Managing Primo problems

with optimal user experience in mind

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Agenda and Objectives
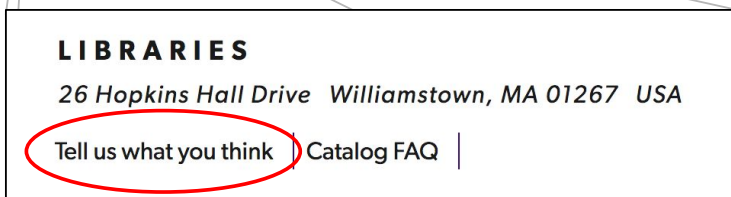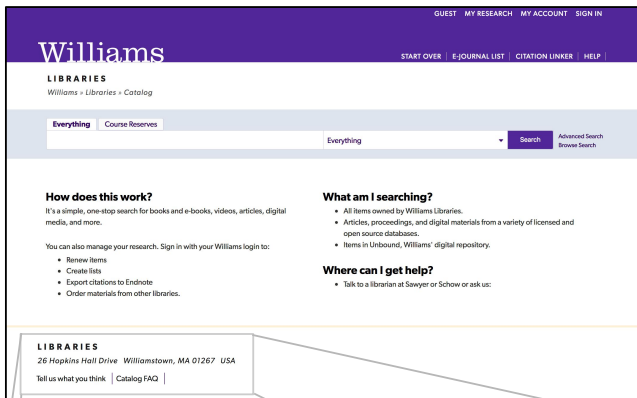
Agenda

- Overview of the Problem Reporting System with short demos
- How I did it
- Feedback and Takeaways
- Questions

Objectives - you'll learn:

- about the problem reporting system
- what you'll need to do in Primo and Google Drive to implement it
- where to go to get the code
- what we learned from this process
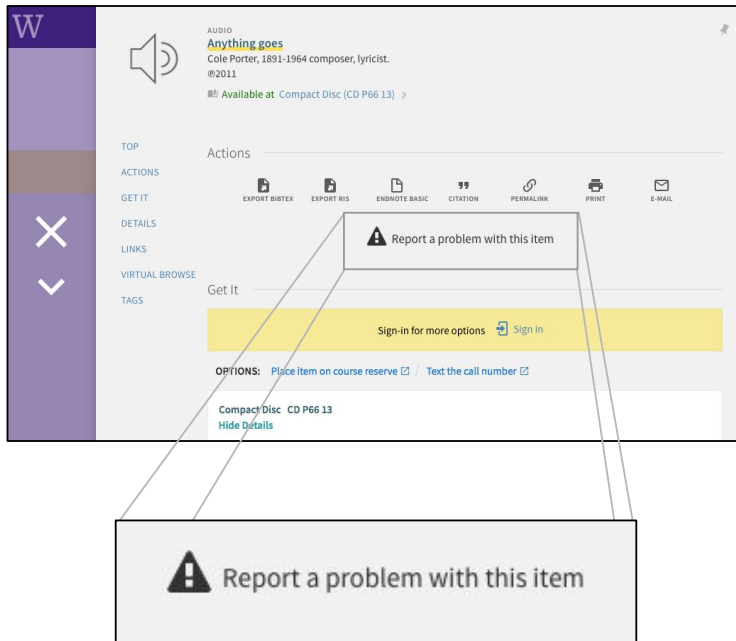
Problem Reporting: a brief history

After GoLive:

- Link in footer to single feedback form
- Two options:
  - General feedback
  - Report a problem
- One custom Google script:
  - Respond to user via email

Issues:

- Not visible, so not used
- Combined feedback
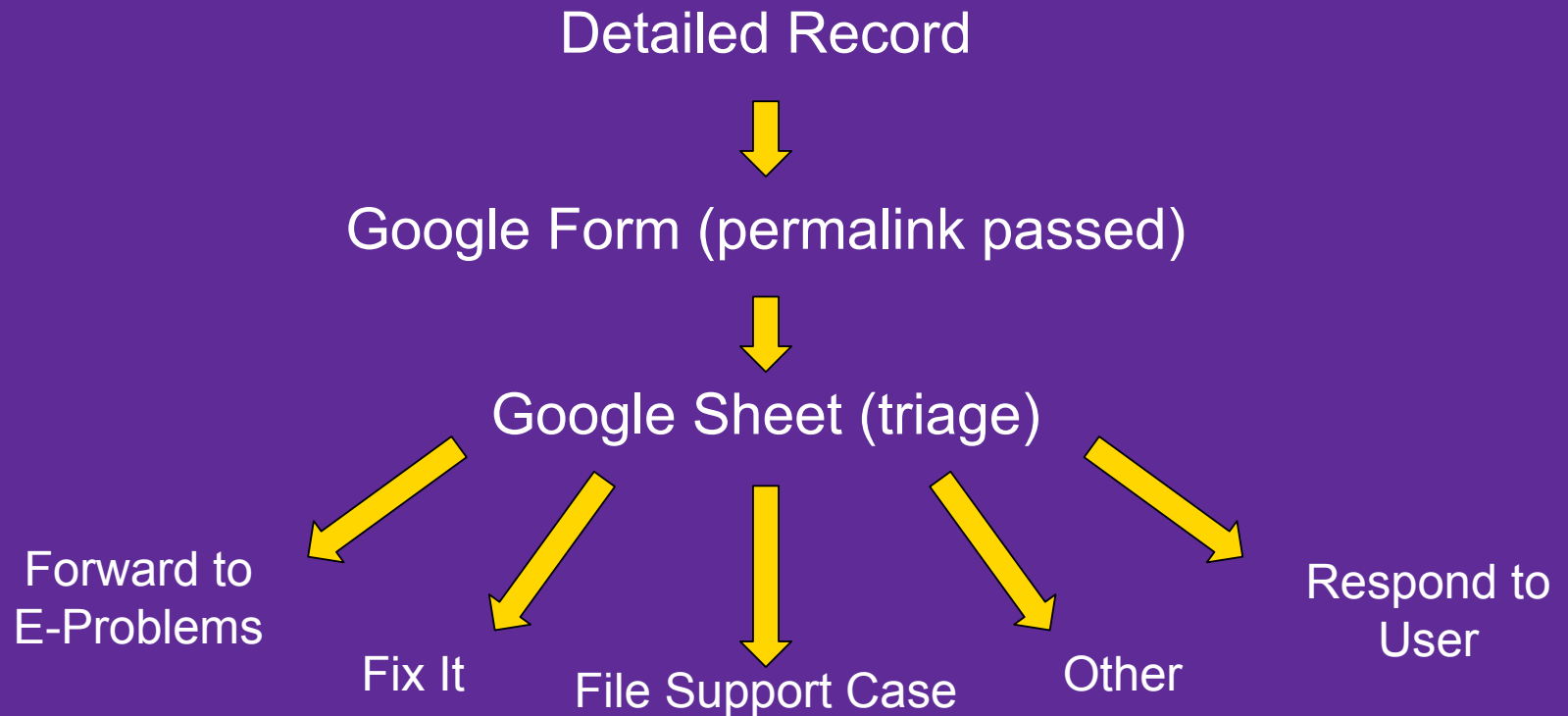- No info passed about item

New UI → New Form!

Necessary changes:

- New UI = no footer (OTB)

Desired changes:

- More visibility
- More data about problem records
- Separate general 👍 / 👎 feedback from problems

New Form: workflow

Detailed Record

Google Form (permalink passed)

Google Sheet (triage)

Forward to E-Problems

Fix It

File Support Case

Other

Respond to User

What does it take to make this work?

Creating Google Form

1. Decide what information you need from the user

2. Get prefilled link

3. Custom Response?

4. Create sheet from results

Add link to catalog record

1. Find where you'd like to put the link

2. Add javasript to custom.js

3. Add logo (host yourself or upload) and necessary CSS

4. Update customization package

Making it work

Create Google Form → Get Prefilled Link
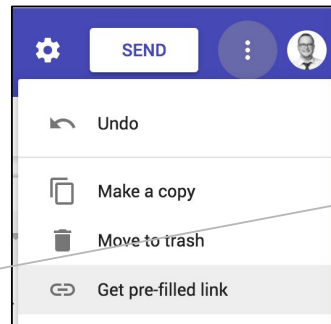
Section 1 of 2

Report a Problem

Oh no! We're sorry that something is not working correctly.

Please tell us what's happening so we can fix it:

≡ Paragraph ▼

Be as detailed as possible.

Long answer text

☐ 🗑 Required 🔵 ⋮

SEND ⋮

↩ Undo

📋 Make a copy

🗑 Move to trash

🔗 Get pre-filled link

Permalink *
If this field is prefilled, please leave as is. If not, please use the "permalink" button in the catalog to generate the URL for this item.

permalink goes here

Permalink *

If this field is prefilled, please leave as is. If not, please use the "permalink" button in the catalog to generate the URL for this item.

permalink goes here

Making it work

Create Google Form → Get Prefilled Link

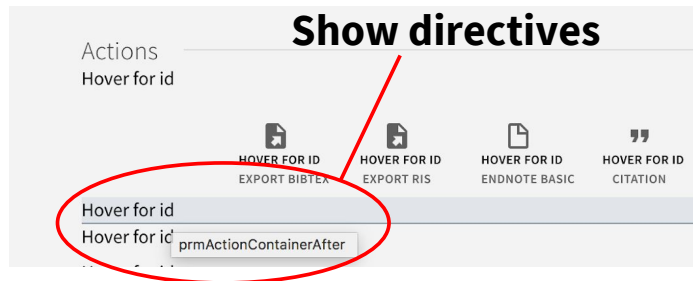| GET LINK	Share this link to include pre-filled responses	COPY LINK

permalink goes here

https://docs.google.com/forms/d/e/1FAIpQLSfCu15ki3ixnee5h74aWvWX3W-zObab9dgjNJMFY2OR-Esi6A/viewform?usp=pp_url&entry.867749837=permalink+goes+here

This is the link you include in your javascript

Making it work

Add link to catalog record

Show directives

Actions
Hover for id

HOVER FOR ID
EXPORT BIBTEX

HOVER FOR ID
EXPORT RIS

HOVER FOR ID
ENDNOTE BASIC

HOVER FOR ID
CITATION

Hover for id
Hover for id

prmActionContainerAfter

```
72  /**********************************************************/
73
74  // Report a Problem
75
76  app.controller('ActionContainerAfterController', [function () {
77      var vm = this;
78
79      vm.getPermalink = getPermalink;
80
81      function getPermalink() {
82          var permalink = encodeURIComponent(window.location.href);
83          var formField = 'https://docs.google.com/forms/d/e/1FAIpQLSdl
            aeHvUuzCeIVp3gC2fKIpcMy7SprQi07Uan9ppyZnWuM3TA/viewform?usp=p
            p_url&entry.867749837=';
84          formField += permalink;
85          return formField;
86      }
87  }]);
88
89  app.component('prmActionContainerAfter', {
90      bindings: { parentCtrl: '<' },
91      controller: 'ActionContainerAfterController',
92      template: '<div id="report-problem" layout="row" layout-
            align="center center"><a id="problemLink" target="_blank"
            href="{{$ctrl.getPermalink()}}" title="Report a problem"><
            img src="https://librarytools.williams.
            edu/assets/images/warning.png">  Report a problem
            with this item</a></div>'
93  });
94
95  /**********************************************************/
```

Javascript in custom.js

Find documentation at:

https://github.com/ExLibrisGroup/primo-explore-package/blob/master/VIEW_CODE/js/README.md
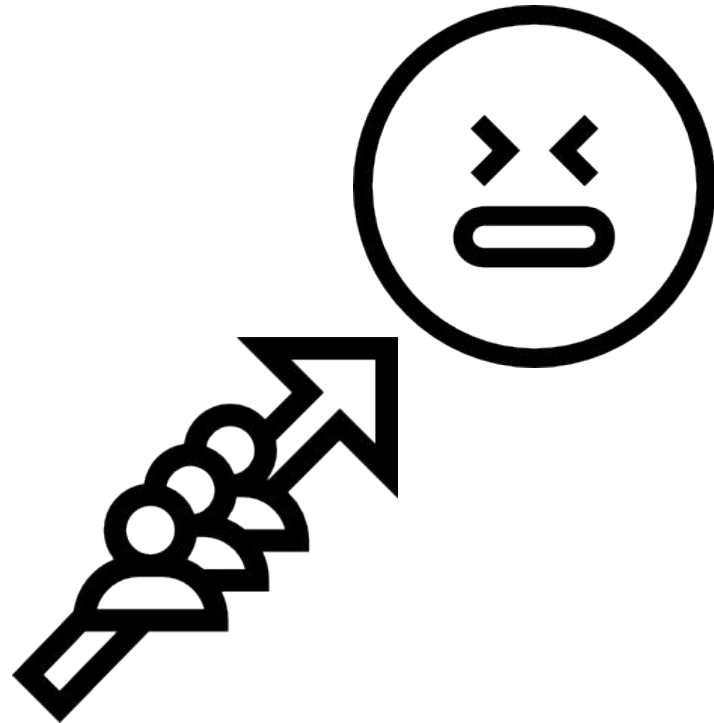
Demo time

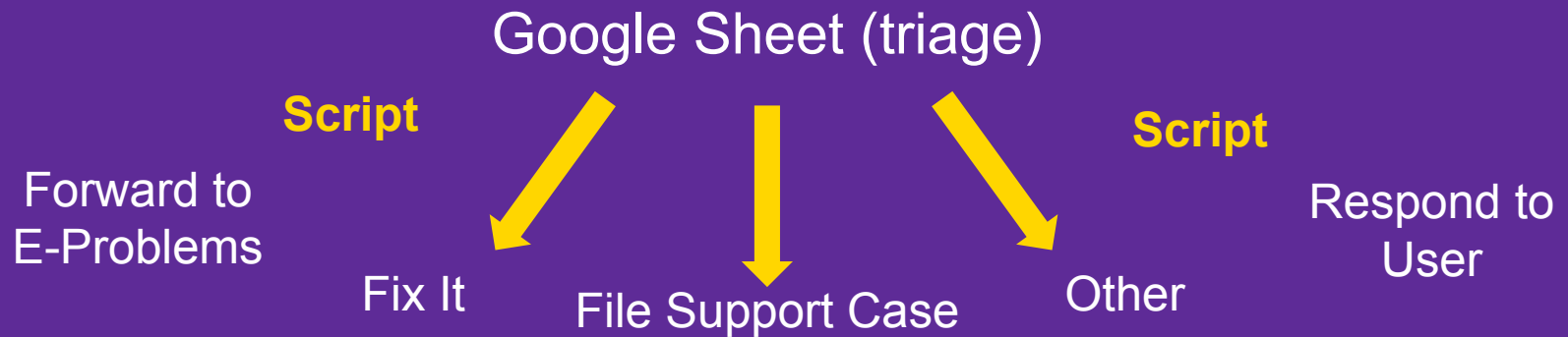# New Form: Use, Reactions, and Ramifications

Use and Reactions

- Soft rollout
- Dramatic increase in use
- Staff Feedback

Ramifications:

- Increase in workload
  - Triage
  - "E-Problems" group
  - "Reference work"
- Increase in pressure
  - Service expectations
  - Number of problems

Increase in workflow: first step

Google Sheet (triage)

Script

Forward to
E-Problems

Fix It

File Support Case

Other

Script

Respond to
User

1. Identify repetitive behavior that can be automated
2. Identify content that can be syndicated/duplicated

Result: Email message builder scripts → decrease triage work

Email message builder: What it does

1. Highlight row

2. Choose where to email

3. Script builds email and sends it

```
// Build message
var message = '<HTML><BODY>'
    + '<p>Hello,</p>'
    + '<p>A user recently reported a problem through the problem reporting form.'
    + '<p><strong>Issue Reported:</strong><br/>'
    + issue
    + '</p><p><strong>Link to record:</strong><br/>'
    + permalink
    + '</p>'
    + '<p>Thank you!</p>'
    + '</HTML></BODY>';
```

4. Script updates form

Built using   Google Apps Script

About Google Apps Script

Google Apps Script

"Google Apps Script is a scripting language based on JavaScript that lets you do new and cool things with G Suite products like Docs, Sheets, Slides, and Forms. There's nothing to install—we give you a code editor right in your browser, and your scripts run on Google's servers."

- Extensive documentation: https://developers.google.com/apps-script/reference/
- My email script uses Spreadsheet App and MailApp (NOT GmailApp) classes

Class SpreadsheetApp

Access and create Google Sheets files. This class is the parent service.

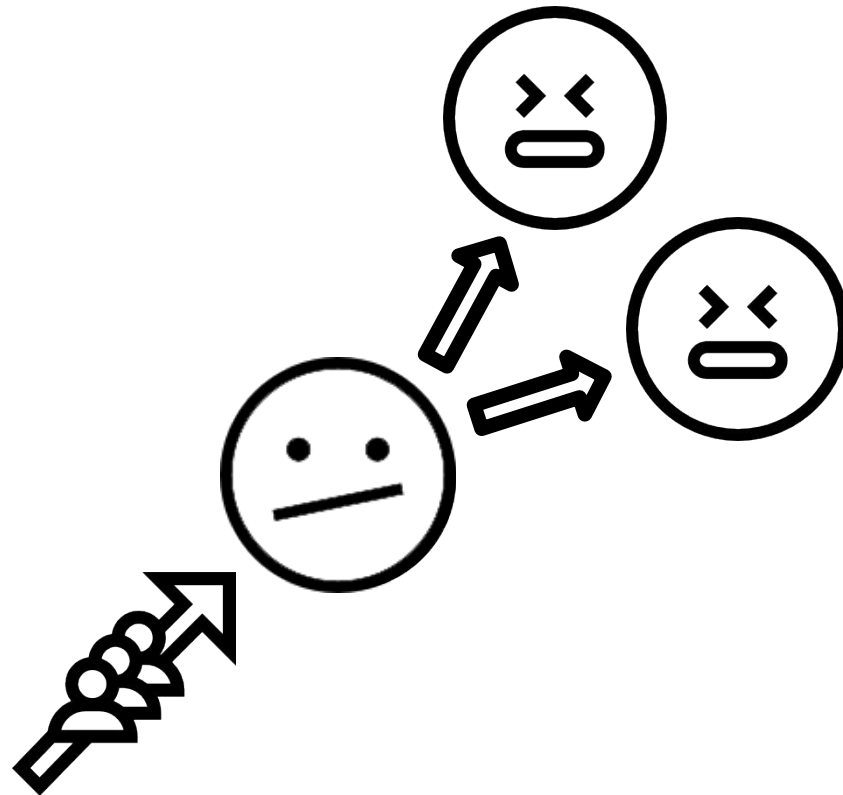## Class MailApp

★★★★★

Sends email.

This service allows users to send emails with complete control over the content of the email. Unlike GmailApp, MailApp's sole purpose is sending email. MailApp cannot access a user's Gmail inbox.

Tutorial: https://developers.google.com/apps-script/articles/sending_emails

Email message builder: ramifications

Ramifications:

- Increase in workload
  - Triage
  - "E-Problems" group
  - "Reference work"
- Increase in pressure
  - Service expectations
  - Number of problems

Increase in workflow: next step

Google Sheet (triage)

Script

Forward to
E-Problems

Fix It

File Support Case

Other

Script
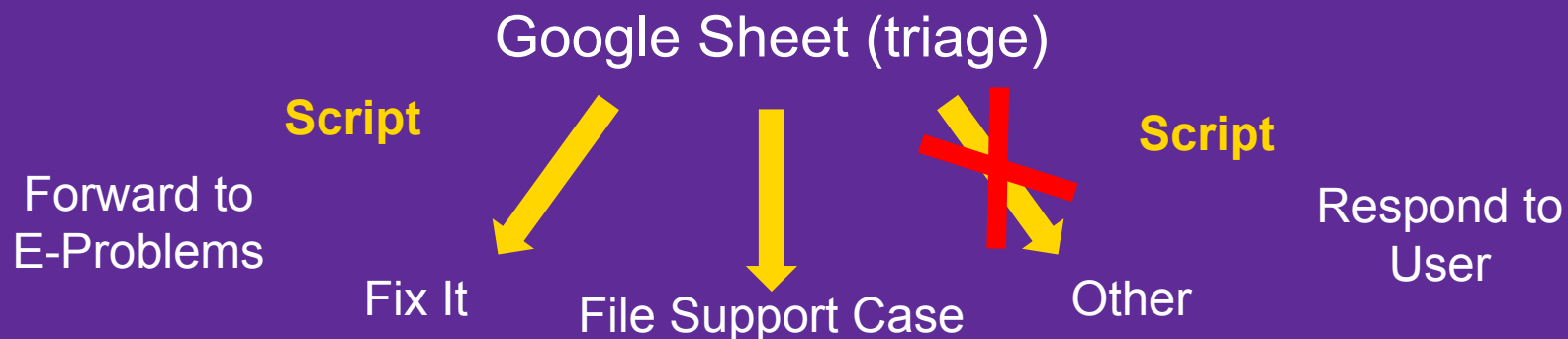
Respond to
User

1. Decrease "reference work" happening outside of scheduled desk shifts
2. Decrease pressure to respond right away

Result: Automate email message builder script → Ask a Librarian service

Forward to Ask a Librarian: What it does

1. Checks to see if any emails from non-library staff have come in recently (past 15 minutes)

2. Script builds email and sends it to our LibAnswers queue

```
if (date > fifteenMinutesAgo) {

    // Logger.log("This has not been emailed");

    // Build message
    var message = '<HTML><BODY>'
    + '<p>A problem with the catalog was recently reported. Here are the details: </p>'
    + '<p><strong>Issue Reported:</strong><br/>'
    + issue
    + '</p><p><strong>Link to record:</strong><br/>'
    + permalink
    + '</p><p><strong>On campus?:</strong><br/>'
    + onCampus
    +'</p><p><strong>Requested through interlibrary loan?:</strong><br/>'
    + ill
    + '</p>'
    + '</HTML></BODY>';
```

3. Scheduled to run every 15 minutes

Current project's triggers			
Run	**Events**		
✕ EmailAskus ⌄	Time-driven ⌄	Minutes timer ⌄	Every 15 minutes ⌄
	notifications		

Making it work

1. Add questions to form

Are you library staff? *
○ Yes
● No

→

One more question...

While we investigate the problem, you can request this item through interlibrary loan (https://library.williams.edu/ill)

Make sure to include something in the notes field indicating that there is a problem with the item.

Have you already requested to borrow this item through interlibrary loan? *
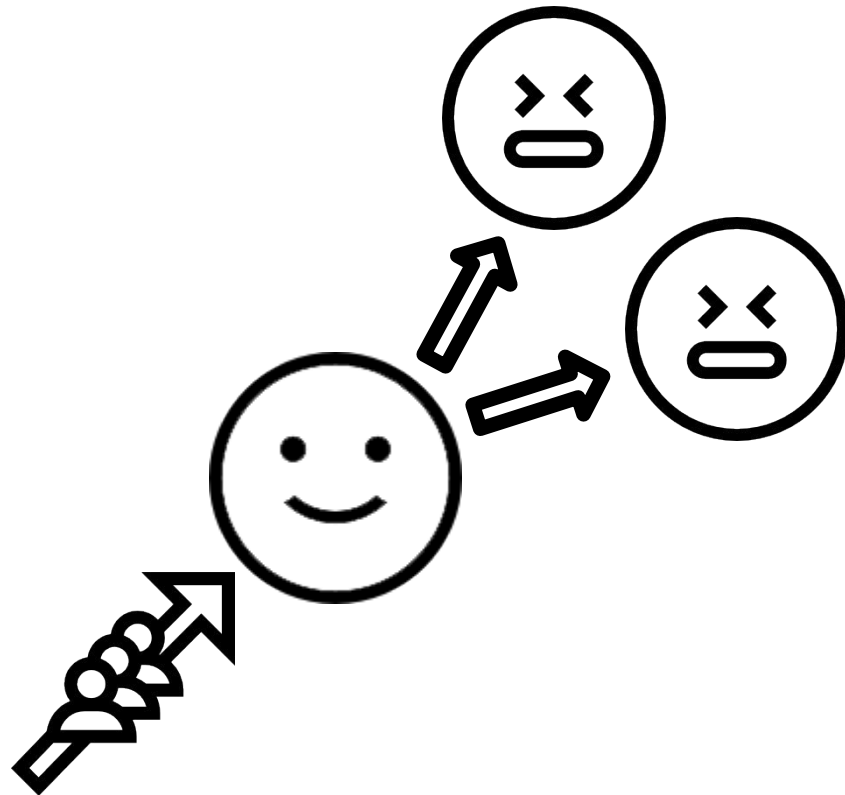
○ Yes
● No
○ Not applicable

2. Change coding of previous scripts
3. Communicate with staff

Forward to Ask a Librarian: ramifications

Ramifications:

- Increase in workload
  - ~~Triage~~
  - "E-Problems" group
  - "Reference work"
- Increase in pressure
  - Service expectations
  - Number of problems

Problems with E-Problems

Email list

- Not clear who (if anyone) is working on the issue
- Gmail conversation mode
- Hard to share notes and manage reported problems

Solution → LibAnswers Queue

Making it work

1. Add additional queue ($99/year cost)
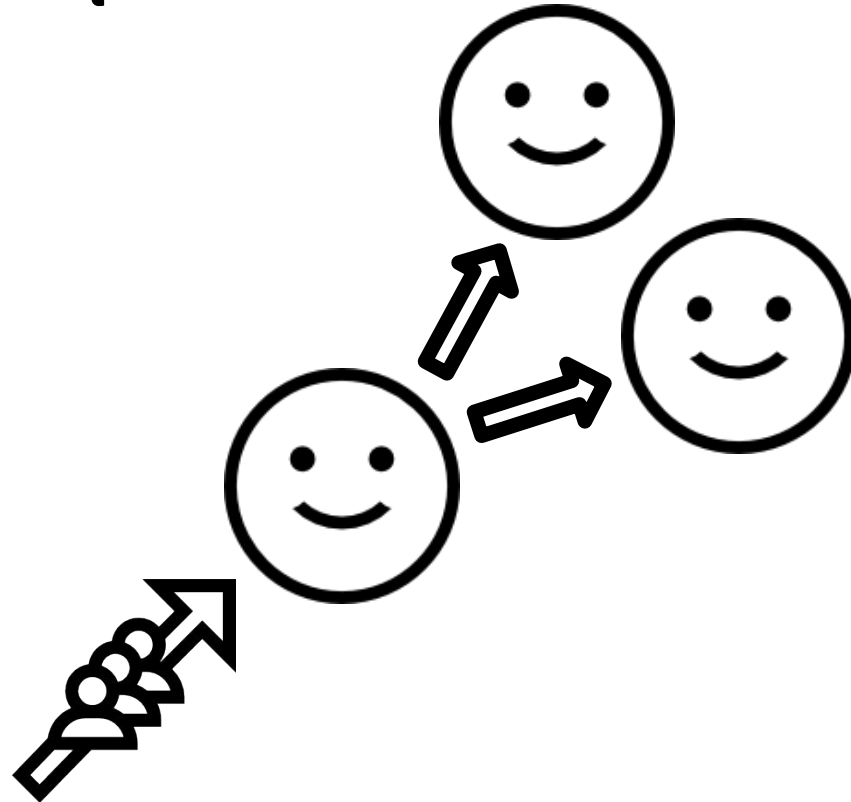2. Change email address in script

```
var data = row.getValues();

var email = 'eproblems@williams.libanswers.com';

var date = data[0][0];
```

3. Train staff

Set up LibAnswers queue: ramifications

Ramifications:

- Increase in workload
  - Triage
  - "E-Problems" group
  - "Reference work"
- Increase in pressure
  - Service expectations
  - Number of problems

Demo time

Where are we now?

(A little over) one year later:

- 212 problems reported
- Stats:
  - 158 resolved
  - 45 in progress
    - Includes 12 support cases opened
  - 5 → "enhancement requests"
  - 108/212 came from end users
- Number of problems reported follows the rhythm of the semester
- Lingering issue: triage bottleneck

Feedback from library staff

Forwarding problems to Ask a Librarian (LibAnswers)

- Compliments
  - Improvement over initial form
    - Enables me to focus on Primo management, and my colleagues to handle the reference questions
    - Better user experience
- Suggestions
  - Canned responses in LibAnswers
  - Hard to find initial issue reported in the email I send
  - "Only as good as the humans using it"

Feedback from library staff

Changing from E-problems email list to LibAnswers queue

- Compliments
  - A lot easier to manage. Features of LibAnswers:
    - Email notification when ticket comes in
    - Claiming questions
    - Internal notes
    - Transferring tickets
    - Closing ticket once resolved
- Need better syncing between Google sheet and LibAnswers queue

Takeaways

Benefits

- Provides a good user experience
  - Most are not used to getting prompt responses to feedback forms
- Helps us identify problems we wouldn't otherwise know about
- Can help us identify large-scale trends/issues
- Has made us realize we need to devote more resources to the management and discovery of electronic content

Drawbacks

- Can take a long time to get something resolved, especially vendor metadata issues
- Sometimes we find problems we can't fix
- Has made us realize we need to devote more resources to the management and discovery of electronic content

I want to know more!

Resources:

- GitHub repository
  - Ex Libris
  - Report Problem
- Documentation
  - Ex Libris New UI Customizations
  - Pre-filled Google Forms
  - Google Apps Script
    - General Documentation
    - Sending emails tutorial
- Contact me!
  - mes4@williams.edu

Questions?

Credits

Original "report a problem" scripts:

- https://www.orbiscascade.org/blog/9/?bid=119
- https://www.orbiscascade.org/blog/9/?bid=1676

Images:

- Monitor Click by Nick Bluth from the Noun Project
- "Parks and recreation technology GIF",
  https://media.giphy.com/media/HteV6g0QTNxp6/giphy.gif
- "MAKE IT WORK POP TV GIF BY NIGHTCAP,"
  https://media.giphy.com/media/3o7TKGMZHi73yzCumQ/giphy.gif