Primo VE Error Reporting Form

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UAB LIBRARIES

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LibWizard Forms Overview

LibWizard Forms is one piece of the LibWizard module of LipApps that allows users to create, collect, and share information for internal and external library use. Aside from creating forms, users can also create surveys, quizzes, and tutorials.

Why LibWizard Forms?

Forms are an efficient way of collecting important information. The data that will be collected for the Primo VE Error Reporting Form are user-reported catalog errors. Example catalog errors are broken links, incorrect metadata, inaccurate coverage dates, as well as any other access issues that prevent full-text accessibility. Collecting this data allows the library to resolve and clean up resources in the catalog; we can pinpoint problem collections, issues with individual titles and articles, and more. Resolving technical issues and cleaning up resources in the catalog is an essential part of maintaining a useful research environment and enhancing user experience.

Chat with a Librarian vs. Primo VE Error Reporting Form

Currently UAB Libraries utilizes Chat with a Librarian to gather information from patrons on aspects of their research and search experience they're having difficulties with. Reference Librarians take shifts to make sure a skilled individual is there to assist with any questions or difficulties patrons have.

These "difficulties" range from research assistance, general library questions (hours, etc.), as well as issues patrons encounter in the catalog. Once a reference librarian speaks live with a patron, technical tickets are usually then made for appropriate departments to resolve relevant issues. For instance, errors such as metadata inaccuracies for print and electronic will be directed to a Metadata Librarian. Technical support requests such as linking errors, coverage date inaccuracies, troubleshooting assistance, EZProxy link generation, server issues, database errors, as well as technical support for vendor site issues are all forwarded to Systems.

The idea behind implementing the Error Reporting Form into the catalog is not only to gather patron reported errors but also to cut down on the already established workflow in place for reporting technical problems. The Error Reporting Form gives patrons the responsibility and independence to report issues instantly without having to chat live with a librarian. This makes the workflow quicker because support tickets are automatically generated, alleviating the task from Reference Librarians. The form is **NOT** meant to assist patrons for immediate requests or help – the intention is to pinpoint problem areas in the catalog so they can be fixed. For immediate assistance, especially for research questions, the form will recommend patrons to use Chat with a Librarian.

Does this workflow mean more support tickets? Yes, but this isn't necessarily a bad thing. The more support tickets we receive, the more we can understand what the catalog needs. By gathering this information, the search experience for users can only get better, more efficient, and less confusing.

Configuration Details: LibWizard & Alma

LibWizard Form Fields

The Error Reporting Form is created by establishing the specific fields which the public form will then display to the user/patron. Fields can also be configured to be hidden from public view but still gather important data, such as ISSN, ISBN, and more.

The LibWizard Error Reporting Form consists of the following fields:

- Public fields, filled out by patron:
    - Intro
    - Name
    - Email
    - Description
    - File Upload
- Auto-filled fields that are included in the form during submissions, but are hidden from patron view when completing the form:
    - Permalink
    - Title
    - Date
    - Author
    - ISBN
    - ISSN
    - Volume
    - Issue
    - MMSID
    - OCLC number

A. Primo VE Problem Reporting Form: Public View

Notification Emails

Internal

Once a form has been submitted, a notification email is sent to UABLibrariesSupport@uab.libanswers.com to generate a support request in LibAnswers. This process has been configured to keep up with support request statistics as well as create a reply to a patron, if necessary.

There isn't an option to reply to submissions through the LibWizard Form alone. Below is a screenshot of the internal email that is sent out upon a new submission and what the LibAnswers ticket looks like once generated.

B. Internal notification email

New submission notifications are currently configured to be sent to the following two emails: UABLibrariesSupport@uab.libanswers.com and bhall6@uab.edu. Emails can be added or removed. New submission emails include patron-filled fields such as name, UAB email, and description of problem. The email also includes metadata of the resource reported.

C. Auto-generated LibAnswers ticket

Like the internal notification email, the LibAnswers ticket is made upon a new form submission and includes patron-filled fields as well as resource metadata.

External

Notification emails are not sent to patrons once the form has been submitted; however, once the user clicks the submit button a message appears that says "Thank you! Your form has been successfully submitted."

Although the Error Reporting form is not meant for immediate assistance with issues, it is possible to email the patron if necessary. **However, we aim to not contact patrons directly**. The steps for doing so in LibAnswers is as follows.
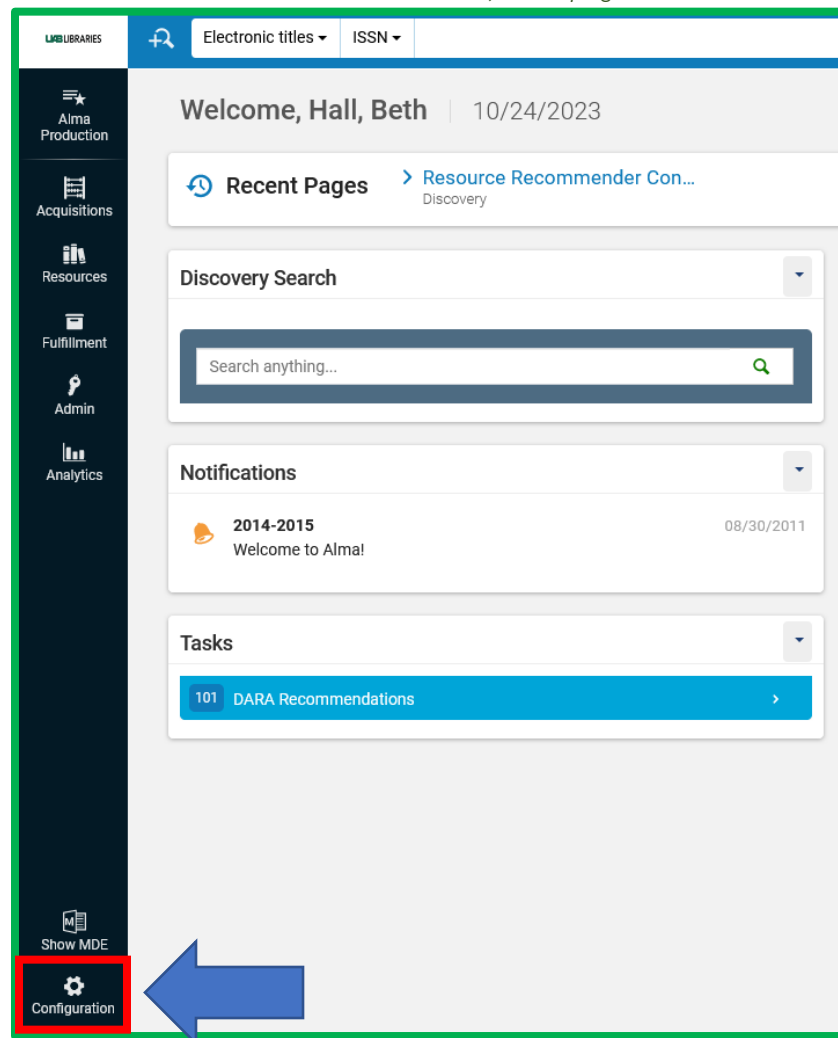
Alma Configuration

The Error Reporting link for completing the form is located on individual records in the catalog–records can include journal titles, electronic and print books, videos, and more.

A. Links section in record details
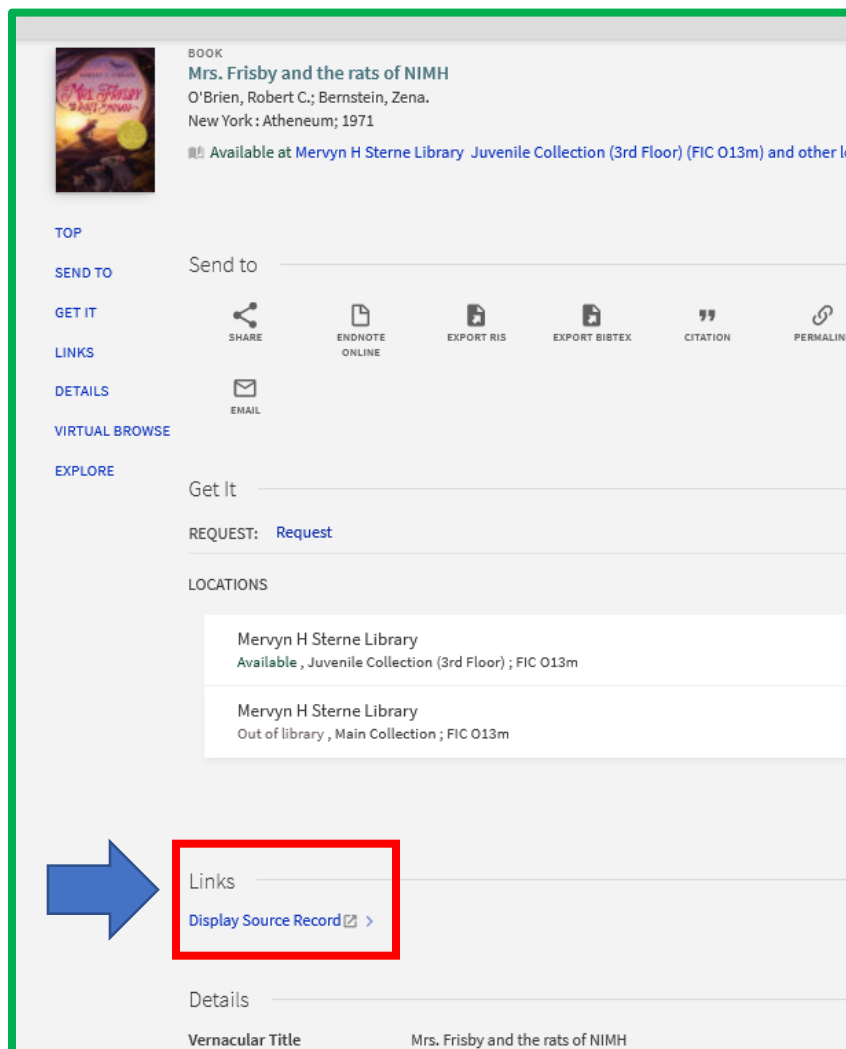
For the form to be integrated into Primo VE it must be configured within Alma. To begin configuration or view service details, log into an active Alma account.
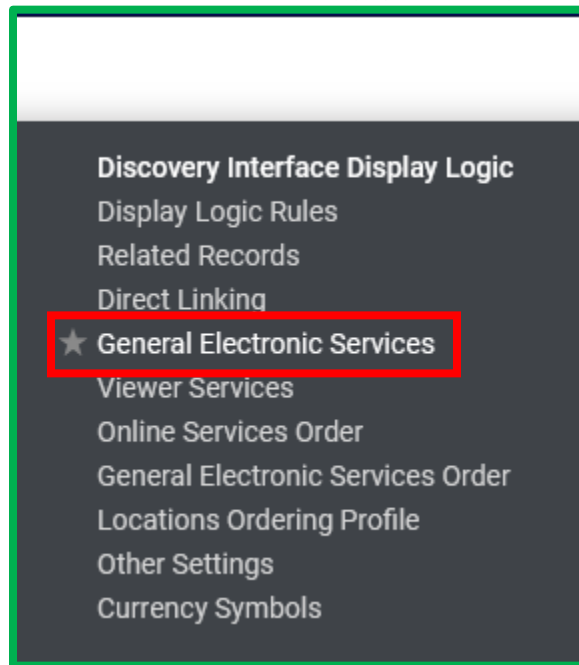
B.   Alma instance, homepage

Once logged into Alma, choose "Configuration" located at the bottom left of the left-side navigation bar on the Alma homepage.

C.   Alma instance, configuration page
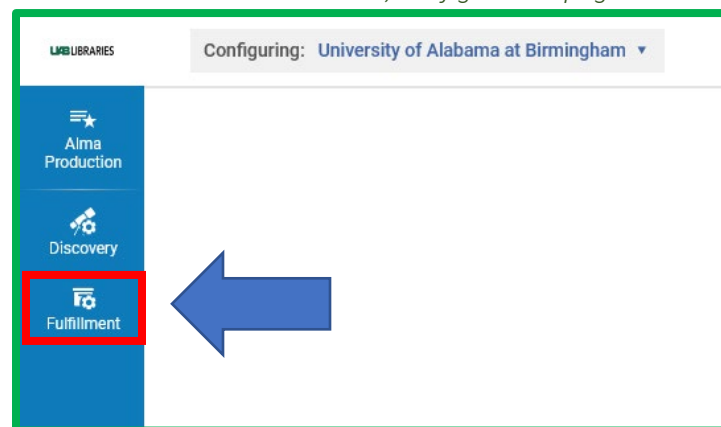
Next, choose "Fulfillment" on the configuration page's left-side navigation bar.

D. Alma instance, Fulfillment pop-out navigation menu

From the fulfillment drop-out menu, choose the "General Electronic Services" link under the "Discovery Interface Display Logic" section of the menu.

E. Alma instance, General Electronic Services page
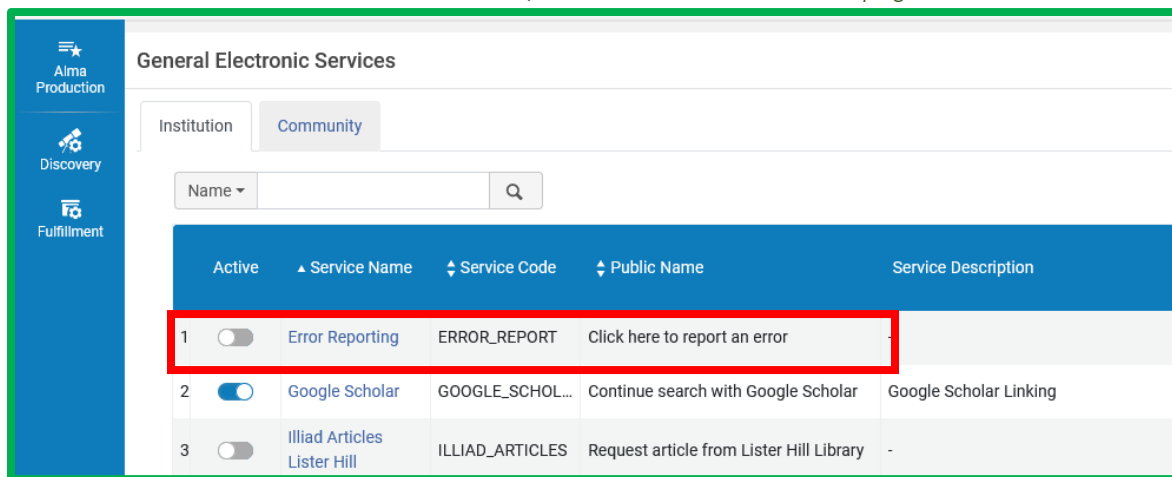
In the General Electronic Services page of Alma, the error reporting form is labeled "Error Reporting." To view or edit the details of the form, choose the edit button. **Do not make any changes unless necessary.** In the above screenshot, the form is set to inactive. To make the link visible in Primo VE, simply change the service status to active.

F. Alma instance, Error Reporting service details

The service details dictate where the error reporting link directs to; in this case, the link will direct to a LibWizard form where patrons are able to submit catalog errors. The service details also control the link name displayed to the public as well as any publicly displayed notes. Service name is what the service is labelled within Alma.

Workflow Chart

G. Primo VE Error Reporting Form Workflow

Primo VE Error Reporting Form Workflow
UAB Libraries

User Key
- Patron
- Systems
- R.A.M.S.

Patron

Patron conducts search in catalog → Patron encounters catalog error/issue → Patron clicks "Report a Problem" link on record → Patron completes form

- Linking
- Metadata
- Coverage
- Access

Systems

LibWizard submission generates → Notification email sends to Systems

LibAnswers ticket generates → Systems forwards ticket to appropriate contact → Resolve issue
- Linking
- Coverage
- Access

R.A.M.S.

Resolve issue
- Metadata

The workflow chart is comprised of three user groups: Patron, Systems, and Resource Acquisitions and Metadata Services (R.A.M.S.).

The patron starts off the workflow by conducting a search in the catalog. Once the patron experiences an issue, they can report it by submitting the form.

Notification emails are then sent out and a new LibAnswers ticket is generated simultaneously. Once a LibAnswers ticket is made, Systems may either resolve the technical issue or the ticket will be directed to the R.A.M.S. department if it concerns metadata.