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

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Eastern Kentucky University Libraries

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About LibAnswers/LibChat

http://springshare.com/libanswers/

LibAnswers w/ LibChat
The Market-leading Reference Platform, Ensure Patrons Get Their Answers - Always.

A Single Platform For All Your Online Reference Needs
Used by over 1,200 Libraries worldwide, LibAnswers is an end-to-end online reference platform. It helps you ensure that patrons get fast and accurate answers from their librarians - always!

- Email, Chat, SMS & Twitter channels
- Create Unlimited FAQs
- Searchable Public Knowledge Base
- Mobile and Tablet-friendly out of the box
- Full Reference Statistics
- Embed Answers & Chat anywhere

http://libanswers.eku.edu/

Consortial cost: $2,400/year + $99 per additional queue
Why did we need this tool?

Hi Karen,

Thank you for reporting. I will report this to our EBSCO rep and keep you posted on what he determines their categorizations, but they do take feedback and if this is an error on their part, they might correct it.

~Laura

From: Gilbert, Karen
Sent: Thursday, November 12, 2015 5:08 PM
To: Arneson, Jens <jens.arneson@eku.edu>; Edwards, Laura <Laura.Edwards@eku.edu>
Subject: EBSCO Limiters - Journal Subset Question

Hi,

This is an odd one, and I hope you can read the attachment which looks a
Why did we need this tool?

Collections Expenditures - $1.4 Million

- **Databases**
- **eJournals**
- **Print books and media**
- **eBooks**
- **Streaming media**

Coordinator of Collections & Discovery

- Library Express (ILL & DocDel) Specialist III
  - Library Express Associate II
  - Library Express Associate I
- Acquisitions & Collection Management Librarian
  - Acquisitions Specialist I
  - Continuing Resources Associate III
  - Monographs Associate II
- Discovery, Metadata, & Analysis Librarian
  - Online Resources Librarian
  - Metadata Associate III
- Scholarly Communication & Publishing Librarian
  - Metadata Associate III

Collections Expenditures:
- 42%
- 38%
- 13%
- 4%
- 3%
- **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

LibAnswers & LibChat

LibAnswers 2.6.5 Update Now Live
- Improved chat builder interface.
- New 'Away' status for chat.
- Extensive research. The patron is left with 'dead air' in the chat? Create a chat.

Read LibAnswers 2.6.5 Update.

Administrative Announcement

There are no new announcements at this time.

Have an admin-level account? Edit this box by clicking on Admin Stuff > System Settings (or just click here).

Open Tickets (13)
Pending Comments (0)
Pending Ideas/Votes (0)
Errors (0)
Spam (0)
Status Posts

Queue: EKU eResources Queue
Source: All Sources
Status: Not Closed
Owned by

Filter
(clear)
<table>
<thead>
<tr>
<th>Id</th>
<th>Status</th>
<th>Queue</th>
<th>Question</th>
<th>Last Message From</th>
<th>Owner</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>705822</td>
<td>Now</td>
<td>EKU eResources Queue</td>
<td>University of Chicago Press Journals 😞 Kelly Asked via Staff Entry</td>
<td>Patron</td>
<td>Rebecca Stimett</td>
<td>Jan 04 2016, 01:33pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Subscription - change of pub/platform or title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>674686</td>
<td>Pending</td>
<td>EKU eResources Queue</td>
<td>Journal of Advanced Nursing record has links to unrelated journal Dermatology Nursing 😞 OCLC Support (<a href="mailto:support@oclc.org">support@oclc.org</a>) Asked via Staff Entry</td>
<td>User</td>
<td>Laura Edwards</td>
<td>Jan 04 2016, 01:31pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Linking - Discovery Metadata update</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>683900</td>
<td>Open</td>
<td>EKU eResources Queue</td>
<td>Maney Publishing acquired by Taylor and Francis 😞 Jens Asked via Staff Entry</td>
<td>Patron</td>
<td>Jens Arneson</td>
<td>Jan 04 2016, 01:30pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Subscription - change of pub/platform or title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>684423</td>
<td>Pending</td>
<td>EKU eResources Queue</td>
<td>Access Interruption to music in print 😞 Jens Asked via Staff Entry</td>
<td>Patron</td>
<td>Jens Arneson</td>
<td>Jan 04 2016, 01:30pm</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Awaiting Vendor Fix Product: Music in Print Series</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating a ticket by staff entry

No replies to this ticket.

Post an Internal Note
Assign/Transfer

Internal Note

Email Note to
Select recipients...

Add to Analytics
Do not add to Analytics Dataset

Under the hood… Tickets

< Original question
Can be edited/updated >
Chat turned into a ticket
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.

Recommendations from your system (FAQs) (10), link
- #99265: 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
- #102763: How do I log in to LearningExpress? copy
- #107597: Tips for managing an eResource troubleshooting ticket copy
- #105444: Problem with the library resources? copy
E-Key login examples:
- Student (john_doe21)
- Faculty/Staff (jdoej)

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@ymail.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" <kellysmith2@gmail.com>, "Laura Edwards" <laua.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]
Under the hood… Tickets

Example Ticket screen capture – page 5
Under the hood… Chat

LibChat Dashboard  Chatting as: Kelly Smith

- Don't forget to sign off of LibChat at the end of your shift/day.

Chat Activity

Chatting:
Name: Test patron #3
Staff: Kelly Smith
Department: EKU Libraries

20 seconds ago

Monitored Departments

- Kelly
- EKU Libraries

Test patron #3
Test patron #3: testing again
10 seconds ago
You are now connected with Test patron #3
Kelly Smith: This is the staff side of LibChat
just now

Canned Messages
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: Byo.

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.
Type of Issue Statistics

- No Data
- Vendor platform problem
- OCLC system outage
- User technical issue
- Metadata update needed
- Discovery
- Link resolver
- EZproxy
- Subscription problem
- Enhancement request
- Workflow management

Transactions
Under the hood... Analytics

### Daily Distribution (on what days are the questions asked)

<table>
<thead>
<tr>
<th>Day</th>
<th>MON</th>
<th>TUE</th>
<th>WED</th>
<th>THU</th>
<th>FRI</th>
<th>SAT</th>
<th>SUN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>%</td>
<td>17%</td>
<td>8%</td>
<td>0%</td>
<td>17%</td>
<td>17%</td>
<td>33%</td>
<td>8%</td>
</tr>
</tbody>
</table>

### Transactions By Day of the Week

```
transactions:

Monday: 2
Tuesday: 1
Wednesday: 0
Thursday: 2
Friday: 2
Saturday: 4
Sunday: 1
```
Under the hood… Analytics
Under the hood… Other Features

Resource Status Update Widget

- All databases are working normally!
- Having issues logging in?
- Clear your cache (CTRL + SHIFT + DEL) and try again.

Twitter Integration

- Thx @EKULibResources & @ekulibraries!
- Neuroscience display for Tall Sharet
- “Optimism Bias” #EKU Thur Dec 3 @ekupsy
- https://t.co/F4a886ZanN
- Asked via Twitter
- Queue: EKU Reference Queue
- Status: No Response
- Site URL / Related Link: No Response
- Department or Class (e.g., ENG 102): No Response
- More Detail / Explanation: No Response

ErikLiddell (@ErikLiddell)
I tried to login and got an error message. Help?

There are a few common problems you might encounter when logging into the Library resources.

** EZproxy Server Error**

** EZproxy Server Error: Please tell your server administrator to check messages её proxy magic for a Max/ VirtualHosts error.**

This message indicates that all access to online library resources is down. If you see this Max/ VirtualHosts error now, please submit this as a question as we can fix the problem as soon as possible.

** Broken Link**

Occur: This link is broken. Please copy this error message and paste it in the chat box to the right or email it to systems-library@eku.edu so the Library can fix it. The problem will be addressed within one business day.

If you select a link to an online library resource and you get an "Oops, this link is broken" message, simply copy the error message and send it to systems-library@eku.edu so we can fix it.

** CAS Login Errors**

The credentials you provided cannot be determined to be authentic.

If you are trying to log in via the Central Authentication Service (CAS) screen and get this error message, make sure you are entering your username correctly. Do not include the email domain part.

Correct: john_doe@mymail.eku.edu

Incorrect: john_doe@myemail.eku.edu

If you are entering your username correctly, and your password has not changed. Contact IT to make sure your account is up.
FAQs are suggested as end user types in a question

Customizable end user ticket submission form

Embedded Chat widget

Browsable FAQs with locally customized tags.
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