May, 2005

Using Customer-Service Software to Manage Serials Online Access Issues

Carol Ann Borchert

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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

![Screenshot of USF Libraries report a problem form](image)
Email Copy Received by Staff

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

### Incident Console

Logged in as BORCHERT

**Incident Groups:** 4 (containing 161 incidents)

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**Top Level**

<table>
<thead>
<tr>
<th>Assigned</th>
<th>Category</th>
<th>Sub-Category</th>
<th>Incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Value</td>
<td>Library</td>
<td>E-Resource Cataloging</td>
<td>17</td>
</tr>
<tr>
<td>No Value</td>
<td>Library</td>
<td>E-Resource Update</td>
<td>124</td>
</tr>
<tr>
<td>Monica Metz-Wiseman</td>
<td>Library</td>
<td>Cat SFX Issues</td>
<td>1</td>
</tr>
<tr>
<td>James Michael</td>
<td>Library</td>
<td>Cat SFX Issues</td>
<td>4</td>
</tr>
<tr>
<td>James Michael</td>
<td>Library</td>
<td>E-Resource Cataloging</td>
<td>2</td>
</tr>
<tr>
<td>James Michael</td>
<td>Library</td>
<td>E-Resource Update</td>
<td>11</td>
</tr>
<tr>
<td>Carol Ann Borchert</td>
<td>Library</td>
<td>Cat SFX Issues</td>
<td>2</td>
</tr>
</tbody>
</table>
Searching for a Specific Incident
List of Incidents Under My Name
View of an Incident

Incident Details (050401-000050)

Set Status to: Updated
Assign to: LIB CAT / LIB Carol Ann Borchert

Edit | Forward | Propose Answer | Print

Customer Info. | History | Transactions

Discussion Thread

Note (LIB Carol Ann Borchert)
Beverly, could you contact Academic Computing?
Carol Ann

Response (LIB Carol Ann Borchert)
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

Additional Information

Contact E-mail: kkeene@hsc.usf.edu
Priority:
Search Results:
Views:
Chat Transcript: None
View of Edit Screen for an Incident
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

- **Ref Username/Password**: 2
- **Ref Suggest a Resource**: 2
- **Ref Proxy Setup**: 1
- **Ref Chat**: 32
- **Ref Ask-a-Librarian**: 277
- **LMR Schedule Use**: 28
- **LMR Reserve Materials-Media**: 10
- **LMR Reference**: 6
- **E-Resource Update**: 2
- **E-Resource Cataloging**: 10
- **Circ Search**: 84
- **Circ Rush Catalog**: 45
- **Circ Reserve Materials-Books**: 12
- **Circ Reserve Materials-Articles**: 63
- **Circ Renewal Help**: 102
- **Circ Problem Resolution**: 33
- **Circ Misc Help**: 25
- **Circ Lost Book Declaration**: 7
- **Circ Library Card**: 5
- **Circ Hold Request**: 467
- **Circ Email Renewal**: 44
- **Circ Document Delivery**: 178
- **Cat SFX Issues**: 15

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

Export Format: Comma Delimited (CSV)
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** |
Staff Effectiveness by Month

- Can drill down to an individual’s name
Staff Performance by Month

Staff Performance
Selected Staff
Interval Type: Created - Close

Incidents
LIB Beverly Caggiano: 1
LIB Carol Ann Borcherdt: 10
LIB James Michael: 30

Average Interval Time
LIB Beverly Caggiano: 3d 23:32
LIB Carol Ann Borcherdt: 29d 11:46
LIB James Michael: 1d 16:19
### Incident Summary

**Selection Criteria**
- Interval Type: Created - Close
- Staff Member: LIB Carol Ann Borchert

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

10 incidents found
## Problems Reported via RightNow Software, June 2004-April 2005

### Number of Serials Access Problems Reported

<table>
<thead>
<tr>
<th>Date</th>
<th>Number of issues reported</th>
</tr>
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<tbody>
<tr>
<td>Jun-04</td>
<td>50</td>
</tr>
<tr>
<td>Jul-04</td>
<td>20</td>
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<td>Aug-04</td>
<td>10</td>
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<tr>
<td>Sep-04</td>
<td>20</td>
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<tr>
<td>Oct-04</td>
<td>15</td>
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<tr>
<td>Nov-04</td>
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<td>Dec-04</td>
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<td>Jan-05</td>
<td>5</td>
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<tr>
<td>Feb-05</td>
<td>30</td>
</tr>
<tr>
<td>Mar-05</td>
<td>10</td>
</tr>
<tr>
<td>Apr-05</td>
<td>20</td>
</tr>
</tbody>
</table>

![Graph showing number of serials access problems reported from June 2004 to April 2005.](image)
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?