. Some patrons can't sign up 2. Visitors cannot sign up 3. SAM not assigning correctly 4. Display info not correct	Graphic or copy changes
Session Management	<u>No One</u> is being timed	1. Session length timing 2. Consecutive/Daily log on 3. Flex-time issues 4. End of Day timing behavior	1. Adding new computers 2. Admin Configuration changes 3. Session message changes
Internet	1. <u>No One</u> is being filtered 2. <u>All Juveniles</u> not filtered 3. Everyone filtered incorrectly	1. Filter level changes 2. Specific URL/site exceptions 3. Filter automation changes	1. Graphic or copy changes 2. Blocked page changes
Print and Copy, Account Funds	1. <u>No</u> printer working in library 2. SAM not charging correctly	1. Some printers do not print 2. Page counts 3. Adobe PDFs	1. Adding new printers 2. Print receipt changes
Reports	Reports not being generated Financial Reports not correct	1. Real time data not reporting 2. Report data not correct 3. Report not generating	Formatting problems
Staff Interface (PC Activity Manager)	1. Staff Interface won't launch 2. Visitor cards not created	1. PC Status display incorrect 2. Sign-Up display incorrect 3. Control links not working 4. Report not generating	Functional changes
Peripheral Equipment	1. <u>No</u> APM is accepting payment 2. <u>No</u> Copy Controller is working 3. No LED is working	1. One APM is not working 2. One Controller not working 3. One LED not working	1. New currency changes 2. Priceline additions/changes
Intermittent or Other	Will be referred to a Customer Service Manager for resolution		

SAM TROUBLESHOOTING REPORT

Please distribute this Form so it will be immediately available when needed. The form must be completed while the problem is occurring and faxed to 732-291-3699.

Library Name: _____

Report by (Your Name): _____

Phone Number: _____ Fax Number: _____

Card Number (if applicable): _____ PIN: _____ PC ID: _____

SIGN-UP OR LOGON PROBLEM: PLEASE COMPLETE THEN REQUEST SUPPORT

1. How many people can't log on? ☐ 1 ☐ 2 plus, **CALL US RIGHT AWAY!**
2. How many PCs won't let people log on? ☐ 1 ☐ 2 plus, **CALL US RIGHT AWAY!**
3. Did you try to sign-up/logon with the card? ☐ Yes ☐ No, **TRY BEFORE CALLING SUPPORT!**
 - a. Check if the card is blocked for Fines, Expired, or Discipline.
 - b. Check to make sure you are using the correct PIN.
 - c. Check if the card is out of daily time or logins.
4. Is the person a patron or visitor? ☐ Patron ☐ Visitor
5. Has the person ever used SAM? ☐ Yes ☐ No

Other Sign-Up Troubleshooting:

1. Is Sign-Up accepting other people onto the waiting list? ☐ Yes ☐ No
2. Is Sign-Up assigning other people onto available PCs? ☐ Yes ☐ No
3. If Sign-Up is not assigning PCs, how many PCs are affected? ☐ 1 ☐ 2, plus **CALL US RIGHT AWAY!**

Error Message (if applicable): _____

PRINT PROBLEM: PLEASE COMPLETE THEN REQUEST SUPPORT

1. How many PCs can't print? ☐ 1 ☐ 2 plus, **CALL US RIGHT AWAY!**
2. How many printers are not printing? ☐ 1 ☐ 2 plus, **CALL US RIGHT AWAY!**
3. Is the problem limited to a specific application? ☐ PDF ☐ MS Word ☐ Internet Browser
 - a. Check if the printer is ON and cables are firmly connected.
 - b. Restart the printer and try to print under the user's card and PIN.
 - c. If you charge for printing, does the person have enough money to print.

Other Print Troubleshooting: **SAVE THE PERSONS WORK THEN...**

1. Try to print under **YOUR STAFF CARD** and **PIN**. ☐ Unresolved, SAM would not print.
2. Close SAM, try to print through Windows. ☐ Unresolved, SAM would not print.

Error Message (if applicable): _____

1. First Log off and log on to SAM. Did this fix the problem? ☐ Yes ☐ No
2. Check to see if there is Internet connectivity. ☐ Yes ☐ No
3. Check to see if there is ILS connectivity. ☐ Yes ☐ No
 - a. If YES, then reboot the PC. Did this fix the problem? ☐ Yes ☐ No

SMART KIOSK TROUBLESHOOTING REPORT

Please distribute this Form so it will be immediately available when needed. The form must be completed while the problem is occurring and faxed to 732-291-3699.

Library Name: _____

Report by (Your Name): _____

Phone Number: _____ Fax Number: _____

Card Number (if applicable): _____ PIN: _____ PC ID: _____

SIGN-UP OR LOGON PROBLEM: PLEASE COMPLETE THEN REQUEST SUPPORT

- | | | |
|--|---------------------------------|---|
| 1. How many people can't sign up? | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 plus, CALL US RIGHT AWAY! |
| 2. How many PCs won't let people sign up? | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 plus, CALL US RIGHT AWAY! |
| 3. Did you try to sign-up/logon with the card? | <input type="checkbox"/> Yes | <input type="checkbox"/> No, TRY BEFORE CALLING SUPPORT! |
| a. Check if the card is blocked for Fines, Expired, or Discipline. | | |
| b. Check to make sure you are using the correct PIN. | | |
| c. Check if the card is out of daily time or logins. | | |
| 4. Is the person a patron or visitor? | <input type="checkbox"/> Patron | <input type="checkbox"/> Visitor |
| 5. Has the person ever used SAM? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Other Sign-Up Troubleshooting:

- | | | |
|--|------------------------------|---|
| 1. Is Sign-Up accepting other people onto the waiting list? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Is Sign-Up assigning other people onto available PCs? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. If Sign-Up is not assigning PCs, how many PCs are affected? | <input type="checkbox"/> 1 | <input type="checkbox"/> 2, plus CALL US RIGHT AWAY! |

Error Message (if applicable): Click or tap here to enter text.

PRINT PROBLEM: PLEASE COMPLETE THEN REQUEST SUPPORT

- | | | |
|--|------------------------------|--|
| 1. How many PCs can't print? | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 plus, CALL US RIGHT AWAY! |
| 2. How many printers are not printing? | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 plus, CALL US RIGHT AWAY! |
| 3. Is the problem limited to a specific application? | <input type="checkbox"/> PDF | <input type="checkbox"/> MS Word <input type="checkbox"/> Internet Browser |
| a. Check if the printer is ON and cables are firmly connected. | | |
| b. Restart the printer and try to print under the user's card and PIN. | | |
| c. If you charge for printing, does the person have enough money to print? | | |

Other Print Troubleshooting: **SAVE THE PERSONS WORK THEN...**

- | | |
|---|---|
| 1. Try to print under YOUR STAFF CARD and PIN . | <input type="checkbox"/> Unresolved, SAM would not print. |
| 2. Close SAM, try to print through Windows. | <input type="checkbox"/> Unresolved, SAM would not print. |

Error Message (if applicable): Click or tap here to enter text.

- | | | |
|---|------------------------------|-----------------------------|
| 1. First Log off and log on to SAM. Did this fix the problem? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Check to see if there is Internet connectivity. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Check to see if there is ILS connectivity. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| a. If YES, then reboot the PC. Did this fix the problem? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

SMART TERMINAL TROUBLESHOOTING REPORT

Please distribute this Form so it will be immediately available when needed. The form must be completed while the problem is occurring and faxed to 732-291-3699.

Library Name: _____

Report by (Your Name): _____

Phone Number: _____ Fax Number: _____

Card Number (if applicable): _____ PIN: _____ PC ID: _____

TERMINALS

1. How many Terminals not working?

☐ 1

☐ 2 plus, **CALL US RIGHT AWAY!**

Error Message (if applicable): _____

TRANSACTIONS

1. How many transactions failed?

☐ 1

☐ 2 plus, **CALL US RIGHT AWAY!**

Error Message (if applicable): _____

Other Troubleshooting: _____

Error Message (if applicable): _____

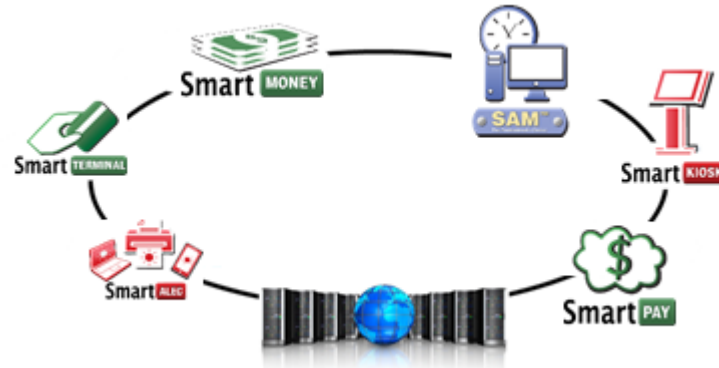


**CALL BEFORE
MAKING CHANGES
TO YOUR SERVER
OR NETWORK!**



**COMPRISE
Technical Support:
800-531-0132**

A PC or Revenue Management solution from Comprise is an investment in a flexible, expandable **Smart** web-based architecture. All Comprise' solutions can be leveraged from a single **SmartServer** linked with your library's ILS or organizations database. All Comprise solutions communicate with leading ILS databases, Microsoft SQL, and integrate seamlessly with each other offering unparalleled flexibility.



Today you might be interested in access management, but tomorrow you find that you also need a financial management solution. Comprise offers you the flexibility to upgrade and expand with one server that can manage multiple locations from one central location. **To purchase these add-on products contact your Comprise Sales Representative at 800-854-6822.**

PC ACCESS MANAGEMENT

SAM Professional is our flagship access management solution. It is available in two versions to meet the needs and objectives of different library and public service organizations. 100% centralized management, access automation, and privacy protection are core to both versions.

Simpler SAM is our hosted version of SAM. It is our entry level access management program that allows smaller organizations to implement the core features of SAM without the overhead of a server or other networking hardware.

POINT OF SALE

Smart Money Manager is a point of sale solution specifically designed for the library environment. It links with your ILS to clear fines/fees in a single step, as well as handling waivers and multiple family member payments.

Smart Terminals can be used at your self-check or circulation desk lets patrons make secure card payments for fines/fees or other purchases. Smart Terminals are patron-facing so patrons swipe their own card.

SELF-SERVICE SOLUTIONS

Smart Kiosk (Pictured Right) enables anyone to make self-service payments and purchases without any staff involvement. They fully automate the handling of bills, coins, and bankcards, and return change for unspent funds. Use them to let patrons or visitors pay for fines, print, copy, or other charges.

SmartPAY allows patrons to make fine/fee payments and anyone to make donations to your library over the Internet. It's easy to use, convenient, and runs from your website.





We're Here to Help!
CALL 800-531-0132

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