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Tracking Trouble: Managing Primo Bug Reports

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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






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

 PEER REVIEWED

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- 2  ARTICLE     

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

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

 PEER REVIEWED

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MORE CONFUSION!

The screenshot shows the ProQuest search interface. At the top left is the ProQuest logo. To the right are icons for home, user profile, and help. Below the logo is a navigation bar with links for Basic Search, Advanced Search, Publications, Browse, and Databases (10). The main content area has a dark background with a central white box containing the search results. The search query is "ISSN(0276-928X) AND VOL(39) AND ISS(5) AND PAGE("40")". The results section shows "Your search for ISSN(0276-928X) AND VOL(39) AND ISS(5) AND PAGE("40") found 0 results." and "Please modify your search and try again. Search tips". Below this, it says "Other searches to try: There are no related searches for your search." At the bottom, there are filter buttons for "All", "Scholarly Journals", "Books", "Videos & Audio", "Dissertations & Theses", and "More". The search bar contains the same query and has a search icon. At the bottom left, there are checkboxes for "Full text" (checked) and "Peer reviewed" (unchecked), with a note: "Searches from this page will not search a document's full text". At the bottom right, there are links for "Recent searches" and "Search tips".

ProQuest

Basic Search Advanced Search Publications Browse Databases (10)

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](#)

Other searches to try:
There are no related searches for your search.

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ISSN(0276-928X) AND VOL(39) AND ISS(5) AND PAGE("40")

Full text Peer reviewed *i* Searches from this page will not search a document's full text *i* [Recent searches](#) [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/2FDMCh8>

USEFUL FORMULAS

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

	A	B	D	G	K	L	M	N	O	Q	R
1	Date reported	Reported By	Journal Title	Priority Level	Responsible Party	Ref No.	Follow-up date	Status	Last status change	Resolve time	Time Lapse
12	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

The screenshot displays an Excel spreadsheet with a formula bar at the top and a data table below. The formula bar, highlighted with a red border, contains the formula: `=IF(ISNUMBER(SEARCH("update",O10)),(P10+30),(P10+M10))`. The data table below has columns: Date reported, Reported By, Journal Title, Responsible Party, Ref No., Priority Level, Follow-up date, Status, and Last status change. Row 10 is highlighted with a red border and contains the following data: Date reported: 2018-10-26, Reported By: ILL, Journal Title: Journal of Clinical Psychology, Responsible Party: Ex Libris, Ref No.: 00618896, Priority Level: 120, Follow-up date: 2019-04-09, Status: Tier 2 New, Last status change: 2018-12-10.

	A	B	D	K	L	M	N	O	P
	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

```
B5 : X ✓ fx =AVERAGEIFS(List!Q:Q,List!K:K,A5,List!N:N,"closed")
```

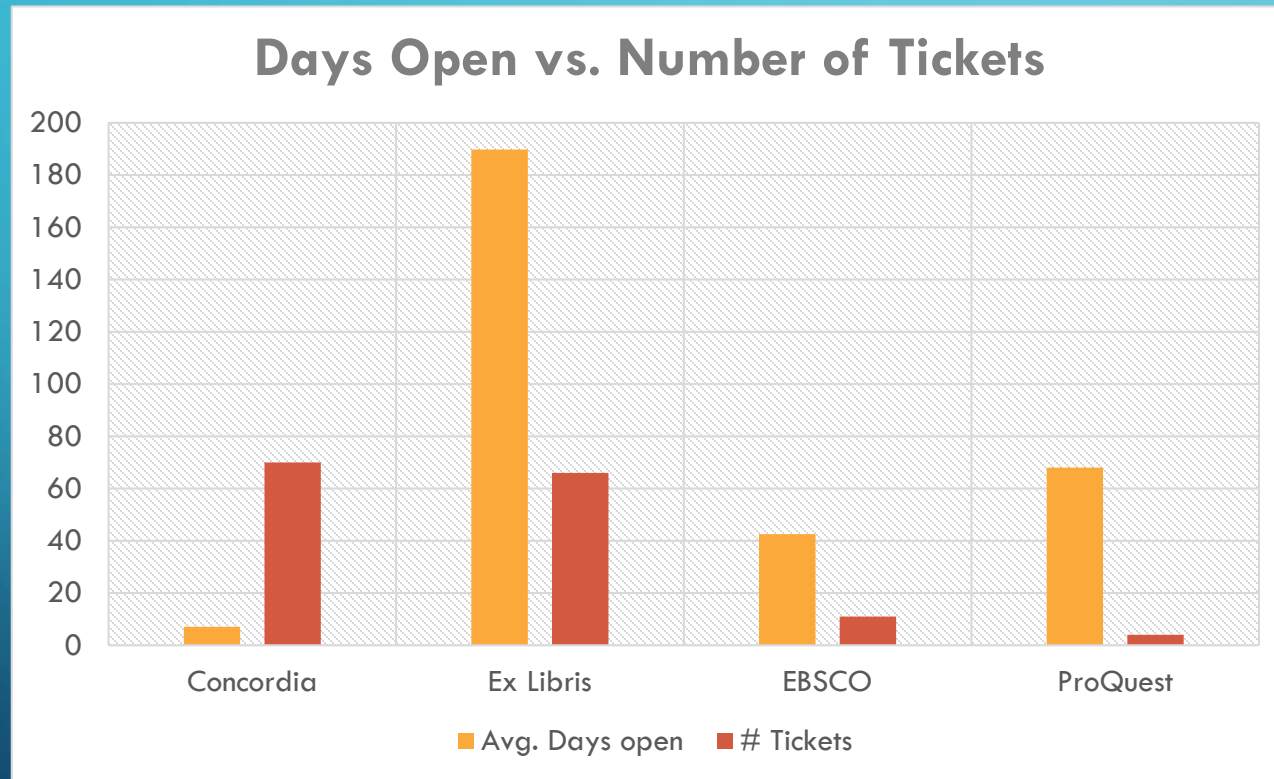
“List!” tells Excel to look in the Worksheet named List

	A	B	C	D		A	K	L	M	N	O	Q
3												
4	Responsible Party	Avg. Resolution	Avg. Days open	# Tickets		Date reported	Responsible Party	Ref No.	Follow-up date	Status	Last status change	Resolve time
5	Ex Libris	185	196	66	1							
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

Stats

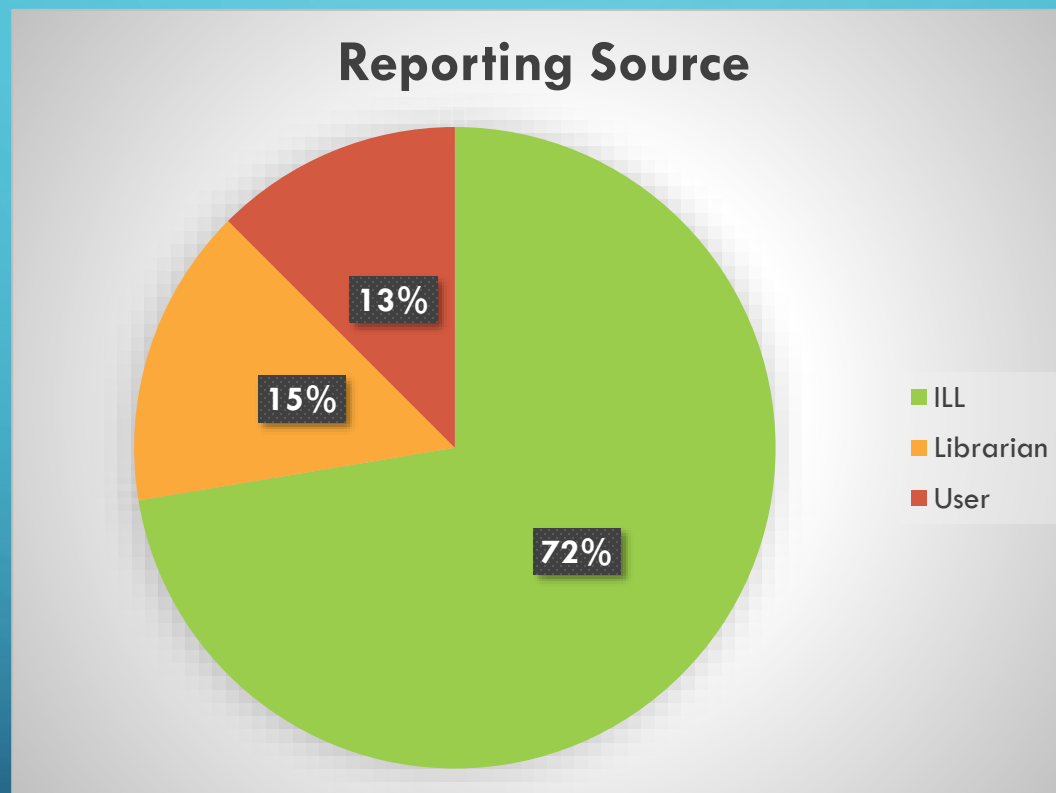
List

STATS!



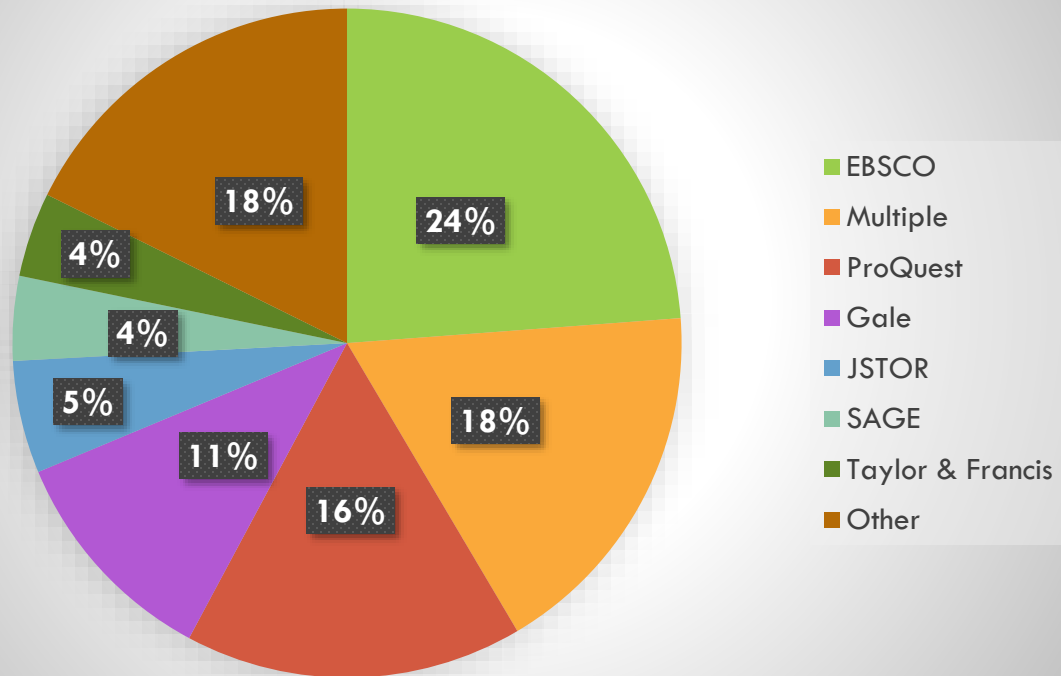
- Total # Tickets: 159
- Overall average days open: 89
- Longest time open: 771 days

STATS!



STATS!

Database Vendor



Databases with the most tickets:

- EBSCO Education Source (23)
- ProQuest Central (17)
- JSTOR (8)

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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