Recording E-Resources Troubleshooting and Responses to Other Patron Queries (LTS Procedure #101)

Scope: *LTS staff who interact with patrons should record information about these transactions. In 2019, the e-resources troubleshooting staff moved to using the integrated statistics counting feature in LibAnswers, and no longer uses Count-It to record transactions; the following procedure has been updated accordingly. LTS Procedure #141 refers to troubleshooting of library resources on the behalf of patrons. Note: If you are involved in any presentations for academic departments or students, please refer to the information about reporting* presentations.

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About LibAnswers

Information to record when closing up the ticket
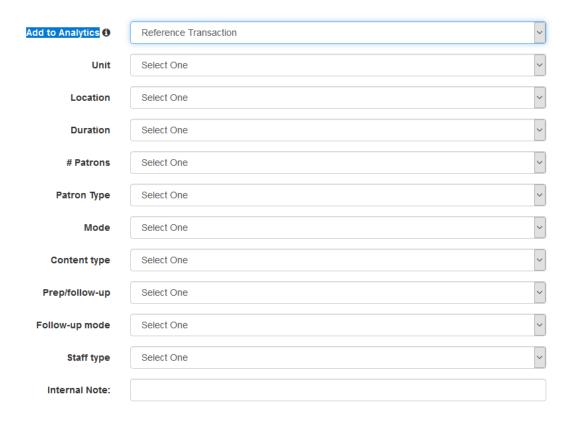
Hashtags and Internal Notes

A. About LibAnswers:

1. URL for LibAnswers: http://cornell.libanswers.com/ and you can log in by clicking on the link at the bottom of the page. You can also log into: https://cornell.libapps/libapps/login.php, which includes all SpringShare products - you will have to chose LibAnswers after logging in.
2. LibAnswers help: https://ask.springshare.com/libanswers
3. Email list if you have questions: **e-resources-l@cornell.edu**
4. Reference staff may submit questions directly to our queue in LibAnswers, and emails from patrons can also be forwarded to the email, Cornell E-Resources Team <incoming@cornell.libanswers.com>, which will then load the question into LibAnswers.
5. Record all transactions and approximate time spent with patrons. Make it quick - you don't need to add a lot of detail.
6. **The initial report will pull in netid of the patron in the report, but this will be anonymized in a matter of days.**

B. Information to record when closing up the ticket:

Once you have completed your troubleshooting work, and you are ready to close the ticket, fill in the following fields at the bottom of the ticket. NOTE: If you try to enter some of the information while you are still working on the issue, the reference transaction will be entered twice!! You will then have to delete the duplicate transaction. So, please wait until you are closing up the ticket to record this information.

Fields at the bottom of the ticket:

1. **"Add to Analytics"** - when you are ready to close the ticket, then change this to "Reference Transaction"
2. "**Add to FAQ Group"** - leave as "Do not add to FAQ Group"
3. **"Add to Analytics" -** leave as "Reference Transaction"
4. "**Unit**" - LTS
5. "**Location**" - usually, this will be "library office" unless you are working remotely, then it would be "off-campus."
6. "**Duration**" - Duration refers to the amount of time spent interacting with the patron, and some of the prep work done to fulfill this interaction. NOTE: LibAnswers will record the total time that the ticket is open, but we want to keep track of the time you actually spent working on it, so please make sure to fill out this field.
7. **"# Patrons"** - This will usually be just one patron.
8. "**Patron type**" - If you know patron type, record it. Otherwise use "unknown."
9. **"Mode"** - Should be "email"
10. "**Content/type**" - "information" or "software/systems"
11. **"Prep/follow-up"** - If additional time is spent after communication is over with the patron, record the time here.
12. **"Staff type"** - "Other staff"
13. **"Internal Note"** - Record the appropriate hashtags; the list is below. Also please record any notes you would like to add (title of resource or further explanation. Don't spend too much time!)

Add to Analytics ⓘ `Reference Transaction`

Unit `Select One`

Location `Select One`

Duration `Select One`

 # Patrons `Select One`

Patron Type `Select One`

Mode `Select One`

Content type `Select One`

Prep/follow-up `Select One`

Follow-up mode `Select One`

Staff type `Select One`

Internal Note:

D. Hashtags and Internal Notes

1. "**Internal Notes**": *Keep it brief.* Maybe just the title of the resource, and a very short description.
2. **Hashtags to use in the Internal Notes field.** We use the hashtags to survey which types of problems arise frequently. What we are using:
   a. **#ER_activation** - resource needs to be activated, or re-activated; replacement access needs purchased
   b. **#ER_blocked_netid** - patron netid blocked, probably due to a compromised netid, and/or an excessive downloading event
   c. **#ER_browser** - issue related to the browser; ex. cache and cookies, browser extensions, specific browser issues
   d. **#ER_closed_by_merge** - duplicate entries are merged into one ticket
   e. **#ER_excessive_download** - publisher notification of an excessive downloading event
   f. **#ER_ezproxy** - resource needed to be added to ezproxy, or needed an ezproxy tweak
   g. **#ER_false_alarm** - problem resolves prior to us looking at it
   h. **#ER_festering** - referring to issues which seem to take forever to resolve
   i. **#ER_holdings** - the holdings information was incorrectly represented in our catalogs
   j. **#ER_IP-** IP list incorrect at vendor's end
   k. **#ER_metadata_error** - may be a cataloging error (either Cornell's or vendor-supplied), or a Summon, 360 Link, or other system metadata error
   l. **#ER_migration** - issues related to migration of content to new publisher platforms; also include migration issues when one journal sold to another publisher
   m. **#ER_missing_content -** content is missing; may be a corrupt file, or a pdf which is not there, author does not allow access to article
   n. **#ER_multiple_platform_error** - content is posted on more than one platform, but we might not have full access on all platforms; patron generally wants access on the platform that does not give full access
   o. **#ER_openurl** - issues related to openURLs, such as the problem reports we get from ProQuest
   p. **#ER_passkey** - passkey is not working correctly
   q. **#ER_payment** - we have not paid the publisher, either through our fault or theirs
   r. **#ER_permit** - permits associated with the patron netid don't allow access to CUL resources
   s. **#ER_platform** - major or minor issues with the publisher or provider platform
   t. **#ER_project_haggis** - problems identified by Peter McCracken for his 360 review project
   u. **#ER_subscription** - ex. desired holdings not included in our subscription, or we missed a journal moving to another publisher
   v. **#ER_technical** - some kind of technical issue. For things like: VPN not working right- patron has a problem but we can't recreate it.
   w. **#ER_url** - issues related to the url, such as link no longer working
   x. **#ER_user_limit** - patron runs into problems with access due to user limits
   y. **#ER_vendor_records** - ex. records pulled for unknown reason, or record not pulled out in time (Safari)
   z. **#ER_walkthrough** - spent time with the patron on the phone, or through email, explaining each step of the process to get access
   aa. **#ER_withdrawal** - content has been pulled; may refer to e-book, e-journal, database, or other content