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# Utilizing Open-Source and Budget-Friendly Tools to Improve Issue Reporting Workflows for E-Resources

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# Utilizing open source and budget friendly tools to improve issue reporting workflows for e-resources



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## Identify objectives:

- Improve communication
- Increase efficiency
- Create a knowledge base
- Reduce redundancy
- Collaborate with other staff or departments
- Better organization and tracking

E-resources are constantly in flux and librarians spend a significant amount of time fixing access issues. Effective communication and issue tracking are important components that increase transparency, reduce redundancy, and provide a knowledge base. Two different academic libraries utilized Google Forms and Sheets and Microsoft Access and Outlook to create issue reporting forms and workflows that led to improved operations.

## Important features:

- Mobile friendly
- Web-based
- Submission form
- Ability to add images or screenshots
- Automated emails
- Multiple staff members as troubleshooters

## University of Dayton

- FTE: 10,210 students
- Library: 48 faculty/staff
- Google Forms
- Google Sheets
- Gmail

### Issue Reporting Form

Please log any technical issues with electronic resources.

The name and photo associated with your Google account will be recorded when you upload files and submit this form. Not cbeis1@udayton.edu? [Switch account](#)

Submission Date:

Date

mm/dd/yyyy

Submitted By:

Your answer

Vendor:

Your answer

Case Number (if applicable):

Your answer

Issue:

Your answer

Example (provide permalink if possible):

Your answer

Images or Screenshots (if applicable):

[ADD FILE](#)

[SUBMIT](#)

Example of Google Form

## Union Institute & University

- FTE: 1,100 students
- Library: 4 staff
- Fully online library
- Microsoft Access
- Microsoft Outlook

- Issues are emailed or chatted directly to the E-Resources Librarian
- E-Resources Librarian logs issue and action in the Access Form
- "Report Issue Email" is generated to all staff with the click of the button
- E-Resources Librarian logs resolution and then generates "Resolution Email" to all

**IssueForm**

Date Reported: 3/27/2017

Resource Affected: FTF

Reported by: Klara

Entered by: Tina

Issue: This thesis, "A critical analysis of three short stories by Vera Panova" has a full text link that goes to another university's proxy page and does not work for us.

Permalink: <http://proxy.myunion.edu/login?url=http://search.proquest.com.proxy.myunion.edu/docview/302599077?accountid=14436>

Action: Emailed EBSCO Support Case #2664909. We do not have access to this through PQ Dissertations & Theses: <http://proxy.myunion.edu/login?url=http://search.proquest.com.proxy.myunion.edu/docview/302599077?accountid=14436>

Date Resolved: 3/28/2017

Resolution: It seems the data we receive from the publisher has bad data, which is causing the full text links to not work properly.

We have identified your reported issue to be a direct effect of data provided to EBSCO by our publishing partners. As EBSCO is not a proprietor of this data, we are bound to not modify or amend what we receive from the data provider. We will reach out to the provider to relay this issue and advocate on your behalf for data

[Report Issue Email](#)

☒ Report Email

[Resolution Email](#)

☒ Resolution Email

.Subject = "Issue Resolved --- " & myResource & " --- " & ResolutionDate

.Body sets the email format to plain text, .HTMLBody changes it to HTML format

strHTML = "Hello " & myLibrarian(0) & " and " & myLibrarian(1) & \_

" , " & myDoubleSpace & "Here is a recent issue that was resolved." & myDoubleSpace & \_

"<table cellpadding='5' cellspacing='5' width='100%'>" & \_

"<tr><td colspan = '1'><b>Reported Issue</b></td></tr>" & \_

"<tr><td><b>Resource:</b>" & myResource & "</td></tr>" & \_

"<tr><td><b>Date Reported:</b>" & ReportDate & "</td></tr>" & \_

"<tr><td><b>Issue:</b>" & TheIssue & "</td></tr>" & \_

"<tr><td><b>Reported By:</b>" & Reportedby & "</td></tr>" & \_

"<tr><td colspan = '1'><b>Action:</b>" & myAction & "</td></tr>" & \_

"<tr><td colspan = '1'><b>Permalink:</b>" & myPermalink & "</td></tr>" & \_

"<tr><td colspan = '1'><b>Entered By:</b>" & Enteredby & "</td></tr>" & \_

"<tr><td colspan = '1'><b>Date Resolved:</b>" & ResolutionDate & "</td></tr>" & \_

"<tr><td colspan = '1'><b>Resolution:</b>" & Resolution & "</td></tr>" & \_

"</table>" & myDoubleSpace & \_

"Sincerely," & myDoubleSpace & "Tina Beis" & myDoubleSpace & \_

Example of Microsoft Access form

Timestamp	Submission Date:	Submitted By:	Case Number (if applicable):	Issue:	Example (provide permalink if possible):	Vendor:	Images or Screenshots (if applicable):	Assigned to:	Resolution Date:	Resolution:
1/29/2018 17:38:18	1/29/2018	Katy		When I try the browsing functions in Flipster I get errors. When I click "View All" next to Latest Issues and when I clicked "View All" next to All Magazines, I get an error that reads "a system problem has occurred" (screenshots attached)	<a href="http://libproxy.udayton.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=eds-eds&amp;AN=edsee-8015872&amp;site=eds-live">http://libproxy.udayton.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=eds-eds&amp;AN=edsee-8015872&amp;site=eds-live</a>	EBSCO	<a href="https://drive.google.com/open?id=13y7yz7oU00g3iFOr0dn2uK8SITHjFqp_a">https://drive.google.com/open?id=13y7yz7oU00g3iFOr0dn2uK8SITHjFqp_a</a> , <a href="https://drive.google.com/open?id=11XNXwSiQNQ6iNt9Z6w4KUAVn-WGbY5">https://drive.google.com/open?id=11XNXwSiQNQ6iNt9Z6w4KUAVn-WGbY5</a>	Tina	1/30/18	Issue seems to be resolved. Unable to replicate it. May have been an error due to session timeout and cookies.
2/1/2018 9:37:40	2/1/2018	Tina	#3047154	IEEE Xplore links in EDS not working correctly	<a href="http://libproxy.udayton.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=eds-eds&amp;AN=edsee-8015872&amp;site=eds-live">http://libproxy.udayton.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=eds-eds&amp;AN=edsee-8015872&amp;site=eds-live</a>	EBSCO		Tina	2/12/18	IEEE Custom link was updated to filter our holdings.
2/1/2018 18:18:03	2/1/2018	Joan		Link in Databases list goes to Page not Found; should link to <a href="http://www.oxfordartonline.com/">http://www.oxfordartonline.com/</a> . Also, content from the Benazir Dictionary of Artists is locked: is this not part of our subscription?	<a href="http://www.oxfordartonline.com/search?q=rauschenberg&amp;searchBtn=Search&amp;isQuickSearch=true">http://www.oxfordartonline.com/search?q=rauschenberg&amp;searchBtn=Search&amp;isQuickSearch=true</a>	Oxford		Tina	02/02/18	Updated link in the ERM. Checking subscriptions with LYRASIS sheet and with Fred. We do not have a subscription to Benazir.

Example of Google Sheet knowledge base

Hello Susan and Matt,

Here is a recent issue that was submitted.

**Reported Issue**

**Resource:** FTF

**Date Reported:** 3/27/2017

**Issue:** This thesis, "A critical analysis of three short stories by Vera Panova" has a full text link that goes to another university's proxy page and does not work for us.

**Reported By:** Klara

**Action:** Emailed EBSCO Support Case #2664909. We do not have access to this through PQ Dissertations & Theses: <http://proxy.myunion.edu/login?url=http://search.proquest.com.proxy.myunion.edu/docview/302599077?accountid=14436>

**Permalink:** <http://proxy.myunion.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=edsnd1&AN=edsnd1.oai.union.ndltd.org.OCLC.oai.xcat.oclc.org.OCLCNo.30931654&site+eds-live&scope=site#>

**Entered By:** Tina

Sincerely,

Tina Beis

Example of Microsoft Outlook email