

Welcome to Rapido Consortial Borrowing - Working with Rapido Support

Customer Care
A&G Software Group

06/18/2026



Welcome, SearchOhio Libraries!

Presenter: Vince Garin

The Customer Care Team Vision and Values



It is not enough to be busy; so are the ants. The question is: What are we busy about?

- Henry David Thoreau

Global Customer Care Vision and Values

Offer best in class customer experience through

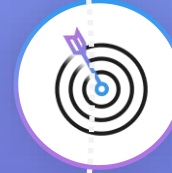
- Product and market expertise
- Innovative support technologies
- Community collaboration



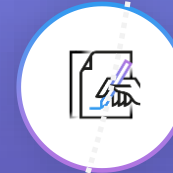
Customer centric culture



Responsiveness



Results driven



Accountability



Transparency



Contents



Journey Through the Support Ecosystem



Self Service Options



Open Cases - What to include in Rapido Support Cases



Working on and Resolving Cases



Share Feedback

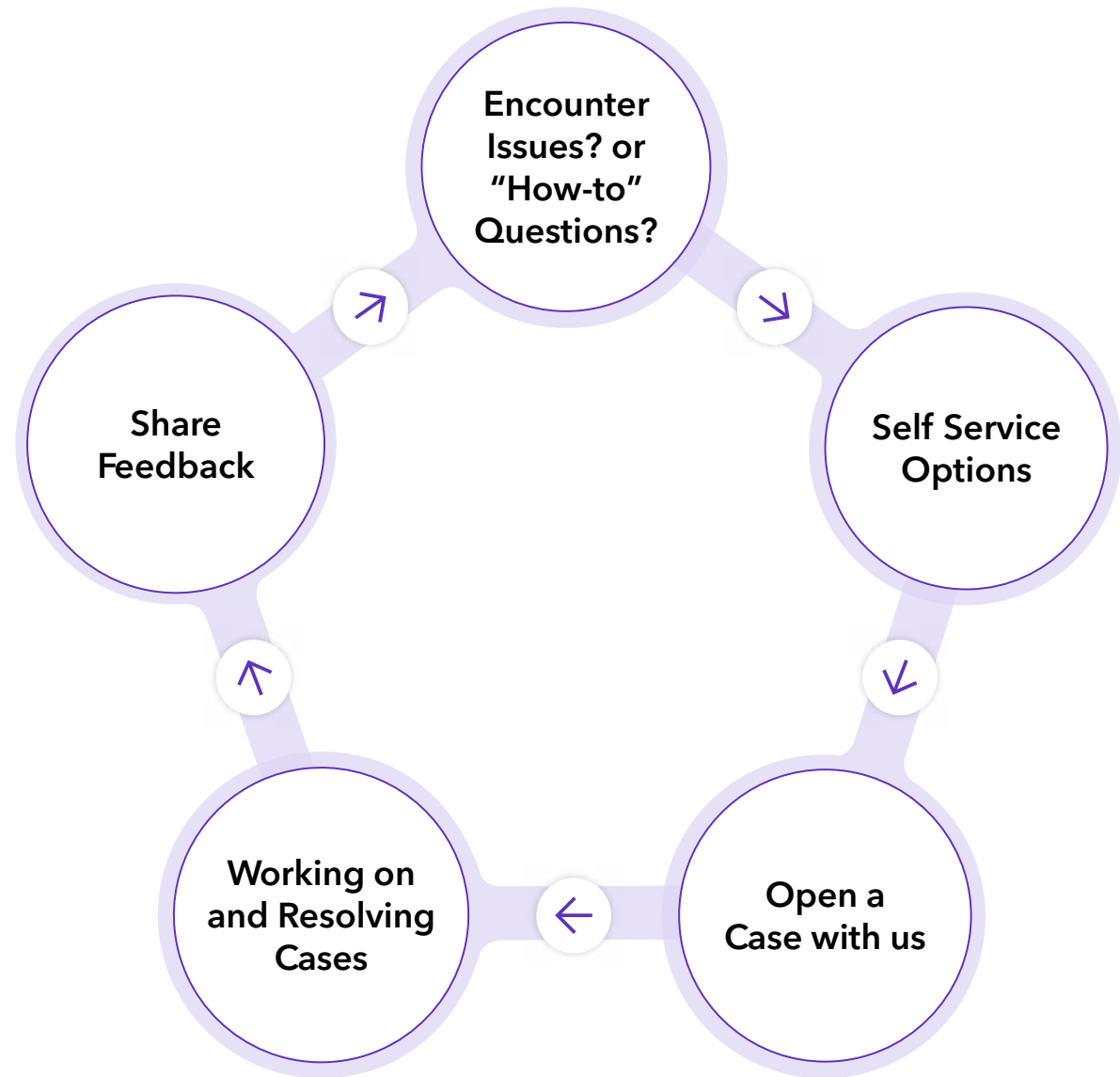


Appendix

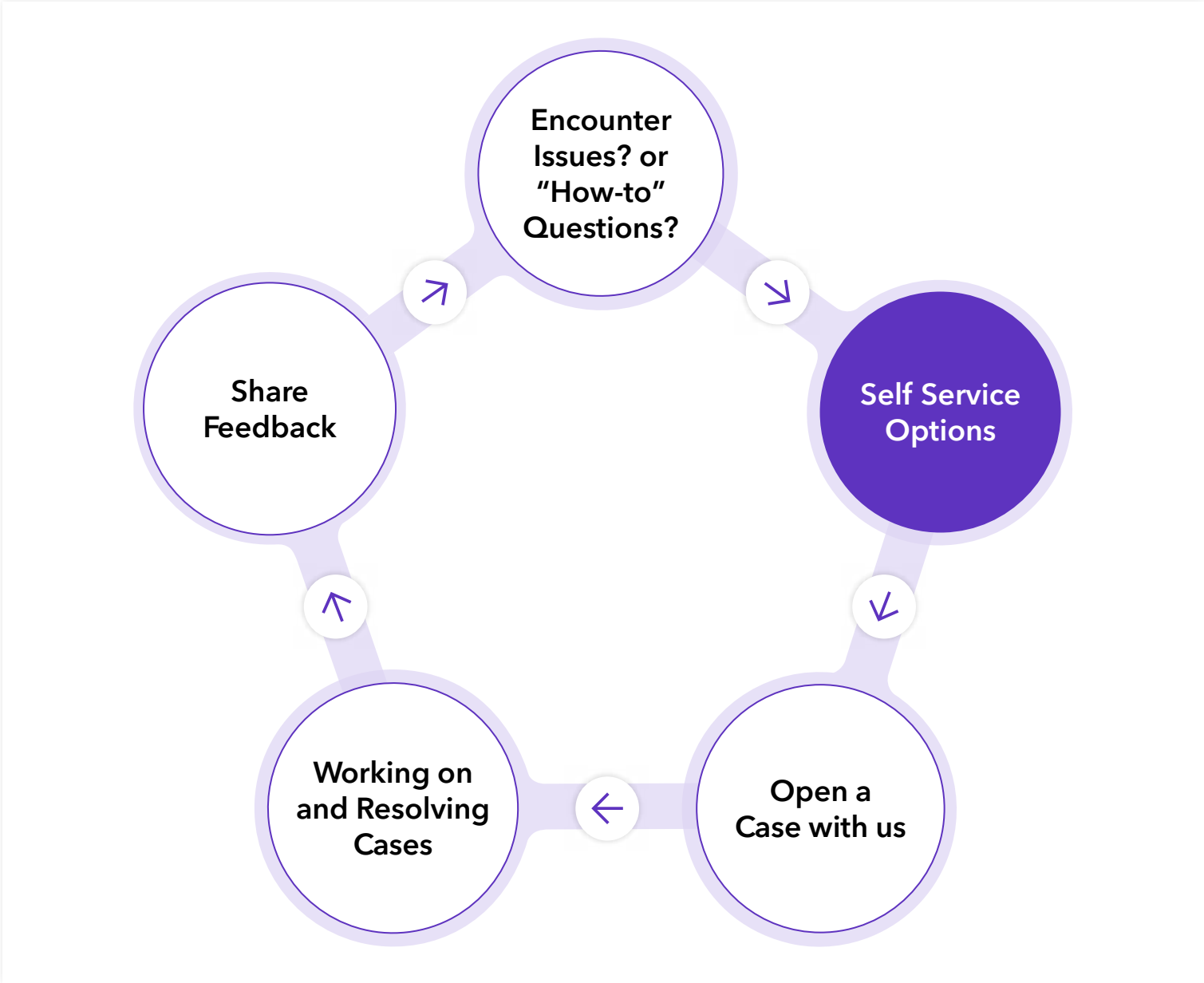
- Troubleshooting tips
- Useful Resources
- Quick References

Journey through the support ecosystem

Support Journey with Customer Care



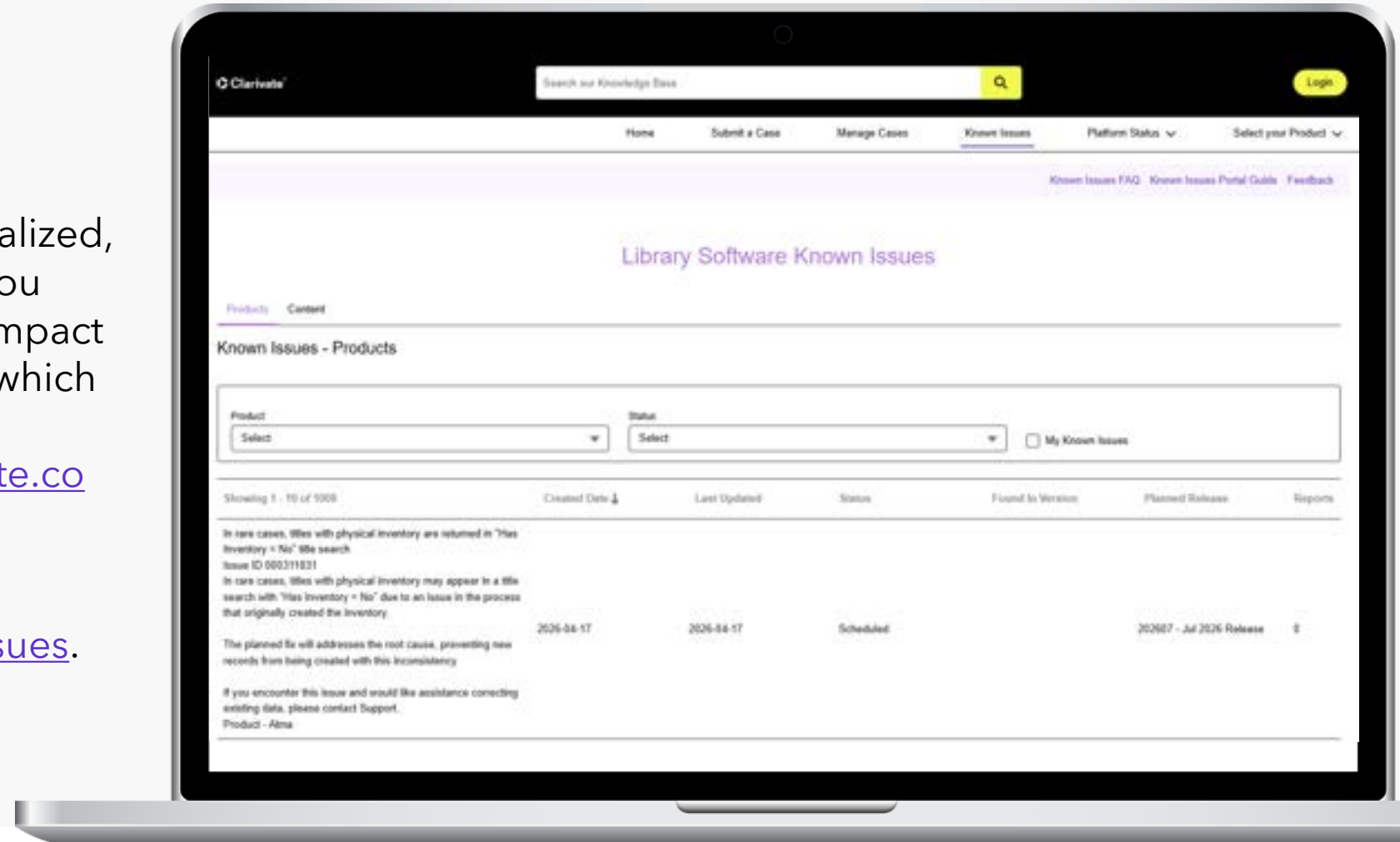
Self Service Options



Self Service Option - Known Issues Portal



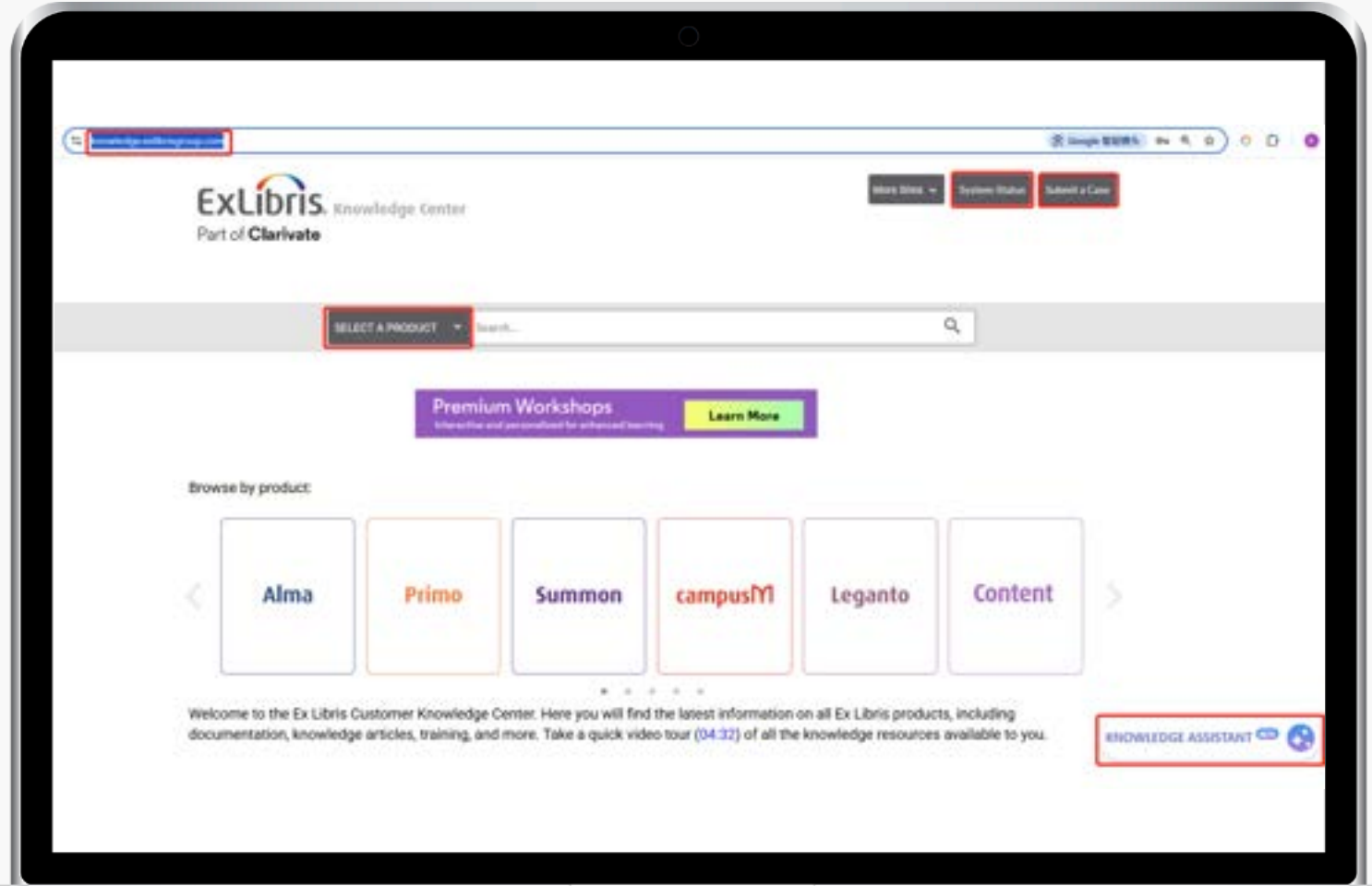
- Known Issues Portal - a centralized, modern solution that gives you real-time visibility into high-impact product and content issues, which can be accessed via the link https://supportcenter.clarivate.com/s/known-issues?language=en_US.
- Check the [FAQ for Known Issues](#).



Self Service Option - Knowledge Center



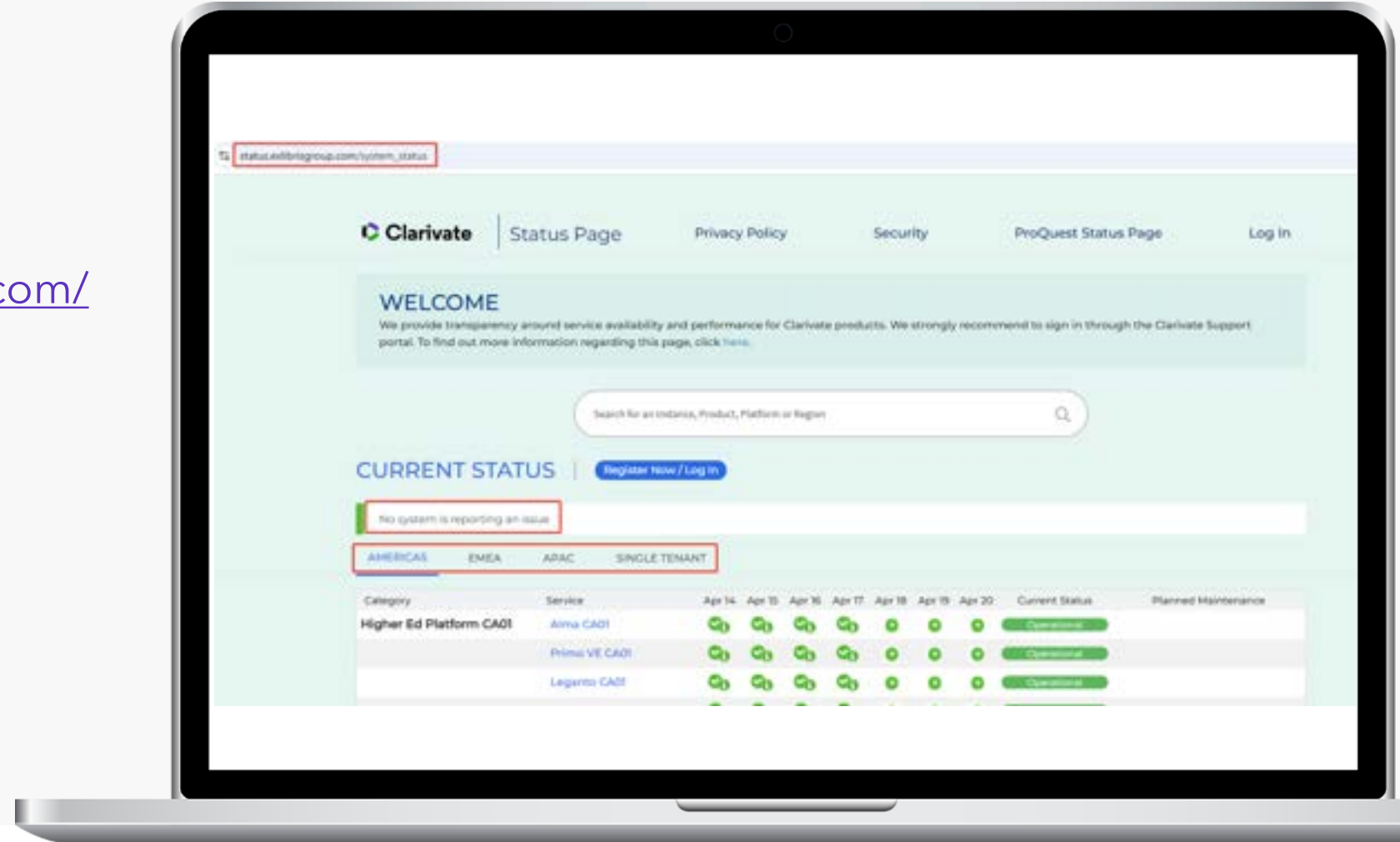
- Rapido Knowledge Center
- Includes KB articles, online seminars, training videos, release notes, and many more...
- Powered by Clarivate AI platform - Knowledge Assistant.
- Innovative product resources and a subset of Ex Libris product resources available in the NEW Knowledge Portal (soft-launch in April 2026)



Self Service Option - System Status Page



View the system statuses via
https://status.exlibrisgroup.com/system_status



Self Service Options - Idea Exchange



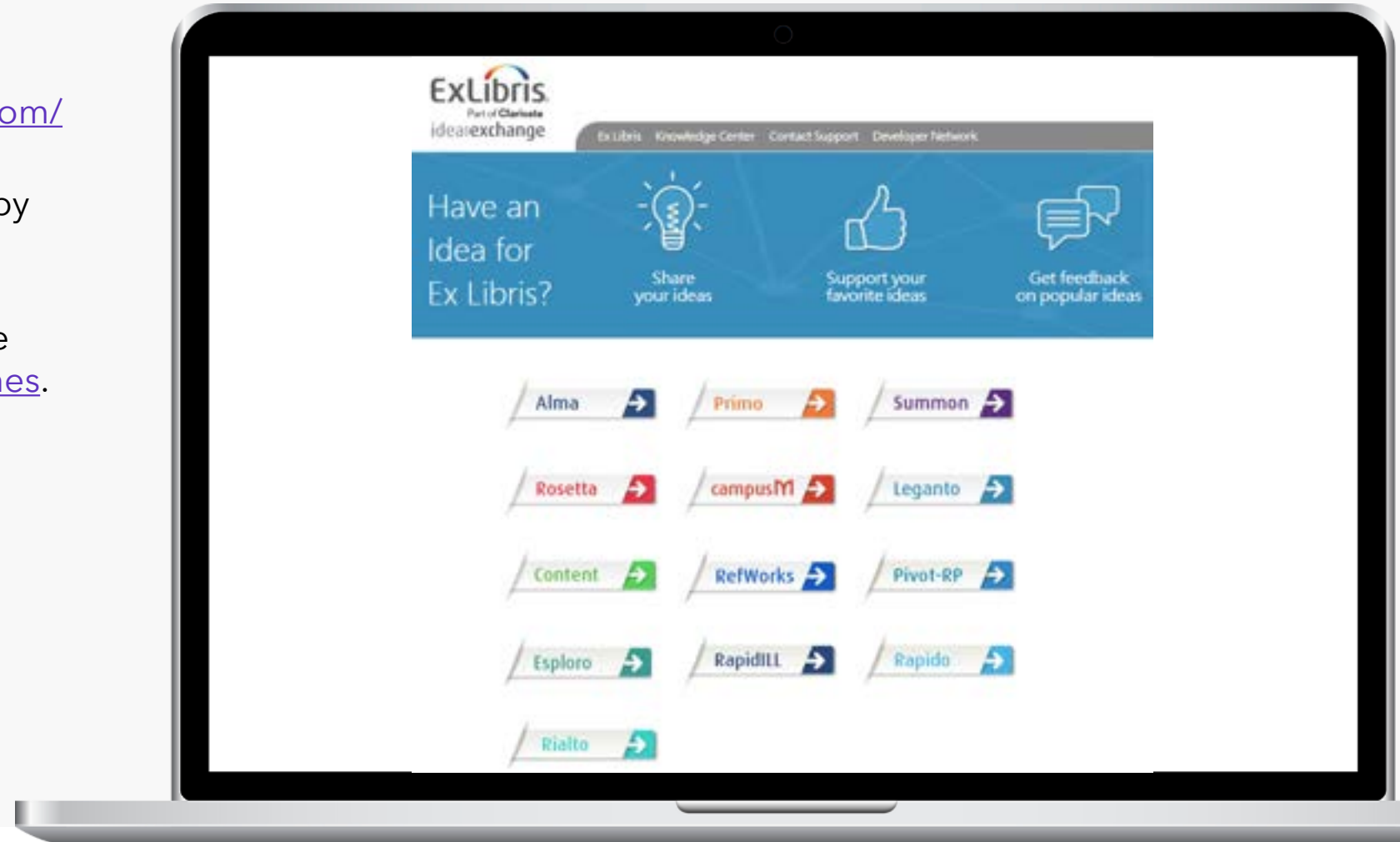
Search or raise your product enhancement requests via <https://ideas.exlibrisgroup.com/>



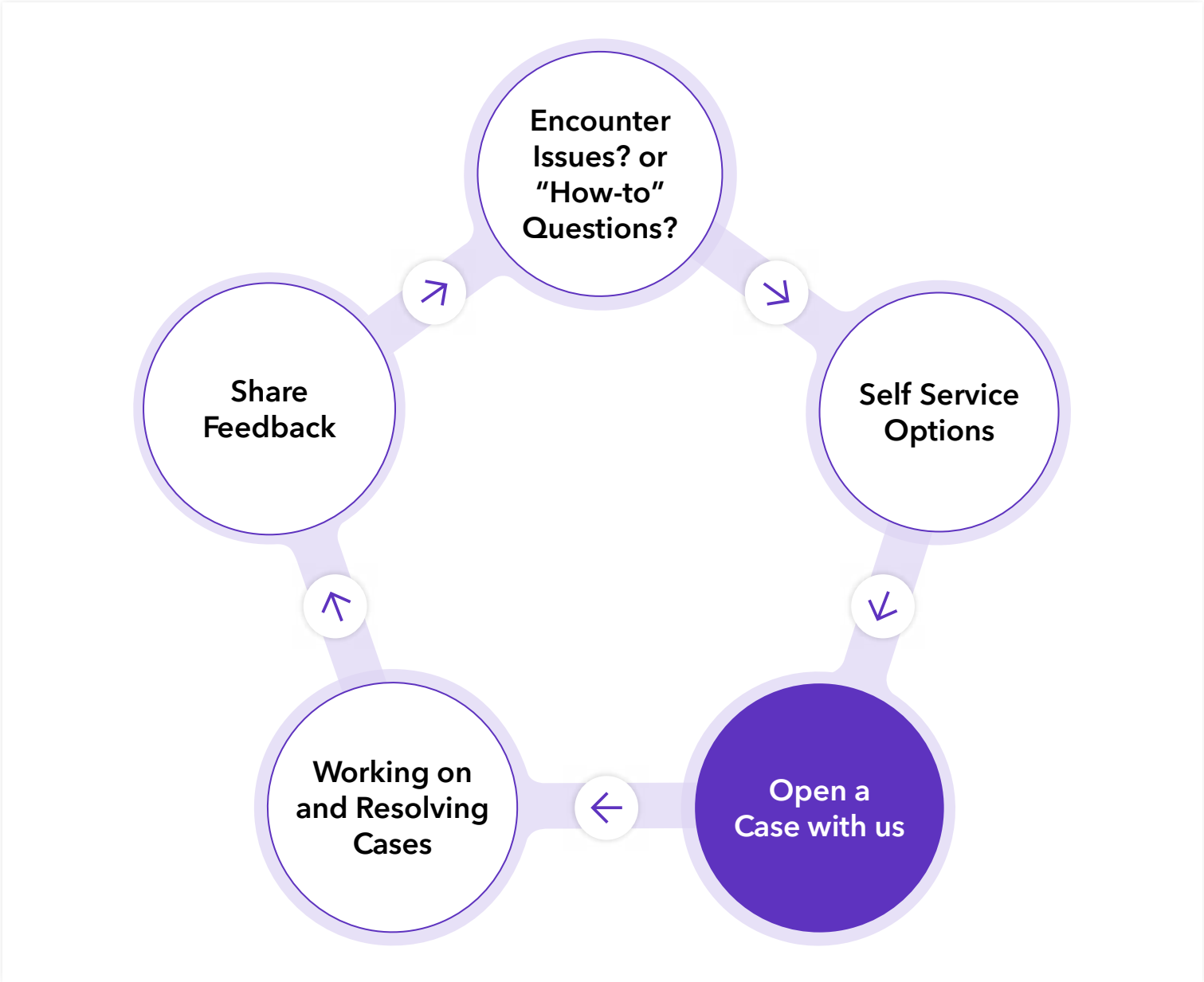
Support your favorite ideas by submitting your votes.



For more information, please review the [FAQ](#) and [guidelines](#).



Open a Case and Chat with us





Submitting Support Cases

Steps to Open a Case



Login to
Support Center



Input the basic
information



Input issue-specific
information



Login to the Support Center

Go to the address: <https://supportcenter.clarivate.com/>

Log in to the Support Center to get **better** and **institution-specific services**.

Read the [Support Portal Guide](#) for details. And click **Submit a Case**

If you don't have an account yet, please **register** and contact your institution's System Admin to request access by following the [Guide](#) or submitting a [login issue](#).

Clarivate® Search our Knowledge Base

Home **Submit a Case** Manage Cases Known Issues

Submit a Support Case

If you cannot find the answer to your question in the [support articles by product](#), our support team is here to help. You can use the [Chat with Us](#) feature or fill out this form with as much detail as possible. If you have questions regarding the use of your personal data, please visit our [Privacy Center](#).

If you have an account with us, **please log in before submitting the form**. Logging in allows you to set preferences and view your training requests, cases and case history.

Don't have an account, but would like one? [Register for an account](#).

If you would like log cases on behalf of an institution, a colleague or system coordinator can [Grant Permissions](#) for this additional functionality after you self-register.

*Pattern / Service

- Select -
- Select -
- Ex Libris**
- ProQuest Database, Ebooks, Videos and RefWorks
- Dissertations and Theses
- Dialog
- Quest/Courts
- Innovative
- Author Connect



Input Basic Information

(Select the Asset)

*Selecting the Asset is an **important step** to ensure that your Support Case will be routed to the **correct** Product Support Team.*

*Please ensure that after logging in to your Support Center account, the relevant **Assets** are visible to you.*

* Select your Asset (Start typing in the box below)

- Rialto
- Alma
- Alma Data Services
- CDL
- Leganto
- Primo
- Rapido

* Example for illustrations only, each institution may have different assets



Input Basic Information

(Fill out the form)

Please fill out the form carefully to ensure that the Customer Care Team has **all the relevant information** regarding your case. Not all fields are mandatory, but it is recommended to fill out as many fields as you can.

Selected Asset:
- CDI

* Platform / Service
Ex Libris

* Product
CDI

Category
-Select-

Sub-Category
-Select-

Affected Environment

Database Collection

* Case Type
-Select-

* Priority
Medium

* Subject

* Description

Select a **Category** and **Sub-Category** from the drop-down menus to provide additional information about the case. The options are based on the selected Asset.

Choose the **Affected Environment** such as the Production or Sandbox environment.

The **Database Collection** field is relevant when submitting a case to the Content teams regarding a specific Collection or Resource.

Select a **Case Type** such as Access, Defect / System Issue or How-to-Question to let us know which type of case you are reporting.

Select the **Priority** based on the urgency of your reported case. This will help the Support Team to prioritize the cases accordingly.

The **Subject** should be brief but informative. This is the title of the Case.

The **Description** should include as much detail as possible. See table below for guidance.



Input Basic Information

(Rapido specifics)

Selected Asset:

Cuyahoga County Public Library-Rapido

* Platform / Service

Ex Libris

* Product

Rapido

Category

Borrowing Requests

Sub-Category

Physical borrowing

* Priority

Medium

Affected Environment

Rapido NA08 - Production

Database Collection

* Case Type

How-to Question

* Subject

Example

* Description

Dear Support,

Everything is ok, this is just an example.

Additional Emails for Case Updates

E-Mail 1

you@example.com



Case Priority

Selecting the **most accurate Priority** helps the Customer Care team allocate resources **effectively** and resolve your issues **promptly**.

System Down:

This is the highest priority. Use it only when the entire product is unavailable, or performance/ functionality is so poor that is unusable. These cases trigger immediate action from the 24x7 HUB.

High Priority:

For urgent or time-critical issues that significantly impact your operations.

(Please note that overusing High priority can make it difficult for Support to identify your most critical cases.)

Medium Priority:

Use this for issues that are inconvenient but don't cause major disruption.

Low Priority:

For non-urgent matters or minor questions.



Escalating a Case

Changing a case's priority

*Has the severity of a problem worsened? Has the problem not been handled in a timely fashion? **Escalate!***

Use the Escalate action in the Case itself

Escalation Policy:

View our [escalation policies here](#).

Contact:

rapidosupportescalation@clarivate.com

Contact:

Wei Dai
Customer Care Manager
Email wei.dai@clarivate.com
+1 312 315 6600

Close Case

Escalate

Printable View

Working on Cases - Manage cases in Support Center

You may find the Support Escalation Policy [HERE](#)

The screenshot shows the Clarivate Support Center interface. At the top, there is a navigation bar with options: Home, Submit a Case, **Manage Cases** (highlighted with a red box), Known Issues, Platform Status, Additional Actions, and Select your Product. Below the navigation bar, there are three buttons: **Close Case**, **Pending Customer Testing**, and **Escalate**, each with a red arrow pointing to it. A **Printable View** button is also visible. The main content area shows case details: Priority (Medium), Case Status (In Progress), Contact Name, Account Name, Escalation Flag, and Email Reference ID. Below this, there are tabs for Case Details, **Case Comments** (highlighted with a red box), Case Attachments, Knowledge Articles, and Case History. A **New Comment** form is visible, with a text input field labeled "Comment (limited to 4000 characters)" and an **Add New Comment** button (highlighted with a red box). A circular arrow icon is overlaid on the right side of the screenshot.

The screenshot shows a form titled "Tell us why you want to escalate your case". Below the title, there is a text prompt: "Please select one of the following escalation categories and add a free-text comment:". A list of escalation categories is provided:

- **Urgency/Severity Change** - Critical Business Impact. The issue is having a greater operational impact than initially assessed and is significantly affecting library or patron services.
- **Handling Time** - The case has not progressed toward resolution within a timeframe considered reasonable for the nature of the issue.
- **Communication Sufficiency** - The updates provided on the case have not met expectations in terms of frequency or detail.
- **Response Quality** - The response provided may not fully address the issue or meet the expected standard in terms of accuracy or clarity.
- **Resolution Reconsideration** - Additional context or impact details are available, and a reassessment of the resolution is requested.

Below the list, there is a note: "Note: This action will not change the Case Status, please add a case comment if you wish to update the status." The form includes a dropdown menu for "Escalation Category" (currently set to "--None--") and a text input field for "Escalation Comment (cannot exceed 100 characters)". A **Next** button is located at the bottom right of the form.



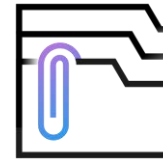
Input Basic Information

(System Down issues)

In case of a “**System Down**” issue, there are **3 ways** to open a case, each of which will trigger immediate attention from the 24x7 HUB.



Submit a
Case as
“**System
Down**”



Email
24x7 Hub
**Contact
Details**



Call
24x7 Hub
**Contact
Details**



Input Issue-Specific Information

(Best Practices)

Best Practices for writing the case description

Define impact scope

Does the problem affect **all users**, or just a **specific group**?
What is the **severity** of the issue?

Define the frequency

Is the problem **constant**, does it happen under certain **conditions** or is it **random**.

Describe the scenario

Describe the **scenario**, event **sequence**, and **reproduce steps**, so that the Support team can **replicate** the issue. Importantly for Rapido CB - **We need to know your local ILS!**

Define the behaviors

Include the **expected** and **actual** behaviors.

Provide examples

Provide **specific** examples, i.e. **request id #, record #'s**, citations, **links, screenshots**, and **screencasts**, etc.

Show the full page

If you provide screen-shots, please show the **full page** that you are viewing, so that we can see in which **workflow** context the screenshot was taken.

What was changed

Did the problem appear after a **config change** or after a **new release** that you think might be related?

Provide test logins

If test **Patron logins** are **needed** or have not been previously provided, please ask Support regarding **secure file** and password **transfers**.

One issue per case

Limit yourself to **one problem** per case to ensure smooth and efficient handling by Support and Development.



Useful Case Templates

(Generic issues)

Useful case opening templates for a detailed description

Subject:

[A brief description of what is needed or the issue symptoms]

Incorrect behavior:

[Summary of suspected bugs, detailing when the issue was initially encountered, general area of issue, etc.]

Expected behavior:

[Which operations should be achieved, which display should appear, etc. if there is referencing documentation, please add the link.]

Reproduction steps:

[What exact operations will reproduce the issue?]

Screenshots and screencasts:

[Pinpointing the exact issue with a few concrete examples is suggested.]

Impact on workflow:

[Such as - affecting the purchase of new inventory, blocking incoming leading requests, etc.]



Useful Case Templates

Rapido Example

Example Rapido support case

Subject:

Why was My Rapido borrowing request sent to the same lender twice?

Incorrect behavior:

Sometimes, Rapido requests are sent to the same lender twice. Two examples are requests with external IDs: 01OHIOLINK0123456 and 01OHIOLINK654321

Expected behavior:

Each lender should only have received these requests once.

Reproduction steps:

This happens when a lender rejects our borrowing requests, but not every time. It only happens with certain lenders.

Screenshots and screencasts:

Attached are a few screenshots of requests in Rapido environment, indicating the requests where this behavior occurred.

Impact on workflow:

This is problematic as the communication with the lender can be tricky - updating any one of the lending requests updates the original borrowing request, which leaves the second lending request out of sync. When this happens, each update causes the External ID of the request to change, causing communication problems between the lender and borrower.



Rapido CB Cases are unique!

Additional details to help us jumpstart Rapido CB troubleshooting

To save us a lot of back and forth, please include as much detail as possible:

Your local ILS:

Are you on Sierra? Polaris? Koha? Are there specifics about your local ILS workflow that are impacted?

Request Specifics

Request ID: External or Internal ID

Partner details


Who was the lending/borrowing partner?

Frequency:

Does the behavior always occur with every request? Intermittently? Any pattern or commonality between requests where it occurs?

Important Identifiers for Rapido Cases

Some examples



Matilda /
ISBN: 1404936289
OCLC: 60496505
External identifier: 01UWISUP0020813

Loaned item to patron

+ Add Label

Request Information

Requested format: Physical
Pickup location: UW Superior:Jim Dan Hill Library
Partner: UW-Milwaukee Libraries 

Requested media: Any
Internal identifier: 6169986640002132
MMS ID: 99916911656602132
Created: 06/08/2026 02:38:07 PM CDT
Updated: 06/15/2026 02:16:46 PM CDT
Due date: 06/08/2026
Loan due date: 06/29/2026
Level of service: Normal (Full)
Barcode: 91025912618
Call number: PN1995.9.C45

External Identifiers

- The same on the lending and Borrowing request
- Downside: can change over time

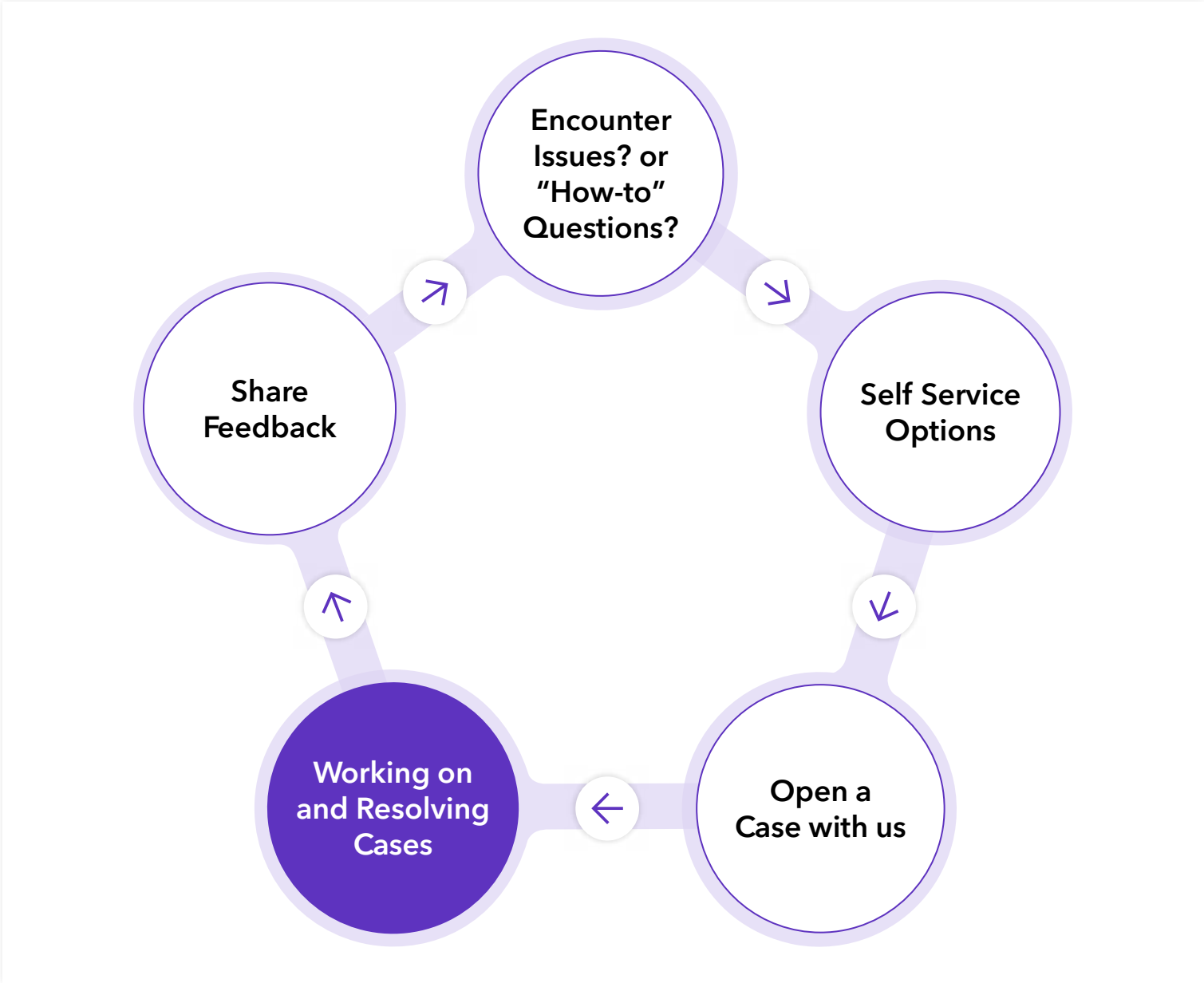
Internal Identifiers

- Unique to each lending and borrowing request
- Pro: never changes!



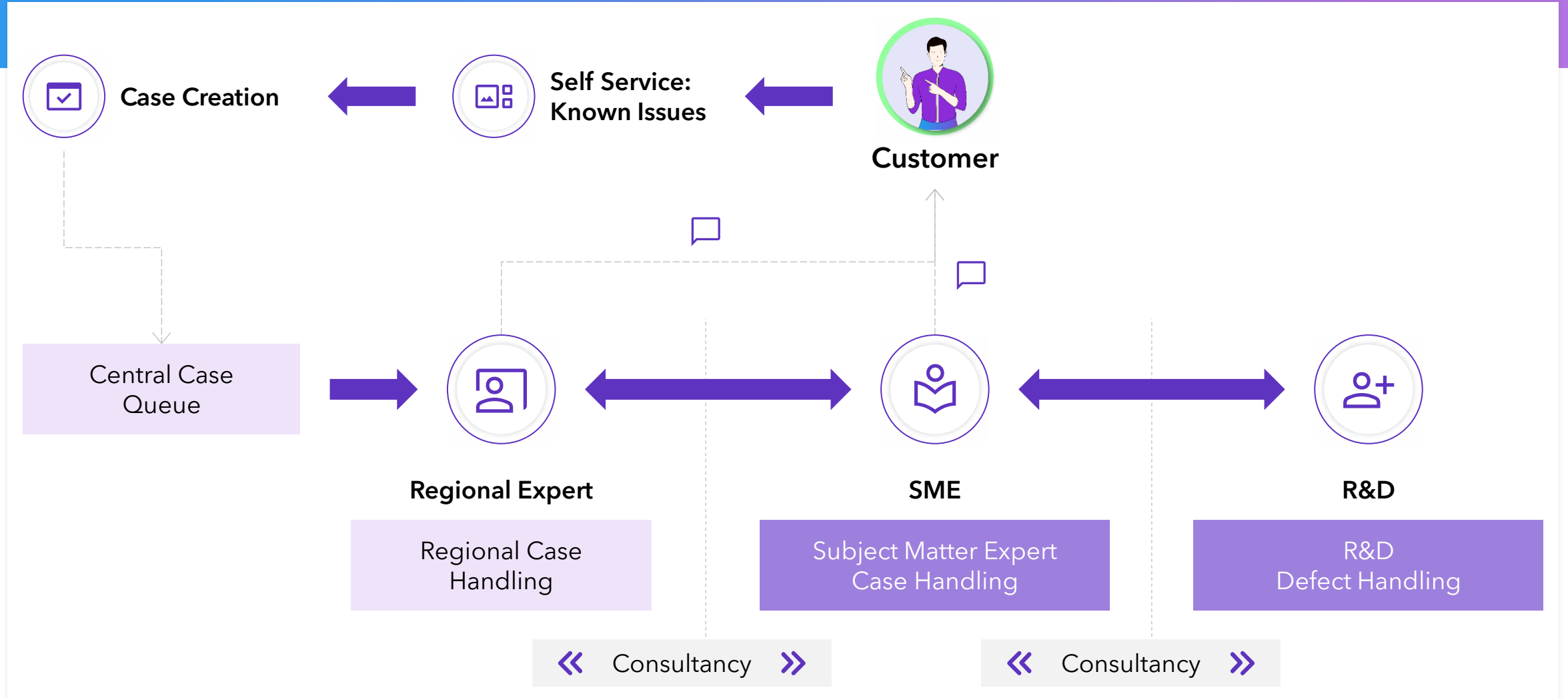
Working on and Resolving Cases

Working on and Resolving Cases



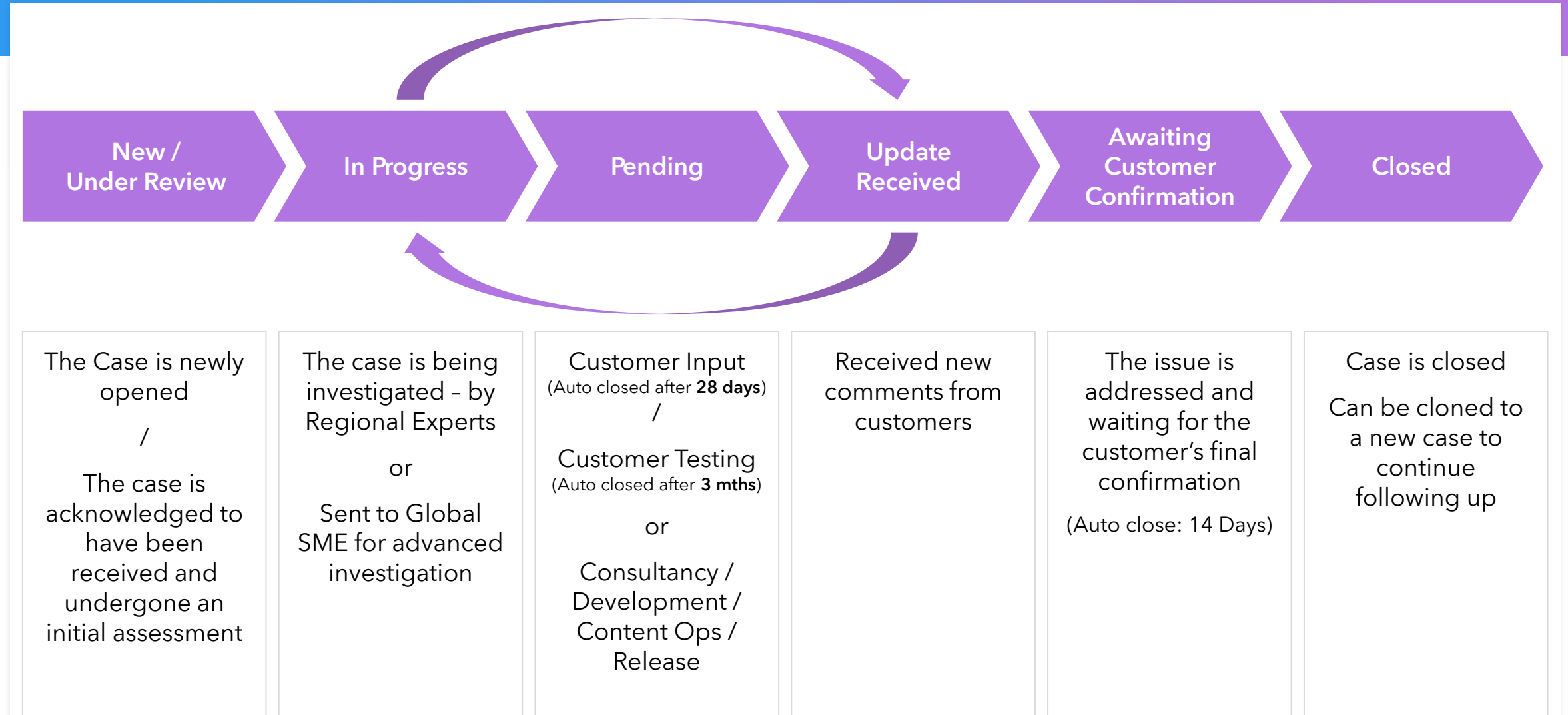
Case Handling Process

Quality of Service



Working on Cases - Case statuses

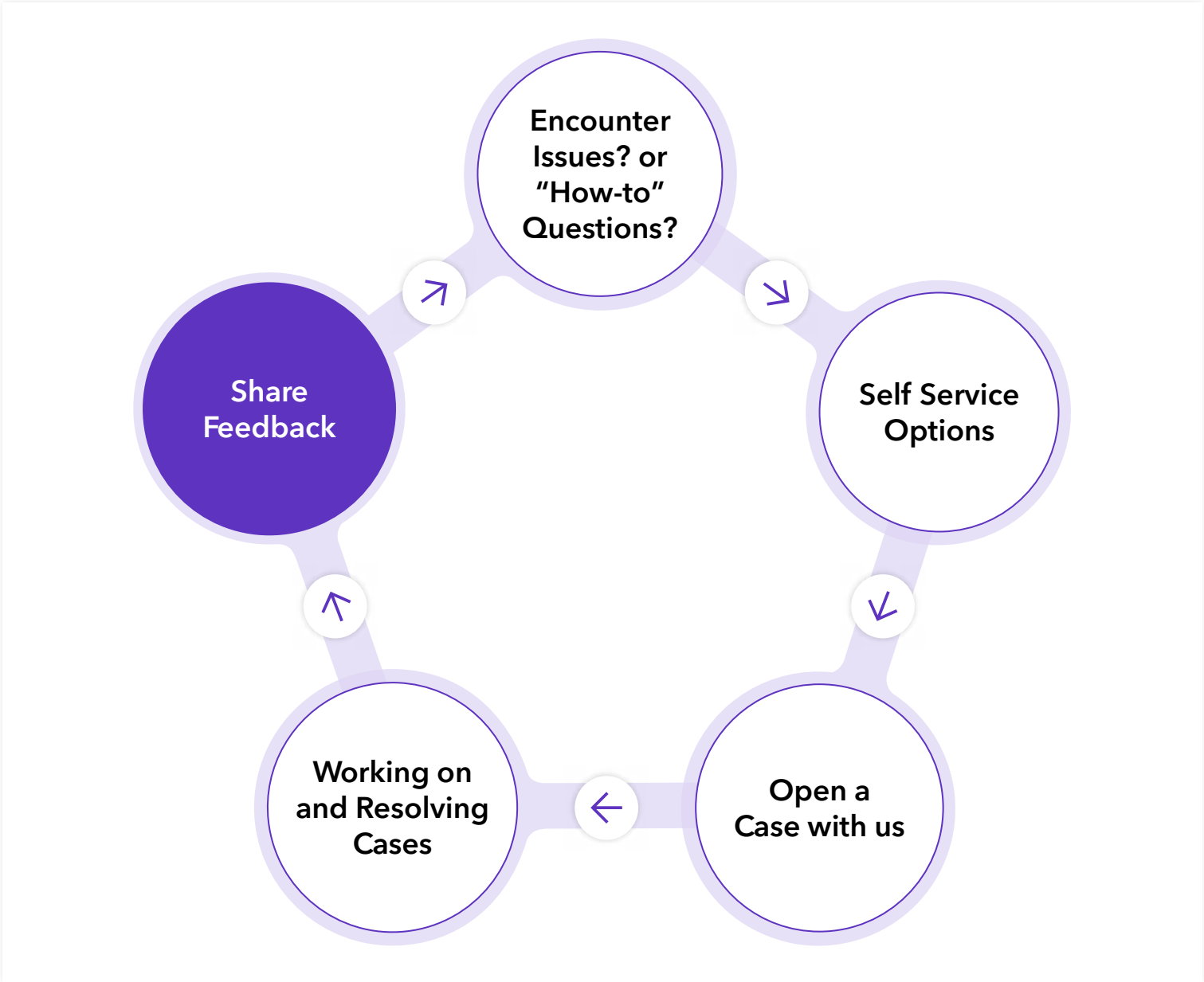
What does each status mean?





Share Feedback

Share Feedback



Share Feedback - Case Satisfaction Survey



We value your feedback on both the **Overall Experience** and the **Representative experience**

Your comments provide specific feedback that helps us drive actions to enhance and streamline your experience with Customer Care

You also have [alternative ways](#) to share your constructive feedback on your customer care experience

Please expect the Case Satisfaction Survey after 24 hours when a case is closed

The screenshot shows the Clarivate Case Satisfaction Survey interface. At the top is the Clarivate logo and a language dropdown menu set to 'English'. The first question is 'How satisfied are you with your recent experience?'. Below it is a horizontal scale with five points: 'Very Satisfied' (green smiley face), 'Satisfied' (yellow neutral face), 'Neutral' (yellow neutral face), 'Dissatisfied' (red sad face), and 'Very Dissatisfied' (red sad face). Each point has a radio button below it. The second question is 'How satisfied are you with the representative who assisted you?'. It has the same five-point scale and radio buttons. At the bottom, there is a text box labeled 'Please provide any additional comments or feedback.'.



Thank You

Vince Garin
vincent.garin@clarivate.com

About Clarivate

Clarivate is a leading global provider of transformative intelligence. We offer enriched data, insights & analytics, workflow solutions and expert services in the areas of Academia & Government, Intellectual Property and Life Sciences & Healthcare. For more information, please visit clarivate.com.

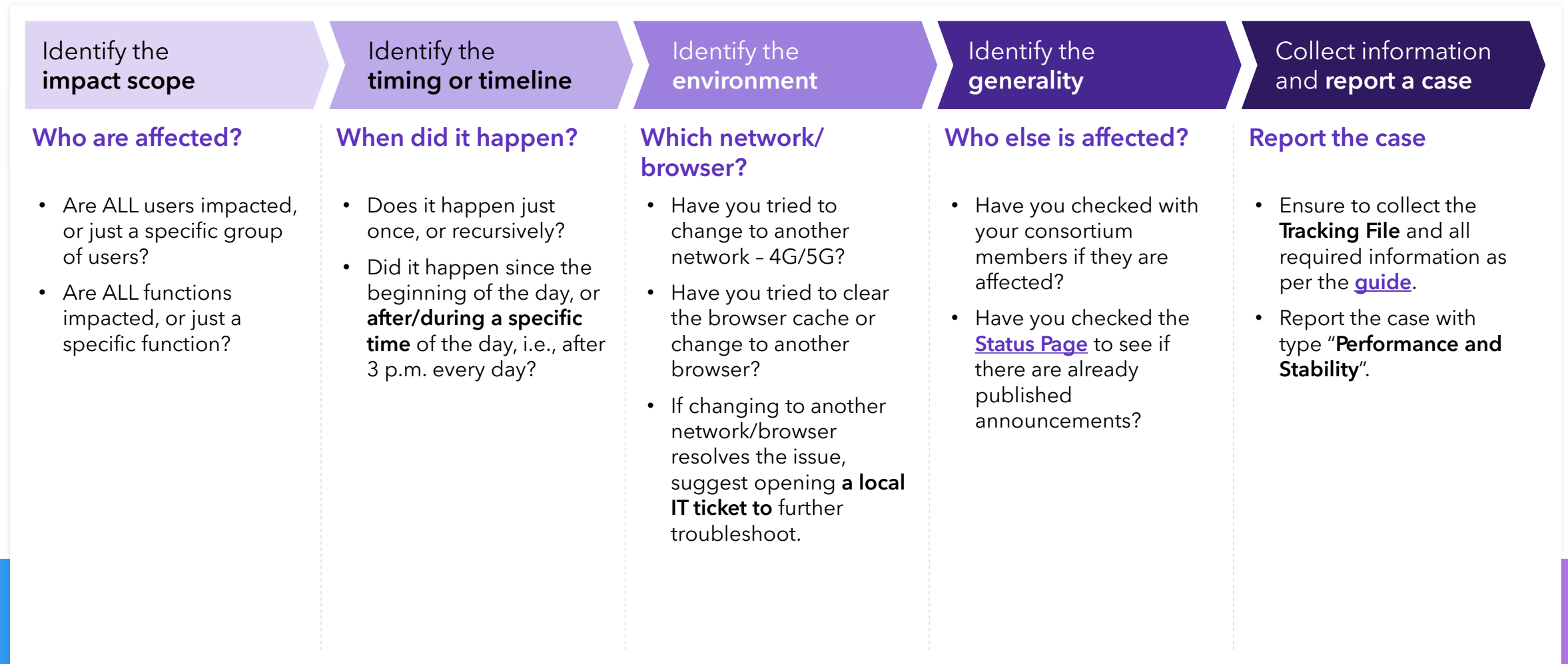
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Appendix I - Troubleshooting Tips

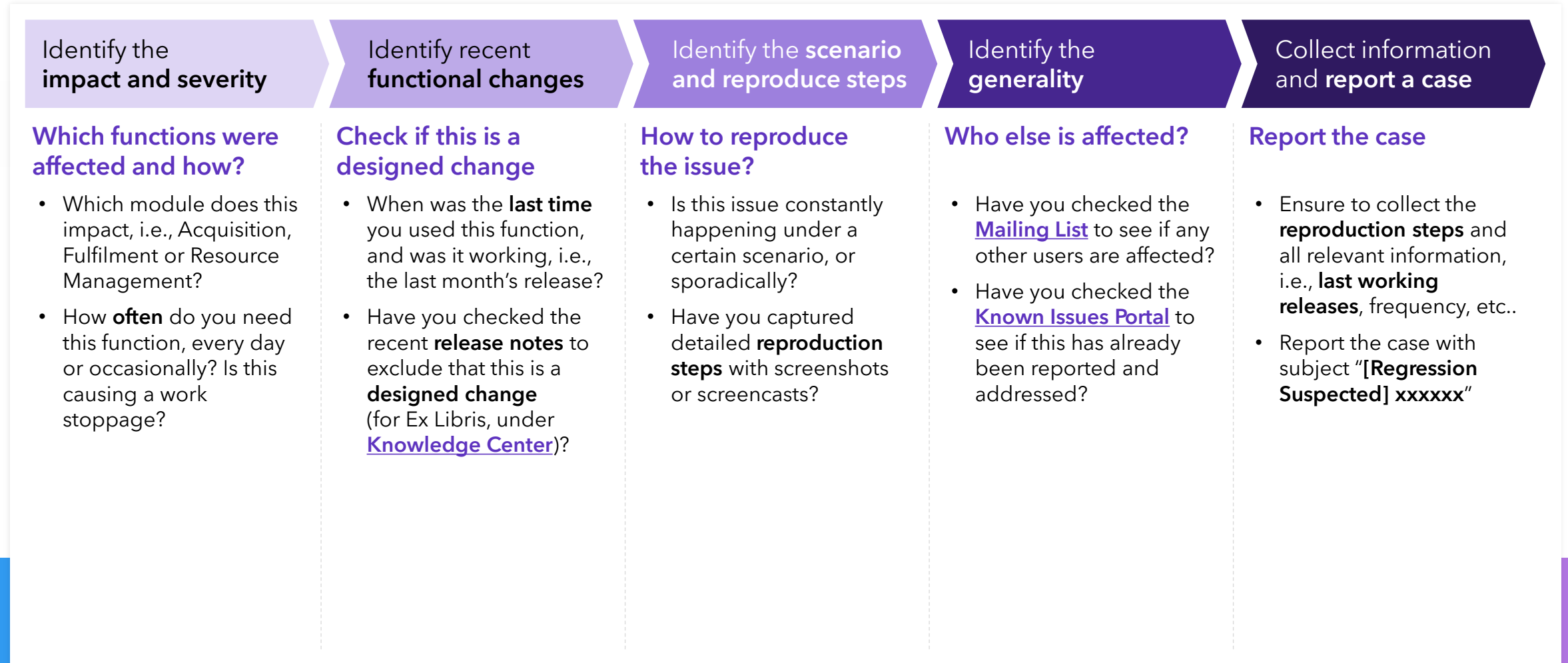
Troubleshooting Tips - Rapido Performance issues

*Several factors may influence the overall user experience, such as **slow network**, the **end-user's computer**, **data-related issues**, challenges within the Ex Libris **data center** or **software bugs**.*



Troubleshooting Tips - Regression issues

Regression issues refer to a situation where a new code change, such as an update or bug fix, causes a previously working feature or functionality to break or malfunction.



Troubleshooting Tips - Reporting Accessibility issues

We are committed to providing accessible experiences for all users. If you encounter an accessibility issue in **Primo VE** or wish to learn more about our [accessibility efforts](#), the support channels described below are available.

Checking the **Accessibility Status**

Review current status

- For the NDE UI - See our published [VPAT](#).
- For the original Primo VE UI - See the [Compliance Level and Report](#).

Reporting a **Single Accessibility Issue**

For individual accessibility concerns

- Submit a case with Case Type "**Accessibility (Assistive Technology)**".
- Under Case Description, provide:
 - a) A concise summary and **steps to reproduce the issue**;
 - b) The assistive technology used (e.g., screen reader and version) and
 - c) Any known WCAG 2.2 AA criterion violated
- Provide **screenshots** or **screencasts**.

Reporting **Multiple Accessibility Issues**

If you have 10 or more issues

- Contact our **Accessibility team** first at accessibility@clarivate.com for a coordinated review.
- Submit a support case with the information:
 - **Subject** - enter a subject such as Request for Review - Accessibility Audit Findings.
 - **Case Type** - select Accessibility (Assistive Technology).
 - **Description** - include:
 - A summary of the audit or test performed
 - A file or list of the issues found
 - Whether you're available to join a follow-up review meeting

Troubleshooting Tips - Reporting Security issues and Vulnerabilities

If you believe you've found a security issue in one of our products or services, partner with us and report potential security vulnerabilities to us via our [HackerOne Responsible Vulnerability Disclosure Program](#), also see details from the [HackerOne - Clarivate site](#).

Before you test and/or report a vulnerability

Review our [Policy](#)

- Review our [Vulnerability Disclosure Policy](#).
- Please note that this should **NOT** be construed as a permission to perform any of the activities listed in "**Keeping Our Data Safe**" section in [HackerOne Responsible Vulnerability Disclosure Program](#).

Report Security issues and Vulnerabilities via **email**

hackerone@clarivate.com

Include the following information:

- A description of the issue and where it is located.
- A description of the steps required to reproduce the issue.

Report Security issues and Vulnerabilities via **HackerOne** site

Register and Submit the report

- Register an account with 2FA enabled.
- Search for "**Clarivate**" program and add to "Favorite".
- [Submit](#) a vulnerability report under the program.

Appendix II – Useful Resources

Useful Resources - Release Notes and more



A lot of useful information for each product via the Knowledge Center

- Rapido: <https://knowledge.exlibrisgroup.com/Rapido>
- Sierra: <https://knowledge.ag-software.clarivate.com/sierra/Home.html>
- Polaris: <https://knowledge.ag-software.clarivate.com/polaris/Home.html>

Search under current path Q Alma

Click here for a guide to Alma knowledge assets

Featured Topics

- March 2025 Release Notes
- February 2025 Release Notes
- January 2025 Release Notes
- December Release Notes
- November Release Notes
- October Release Notes
- September Release Notes
- August Release Notes
- July Release Notes
- June Release Notes
- May Release Notes
- April Release Notes
- March Release Notes
- February Release Notes
- January Release Notes
- Alma Glossary

Product Documentation
Access the latest documentation for Ex Libris products

Best Practices and How-Tos
Access a library of valuable how-tos, workflow best practices, and learn how to get the most out of Alma

Release Notes
Stay informed about the features and capabilities included in each product release

Training
Learn new skills and get certified with our tutorials, recorded training and other materials

LibGuide
An index of our most popular training materials, organized by functionality area, all on the familiar LibGuide platform.

Community Knowledge
Learn from other customers' experience, access customer contributed articles and share your own expertise

Content Corner
Alma Community Zone

Knowledge Articles
Answers as provided by our product analysts, to commonly raised questions.

Product Materials
Learn more about our product offerings, and how they can serve your needs

Useful Resources - Trust Center



In-depth information about the security, privacy, compliance, and availability of Clarivate and Ex Libris solutions

- <https://clarivate.com/trust-center/?lid=exl-tc>

Clarivate

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Trust Center [Explore Clarivate Trust Center](#)

Trust Center

[FAQ](#) [How to report a vulnerability?](#)

Clarivate is committed to providing its customers with a highly secure and reliable environment.

We have implemented a multi-tiered [security program](#) based the [ISO 27001 standards](#) as the basis for our Information Security Management System, ensuring strong security across technology, [product security](#), and overall processes. The security framework covers personnel security, user access management, infrastructure security, endpoint and virus protection, patch management, security monitoring, incident response, device lockdown, operations security, capacity management, vulnerability scanning, risk assessment, physical security, third-party vendor management. This includes a [Responsible Disclosure Program](#).

Useful Resources - Ex Libris Websites



- [Ex Libris Website](#)
 - See News & Events for important Webinars
- [Ex Libris YouTube Channel](#)
 - o New releases, seminars and training videos
- [Ex Libris Blogs](#)
 - o Check the most recent updates on the products

Rapido Release Highlights Videos

- o Keep up to date with the latest Rapido developments

The screenshot shows the top navigation bar of the Ex Libris website. On the left, it says "Clarivate | Ex Libris" with a logo. On the right, it says "Products & Services" with a dropdown arrow. Below the navigation bar, there is a large green heading: "Transforming the future of library software solutions, today". Underneath the heading, there is a paragraph of text: "With three decades of continuous innovation and together with our global community of industry leaders from academic institutions, private and public libraries, and technology powerhouses, we are embracing generative AI, linked open data and conversational discovery." Below this paragraph, there is another paragraph: "Leverage the latest innovation and advanced features to optimize library management, research, teaching and learning across the entire higher education ecosystem with an all encompassing library software system." At the bottom of the main content area, there is a yellow button with the text "Click to watch what we are doing with GenAI".

Appendix III - Quick References



Quick Reference



Self-Service Options and Useful Links

- Known Issues Portal: supportcenter.clarivate.com/s/known-issues
 - Knowledge Center: Knowledge.exlibrisgroup.com
 - System Status Page: Status.exlibrisgroup.com/system_status
 - Developer Network: Developers.exlibrisgroup.com
 - Idea Exchange (Enhancement Requests): Ideas.exlibrisgroup.com
-



Open a Case with Support

- Support Center: supportcenter.clarivate.com
-



Quick Reference



Guides, Policies, Processes, etc.

- [Procedure for Reporting System down cases](#)
- [Support Center User Guide](#)
- [Enhanced Chat Support for Higher Education Platform Customers](#)
- Idea Exchange [FAQ](#) and [Posting Guidelines](#)
- [What is Case Status and What does it mean?](#)
- [Support Escalation Policy](#)
- Clarivate Trust Center: <https://clarivate.com/trust-center/?lid=exl-tc>
- [HackerOne Responsible Vulnerability Disclosure Program](#)
- [Accessibility Documentation](#)



Quick Reference



Product Related information

- Rapido Release Notes:
https://knowledge.exlibrisgroup.com/Rapido/Release_Notes
- RCA Reports:
https://knowledge.exlibrisgroup.com/Cross-Product/RCA_Reports



User Groups and Communities

- Ex Libris Users [ListServ](#)
- [International Group of Ex Libris Users \(IGeLU\)](#)
- [Ex Libris Users of North America \(ELUNA\)](#)