What’s the Problem?

Understanding the Complexity of Electronic Resource Access Issues

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What is the face of electronic resources troubleshooting for many library patrons?
“I’m not even supposed to be here today”
How does this person have a good experience?

A good plan!

• Collaborative
• Checklists
• Customer service
• Proactive
Easier said than done
routine product maintenance
Reference
Effort
Assessment
Data
Library Effort Assessment Data
Training +
Skill +
Education +
Teaching +
Effort +
Knowledge/Expertise
= 6
ER READ Scale Examples

1:

- Brief technical problems such as short internet outage that only restrict access for several minutes
- Reminder of correct account to use for off campus authentication.
- Reloading page or restarting browser solves issue.
2:

• User error in off-campus authentication (wrong password, status, etc.)

• Explanation of off-campus authentication policies from information widely available on library website.

• Referral to IT or other appropriate department for password reset.
3:
• Verification that the library still subscribes to a particular database or electronic journal.
• Access issues which can be resolved quickly via information readily available on vendor website.
4:
• Adding a new resource to off-campus authentication method, such as a proxy server.
• Access issues which require submission of help ticket to vendor.
5:
• Some project management is involved for short duration projects.
• Access issues for which sufficient documentation or user support is not available
• Access issues which require multiple follow-ups to vendor to resolve.
• Complicated or custom database information must be added to proxy server.
6:
• Project management is involved for long term projects.
• Large-scale projects requiring collaboration with multiple library/information technology staff, such as installation or upgrade of services to ensure access.
Implementation

• **Review** the READ Scale
  http://readsacle.org/

• **Ado(a)pt** a system for tracking issues that is accessible to public and ER staff. Example: http://bit.ly/ivgBi4.

• **Attach** READ Scale to these issues

• **Analyze** what types of questions were answered by whom
Report a Problem

Your Name

Your Email Address *

Dominican Affiliation *

-Select-

Name of Resource *

Are you...

- On Campus
- Off Campus

Describe Your Problem *

Submit  Reset

Powered by Zomo Creator

Report Abuse
## Report a Problem

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Reported</td>
<td>06/20/11</td>
</tr>
<tr>
<td>Your Name</td>
<td></td>
</tr>
<tr>
<td>Your Email Address</td>
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</tr>
<tr>
<td>Dominican Affiliation</td>
<td>-Select-</td>
</tr>
<tr>
<td>Name of Resource</td>
<td></td>
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<tr>
<td>Are you...</td>
<td>On Campus, Off Campus</td>
</tr>
<tr>
<td>Describe Your Problem</td>
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<td>Status</td>
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<td>Resolution</td>
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</tr>
<tr>
<td>READ Scale</td>
<td>1, 2, 3, 4, 5, 6</td>
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</table>

[Submit, Reset]
Communication and clarity

Checklists
A CHECKLIST FOR CHECKLISTS

Development

- Do you have clear, concise objectives for your checklist?
- Is each item:
  - A critical safety step and in great danger of being missed?
  - Not adequately checked by other mechanisms?
  - Actionable, with a specific response required for each item?
  - Designed to be read aloud as a verbal check?
  - One that can be affected by the use of a checklist?

Have you considered:
- Adding items that will improve communication among team members?
- Involving all members of the team in the checklist creation process?

Drafting

- Does the Checklist:
  - Utilize natural breaks in workflow (pause points)?
  - Use simple sentence structure and basic language?
  - Have a title that reflects its objectives?
  - Have a simple, uncluttered, and logical format?
  - Fit on one page?
  - Minimize the use of color?

Is the font:
- Sans serif?
- Upper and lower case text?
- Large enough to be read easily?
- Dark on a light background?

- Are there fewer than 10 items per pause point?
- Is the date of creation (or revision) clearly marked?

Validation

- Have you:
  - Trialed the checklist with front line users (either in a real or simulated situation)?
  - Modified the checklist in response to repeated trials?

Does the checklist:
- Fit the flow of work?
- Detect errors at a time when they can still be corrected?

- Can the checklist be completed in a reasonably brief period of time?
- Have you made plans for future review and revision of the checklist?

Courtesy of http://www.projectcheck.org/checklist-for-checklists.html

Please note: A checklist is NOT a teaching tool or an algorithm

Last updated 1/14/10
Questions for Discussion

• If you are in public services, what kinds of questions do you feel comfortable answering at the reference desk?

• What does the workflow look like at your library?

• How formal is this process? Is it documented?

• A lot of success in effective electronic resources troubleshooting is staff empowerment. What type of training or access would help you to be more effective?