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Essential Audits for Proactive Electronic Resource Access Support

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Essential Audits for Proactive ERA Troubleshooting and Support

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Abstract

As electronic resource access (ERA) issues increase in frequency and complexity, technical services librarians are on the lookout for proactive techniques to identify and address these issues before they become a problem for patrons (Rathmel et al. 2015, 104-105).

This poster highlights a number of "essential audits" employed by the ERA support team (eTeam) at Georgia Southern University to catch access issues before they are reported by patrons or public services personnel. Regular audits include bi-weekly link tests on the library's A-Z Database List, quarterly link asset tests in LibGuides, and rolling link and authentication audits of link resolver records.
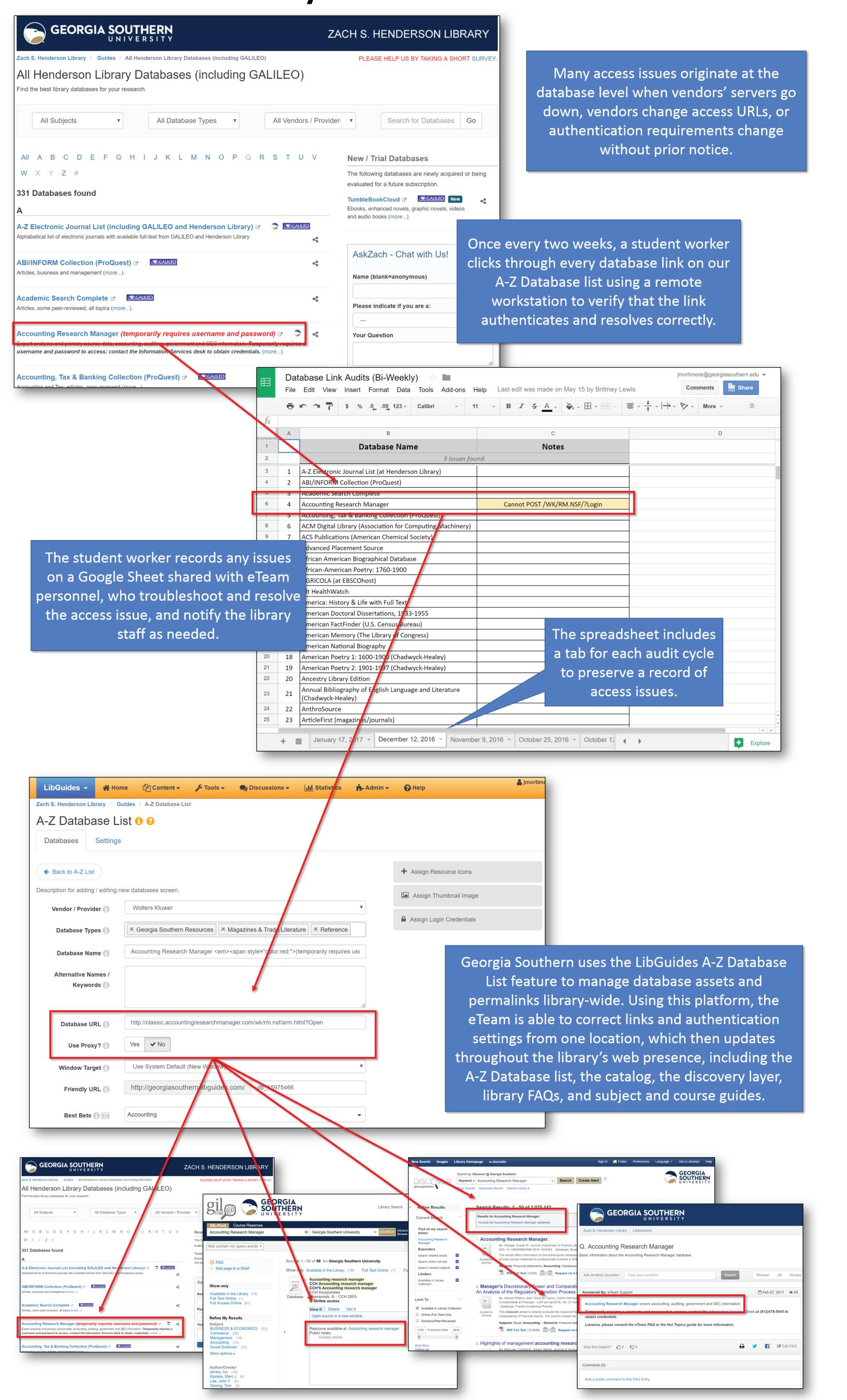
Best Practices

1. Prioritize all resource audits according to usage or demand.

2. Use a ticketing system like LibAnswers or BugZilla to organize and track active audits.

3. Schedule and monitor reoccurring audits using a shared calendar like Google Calendars.

4. Use Google Sheets to easily share findings and adjust permissions on the fly. Include links to these sheets within their corresponding tickets for easy reference.

5. Utilize your content management system's ability to create and map resource permalinks to reduce the number of locations where you need to correct URLs.
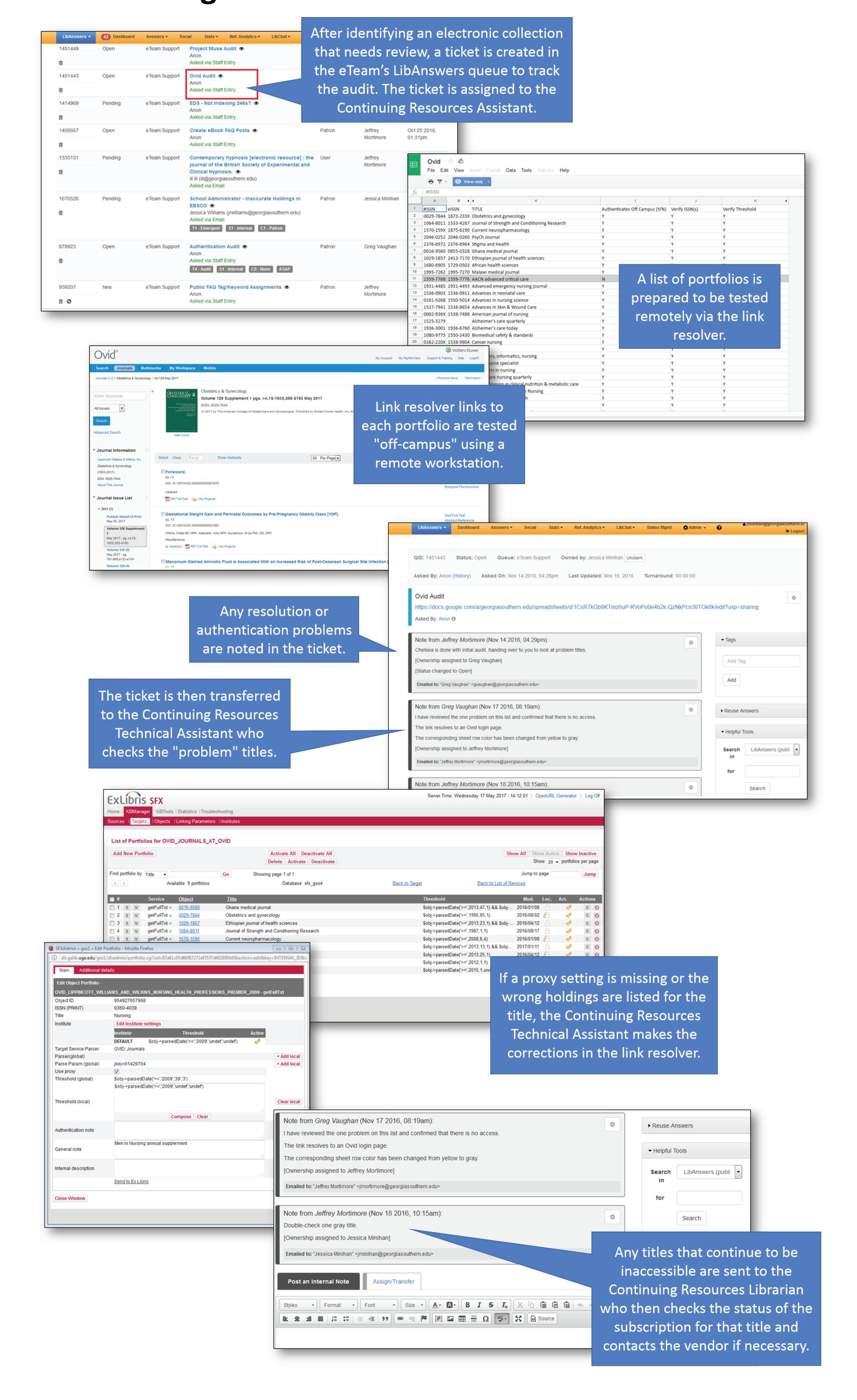
Reference:
Rathmel, Angela, Liisa Mobley, Buddy Pennington, and Adam Chandler. "Tools, Techniques, and Training: Results of an E-Resources Troubleshooting Survey." Journal of Electronic Resources Librarianship 27, no. 2 (2015): 88-107.

Bi-Weekly A-Z Database Link Audit

Many access issues originate at the database level when vendors' servers go down, vendors change access URLs, or authentication requirements change without prior notice.

Once every two weeks, a student worker clicks through every database link on our A-Z Database list using a remote workstation to verify that the link authenticates and resolves correctly.

The student worker records any issues on a Google Sheet shared with eTeam personnel, who troubleshoot and resolve the access issue, and notify the library staff as needed.

The spreadsheet includes a tab for each audit cycle to preserve a record of access issues.

Georgia Southern uses the LibGuides A-Z Database List feature to manage database assets and permalinks library-wide. Using this platform, the eTeam is able to correct links and authentication settings from one location, which then updates throughout the library's web presence, including the A-Z Database list, the catalog, the discovery layer, library FAQs, and subject and course guides.

Rolling Link Resolver Authentication Audits

After identifying an electronic collection that needs review, a ticket is created in the eTeam's LibAnswers queue to track the audit. The ticket is assigned to the Continuing Resources Assistant.

A list of portfolios is prepared to be tested remotely via the link resolver.

Link resolver links to each portfolio are tested "off-campus" using a remote workstation.

Any resolution or authentication problems are noted in the ticket.

The ticket is then transferred to the Continuing Resources Technical Assistant who checks the "problem" titles.

If a proxy setting is missing or the wrong holdings are listed for the title, the Continuing Resources Technical Assistant makes the corrections in the link resolver.

Any titles that continue to be inaccessible are sent to the Continuing Resources Librarian who then checks the status of the subscription for that title and contacts the vendor if necessary.

Quarterly Link Asset Audits in LibGuides

Similar to our A-Z database assets, the eTeam maintains several hundred link assets on a shared "Template" guide that are mapped to the library's public-facing subject guides and FAQs.

Newspaper link assets.

Electronic reference book assets.

Once every quarter, a student worker clicks through every link asset on the "Template" guide using a remote workstation to verify that the link authenticates and resolves correctly.

Any resolution or authentication problems are noted in the ticket.

The ticket is then transferred to the Discovery Services Librarian who corrects the "problem" link.

If the link requires cataloging to be corrected, then the ticket is transferred to the Cataloging Queue where a cataloger can investigate the issue further and make any bib or holdings fixes.

Once updated on the "Template" guide, the corrected links are updated throughout our web presence, including the library's subject guides and FAQs.