Page Not Found: creating a troubleshooting workflow for your library

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Reporting the Issue

Being aware of the issue is the first step in the process. All library staff should be aware of how and to who an issue should be reported. Common methods are:

- ◆ Through “report a problem” forms in library catalog
- ◆ In person, via email, chat or phone to reference staff
- ◆ Librarian discovered issue during searching or during testing
- ◆ Via email to technical services staff

Email should be sent to a shared account which several trained troubleshooting staff monitor several times per day. This keeps related emails together in an easily searchable location and allows for issues to be addressed quickly.

Tracking Issues

Tracking reported issues is important for several reasons:

- ◆ Organize current reports and flag issues for follow up
- ◆ Identify trends or chronically problematic resources
- ◆ Track coordination across departments
- ◆ Quickly find solutions for new issues based on previous reports

Methods can be as simple as creating an Excel spreadsheet and recording basic information for each report or placing a colored flag on email identifying who is working on it. Other more complex programs exist depending on the type of information being tracked.

Introduction

As more library resources are moving online patrons and staff are trying to keep up with the rapidly changing technology. Almost daily libraries are being notified of platform updates, journal coverage changes, and security improvements to their databases. Ensuring seamless and easy access to the library’s electronic resources is key to drawing patrons to the library. Having an effective and consistent troubleshooting workflow can help keep access up and restore it in the event of unexpected downtime.

Identifying the Problem

Once the problem report is received actually diagnosing the problem can be challenging. Proper staff training and identifying common points of failure ahead of time can speed up the process. Common points include:

- ◆ Bad or outdated links in the library catalog
- ◆ Failed Open URL linking
- ◆ Authentication issues (proxy, out of date stanzas, IP ranges)
- ◆ Content removed by vendor and not updated in ILS
- ◆ Vendor inadvertently revoked access
- ◆ Acquisitions failed to renew or subscription lapsed
- ◆ Technical issues in database or in library’s systems
- ◆ User error

Identifying the steps needed to troubleshoot each area prior to encountering issues will lead to a quicker and more seamless process. Many reports will involve follow up and testing to identify what area it falls into. Thorough information gathering before contacting vendors or making changes is crucial for narrowing down the cause. Replicating the problem and testing both on and off campus are also valuable steps in the process.

References

Sunshine Carter & Stacie Traill (2017) Essential skills and knowledge for troubleshooting e-resources access issues in a web-scale discovery environment, *Journal of Electronic Resources Librarianship*, 29:1, 1-15, DOI: 10.1080/1941126X.2017.1270096

Effective Problem Reports

After gathering all necessary information and identifying the problem submitting a problem report to a vendor might be needed. Including well organized information will allow the vendor to find any issues on their end quickly and minimize back and forth requests for additional information. Elements of effective reports include:

- ◆ Detailed description of the issue (when it started, occurring on or off campus, for what products)
- ◆ Steps needed to replicate it
- ◆ Screen shots or short video (Jing is great for this) can be very useful for some problems
- ◆ Links that are being used to access the resources and Open URLs
- ◆ Any updates that have been performed by the library recently or suspected causes
- ◆ If the resource is completely down indicate this is a critical fix

After contacting the vendor flag for follow up later and keep checking back if a resolution is not found. Keep testing at the library also as solutions are sometimes found later.

Solutions

After a solution is found test it on and off campus before notifying affected users of the fix. Document the cause, who was contacted, and the solution for future reference. If a certain resource is chronically problematic consider exploring alternatives to ensure problem free access for library staff and patrons.