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LibAnswers: A Solution for eResource Ticketing and Workflow Management

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LibAnswers w/LibChat

A Solution for eResource Ticketing and Workflow Management

American Library Association Midwinter Conference 2016

Kelly Smith
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Eastern Kentucky University Libraries
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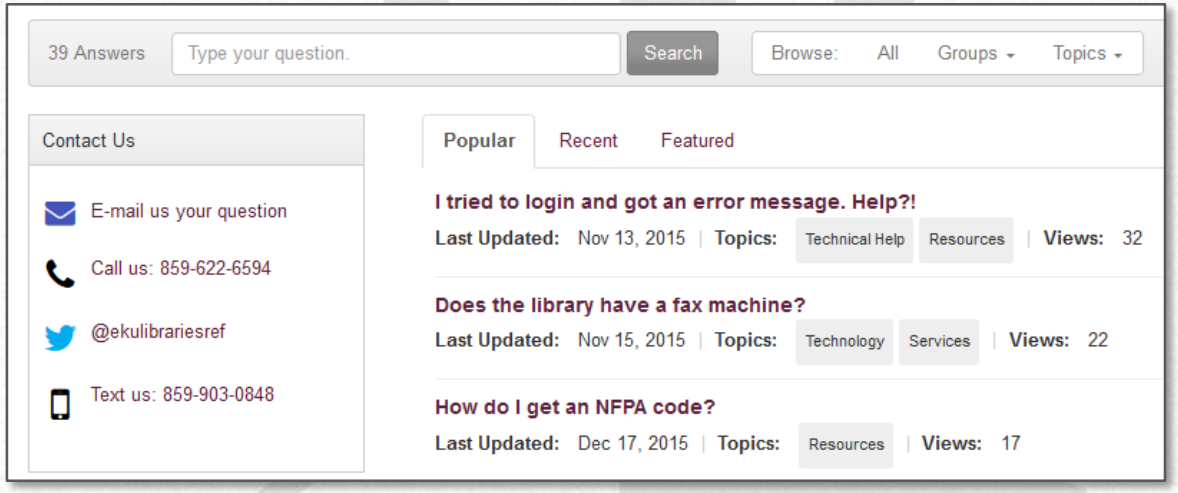
About LibAnswers/LibChat

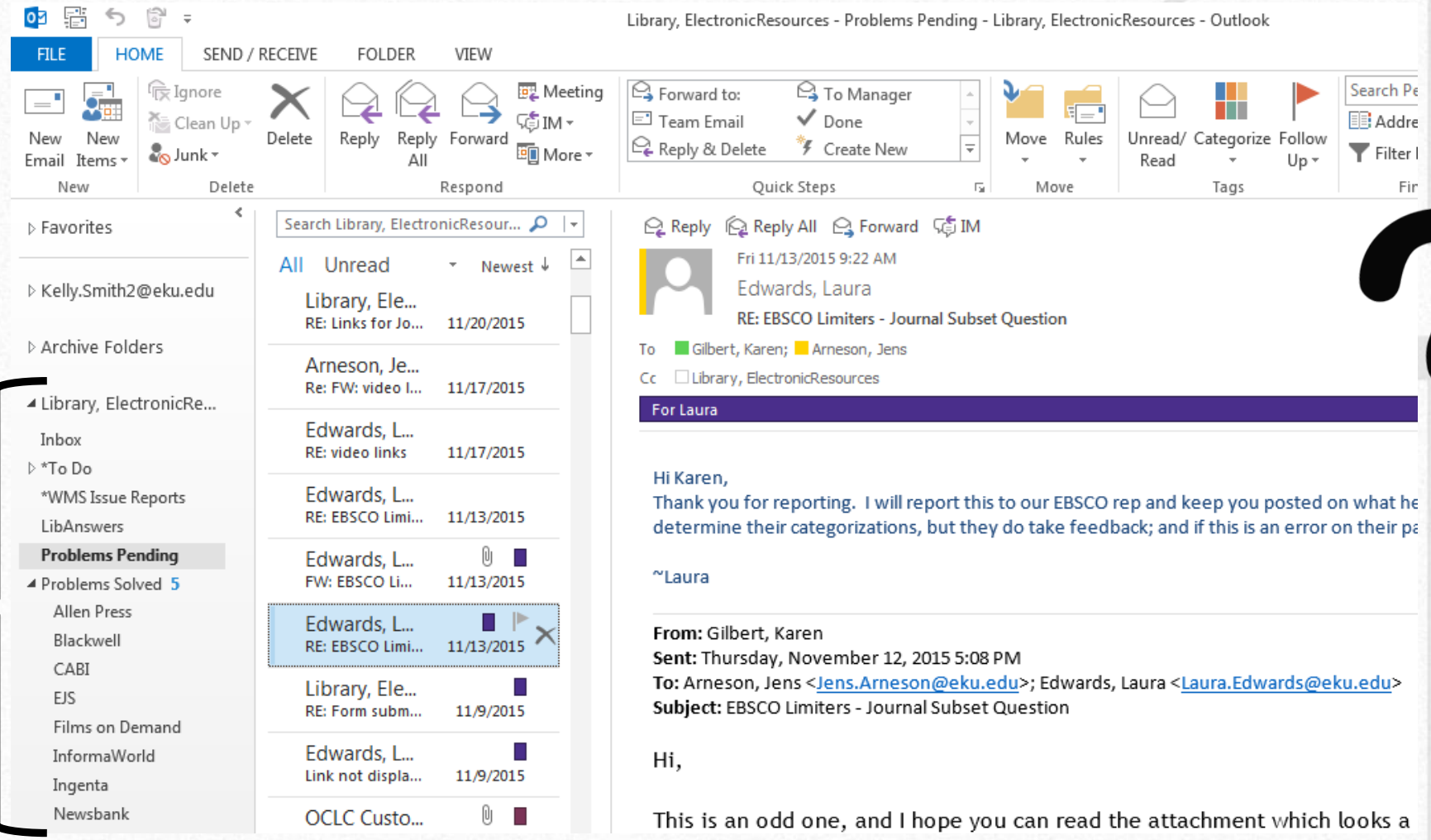
http://springshare.com/libanswers/

http://libanswers.eku.edu/



Consortial cost: $2,400/year + $99 per additional queue

Why did we need this tool?



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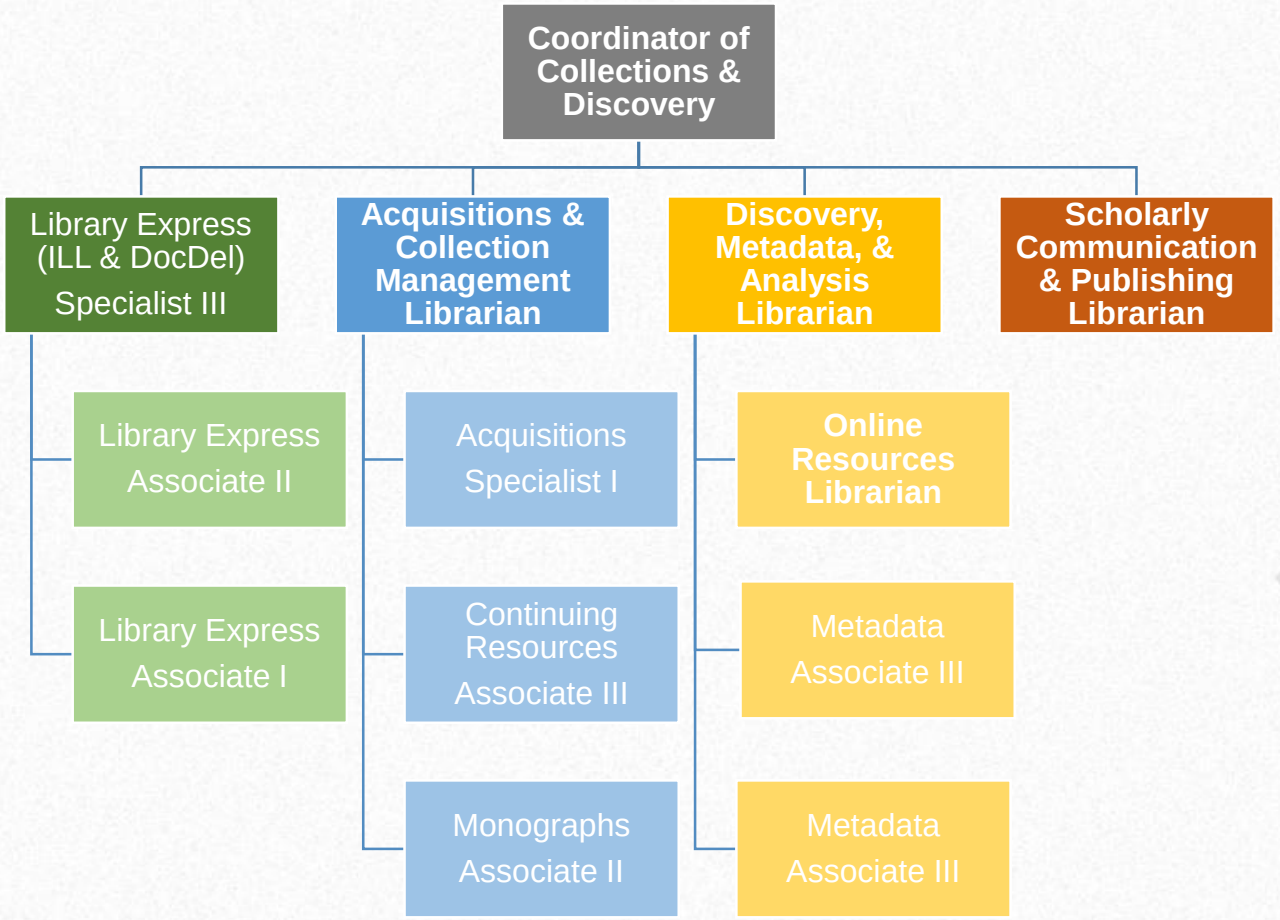
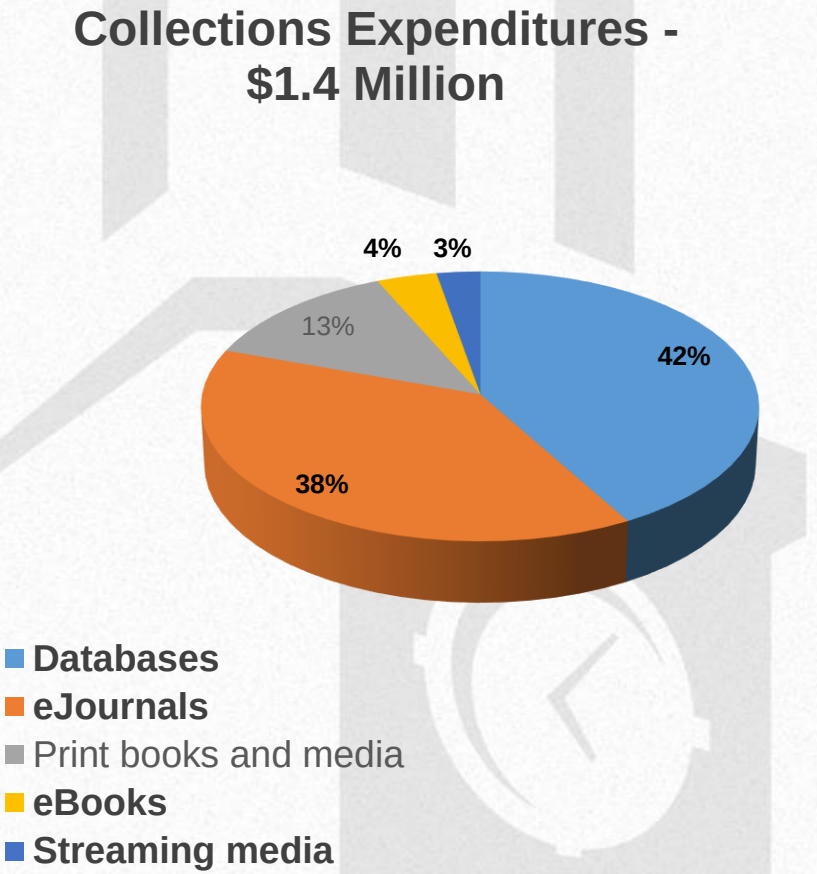
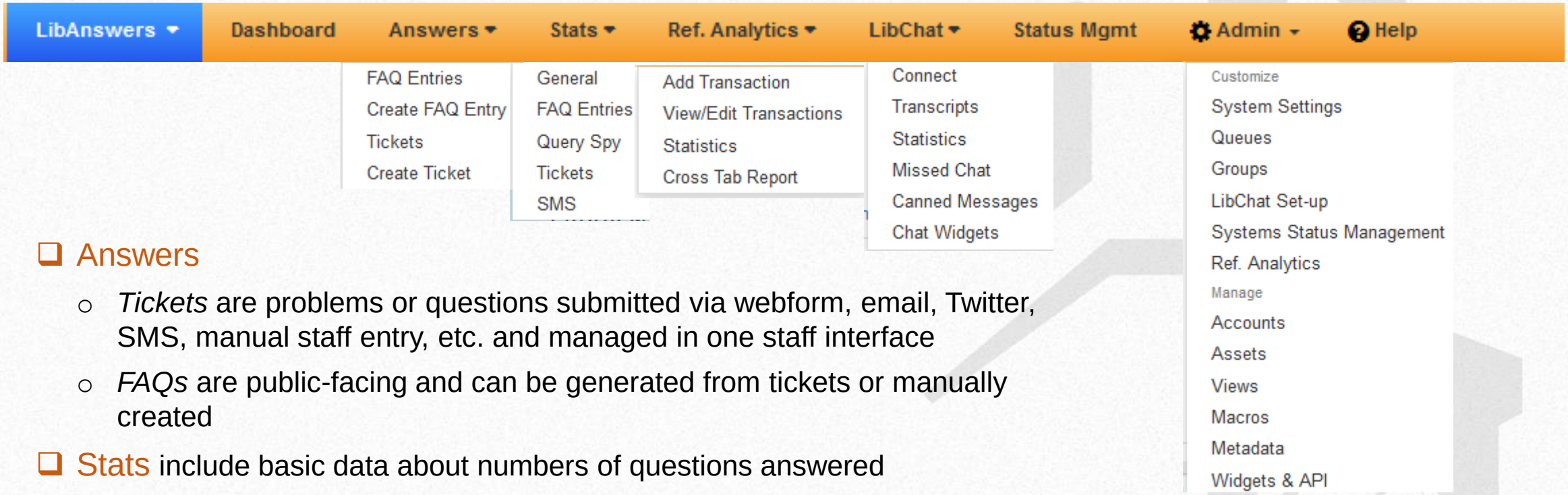


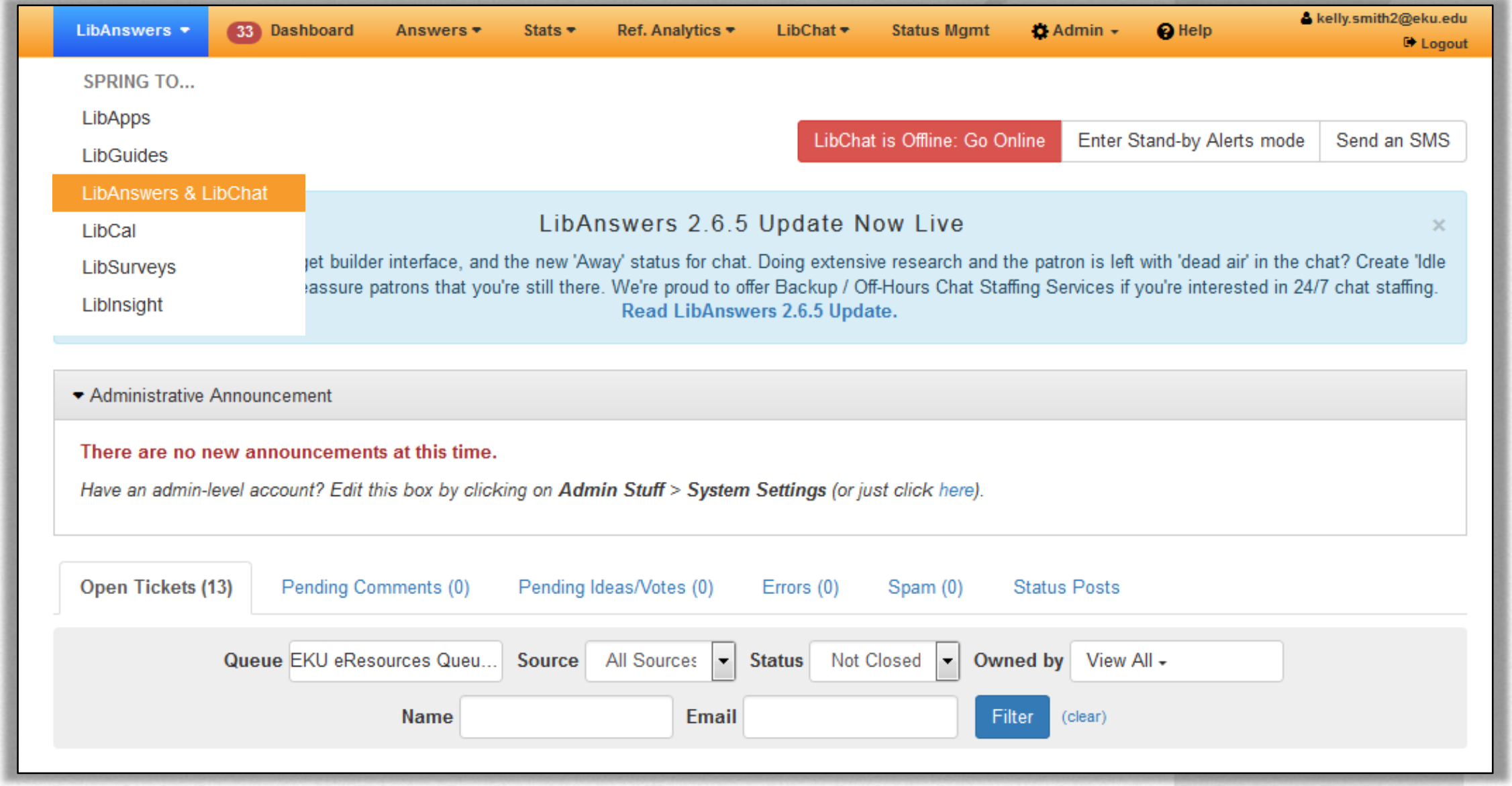


Under the hood… Dashboard



- Answers
  - *Tickets* are problems or questions submitted via webform, email, Twitter, SMS, manual staff entry, etc. and managed in one staff interface
  - *FAQs* are public-facing and can be generated from tickets or manually created
- Stats include basic data about numbers of questions answered
- Analytics are more customizable, based on locally defined metrics
- LibChat is the chat service provided with LibAnswers

Under the hood… Dashboard

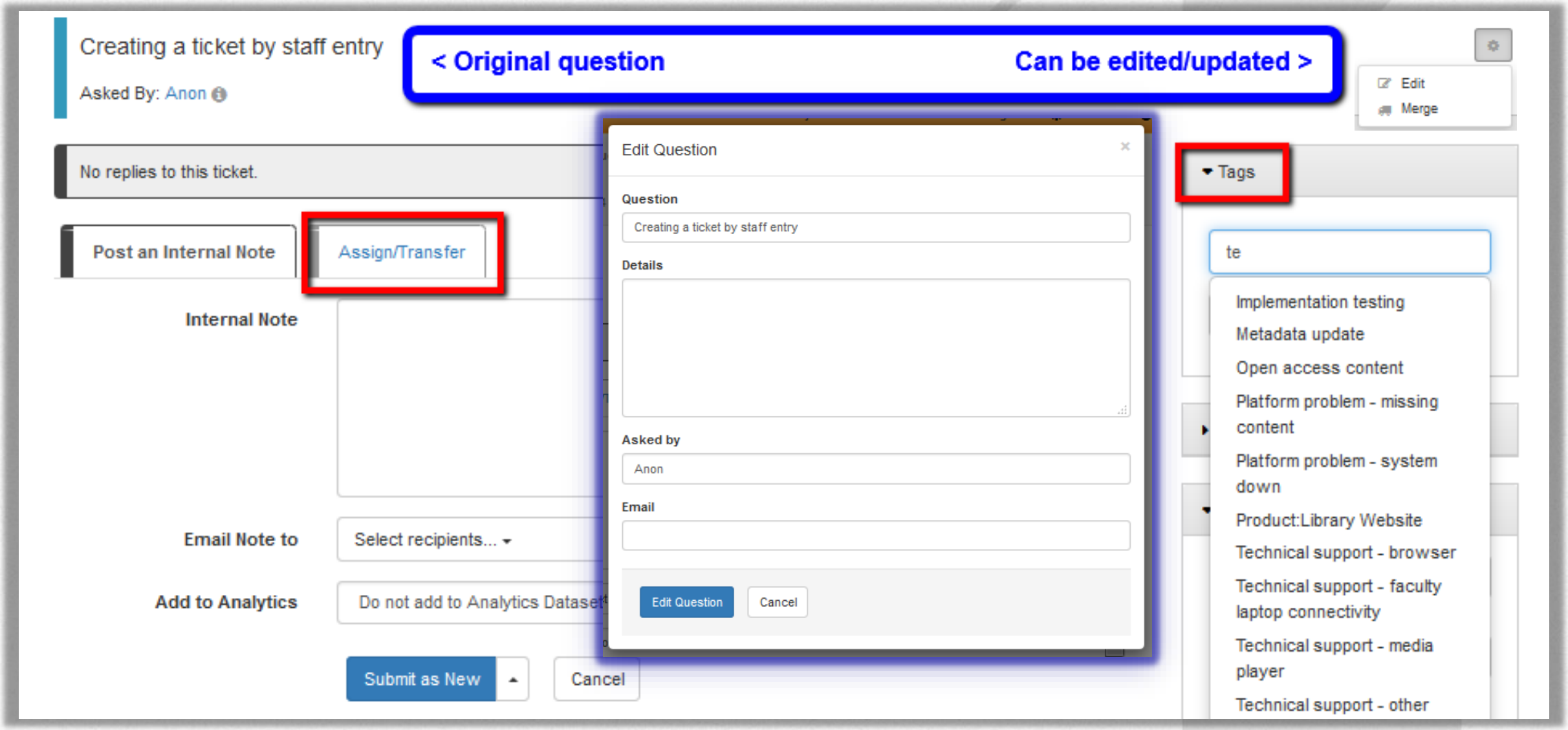


Under the hood… Dashboard

Tickets 1 - 12 (of 12)

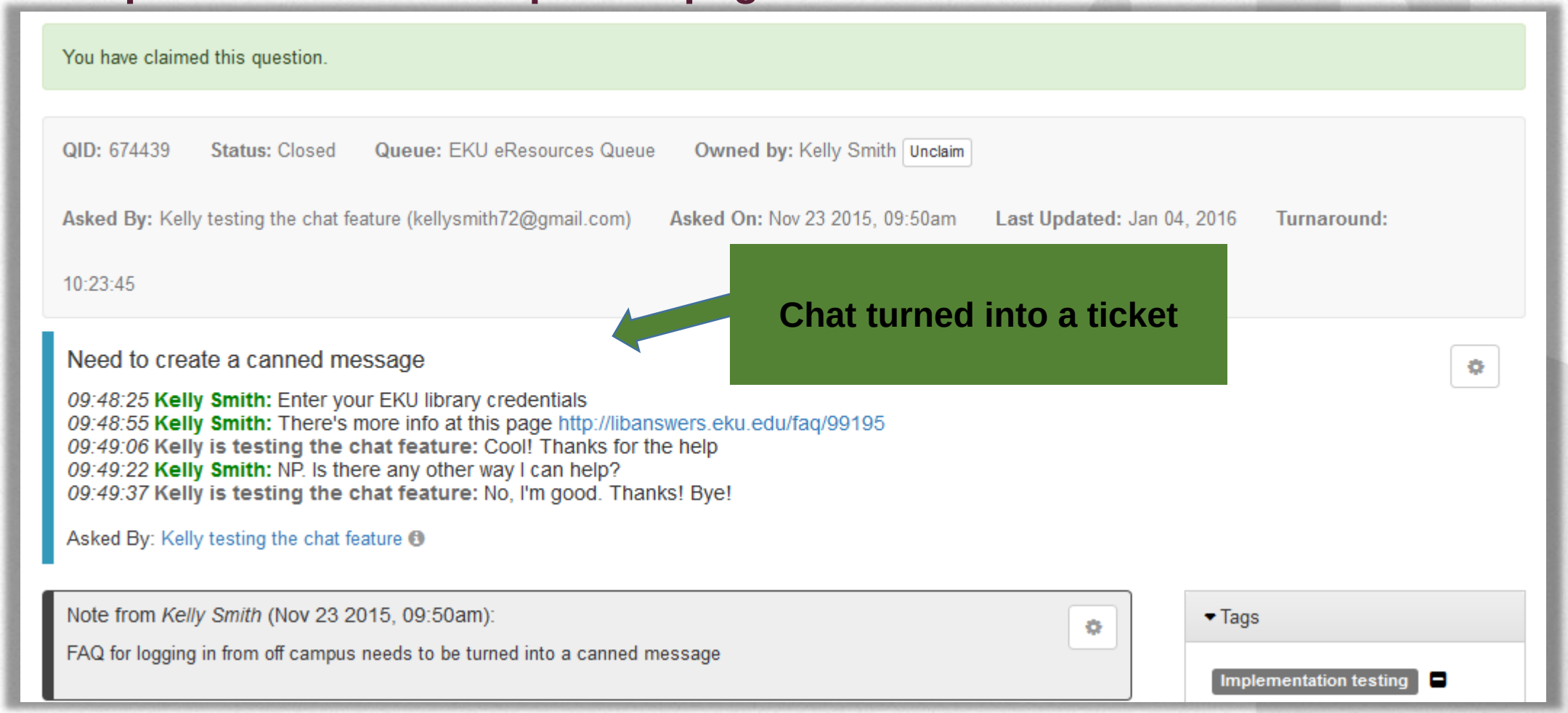
Id	Status	Queue	Question	Last Message From	Owner	Updated ↓
705822	New	EKU eResources Queue	University of Chicago Press Journals Kelly Asked via Staff Entry Subscription - change of pub/platform or title	Patron	Rebecca Stinnett	Jan 04 2016, 01:33pm
674686	Pending	EKU eResources Queue	Journal of Advanced Nursing record has links to unrelated journal Dermatology Nursing OCLC Support (support@oclc.org) Asked via Staff Entry Linking - Discovery Metadata update	User	Laura Edwards	Jan 04 2016, 01:31pm
683900	Open	EKU eResources Queue	Maney Publishing acquired by Taylor and Francis Jens Asked via Staff Entry Subscription - change of pub/platform or title	Patron	Jens Arneson	Jan 04 2016, 01:30pm
684423	Pending	EKU eResources Queue	Access Interruption to music in print Jens Asked via Staff Entry Awaiting Vendor Fix Product:Music in Print Series	Patron	Jens Arneson	Jan 04 2016, 01:30pm

Under the hood… Tickets



Under the hood… Tickets

Example Ticket screen capture – page 1



Under the hood… Tickets

Example Ticket screen capture – page 2

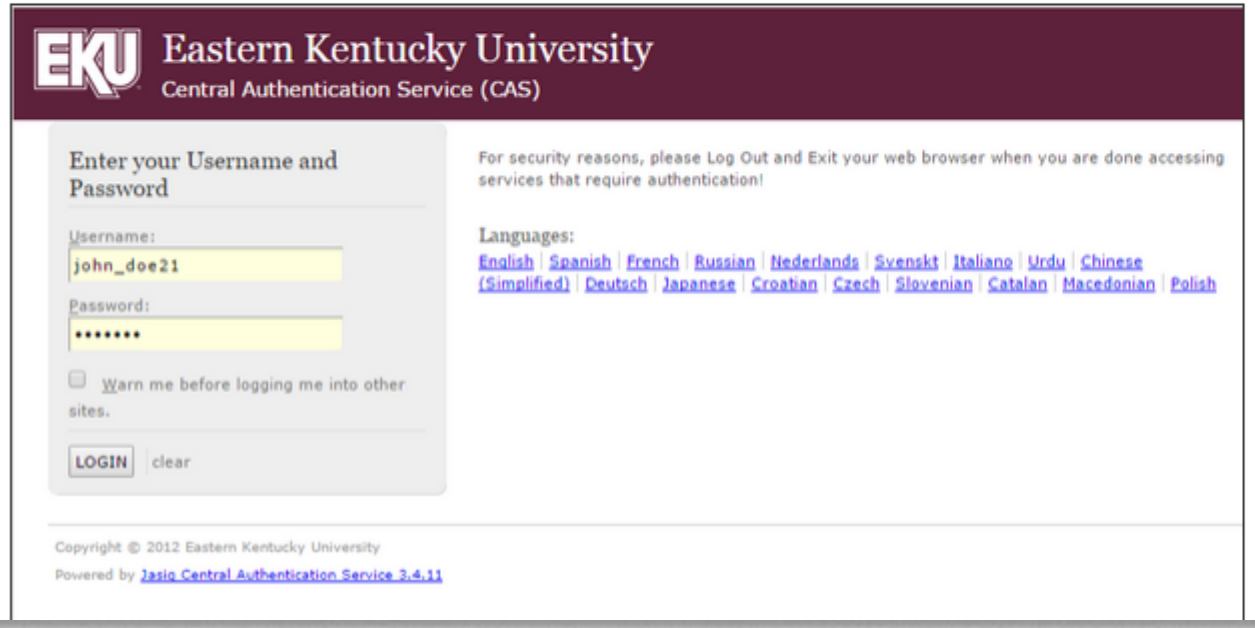
Note from *Kelly Smith* (Nov 23 2015, 09:51am):

follow up on this

[Status changed to *Pending*.]

Reply from *Laura Edwards* (Dec 04 2015, 09:35am):

When accessing the Libraries' databases and other online resources, you will be prompted to log in with your E-Key (EKU email) to make content available to you that is not free on the open web.



Technical support - other

Add Tag

Add

Reuse Answers

Recommendations from your system (FAQs) (10): hide

- #99285: I tried to login and got an error message. Help?! **copy**
- #99210: How do I create a persistent link to a library resource? **copy**
- #99437: How do I download an eBook? **copy**
- #102769: How do I log in to LearningExpress? **copy**
- #107597: Tips for managing a eResource troubleshooting ticket **copy**
- #105444: Problem

Under the hood… Tickets

Example Ticket screen capture – page 3

E-Key login examples:

- Student (john_doe21)
- Faculty/Staff (doej)

Once you login, you should be seamlessly connected to our online resources.

If your login does not work, first make sure you have entered your username correctly. Only use the first part of your email--do not include the domain part of your email address.

Correct: john_doe21

Incorrect: john_doe21@mymail.eku.edu

If you are entering your username correctly and still can't login, **contact IT** to make sure your E-Key information is up to date. If IT confirms that your login information is correct, and you are still having problems logging in, please **contact us** so we can troubleshoot this problem.

Emailed to: "Kelly testing the chat feature" <kellysmith72@gmail.com>, "Laura Edwards" <laura.edwards@eku.edu>

Note from *Laura Edwards* (Dec 04 2015, 09:37am):

Kelly - I created a macro "Logging in to Library Resources from Off-Campus". Copied and pasted from the FAQ to see how it looks on the patron side.

Emailed to: "Kelly Smith" <kelly.smith2@eku.edu>

Note from *Kelly Smith* (Jan 04 2016, 01:34pm):

[Queue Transfer from: EKU Reference Queue to EKU eResources Queue]

of Style **copy**

- #105245: What is my login for the library computers? **copy**
- #99447: I downloaded an eBook to my computer but I can't open it. Help?! **copy**
- #99237: How do I get an NFPA code? **copy**
- #99257: How do I find an ANSI standard? **copy**

Recommendations from your system (private) (8): show

Keyword Search

Copy an Answer

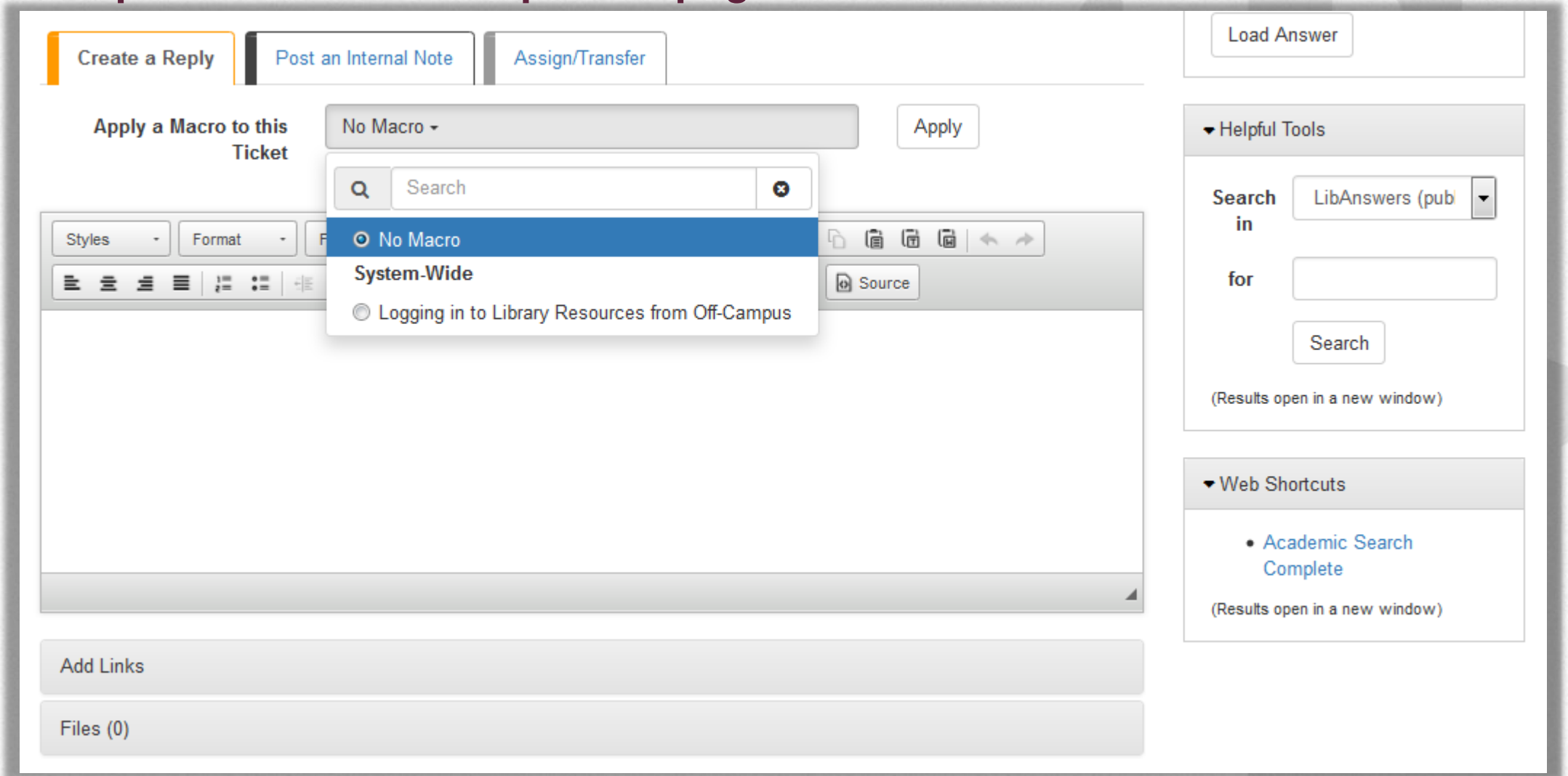
Question ID

FAQ Entry

Load Answer

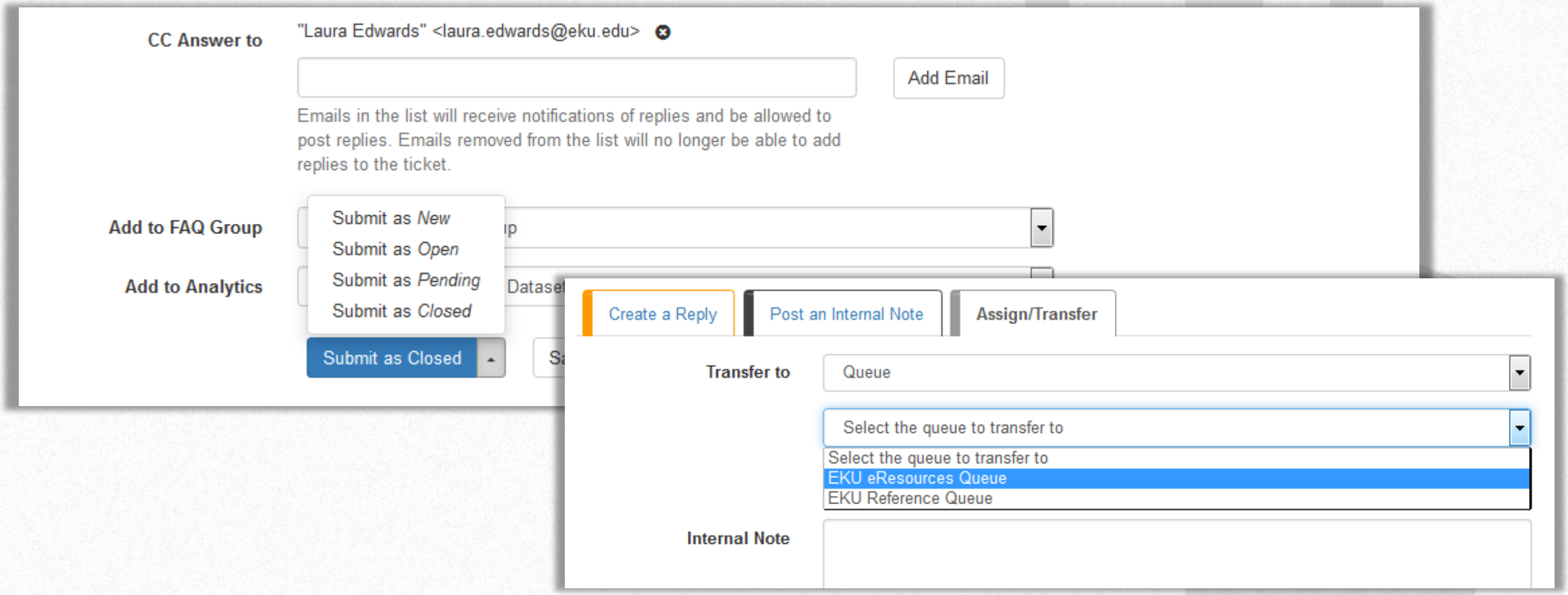
Under the hood… Tickets

Example Ticket screen capture – page 4

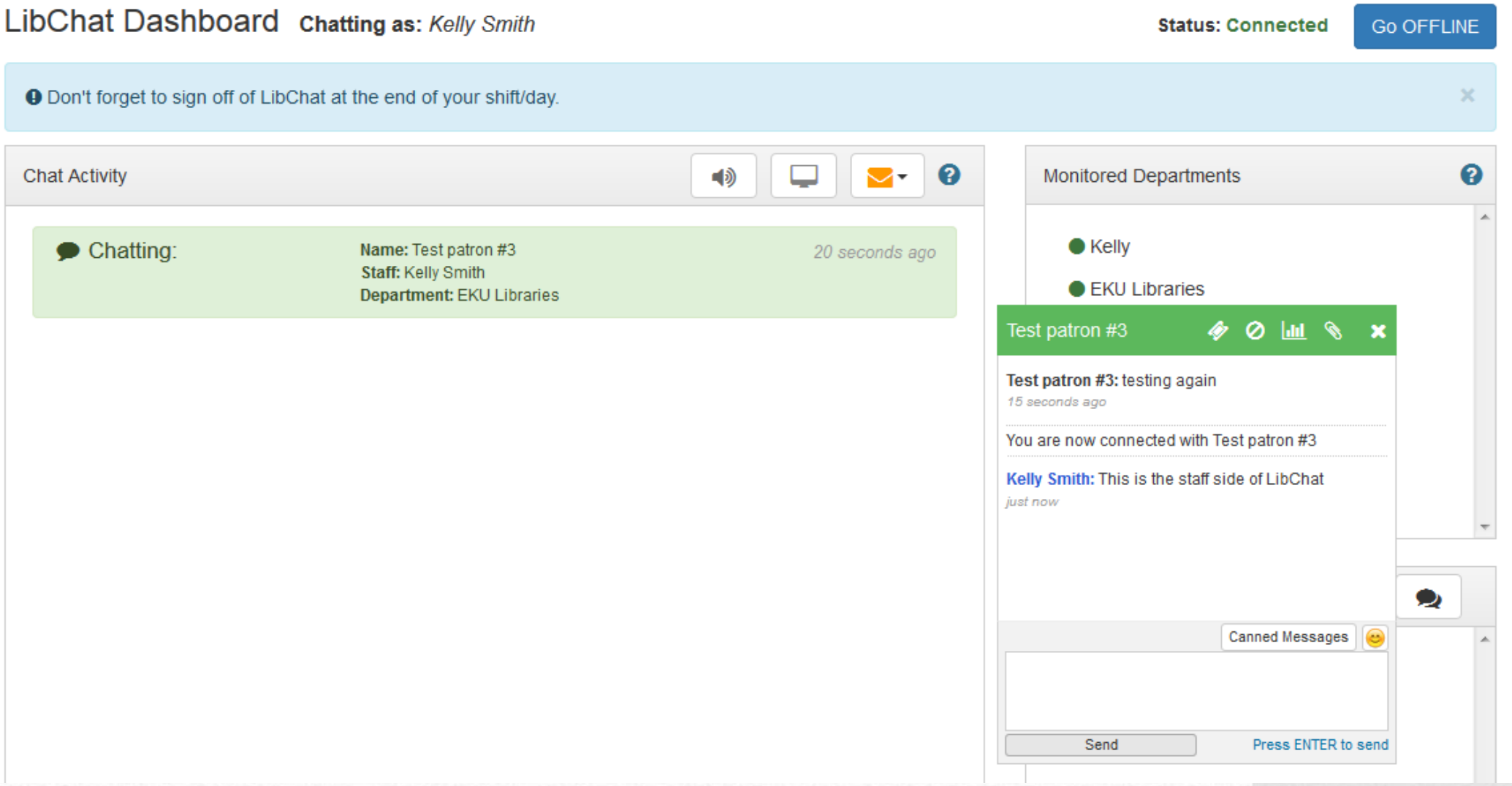


Under the hood… Tickets

Example Ticket screen capture – page 5



Under the hood… Chat



Under the hood… Chat

QID: 674367 **Status:** New **Owned by:** Kelly Smith Unclaim

Asked By: Kelly Testing (kelly.smith2@eku.edu) **Asked On:** Nov 23 2015, 09:16am **Last Updated:** Nov 23, 2015 **Turnaround:** 00:00:00

I'm generating a chat. Please ignore. I will delete later

09:14:17 **Kelly Smith:** Thanks for contacting us. I'm responding to your chat.
09:14:31 **This is Kelly:** Thanks for your help today.
09:14:48 **Kelly Smith:** Bye.

Asked By: Kelly Testing

This is a chat session that was turned into a ticket.

If an end user's issue cannot be resolved and needs follow up, this is a great way to manage that.

Chat history is included in the ticket.

Note from *Kelly Smith* (Nov 23 2015, 09:16am):

Generating a ticket from a chat

Create a Reply | Post an Internal Note | Assign/Transfer

Styles | Format | Font | Size | Source

Tags

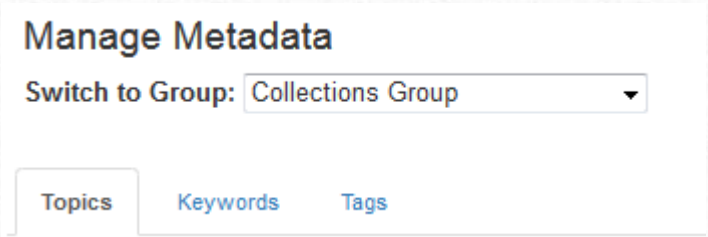
Implementation testing

Add Tag

Add

Reuse Answers

Under the hood… Analytics



EKU Reference Group Topics

For Distance Learners
For Faculty
Printing
Research Help
Resources
Services
Spaces
Technical Help
Technology

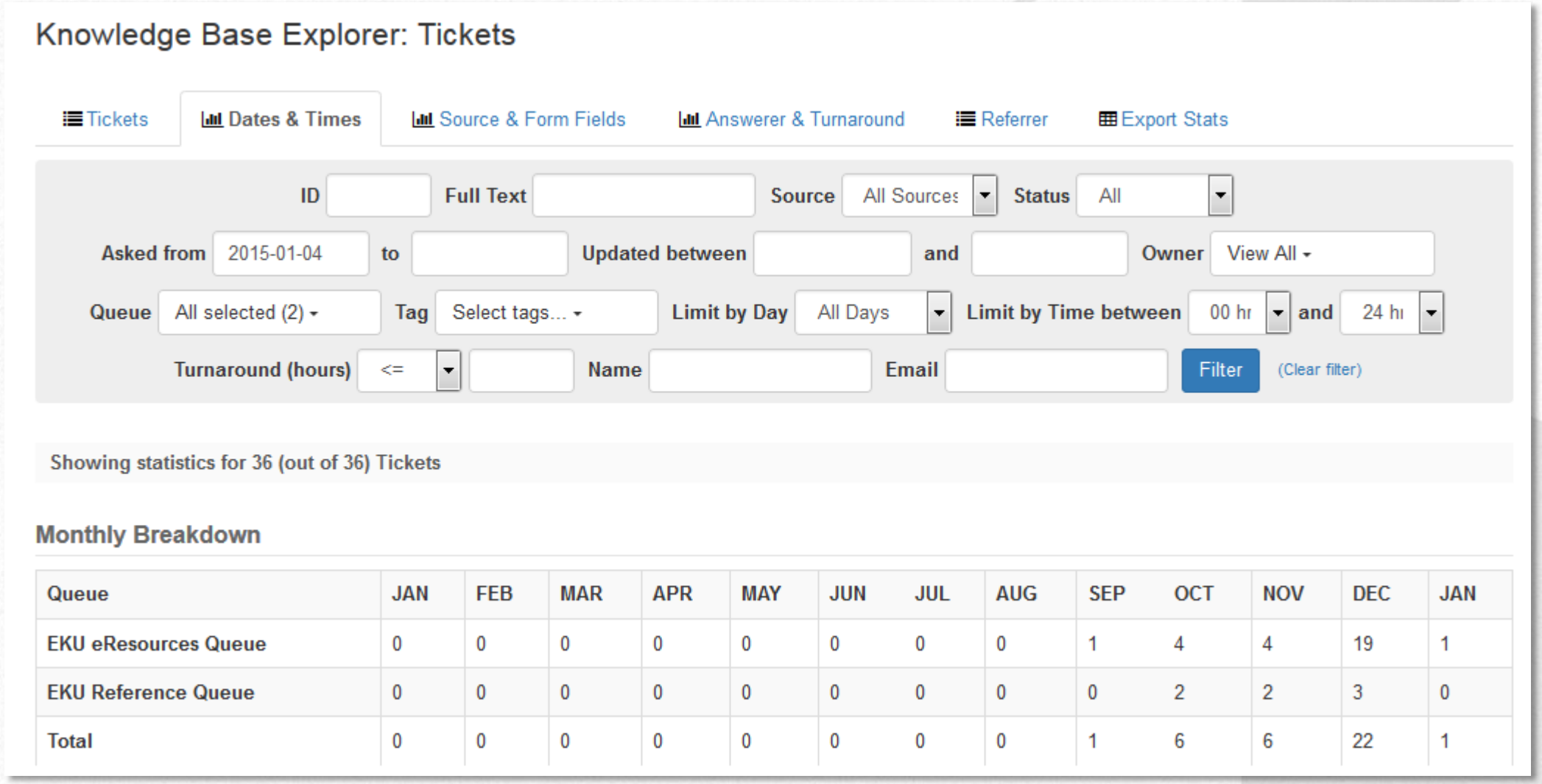
Collections (eResources) Group Topics

Discovery
Enhancement Request
EZProxy / Authentication Problem
Link Resolver
Metadata
OCLC System Outage
Subscription Problem
User Technical Issue
Vendor Platform Problem
Workflow Mangement

Tags - apply to all queues in system

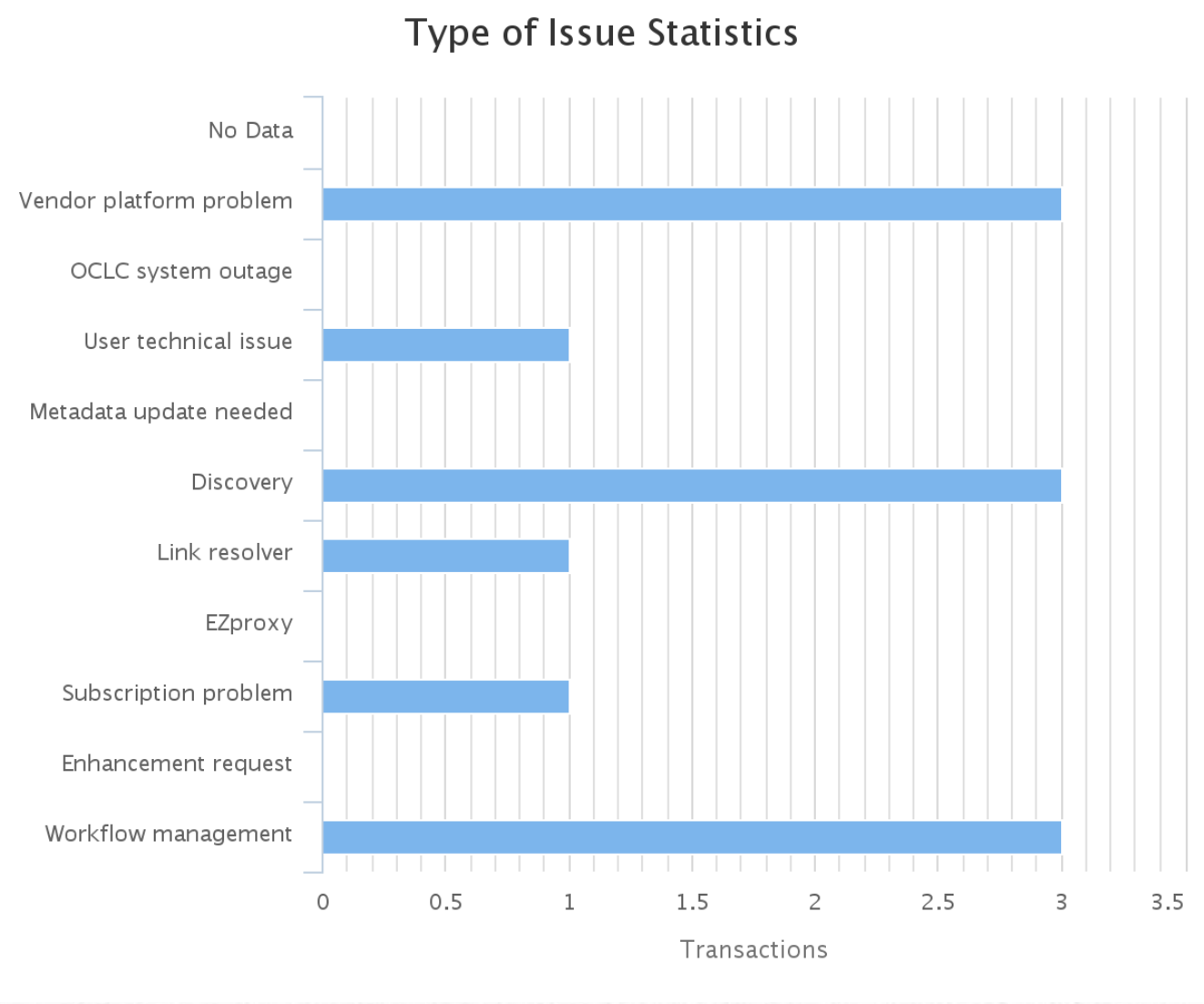
* Urgent *
Awaiting Vendor Fix
Help - Directional
Help - Research
Implementation testing
IP / EZproxy
Linking - A to Z list
Linking - Discovery
Linking - link resolver
Metadata update
Open access content
Platform problem - access denied due to excessive downloading
Platform problem - incorrect metadata
Platform problem - missing content
Platform problem - system down
Subscription - activation needed
Subscription - canceled
Subscription - change of pub/platform or title
Subscription - coverage change
Subscription - lapsed
Technical support - browser
Technical support - faculty laptop connectivity
Technical support - media player
Technical support - other
Unresolved - problem cannot be duplicated
Unresolved - referred elsewhere
User error
Workflow - cancelation
Workflow - new resource
Workflow - renewal

Under the hood… Analytics



Queue	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
EKU eResources Queue	0	0	0	0	0	0	0	0	1	4	4	19	1
EKU Reference Queue	0	0	0	0	0	0	0	0	0	2	2	3	0
Total	0	0	0	0	0	0	0	0	1	6	6	22	1

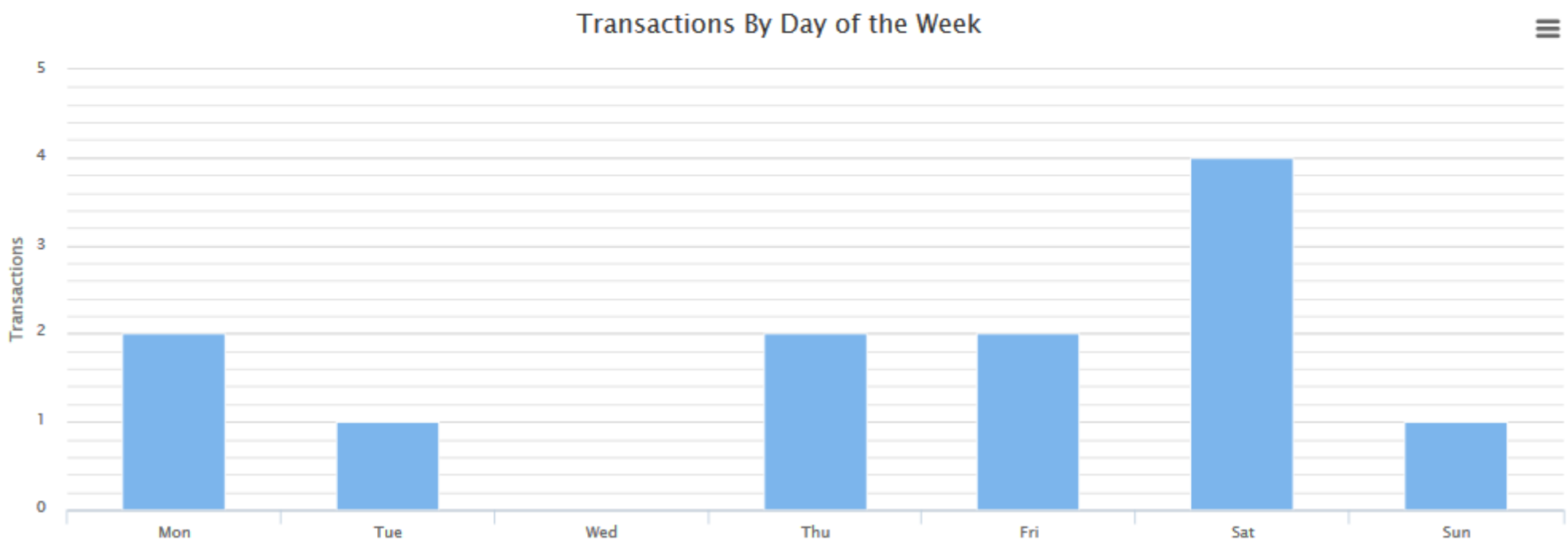
Under the hood… Analytics



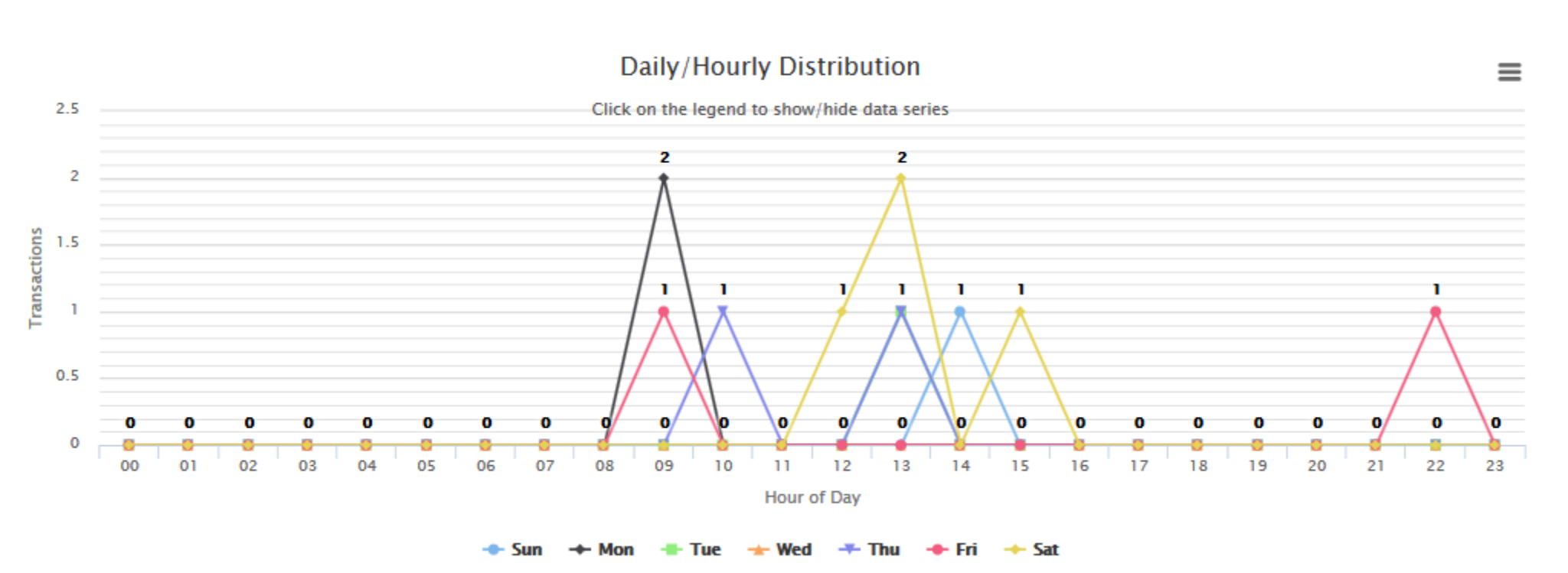
Under the hood… Analytics

Daily Distribution (on what days are the questions asked)

MON	TUE	WED	THU	FRI	SAT	SUN
2 17%	1 8%	0 0%	2 17%	2 17%	4 33%	1 8%

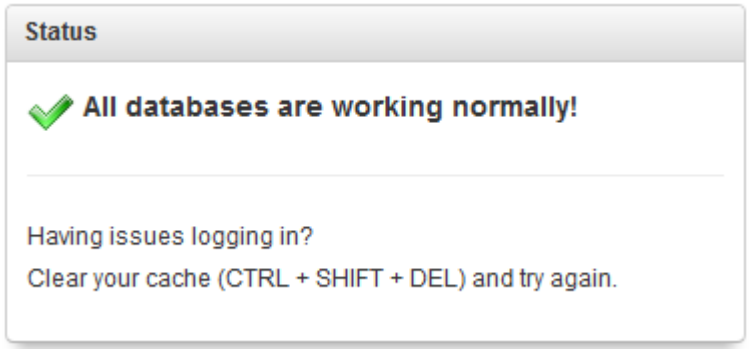


Under the hood… Analytics

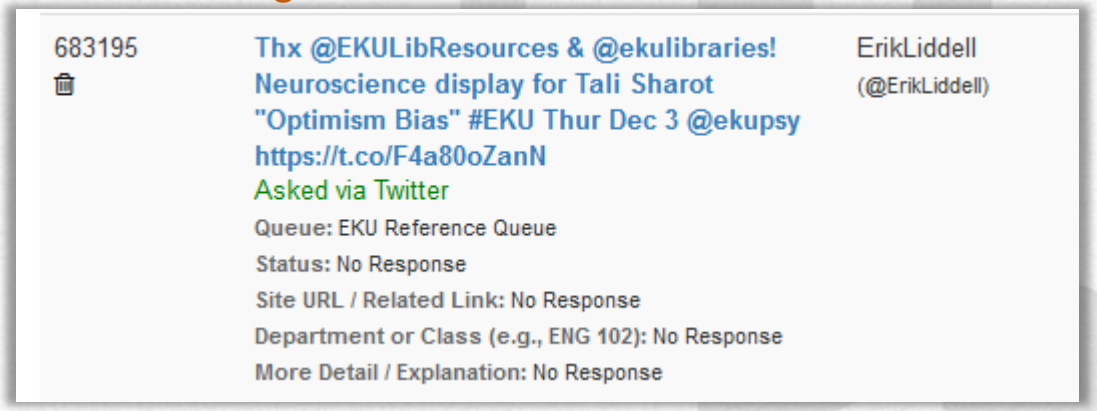


Under the hood… Other Features

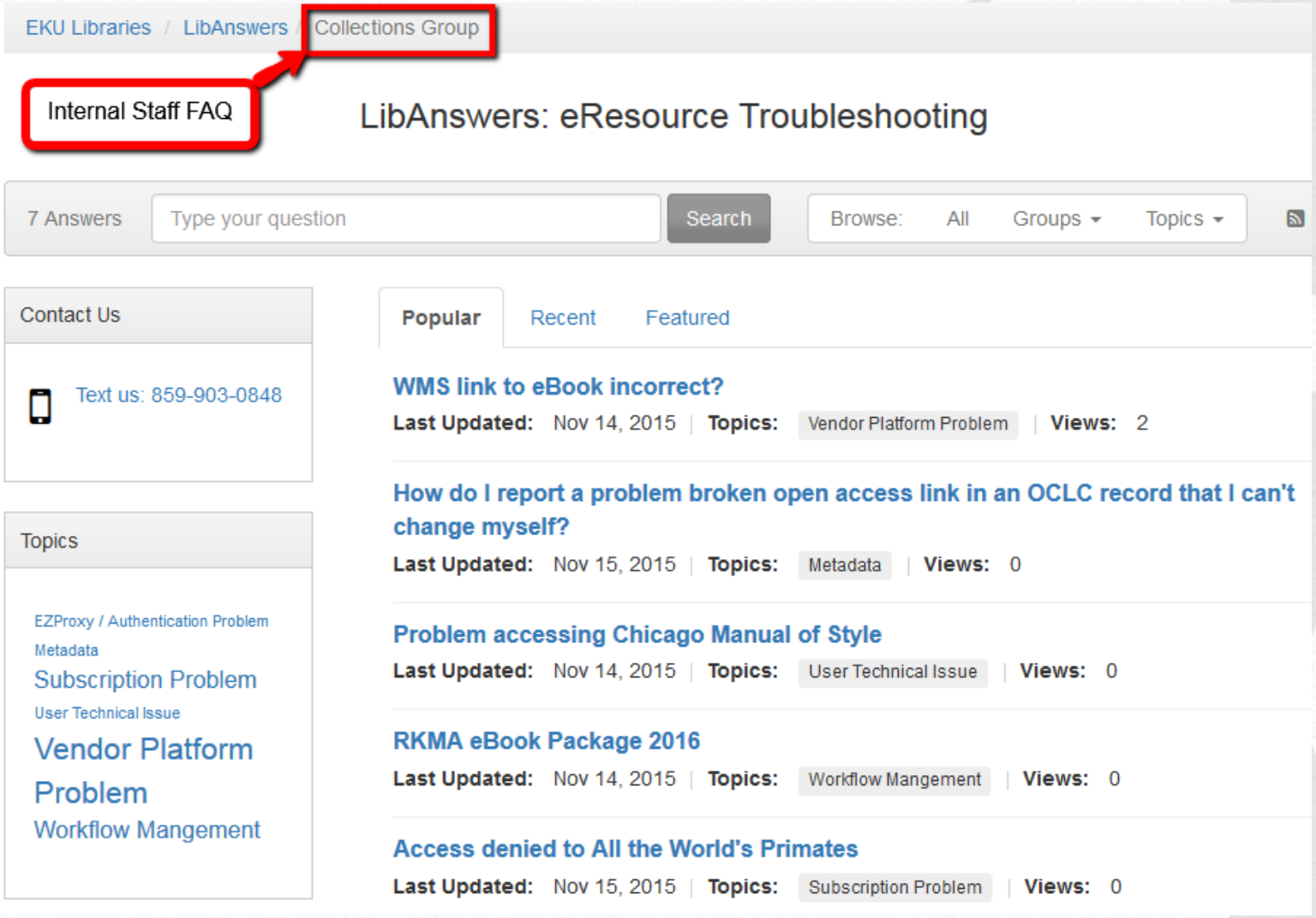
Resource Status Update Widget



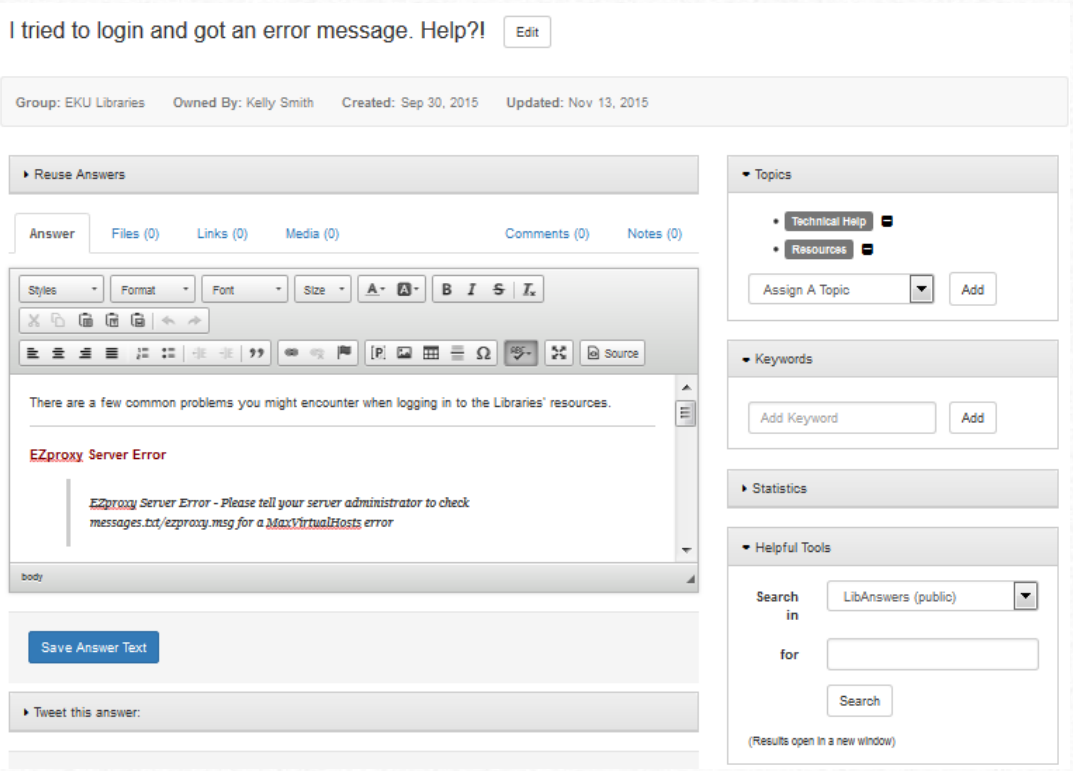
Twitter Integration

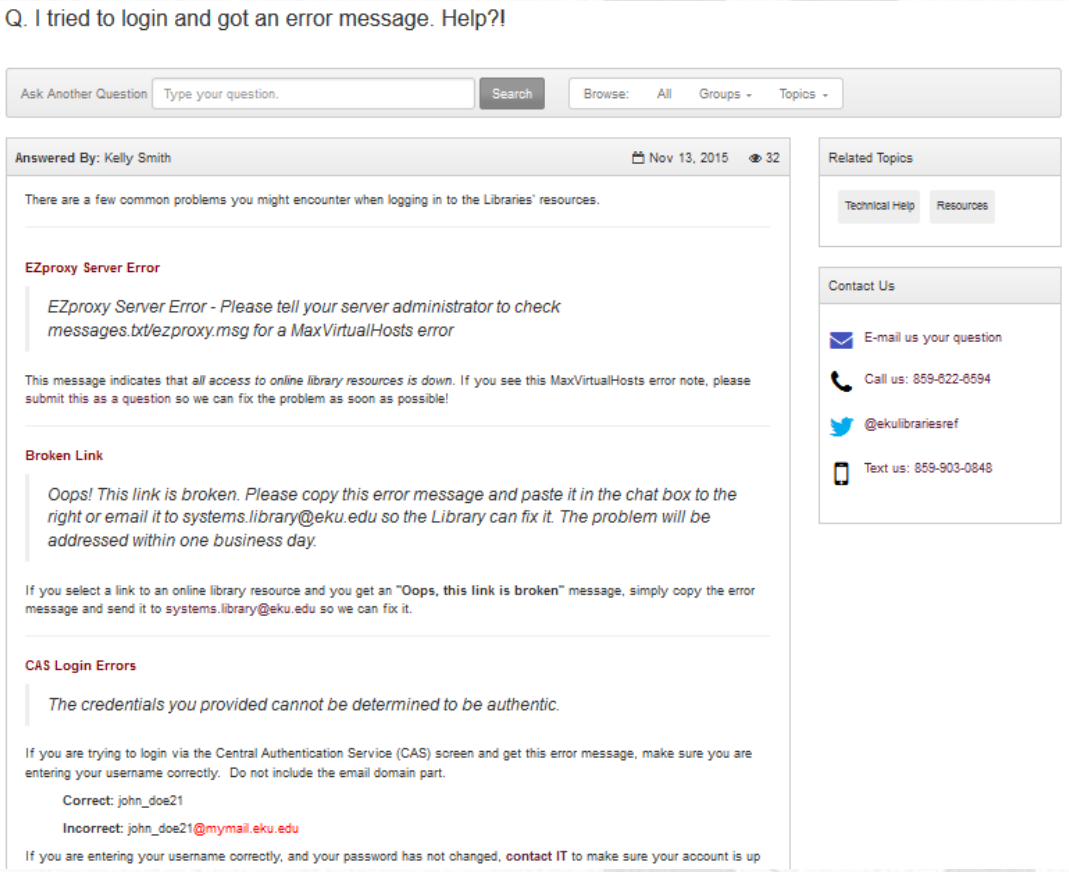


Under the hood… FAQ



Under the hood… FAQ





Public portal… FAQ

Ask Us!

37 Answers | logi | Search | Browse: All Topics | RSS

FAQs are suggested as end user types in a question

- How do I login to use library databases and other resources?
- I tried to login and got an error message. Help?!
- What is my login for the library computers?
- How do I get an NFPA code?
- How do I find an ANSI standard?
- How do I renew a book?

Chat with the Li… | …estion

Customizable end user ticket submission form

Ask Us

Sorry, chat is…

Search our Knowledgebase and/or submit your question

Embedded Chat widget

…can we help you?

…earch help? *Tell us about your topic and assignment.*

…g an issue? *Include* ***details*** *about where you started your search, exact steps taken, onscreen messages, etc. Provide relevant* ***links*** *to a specific problem resource, if applicable.*

Question / Issue *

More Detail / Explanation

Site URL / Related Link

Attach a file

Schedule An Appointment

Popular | Recent | Featured

I tried to login and got an error message. Help?!
Last Updated: Nov 13, 2015 | **Topics:** Technical Help, Resources | **Views:** 26

Does the library have a fax machine?
Last Updated: Nov 15, 2015 | **Topics:** Technology, Services

Browsable FAQs with locally customized tags.

How do I find scholarly online resources?
Last Updated: Nov 15, 2015 | **Topics:** Resources, Research Help | **Views:** 11

How do I get an NFPA code?
Last Updated: Nov 15, 2015 | **Topics:** Resources | **Views:** 11

How do I find an ANSI standard?
Last Updated: Nov 15, 2015 | **Topics:**

Benefits

1. Ease of implementation
2. Customizability
3. Integration with existing Libguides
4. Intuitive interface
5. Ability to transfer tickets / assign ownership
6. Ability to merge tickets
7. Centralized management of ERM
8. Unique FAQ functionality