University of South Florida

From the Selected Works of Carol Ann Davis

May, 2005

Using Customer-Service Software to Manage Serials Online Access Issues

Carol Ann Borchert

Using Customer-Service Software to Manage Serials Online Access Issues

Presented by:
Carol Ann Borchert
May 20-21, 2005

University of South Florida

- One university, geographically dispersed
 - Moving towards more centralized Technical Services
 - Remote users authenticate via BlackBoard or EZProxy
 - Use SFX to link to e-journals
-

Statement of Problem

- Periodic problems in accessing online journals due to inaccurate thresholds, proxy issues, etc.
 - Using an email list to manage complaints resulted in things being “lost” in inboxes, no record of problems if similar issue was later reported
-

Proposed Solution

- Use the same software being used by other departments to manage reference questions and technology issues
 - Being used by:
 - Library Reference Department
 - Library Technology Department
 - Library Access Services Department
 - University Academic Computing Department
-

Public or Staff Can Report a Problem

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Quick links...

Report an SFX Problem

your **Name**

your **Email**

Citation
exhibiting
misbehavior

Description
Please include
as much detail
as possible

* Required Fields

Email Copy Received by Staff

From: lib-cat@ritchie.acomp.usf.edu

Sent: Fri 4/8/2005 6:18 AM

To: Borchert, Carol Ann

Cc:

Subject: SFX Problem reported by Karen Keene (Incident: 050401-000050)

The following incident has been assigned to you by: LIB Beverly Caggiano (caggiano@lib.usf.edu).
It was previously assigned to: LIB Beverly Caggiano (caggiano@lib.usf.edu).

[View Incident](#)

Reference #050401-000050

Summary: SFX Problem reported by Karen Keene

Category: Library

Sub-Category: Cat SFX Issues

Contact Information: kkeene@hsc.usf.edu

Date Created: 04/01/2005 11:15 AM

Last Updated: 04/08/2005 06:18 AM

Status: Unresolved

Priority:

Search Results:

Views:

Chat Transcript:

Discussion Thread

Note (LIB Beverly Caggiano)

04/08/2005 06:16 AM

I've send Academic Computing the changes. If Lee Ann could test it one more time early next week and let us know if it's still broken, I'd appreciate it.

Note (LIB Carol Ann Borchert)

04/07/2005 04:42 PM

Beverly, could you contact Academic Computing?

Carol Ann

Response (LIB Carol Ann Borchert)

04/07/2005 04:42 PM

Thanks! I'll let Beverly know to contact AC.

Staff View of Incident List

Links

Incident Console

Logged in as BORCHERT

Incident Groups: 4 (containing 161 incidents)

Page: 1 of 1

Top Level

Assigned ▼▲	Category ▼▲	Sub-Category ▼▲	Incidents ▼▲
No Value	Library	E-Resource Cataloging	17
No Value	Library	E-Resource Update	124
Monica Metz-Wiseman	Library	Cat SFX Issues	1
James Michael	Library	Cat SFX Issues	4
James Michael	Library	E-Resource Cataloging	2
James Michael	Library	E-Resource Update	11
Carol Ann Borchert	Library	Cat SFX Issues	2

Searching for a Specific Incident

The screenshot shows the 'Incident Console' window. It features a toolbar at the top with icons for home, search, incident, calendar, and help. Below the title bar, there are three icons: a folder, a magnifying glass, and a group of people. The main area contains four filter sections: 'Status Type' with a list of 'Unresolved', 'Solved', and 'Waiting'; 'Status' with a list of 'Cataloged', 'For Review', 'In Progress', 'Searching', 'Solved', 'To Do', 'Unresolved', and 'Updated'; 'Assigned' with a list of names including 'LIB Beverly Caggiano', 'LIB Bradley Bishop', 'LIB Brent Burgess', 'LIB Carol Ann Borchert', 'LIB Caroline Reed', 'LIB Catherine Camp', 'LIB Charleen Sadusky', and 'LIB Cheryl McCoy'; and 'Category' with checkboxes for 'Library' (checked) and 'Unspecified'. Below these filters is a 'Text Search' section with a dropdown menu set to 'Summary/Thread', a text input field, and 'Order By' dropdowns. At the bottom, there are 'Reset', 'Search', and 'Cancel' buttons. A table displays the search results.

Text Search	Order By	Reset	Search	Cancel
James Michael	Library	E-Resource Update	11	
Carol Ann Borchert	Library	Cat SFX Issues	2	

List of Incidents Under My Name

The screenshot shows a web application titled "Incident Console". At the top right, it says "Logged in as BORCHERT". Below the title bar, there are navigation icons and two buttons: "All to Clipboard" and "Clipboard". The main content area shows "Incidents: 2" and a pagination control "Page: 1 of 1". A breadcrumb trail reads "Top Level > Carol Ann Borchert/Library/Cat SFX Issues". Below this is a table with columns: "Ref. #", "Contact", "Assigned", "Sub-Category", "Updated", "Summary", and "Status". There are two rows of incident data, each with a checkbox in the "Add to Clipboard" column.

Add to Clipboard	Ref. #	Contact	Assigned	Sub-Category	Updated	Summary	Status
☐	050315-000060	hughlafollette@	Carol Ann Borchert	Cat SFX Issues	04/04/2005 12:50 PM	metalib	Unresolved
☐	050401-000050	kkeene@hsc.usf	Carol Ann Borchert	Cat SFX Issues	04/08/2005 08:54 AM	SFX Problem reported by Karen Keene	Updated

View of an Incident

Links

Incident Details (050401-000050)

Logged in as BORCHERT

Set Status to
Updated

Assign to
LIB CAT / LIB Carol Ann Borchert

EditForwardPropose AnswerPrint

Customer Info. History Transactions

SFX Problem reported by Karen Keene

Status
Updated

Assigned to
LIB CAT
Carol Ann Borchert

Category
Library
Cat SFX Issues

Created
04/01/2005 11:15 AM

Initial Response
04/04/2005 12:49 PM

Updated
04/08/2005 08:54 AM

Customer SmartSense

Staff SmartSense

Discussion Thread

Note (LIB Carol Ann Borchert) 04/07/2005 04:42 PM
Beverly, could you contact Academic Computing?
Carol Ann

Response (LIB Carol Ann Borchert) 04/07/2005 04:42 PM
Thanks! I'll let Beverly know to contact AC.
Carol Ann

Customer 04/07/2005 04:30 PM
>
Hi Carol Ann,
Lee Ann tested this from her home for us.
It looks like EZProxy is okay now.
She also confirmed that Blackboard Proxy drops.
Her comments are listed below (please notice her comment in the last

Previous Incident

Next Incident

Additional Information
Contact E-mail: kkeene@hsc.usf.edu
Priority:
Search Results:
Views:
Chat Transcript: None

View of Edit Screen for an Incident

Links --

Edit Incident (050401-000050)

Logged in as BORCHERT

Customer Info.

Transactions

History

Discussion Thread

* **Summary:** SFX Problem reported by Karen Keene

Previous Entries

Response (LIB Carol Ann Borchert)

04/08/2005 08:54 AM

Karen, could you or Lee Ann test this early next week again via BlackBoard? Beverly has sent the changes to Academic Computing.

Carol Ann

Note (LIB Beverly Caggiano)

04/08/2005 06:16 AM

I've send Academic Computing the changes. If Lee Ann could test it one more time early next week and let us know if it's still broken, I'd appreciate it.

Note (LIB Carol Ann Borchert)

04/07/2005 04:42 PM

Beverly, could you contact Academic Computing?

Carol Ann

Response (LIB Carol Ann Borchert)

04/07/2005 04:42 PM

Thanks! I'll let Beverly know to contact AC.

Add: ☐ Customer Entry ☒ Response ☐ Note

Standard Responses

[Circulation]
[Library Document Delivery]
[Library LMR]
[Reserve]

OpenAppend

☐ Send Response BCC:

☒ Include Signature In Response

SaveCancel

Status: UpdatedAssign to: LIB CAT / LIB Carol Ann BorchertResponse AttachmentsSpell Check

Benefits of Using the Software

- Incidents are no longer mixed in with other email
 - We retain a transcript of each incident
 - We are able to pull statistical reports each month
 - We can record internal notes to each other as well as responses to patrons
-

Disadvantages of Using the Software

- Limitations of the statistics collected
 - Takes more time to go to a separate system to resolve problems
 - Organization of the data retained is haphazard
-

Incidents by Category for the Month

-> Library Category

Report Time Range: 03/01/2005 - 03/31/2005

Drill Down to: ☒ Incident Summary

Incident Count

Print

Switch to Tabular Output

Export Format:

Export

Help

Tabular View of Incidents by Category

Cat SFX Issues	2005	03/01 - 03/06	5
		03/07 - 03/13	4
		03/14 - 03/20	3
		03/21 - 03/27	3
		03/28 - 03/31	0
		Subtotal	15

Circ Document Delivery	2005	03/01 - 03/06	35
		03/07 - 03/13	11
		03/14 - 03/20	45
		03/21 - 03/27	60
		03/28 - 03/31	27
		Subtotal	178

Print

Switch to Graphical Output

Staff Effectiveness by Month

- Can drill down to an individual's name

Staff Effectiveness

Selected Groups

Report Time Range: 03/01/2005 - 03/31/2005

Staff Performance by Month

Staff Performance

Selected Staff

Interval Type: Created - Close

Report Time Range: 11/01/2004 - 11/30/2004

Incidents

Average Interval Time

Staff Performance by Incident for the Month

Incident Summary

Selection Criteria

Interval Type: Created - Close

Report Time Range: 11/01/2004 - 11/30/2004

Staff Member: LIB Carol Ann Borchert

Reference #	Title	Created	Time
040614-000041	Guilford Publications and ECO subscribers	06/14/2004	142d 09:23
040616-000066	Current Opinion in Drug Discovery and Development	06/16/2004	140d 00:35
041103-000083	Re: BioMed Central Off Campus [Incident: 041018-000072]	11/03/2004	0d 18:37
041108-000131	Re: BioMed Central Off Campus [Incident: 041018-000072]	11/08/2004	6d 23:16
041108-000138	BioMed Central	11/08/2004	3d 21:46
041117-000020	Hypertension Proxy Problem	11/17/2004	0d 02:25
041118-000071	Philosophy of Science	11/18/2004	0d 00:00
041118-000146	SIAM Journal on Discrete Mathematics	11/18/2004	0d 17:15
041119-000048	RE: LEA Online: Media Psychology [Incident: 041011-000053]	11/19/2004	0d 00:13
041119-000062	October online	11/19/2004	0d 00:00

10 incidents found

Problems Reported via RightNow Software, June 2004-April 2005

General Considerations When Selecting Software

- Are there applications for other departments in your library or organization?
 - What do you need the software to do for you?
 - What kind of statistics (if any) are available from using that software?
 - How is the information archived and organized? How do you search it?
-

General Considerations When Selecting Software (continued)

- What is the cost of the product?
 - What sort of maintenance or upgrades are included in the initial price?
 - Be involved in deciding which software to use.
-

Thank you
for your attention!

QUESTIONS?