

Troubleshooting Electronic Resource Problems

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Introduction

The Health Sciences Library has developed practices to discover, monitor and resolve e-resource access issues. These practices can be adapted for any library.

Methods

Troubleshooting Guide: LibGuides was used to create a guide to help frontline staff perform initial problem solving. The guide also helps staff gather information from patrons that may be useful for the troubleshooting team.

Problem Reports: When staff discover or are notified of access issues, they submit a problem report. The report goes to the troubleshooting team who responds within 24 hours. Everyone in the User Services Department also sees each report and response.

Tracking System: Brief information about the problem is entered into a spreadsheet including title, package and nature of the problem. This allows members of the troubleshooting team to quickly see which problems aren't yet resolved and if follow-up is needed.

Problem Report Form

* Indicates required fields	
* Staff Name (select) -- Select --	add your name
* Description of Problem or Request	* Select One to Determine Recipient of Submission: -- Select --
Access Problems and Referrals NEED Patron Information to Respond!	
Patron Name	Phone
PID/BID	E-mail
Location Where Problem Occurred (Office, Home, etc.)	Is Patron in Millenium?
Submit	Reset

Peripherals

Sometimes the problem is part of a bigger issue. Other titles in the package may have similar issues which require investigation. IT issues may affect other titles and packages. Library holdings may need to be adjusted in multiple places.

Troubleshooting Guide

Reporting the Problem: Best Practices
Report the problem, so that RMS staff can follow up with the user.
<ul style="list-style-type: none">• Be sure to include the user's name and contact information, so that we can follow up! We strongly prefer email; it's easier to convey detailed information this way and we've got a record of what's been done.• What was the user trying to access? If the PMID is available, please include it.• What is the user's IP address? (I like IPChicken because it also includes browser information)• Which browser was the patron using? Which version?• Where did the patron start? A Library web page? Google? Personal bookmarks? (Hint: Always start with the Library!)• Were there any error messages? What were they?
If you are unable to provide the item the user needs, instruct them to request it through ILL.

Communication

Responding clearly and appropriately to problem reports ensures necessary information is gathered and communicated. Here are some effective methods HSL uses when responding to problem reports.

- Respond ASAP! At least within 24 hours.
- Include a thank you for bringing the problem to our attention.
- If possible, make sure the patron has the needed information – let them know we have it in print, refer to ILL, offer other options.
- Ask if the patron has everything they need.
- Ask staff/patron to inform us if the problem continues.
- Contact staff/patron with follow-up information as appropriate.

User Education

Some problems can't be resolved or aren't really problems. These situations require more and better sharing of information with staff and patrons.

Title Changes: All previous titles are included with the current title (links from all old titles go to the current title – can be confusing)

Add a note – Previous titles are also included

Free Titles: Access can be more volatile and the library doesn't have the power to demand fixes.

Add a note – This is a free title and the library may lose access at any time.

Account Setup: Some resources require free personal account setup for access

Add a note – Access is free but you must create an account first.

Multiple Users: Some titles (usually e-books) don't allow for unlimited simultaneous users.

Add a note – If you can't access this title, please try again later.

Conversations with and presentations to staff can also be effective ways to communicate information.

Contact Us

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Troubleshooting Guide

http://guides.lib.unc.edu/eresources_troubleshooting