2018

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Publication Statement

This is an Accepted Manuscript of an article published by Taylor & Francis in Journal of Electronic Resources Librarianship on May 19, 2019, available online: http://www.tandfonline.com/10.1080/1941126X.2019.1593416.

RETHINKING THE TROUBLESHOOTING MODEL

By Jennifer Everson Brown, University of Denver Libraries

Introduction

In the various jobs I have held, most of them library-related, customer service has been a part of them all. I decided to apply a customer service-based approach to electronic resources as the Electronic Resources Manager at the University of Denver Libraries (DU). In order to implement a customer service-based approach with a larger staff, a standardized training procedure was necessary.

Background

At DU, we have a dedicated staff of one for electronic resources: the Electronic Resources Manager. In years past, we set up a loose schedule for on-call e-resource questions that occurred after regular business hours; one of three staff members would monitor email for questions and reply before the next day, including weekends. Most responses were simple, such as “I will get back to you,” and many required simple solutions. This set up was not ideal for all, and when positions became vacant it was apparent a change was necessary. To relieve the pressure of being on-call for all e-resource-related questions 24x7, I collaborated with our Reference/Research Center, which now carries out initial e-resource troubleshooting with patrons. For advanced troubleshooting, the Research Center transfers a problem to the Electronic Resources Manager. The Research Center also remains open past a “normal” business day, which makes for faster responses to patrons.

Training the Research Center

The Research Center consists of graduate-level student employees who staff the Reference desk for short questions (under 15 minutes); for more complicated questions, reference consultations are conducted by Reference library faculty and experienced student employees. Each year when new students are hired, I conduct an Electronic Resources training as part of new-hire Reference training sessions, which includes general customer service. I then follow up with the entire staff of students later in the year for a short training. The initial training involves a PowerPoint presentation detailing how to tailor customer-service interactions to e-resource issues. Questions are encouraged during all trainings.

The presentation begins with a series of questions: “Can I (the staff person) access the resource?” “How am I connected?”: on- or off-campus, wireless or wired connection, affiliation, is my browser clear of cookies, etc. Then the inevitable question: “Should they (the patron) be able to access the resource?” This is a theoretical question, with the emphasis on “should.” With these two simple questions, we begin to think of troubleshooting from a variety of perspectives, including location (on- or off-campus), device (visitor computer, personal computer, other device), connection (wired or wireless), affiliation to the university (consider any branches), and, of course, license agreements for the resource. Basic troubleshooting begins by considering all of these aspects of e-resource access.

Additional troubleshooting tactics include considering the various paths to a resource, taking stock of login and error pages, and addressing proxy problems. During training, we walk through multiple pathways to resources: ask the patron to describe their path as best they can, try other paths and methods with the patron, and depending on the problem, direct the patron to other resources. Sometimes the problem lies with a specific resource and has nothing to do with the patron’s account or browser cache. Then again, sometimes it is a problem with the patron’s account. We often get to this step in our training before trainees realize troubleshooting is not a black-and-white process. I encourage them to be curious and resourceful while following the troubleshooting steps provided.

In addition to walking through modes of electronic resource discovery, license/access restrictions, and our authentication functions (including error messages and their meanings), we look at a recent patron question so we can walk through the problem together. Depending on when they began their new job, trainees may be able to supply a problem they want to work through. During this training (and subsequent trainings and daily communications about tickets), it is important to strike the right level of communication about issues; too much communication in the first few days on the job may overwhelm trainees, and too little may cause them to not understand the issue(s) or to misinform patrons. In each ticket interaction, I have found it helpful to include an open-ended phrase that allows for clarification or questions and lets staff know knowledge-sharing is welcome.

Finally, we cover “The Queue” and when to involve the Electronic Resources Manager with a question. DU uses Springshare’s LibAnswers for ticketing systems. The Research Center and Electronic Resources each have their own queue in LibAnswers, which has been a great asset for staff to transfer tickets from one queue to the other depending on ticket needs. In addition to the queue, we have enabled the chat feature, which helps with quick clarification for when to involve the Electronic Resources Manager.

Report-A-Problem Form

Modeled after Serials Solutions’ Report-A-Problem form, we integrated our version of this form into Primo, our discovery interface. Currently, this form is only enabled for electronic resource items. This form is set up to send directly to the Research Center ticketing queue and contains voluntary patron information such as contact information including affiliation (there are branches and other institutions in our Alma/Primo instance), and Primo-provided link and citation information of the reported item. These latter elements are particularly useful in recreating what a patron sees in Primo; without that information, patron-provided citation information is not efficient or ideal.

Training for staff

I also lead a training for DU's Electronic Resources Working Group, which consists of benefitted staff and faculty who have some interaction with electronic resources. This training is done in preparation for a person other than the Electronic Resources Manager to monitor the E-Resources queue in LibAnswers. Training includes discussion of general upkeep, what not to do, how to report problems to vendors, and recent issues or tickets that need close attention. This type of training occurs on an as-needed basis but could be expanded.

Communication & Tips

When communicating with patrons, whether via our ticketing system or in person, I have found it helps to inform them about the issue. This can have a great impact on their interaction with the library. For example, "This behavior does not seem normal to me, so I'd like to inquire with our vendor. I will get back to you as soon as I can about a solution" is a basic, informative, and polite response. Keeping patrons informed lets them know they have not been forgotten. While that example covers the beginning stages of troubleshooting, letting a patron know about the resolution can also be helpful; patrons who are more informed about how e-resources work are often the better for it. For instance, explaining the hazards of saving passwords in browsers can be helpful to a patron's privacy and security in addition to solving their authentication problems.

If a problem needs to be sent to the E-Resources queue for advanced troubleshooting, a patron may already have had at least one staff member—maybe more--help them, and the patron's level of stress or frustration may be high. Be aware of the audience and judge it as best you can. Sometimes less communication can function just as well; a patron who only wants an article may not care about the ins and outs of library-vendor relations.

Follow-up

Between the Research Center and Electronic Resources, we try to let the Research Center handle patron follow-up unless a ticket is an advanced case and E-Resources has been working directly with the patron. Also, remember to follow-up with vendors. Do not let a reported issue disappear into the ether. Use your best judgment about the importance of the issue and contact the vendor if it has not been resolved or communicated in a way that reflects its importance.

Stay in communication with the Reference/Research Center. Your daily interactions with that department as you talk about tickets is helpful. Connecting with staff aids communication between departments. I make an effort to connect faces to names, and that practice helps me to be personable, which can ease staff anxiety about reporting problems.

Conclusion

As a unit, Electronic Resources hoped to alleviate stress and pressure from answering all reported e-resource problems at all hours of the week. Letting a trained service point handle basic troubleshooting questions has greatly benefited E-Resources, and patrons now receive help more quickly because the Research Center is open past the hours in which the Electronic Resources Manager is available via email. I, the Electronic Resources Manager, do not experience burnout as quickly about troubleshooting, because I do not have to explain why/how to clear cache and cookies with every interaction. I also have more time to dedicate to other troubleshooting problems and job responsibilities. Finally, this customer service-based approach teaches Research Center staff (who are also students) how to think through problems critically and creatively. Incorporating a Report-A-Problem form also relieves issues with troubleshooting. Some elements of the training I conduct may be considered common sense: think through the problem, communicate, follow-up, and treat others as you want to be treated, for example. Including these elements within training is essential to building and maintaining a customer service-based approach to troubleshooting that has lasting benefits.

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