Promoting A Service Culture Across Technical and Public Services: Lessons from Electronic Resource Access Troubleshooting and Support

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If “the functions that the library performs have been blown up and scattered throughout the universe,”¹ then the same holds true for technical and public services. Anymore, the old distinctions between the “front office” and the “back office” fail to align with library practice. As Hiatt says, “Technical Services is Public Services.” Technical and public services personnel are equally involved in providing resources, services, and support direct to patrons, demanding improved communication, collaboration, and shared competencies library-wide.

Embracing the belief that “Technical Services is Public Services,” this essay explores how technical services personnel contribute to a service culture that diminishes old lines between technical and public services by integrating electronic resource access (ERA) troubleshooting and support into existing public services workflows. As Resnick and Clark argue, “traditional library divisions… are no longer helpful in enabling consistent and reliable access to electronic resources, which are purchased and managed throughout the organization, making access an integrated process that is part of everyone's job.”² ERA troubleshooting and support represents a critical point of contact between service units that ideally contributes to a shared service culture, rather than eroding it.

First, this essay considers the importance of communication and referral skills commonly associated with reference work to ERA troubleshooting and support. In doing so, this essay emphasizes shared competencies across technical and public services practice. Next, this essay provides a case study of support practices at Georgia Southern University, with emphasis on how technical and public services personnel are leveraging a shared Springshare LibAnswers platform to support patrons across departmental lines. The goal of this essay is to encourage public service capacity-building within technical services pursuant to promoting a shared service culture across service units.

Shared Challenges, Shared Competencies

ERA troubleshooting and support is recognized throughout the literature as presenting unique, and uniquely complex, challenges for personnel across service units.³ As Borchert lamented in 2006, when a patron complains about an access issue,

we must determine if it was a problem with the user, the library, the publisher, the subscription agent, the vendor managing the publisher's content, the database from which the citation was

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found, or the proxy database. Access problems can also be caused by an Internet glitch, firewalls preventing proxy access, outdated software versions, or incompatible browsers.5

The technical complexity of ERA-related issues often is considerable, requiring careful diagnosis and appropriate referral to resolve. Public services personnel play a vital role in supporting this process, and are often the first to uncover access issues. As Jasper says, “the likelihood of a single librarian or a single library department being able to manage the entire process of making online resources available seems very small.”6

At the same time, as libraries have accelerated the transition to electronic resources, awareness of technical services’ public service role has increased. While patrons have always been “the direct customers of technical services work,”7 Hiatt says, the transition to electronic resources “has made our connection with the patron-customer more immediate and apparent.”8 Patrons interact with technical services work everywhere it is found, often without public services mediation. From the catalog and discovery layer, to the A–Z database list and link resolver, to authentication and full-text retrieval, patrons directly interact with technical services decisions. When ERA issues arise, technical services personnel provide troubleshooting and support. Given the complexity of library collections and the ERA-related issues that arise, little wonder that technical services personnel are now more involved in direct patron support than in the print-dominated environment.

Technical services’ public service role comes into clearer focus when we consider that technical services personnel rely on many of the same core competencies as reference librarians when addressing ERA-related issues. In a 2009 study, Tyra Resnick analyzed a sample of ERA-related problem reports collected by Texas A&M University Libraries by coding each for utilization of twelve “Competencies for Lifelong Learning and Professional Success” published by the Medical Library Association.9 Among these, competencies related to communications with users and other internal library staff were utilized most to resolve ERA-related issues. According to this study, 98% of all resolved problem reports involved competencies related to communication and referral, while only 40% involved competencies related to specialized knowledge of resources, and only 38% involved competencies related to specialized knowledge of library technologies.10

In a later 2010 study, Resnick and her colleagues analyzed a larger sample of ERA-related problem reports drawn from Texas A&M University Libraries’ helpdesk and virtual reference systems.11 Each report was coded for utilization of “communication,” “technical knowledge,” and “resource knowledge” competencies. Again, Resnick and her colleagues determined that communication skills with internal and external audiences, and knowledge and experience to make appropriate internal referrals, were more important for resolving ERA-related issues than technical or resource knowledge competencies.12 Resnick concludes, “the ability to explain various access barriers and solutions or workarounds to users clearly and succinctly is usually associated with reference/public services staff and was definitely the single most important component of effective service provision.”13

As Resnick’s findings suggest, ERA troubleshooters frequently work with patrons and public services personnel to identify information needs, and contribute to their understanding of how library collections work, how to navigate them, and how to respond to real or perceived access barriers. While technical and resource knowledge are important for resolving ERA-related issues, competencies that technical and public services personnel hold in common are what matter most for delivering seamless ERA-related customer services. Resnick’s findings are important for framing any discussion of technical services’ public service role because they point to the fact that ERA-related questions are reference questions. In terms of patron experience and the professional competencies engaged, referring ERA-related questions to technical services personnel is really no different than referring questions to a subject area expert. While the subject matter and solutions may differ, technical and public services personnel fundamentally are engaged in the same work.
The recent literature on ERA troubleshooting and support reveal emerging practices consistent with Resnick’s findings, and strengthen the argument for a shared service culture.\textsuperscript{14} For example, in a 2013 survey of troubleshooting practices at over 200 academic libraries, Rathmel et al. report a transition away from traditional ERMs and email-based troubleshooting solutions toward shared ticketing systems and cross-departmental training.\textsuperscript{15} The authors stress “a need to understand the overlap between reference staff and public services staff who troubleshoot e-resources, particularly related to organizational workflow and training.”\textsuperscript{16} Similarly, in a 2015 survey of 14 academic institutions, Smith reveals increasing interest in ticketing systems for supporting “communication and collaboration, customer responsiveness, workflow efficiency, service effectiveness, and assessment and reporting options.”\textsuperscript{17} Smith emphasizes adoption of systems similar to Springshare LibAnswers, which support direct integration with public services workflows. The case study that follows describes such an implementation.

**ERA Troubleshooting and Support at Georgia Southern University**

Founded in 1906, Georgia Southern University currently offers over 100 degree programs to nearly 21,000 undergraduate and graduate students. The Zach S. Henderson Library employs more than fifty faculty and staff members, and is home to over 650,000 volumes, 775,000 government documents, 175,000 electronic books, 85,000 electronic journals, and over 195 subscription databases. The library is a member of the GALILEO consortium, an initiative of the Board of Regents of the University System of Georgia, which supports a significant portion of the library’s core databases and electronic resources.

While campus IT and the library’s Systems Department play important roles in ERA issue resolution, responsibility for ERA troubleshooting, triage, and support falls to the library’s Collection and Resource Services Department (C&RS). Within C&RS resides the eTeam, a group of technical services personnel responsible for providing both active and reactive ERA support to the library. Initially, C&RS set up the eTeam as a simple email referral service, to which any library personnel could refer access issues. These email reports would be forwarded to two librarians within C&RS, who would address them directly or refer them to the best party to handle the issue. While email referral provided a basic level of support, as the library’s ERA troubleshooting needs grew with an accelerated transition from print to electronic serials and adoption of a discovery layer in the early 2010s, the eTeam began to face challenges managing request volume and complexity.

Recognizing the need to address discovery and ERA-related issues as core services of the technical services department, in early 2015 C&RS reclassified an open position to Discovery Services Librarian, who is charged with coordinating efforts to improve discovery and access to all electronic resources and services. With the addition of this position in late summer 2015, C&RS personnel revisited the eTeam’s organization and workflows, eventually adopting the Springshare LibAnswers platform as the basis for ERA troubleshooting, triage, and support.

When evaluating solutions for managing access-related issues, the eTeam desired a hosted solution that would replicate many features of a traditional IT ticketing system, but one with a minimal learning curve that would be familiar to library personnel and integrate well with existing technical services workflows. A significant priority for eTeam personnel was to move workflows out of their email inboxes, where emails often became lost or buried, and threads would become fragmented, especially where multiple stakeholders were involved. In addition, the eTeam desired a platform for consolidating a variety of workflows, including troubleshooting support, ongoing and ad hoc resource audits, enhancement projects, and new resource rollouts.

At the same time, the eTeam desired to improve communications about ongoing ERA-related issues and enhancement projects with public services staff and patrons. Very often, if access issues were especially complex or took an extended period to resolve, public services staff would become confused about appropriate messaging, or patrons would become lost in email threads. Patrons perceived being given the runaround, and that the
librarians didn’t know how to use their own collection. Moreover, too many ERA troubleshooting requests were coming in by word of mouth, with no real “paper trail” or formal acknowledgment. In turn, status updates could be just as informal, rarely reaching everyone who needed to be aware of them. This often led to redundant effort, where messages or instructions were repeated numerous times to limited effect.

After considering a number of ticketing solutions, the eTeam adopted the Springshare LibAnswers platform for ERA troubleshooting and support. Designed foremost as a platform for managing synchronous and asynchronous reference support, LibAnswers met most of the eTeam’s functional requirements with the added benefit of integrating with public services workflows. LibAnswers supports patron communications and reference via chat, SMS, email, Twitter, and Facebook, and includes internal and external self-service FAQ support, system status support, multiple ticketing queues, and comprehensive reporting features. Recognizing technical services’ public service role in ERA support, the eTeam determined that supporting public services integration would prove critical to the success of any new platform.

The eTeam’s first step after adopting LibAnswers was to create a dedicated eTeam ticketing queue to collect, triage, monitor, and resolve ERA-related requests (see figure 1). All eTeam members belong to the queue, and each member is expected to act on tickets assigned to them. To keep triage orderly, all tickets are evaluated, assigned, and closed by one person, the eTeam leader. While this may sound like a bottleneck, the opposite has proven true. By assigning final responsibility for all tickets to one person, the eTeam leader has an incentive to keep the ball rolling on unassigned and unresolved tickets while eTeam members benefit from a clear chain of command. Triage is evaluated using a three-part tier scheme, which is coded using tags.

![FIGURE 1](image-url)

**eTeam Ticketing Queue in Springshare LibAnswers, including ticket status, owner, and update date**
To start, the eTeam established a dedicated email address for library personnel to report all access issues. All emails sent to this address are forwarded to the queue. In this way, the eTeam has preserved established email referral practices while shifting away from casual or word-of-mouth reporting. Moreover, adoption of a single email address supports increased identification of ERA-related support with the eTeam itself, rather than with individual technical services personnel. This reduces triangulation in support-related communications, especially with patrons. When promoting ERA-related services, the eTeam stresses the importance of using the email so that requests won’t get lost, and as the fastest way to get issues resolved.

Next, to facilitate internal communication about ERA-related issues and enhancements, the eTeam established an internal eTeam FAQ (see figure 2). Available to library personnel only, this FAQ includes an issue reporting form; a system status updater indicating the status of the library’s databases, discovery tools, and authentication systems; a comprehensive “Known ERA Issues” FAQ post; and additional FAQ posts with status updates and support information for library resources. The purpose of this FAQ is to provide a persistent platform for internal ERA-related communications, which contributes to shared accountability across service units. On the one hand, the eTeam is accountable for keeping information up-to-date and making sure everyone is aware of changes. On the other hand, public services personnel are accountable for keeping abreast of updates, consulting support materials, and letting the eTeam know of questions and concerns.

Because this is an internal FAQ, the eTeam can be more technical than in public-facing communications. Whenever appropriate, the eTeam rolls out posts to the internal FAQ first a few hours to a few weeks in advance.
of any public communication. This allows public services personnel time to get familiar with the issue first, prior to offering patron support. For example, when the library recently adopted EBSCO’s Flipster platform, the eTeam prepared an internal FAQ post describing the user interface and how to navigate it. The eTeam rolled this information out to the internal FAQ first, then later to the library’s public-facing self-service FAQ. This gave public services personnel time to familiarize themselves with Flipster first, prior to supporting it at the Information Services Desk.

While library personnel don’t use the issue reporting form much, that’s not really its purpose. Like the internal FAQ itself, the form exists to establish accountability. Any time a staff member sends a personal email or talks to an eTeam member face-to-face, the team member reminds him or her to use the form or email instead. By formalizing the submission process, the eTeam encourages trust in the system while buying distance from requests that might otherwise turn personal. Similarly, the eTeam anonymizes all FAQ posts and communications, listing “eTeam Support” as the author.

One advantage of rolling support materials out to the internal FAQ first is that it gives all library personnel a chance to “kick the tires” a bit before further rolling out new resources or support materials to patrons. Currently, much of the support material that appears on the library’s public-facing FAQ started out in the eTeam queue as an ERA-related support request, was developed into an internal FAQ post by the eTeam, was vetted by public services personnel, then mapped to the public FAQ. Furthermore, repurposing ERA support materials is simplified personnel can target these materials to different audiences from the same platform. In this way, LibAnswer’s ticketing and FAQ functionality directly supports increased collaboration between technical and public services personnel when supporting patrons, supporting a shared service culture.

As suggested earlier, all new tickets ingested into the eTeam queue are evaluated, assigned, and closed by the eTeam leader. Triage is handled using a three-part tier scheme, which is applied using tags (see figure 3). Tags work well because they are easy to apply and change as tickets evolve as well as they are easy to see in the queue. Each ticket is coded for origin and scope, required stakeholder review, and required communication plan. While this scheme may sound excessive, the eTeam’s decision to use a single queue to process support requests, enhancement projects, and new resource rollouts means that team members see a lot of different tasks with varying scope and urgency moving through the queue simultaneously. Thorough coding makes this workflow manageable.

For origin and scope, the eTeam uses a five-tier scheme (T1–T5), from limited-scope issues reported at the patron’s point of need at T0, to full-scale resource audits at T4. Many T0 point-of-need requests come from public services personnel working at the Information Services Desk. These requests can range from buggy browser plugins to highly visible access issues, like when the link resolver suddenly goes dead. Non-trivial point-of-need requests often are re-coded as T1 “emergent” if the eTeam determines that an issue is pervasive and likely impacts other patrons. The eTeam receives many T1 requests from ILL due to authentication and user interface issues, as well as unannounced coverage changes in aggregator databases. Since adopting LibAnswers in late-summer 2015, however, most ERA-related tickets have been coded as T2 “enhancements” originating within the eTeam itself. This is due to a backlog of access-related enhancements the eTeam is now able to address due to improved workflow efficiencies.
For stakeholder review, the eTeam uses a 5-tier scheme to determine what internal or external stakeholders need to be involved to resolve a ticket (S1–S5). This scheme ranges from S1 when only the eTeam member is involved, to S5 when input from an entity external to the library is required (e.g., the Provost, the Faculty Senate Library Committee, or the consortium). By evaluating for stakeholder input early, the eTeam is better able to triage tickets, especially when timing of meetings is likely to impact workflow. Furthermore, as suggested above when collaborating with public services personnel to develop public-facing support materials, evaluating tickets for stakeholder review ensures the eTeam is less likely miss opportunities to do so.

Lastly for communication plan, the eTeam uses a 5-tier scheme to determine the communication activities required to ensure that all stakeholders are informed about resolution of a ticket (C1–C5). This scheme ranges from C1 when no communication is required, to C5 when communication external to the library is required. In many cases, resolving an ERA issue needs no communication at all, especially if it is a minor enhancement or audit-related issue originating from within the eTeam itself. However, even a request originating at point-of-need eventually may require a campus-wide communications strategy. This occurred soon after the eTeam queue was established when a faculty member complained on Facebook that the recently released WorldCat Discovery interface was “unusable.” As it happened, the state consortium had pushed this interface to the library’s A–Z database list without notifying anyone, catching everyone off guard. In this case, what might have been a simple C2 patron communication quickly turned into a C5 external communication plan.

Again, as with the other two tier schemes, coding for communication plan ensures that eTeam members collaborate closely with public services personnel to ensure that stakeholder involvement and communications strategies are communicated early, and that ERA-related issues are supported consistently across service units. Not only does this three-part tier scheme support the eTeam’s and C&RS’s internal workflow management, but it encourages team members to frame their work in terms of how it contributes to a shared service culture. Since its adoption, this process has contributed to a strong perception among technical and public services personnel of improved communication and collaboration across service units, especially regarding provision of access support to patrons.

The eTeam’s decision to adopt a platform that supports public services integration was validated when, over the course of late 2015 and early 2016, the library’s Information Services Department (ISD) adopted the LibAnswers platform for core chat, SMS, and email reference services, including creating a public-facing “Library Resources” FAQ to which the eTeam could map support materials originally developed for library personnel. With ISD’s adoption of LibAnswers, technical and public services personnel are now able to leverage the platform’s ability to support fully integrated reference and technical services. Public services personnel can transfer or generate ERA support tickets directly from chat transcripts, SMS messages, and reference emails. Furthermore, technical and public services have identified opportunities for collaboration that go beyond specific ERA-related support needs, including using the public-facing FAQ to host detailed descriptions for the A–Z database list, collaborative development of subject guides and assets on the LibGuides platform, and dynamic mapping of content across both LibGuides and LibAnswers platforms.18

Conclusion

Through mutual adoption of the LibAnswers platform for reference and technical services support, technical and public services personnel at Georgia Southern have taken early steps toward establishing a service culture that respects shared challenges, core competencies, and a desire to provide seamless customer service experiences to all students, faculty, and staff. Given the ACRL’s recently adopted Framework for Information Literacy for Higher Education’s emphasis on framing library resources and services in domain-appropriate ways, capacity-building for such a shared service culture couldn’t be more timely.19
Furthermore, the eTeam’s experience evaluating and adopting the LibAnswers platform for ERA troubleshooting and support argues strongly for technical services’ responsibility to assert its public service role by promoting such capacity-building. To date, the eTeam has focused on supporting this service culture through collaborative workflow and content development. As Rathmel et al. and Hart and Sugarman describe, ERA-related cross-training is another area of interest to technical and public service units for such capacity-building. While Rathmel et al. recommend further investigation into “the overlap between reference staff and technical services staff who troubleshoot e-resources, particularly related to organizational workflow and training,” current trends are not just promising, but exciting.

Notes
8. Ibid., 9.
10. Ibid., 113.
12. Ibid., 352–353.
13. Ibid., 354.
16. Ibid., 105.