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E-Team Workflow: A Case Study in Improving Electronic Access Troubleshooting

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E-Team Workflow
A Case Study in Improving Electronic Access Troubleshooting

Presented by: Debra Skinner
Collection & Resource Services
Zach S. Henderson Library

Collection Management & Electronic Resources Interest Group
American Library Association, June 26, 2016
Agenda

• Context
  - *ERA troubleshooting (past, present, and future)*

• Plan
  - *eTeam queue and internal FAQ*

• Execution
  - *Tags, tiers, and assessment*

• Observations & Opportunities
  - *Outcomes, looking forward, and best practices*

• Questions
The Context

• ERA troubleshooting is complex
  – Campus IT
  – Library Systems Department (library computers, proxy)
  – Collection & Resource Services Dept. (Tech Services)
    • Handles ERA troubleshooting
  – GALILEO (Georgia Consortium)
  – Vendors/Publishers

• Training Needs
  – Information Services Desk triage
  – User and his/her computer
    • On/Off Campus
    • Cookies
    • Browser
Complexity Increases

• Discovery Layer – Easy to use on basic level
  – Adds new dimension of complexity
  – Staff, faculty, students have to make adjustments
  – Multiple catalogs for library resources
    • Classic
    • Gil-Find (Vu-Find)
    • Discover
    • Union
  – Initial set-up and ongoing tweaks
    • Proactive decisions about usability
    • More troubleshooting
Who You Gonna Call?

- **E-Team**
  - E-mail for all electronic resources troubleshooting
  - Sent to two librarians in Collection & Resources Services
    - Triage
    - Forward problems as needed

- **Staffing**
  - Convinced Library Dean to allow re-direct open position
  - Hired as Discovery Services & Data Curation Librarian
  - Discovery interpreted in broad sense of making all library resources as discoverable as possible
  - Emphasis on proactive activities in addition to response
  - Emphasis on training to reduce redundant work
The Plan

ERA troubleshooting and support wants and needs:

– Move workflows out of our inboxes
  • Reduce buried and lost emails
  • Improve delegation, tracking, and turn-around time
  • Consolidate support, enhancement, and rollout tasks
  • Increase transparency and accountability

– Consolidate and improve communications with library personnel and patrons
  • Formalize request and acknowledgment process
  • Improve status and update reporting
  • Repurpose and integrate support materials

Enter LibAnswers...
All eTeam members belong to queue.
eTeam leader manages triage, assignment, and closure of tickets.
All tickets coded using a three-part tiering scheme.
Since July, about 567 tickets entered.
Internal FAQ accessible only to library personnel.

Provides system status information, updates on open support tickets, and support material for electronic resources.

Content oriented to a library audience.
Internal FAQ

New ERA support tickets.
Persistent “Known Issues” post.
Internal FAQ

Links to status information, updates, and support material
Internal to External FAQ

Internal eTeam FAQ

External Public FAQ

No reinventing the wheel… Relevant internal posts are reposted to public-facing FAQ.
The Execution: Tags

Tiers assigned as tags, which can be changed on the fly as the ticket evolves.

ASAP tag for time-critical tickets.
## Origin & Scope

<table>
<thead>
<tr>
<th>Tier</th>
<th>Title</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Point of Need</td>
<td>Real-time report; attempt resolution at point of need and/or escalate to Tier 1 if further intervention is required. Many Tier 0 tasks may be resolved at the Reference Desk without needing to be reported to the eTeam.</td>
<td>Database account setup question; answered with existing eTeam FAQ; resolved at Tier 0.</td>
</tr>
<tr>
<td>1</td>
<td>Emergent</td>
<td>Escalated Tier 0 task that either: 1. Information need could not be met at point of need and requires further intervention. 2. Requires further intervention even if information need was met.</td>
<td>Journal needs to be removed from link resolver, catalog, and OCLC due to coverage change in database. Issue reported by ILL. eTeam corrects record; ILL notified; resolved at Tier 1.</td>
</tr>
<tr>
<td>2</td>
<td>Enhancement</td>
<td>Enhancement identified from analysis of Tier 0 and Tier 1 tasks, or as result of content review, usability study, etc.</td>
<td>Reference staff request changes to Discover forms in LibGuides. eTeam develops new forms; resolved at Tier 2.</td>
</tr>
<tr>
<td>3</td>
<td>Rollout</td>
<td>Task management for rollout of new resource or service.</td>
<td>Library adopts New York Times Online. eTeam evaluates account setup procedures, prepares instructions, and deploys to appropriate portals. Resolved at Tier 3.</td>
</tr>
<tr>
<td>4</td>
<td>Audit</td>
<td>Planned ongoing review of system, configuration, or metadata to reduce troubleshooting incidents.</td>
<td>Due to frequent Tier 1 requests for missing Wiley full text, eTeam starts ongoing audit of associated target and profile activations in link resolver and catalog. Ongoing at Tier 4.</td>
</tr>
</tbody>
</table>
# Tiers

## Stakeholder Review

<table>
<thead>
<tr>
<th>Tier</th>
<th>Title</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None</td>
<td>No review beyond ticket owner.</td>
<td>eTeam member corrects a journal title’s spelling found during a Tier 4 audit of Wiley journal subscriptions.</td>
</tr>
<tr>
<td>1</td>
<td>Internal</td>
<td>Review by other eTeam personnel.</td>
<td>Head of Technical Services reviews proposed changes to discovery layer settings to improve full text delivery.</td>
</tr>
<tr>
<td>2</td>
<td>Department</td>
<td>Review by other library department.</td>
<td>Reference Department reviews and approves link text changes in discovery layer.</td>
</tr>
<tr>
<td>3</td>
<td>Committee</td>
<td>Review by library inter-departmental committee or workgroup.</td>
<td>Liaison Committee reviews proposed changes to default limiter settings in Discover.</td>
</tr>
<tr>
<td>4</td>
<td>Faculty/Dean</td>
<td>Review by full library faculty and/or Dean.</td>
<td>Faculty Committee reviews adoption of new discovery layer.</td>
</tr>
<tr>
<td>5</td>
<td>External</td>
<td>Review by external university or state entity.</td>
<td>State Library reviews eTeam’s requested changes to database interface branding for state-funded resources.</td>
</tr>
</tbody>
</table>
## Communications Plan

<table>
<thead>
<tr>
<th>Tier</th>
<th>Title</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>None</td>
<td>No notification outside of the eTeam.</td>
<td>eTeam corrects a journal title’s spelling during a Tier 4 audit of Wiley journal subscriptions.</td>
</tr>
<tr>
<td>1</td>
<td>Patron</td>
<td>Notification to patron(s) who initiated support request.</td>
<td>Patron reports a full text linking problem in the link resolver; eTeam corrects link and restores access; patron notified.</td>
</tr>
<tr>
<td>2</td>
<td>Personnel</td>
<td>Notification to library personnel who initiated support request.</td>
<td>ILL notifies eTeam of bad full text link; eTeam corrects link and restores access; ILL personnel notified.</td>
</tr>
<tr>
<td>3</td>
<td>Liaisons</td>
<td>Notification to all librarians with liaison, reference, or teaching duties; internal eTeam FAQ post.</td>
<td>eTeam tests changes to limiter order and link text in discovery layer; liaisons notified via listserv and eTeam FAQ.</td>
</tr>
<tr>
<td>4</td>
<td>Library</td>
<td>Notification to all library personnel; internal eTeam FAQ post.</td>
<td>eTeam makes display changes in discovery layer that impact several departments’ workflows; all library personnel notified via listserv and eTeam FAQ.</td>
</tr>
<tr>
<td>5</td>
<td>External</td>
<td>Public notification, including library blog, Facebook, Twitter, and University-wide communications; external FAQ post.</td>
<td>New WorldCat Discovery interface draws complaints from patrons. eTeam provides public updates while working with OCLC to address usability issues.</td>
</tr>
<tr>
<td>Id</td>
<td>Status</td>
<td>Queue</td>
<td>Question</td>
</tr>
<tr>
<td>-------</td>
<td>--------</td>
<td>----------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>656109</td>
<td>Pending</td>
<td>eTeam Support</td>
<td>Resolve Flipster URLs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>659092</td>
<td>Open</td>
<td>eTeam Support</td>
<td>EZP config for Gale subdomain for EBSCOhost/EDS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>637933</td>
<td>Open</td>
<td>eTeam Support</td>
<td>Set Up Analytics in EBSCOhost/EDS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>656260</td>
<td>Pending</td>
<td>eTeam Support</td>
<td>Library Links - items missing from SFX menu</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>462362</td>
<td>Open</td>
<td>eTeam Support</td>
<td>SFX Target for Flipster</td>
</tr>
</tbody>
</table>
Assessment a la Reference Analytics...

eTeam leader codes each ticket at closure.

All tier information is encoded with ticket information.

Variables include source, trigger, cause, systems involved, 3rd parties, and final resolution.
### Sources and Communications Tiers

<table>
<thead>
<tr>
<th>Source</th>
<th>Count</th>
<th>% (n=567)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Services</td>
<td>3</td>
<td>0.5%</td>
</tr>
<tr>
<td>Library Admin.</td>
<td>8</td>
<td>1.4%</td>
</tr>
<tr>
<td>C&amp;RS / eTeam</td>
<td>284</td>
<td>50.1%</td>
</tr>
<tr>
<td>ILL</td>
<td>128</td>
<td>22.6%</td>
</tr>
<tr>
<td>ISD/Reference</td>
<td>116</td>
<td>20.5%</td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
<td>3.0%</td>
</tr>
<tr>
<td>X - No Metadata</td>
<td>11</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Variable</th>
<th>Count</th>
<th>% (n=567)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – None</td>
<td>152</td>
<td>26.8%</td>
</tr>
<tr>
<td>1 – Patron</td>
<td>20</td>
<td>3.5%</td>
</tr>
<tr>
<td>2 – Personnel</td>
<td>229</td>
<td>40.4%</td>
</tr>
<tr>
<td>3 – Liaisons</td>
<td>84</td>
<td>14.8%</td>
</tr>
<tr>
<td>4 – Library</td>
<td>23</td>
<td>4.1%</td>
</tr>
<tr>
<td>5 – External</td>
<td>47</td>
<td>8.3%</td>
</tr>
<tr>
<td>X - No Metadata</td>
<td>12</td>
<td>2.1%</td>
</tr>
</tbody>
</table>
Outcomes (so far)...

• Improved relationships with other library departments
• FAQ posts provide quick access for answers to user questions
  – Improved triage at Reference Desk
  – Faster response from Collection & Resource Services
  – Librarians and staff feeling more confident
  – Less time spent on redundant questions
  – Training through FAQs
  – Requests less vague and more focused
Observations & Opportunities

Looking forward...

• Continue to build FAQs to answer most recurring questions and make them public
• Add other individuals to Queue such as systems staff
• Add other troubleshooting processes to the system such as cataloging and web usability
• Send advance FAQs as needed to head off troubleshooting for new resources & apps
Observations & Opportunities

Best Practices...

• Decide who can submit a ticket.
• Aggressively promote submission process.
• Stress need for specific requests that can be replicated.
• Inform all public service staff about problems and solutions, not only the person submitting problem.
• Make FAQ posts available for all library staff to use.
• Schedule regular open ticket reviews.
Thank You!

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