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Tracking Trouble: Managing Primo Bug Reports

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A decorative graphic on the left side of the slide consists of white and light blue lines resembling a circuit board or a tree structure, with small circles at various points. A small yellow speech bubble icon is located at the top left corner.

TRACKING TROUBLE: MANAGING PRIMO BUG REPORTS

CARIN YAVORCIK, ELECTRONIC RESOURCES LIBRARIAN
CONCORDIA UNIVERSITY - PORTLAND

OVERVIEW

- Types of problems
- Our solution: Tracking Spreadsheet
- Useful formulas
- Statistics
- Future directions



Chester has graciously agreed to add a little levity to this presentation.





ARTICLE / multiple sources exist. see all

On Writing, Technical Communication, and Information Technology: The Core Competencies of Technical Communication.

Hart - Davidson, William

Technical Communication: Journal of the Society for Technical Communication, 2001, Vol.48(2), p.145-55

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CONFUSION!

- 1



ARTICLE

Keeping Your Temper under Control: Materials and the Manufacture of Papuan Pottery

Rye, O. S.

Archaeology & Physical Anthropology in Oceania, 1 July 1976, Vol.11(2), pp.106-137

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- 2



ARTICLE

KEEPING YOUR TEMPER UNDER CONTROL: MATERIALS AND THE MANUFACTURE OF PAPUAN POTTERY

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Archaeology and Physical Anthropology in Oceania, July 1976, Vol.11(2), pp.106-137

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MORE CONFUSION!



The screenshot shows the ProQuest website interface. At the top, the ProQuest logo is on the left, and navigation icons (refresh, folder, user, help) are on the right. Below the logo is a navigation bar with links: Basic Search, Advanced Search, Publications, Browse, and Databases (10). The main content area has a dark, abstract background. A large, semi-transparent white box in the center contains the following text:

Your search for ISSN(0276-928X) AND VOL(39) AND ISS(5) AND PAGE("40") found 0 results.
Please modify your search and try again. [Search tips](#)

Below this message, it says "Other searches to try:" followed by "There are no related searches for your search." At the bottom of the white box, there is a search bar containing the query: `ISSN(0276-928X) AND VOL(39) AND ISS(5) AND PAGE("40")`. To the left of the search bar are filter buttons: All (selected), Scholarly Journals, Books, Videos & Audio, Dissertations & Theses, and More. Below the search bar, there are checkboxes for "Full text" (checked) and "Peer reviewed" (unchecked), followed by a note: "Searches from this page will not search a document's full text". To the right of the search bar are links for "Recent searches" and "Search tips".



TASK MANAGEMENT COMPLICATIONS

- Volume
 - Limited ability to fix in-house
 - Multiple vendors – no single interface
 - Vendors have long resolve times
 - Tickets have different priority levels
- 
- 

OUR SOLUTION: TRACKING SPREADSHEET

- Gathers information about tickets from all vendors (and in-house!)
- Full control: include the data we think is important, and organize it in the way that works best for us
- Use formulas to automatically generate follow-up dates and gather statistics
- Serves as a knowledge base for future problems
- Provides statistical information on a variety of data points

LIMITATIONS

- No way to automatically collect data – manual entry of each ticket
- Limited options for multi-person teams – shared workbooks are available, but do not function as well
- Processing power – can only include so much data in one spreadsheet



ONWARDS: SPREADSHEET DEMO!

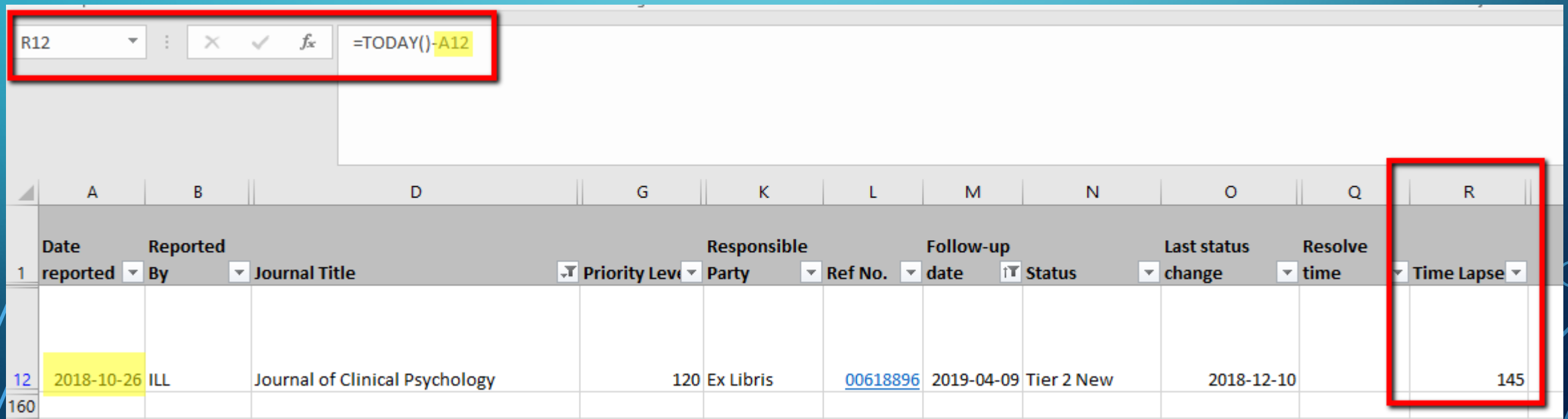
Follow along in a sample template:

<https://bit.ly/2JQOt6j>



USEFUL FORMULAS

=TODAY()-[date] – calculate time lapsed since a particular date



Date reported	Reported By	Journal Title	Priority Level	Responsible Party	Ref No.	Follow-up date	Status	Last status change	Resolve time	Time Lapse
2018-10-26	ILL	Journal of Clinical Psychology	120	Ex Libris	00618896	2019-04-09	Tier 2 New	2018-12-10		145

USEFUL FORMULAS

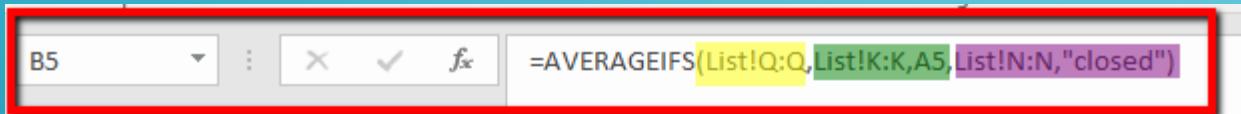
=IF(ISNUMBER(SEARCH())) – perform a logical test based on text in a cell (do X if present, do Y if not present)

- Used to calculate follow-up date based on status/priority
- Nest to perform multiple logical tests

Date reported		Reported By	Journal Title	Responsible Party	Ref No.	Priority Level	Follow-up date	Status	Last status change
10	2018-10-26	ILL	Journal of Clinical Psychology	Ex Libris	00618896	120	2019-04-09	Tier 2 New	2018-12-10

USEFUL FORMULAS

=COUNTIFS/AVERAGEIFS – count/average number of cells that meet certain conditions



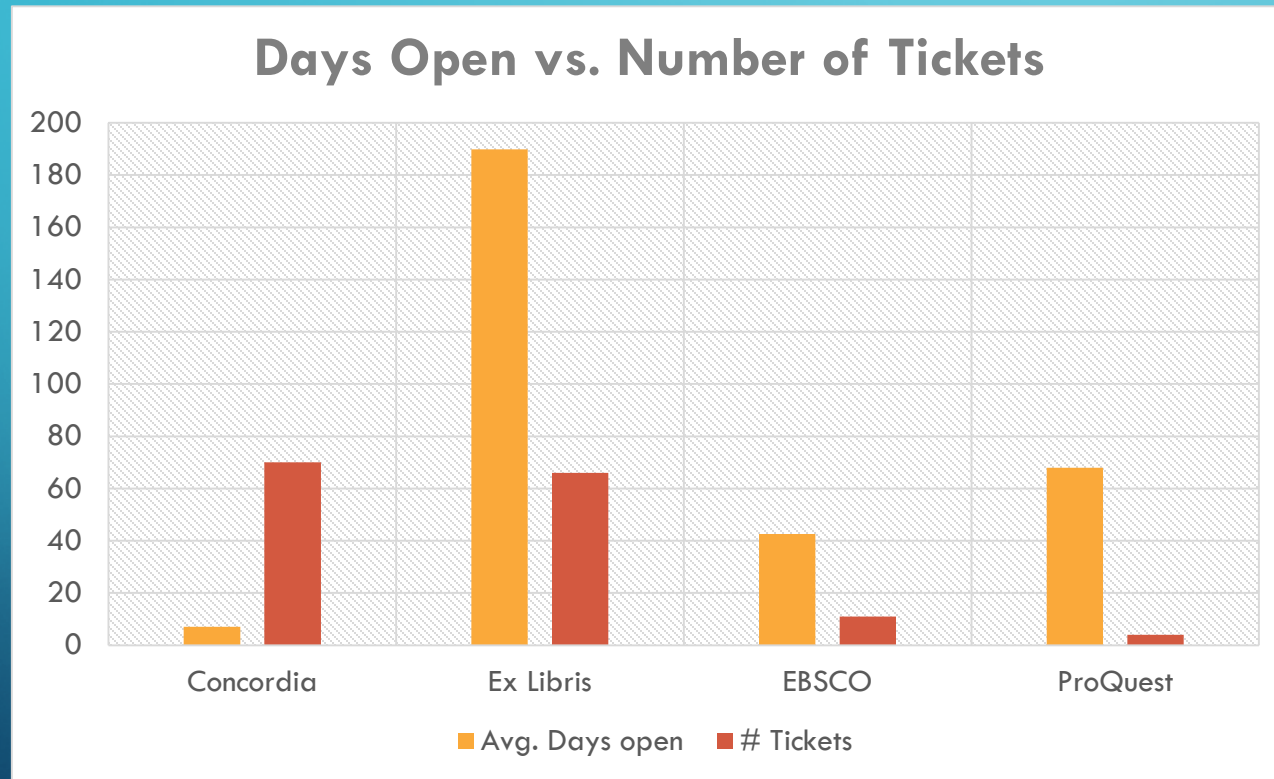
“List!” tells Excel to look in the Worksheet named List

					A	K	L	M	N	O	Q	
3					1	Date reported	Responsible Party	Ref No.	Follow-up date	Status	Last status change	Resolve time
4	Responsible Party	Avg. Resolution	Avg. Days open	# Tickets								
5	Ex Libris	185	196	66								
6	Concordia	7	7	70								
7	EBSCO	22	43	11								
8	ProQuest	115	68	4								
9	JSTOR	8		2								
10	Wiley	40		1								
11	Gale		86	2	43	2018-03-14	Ex Libris	00529058		Closed	2018-12-20	281
16					16							

Stats

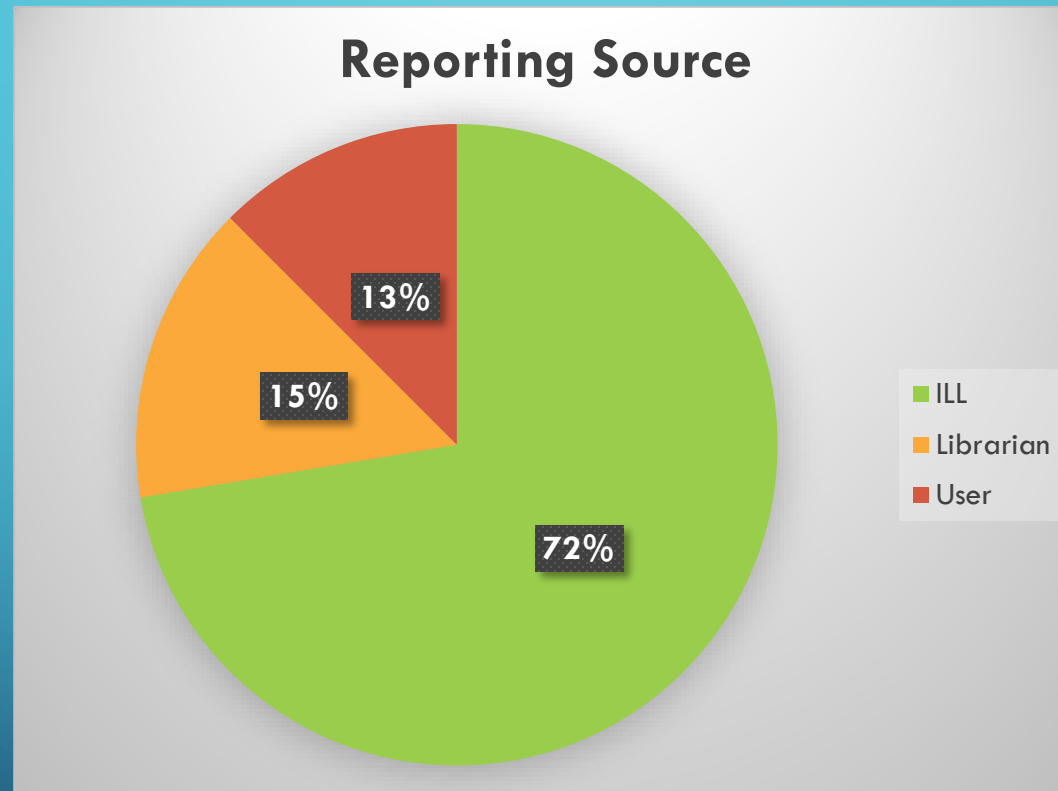
List

STATS!



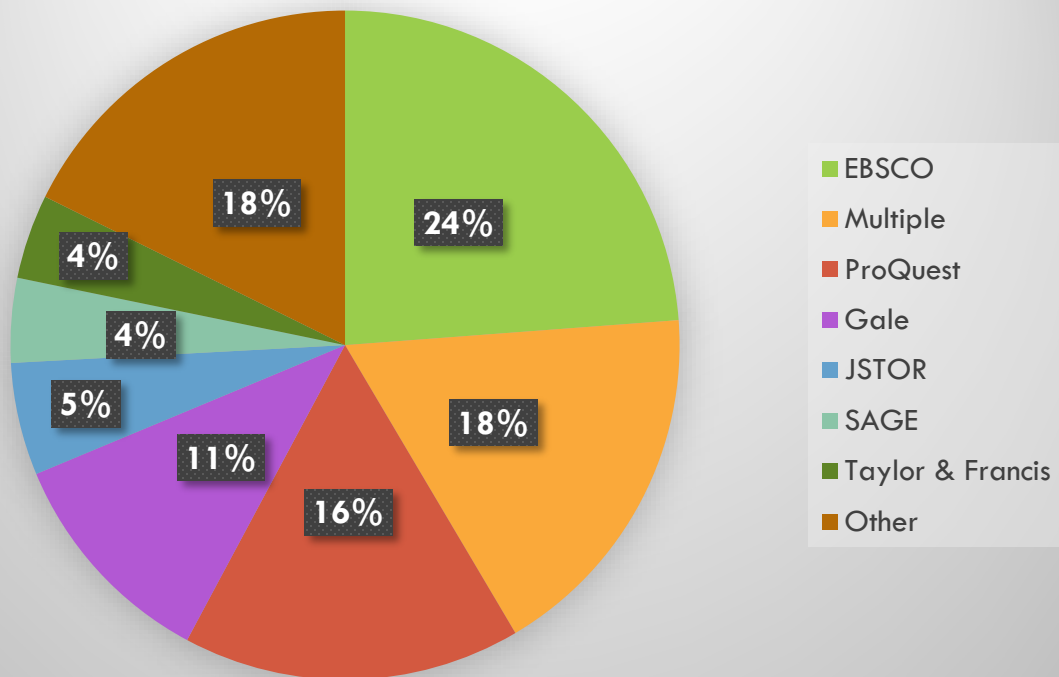
- Total # Tickets: 159
- Overall average days open: 89
- Longest time open: 771 days

STATS!



STATS!

Database Vendor



Databases with the most tickets:

- EBSCO Education Source
- ProQuest Central
- JSTOR

FUTURE DIRECTIONS?

- Collect information on type of problem
- Investigate multi-user functionality
- Assign tracking numbers for internal tickets
- Integrate stats with annual database review


NEW DEVELOPMENT: REPORT A PROBLEM FORM

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Please describe the problem:

If you received an error message, what did it say?

Please give us as much information about the item you are trying to access as you can. If possible, provide a citation to the resource.

If possible, please provide a link to the page where you encountered this problem.

OpenURL (staff use only)

https://na01.alma.exlibrisgroup.com/view/uresolver/01ALLIANCE_CONC/openurl?rfr_id=info:sid/primo.exlibrisgroup.com-

QUESTIONS?

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Pronouns: she, her, hers

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