Using an Enterprise-Level Issue Tracking System to Deliver Email Reference

Randy Oldham
University of Guelph
Electronic Reference at Guelph

- Virtual Reference since 2003
- Used VRL plus / docutek
- Combination of live chat and email reference
- Approximate cost per year: $6,000 USD
Change to chat reference…

- Joined ScholarsPortal AskOn in 2008
- Demised the chat portion of Docutek
- That meant…$6,000USD a year for EMAIL REFERENCE
Reflection

- We reflected…What were we missing…
- Our money…
  - We were paying about $6,000USD/year for what was functionally just a glorified email account
  - Wanted better tracking
  - Assign tickets
  - Workflows
  - Integrated knowledgebase
Footprints

- Enter Footprints…
- Not just the poem on the beach…
- Footprints…Also an enterprise-level issue tracking system
- Hosted on campus by central IT provider
- Licensing fees **one time only**…approximately $4,000 CAD
Who uses it for what?

- Used on campus by:
  - CCS
  - OVC ITS
  - OpenED
  - DRC
Footprints features

- Rich statistics and reporting with custom reports (schedulable/email)
- Pre-populated quick responses
- Individual accounts for operators
- Automated ticket numbering
- Reply to email = append to ticket
- Workflows…When a ticket is assigned BLAH status…then email the ticket to BLAH email account with BLAH text attached…
The Ticket

- Request information/user id

- Info populated from incoming email…
- Use their UG address, see more info here (user id, phone)
- STATUS… this is required and how you change the ticket to CLOSED.
- Customizable priority levels.
The Ticket: 2

- **Contact Information**

  - HISTORY Button: all requests by user
  - CLEAR: clear out all info in all fields
  - Use uoguelph email = LOTS of info
  - To populate fields if empty: click ‘clear’, enter something: user id, first or last name, or email address and hit enter
- Correspondence/Description

- Append New Correspondence/Description

Account Issues - Send to Circ

Quick Correspondence/Description Workspace

Search Knowledge Base

I have forwarded your message on to our Archival and Special Collections department.

libaspc@uoguelph.ca

You should hear from them shortly.

- Complete Correspondence/Description

farmer.bob@mail.com 2012.08.31 08:56:00

Entered on 2012-08-31 at 08:56:00 EDT (GMT-04:00) by farmer.bob@mail.com:
E-mail address: farmer-bob@mail.com
Type of user: staff

Comment:
I have a factory-painted purple John Deere tractor from 1942. Model number 4208-865-497623. Have you any information on this tractor?

IP Address: 131.104.61.149
The comments form was selected from this page: http://www.lib.uoguelph.ca/
Date: Friday, August 31, 2012
■ Issue Information

■ Assign custom CATEGORIES to the ticket to allow us to track queries
■ Coming up with categories is time consuming…what do you want to track?
■ Internal notes are…internal only
Assignees and Notifications

- This is who is working on the ticket.

- Tickets can be auto-assigned when you open ticket
Assignees and Notifications…con’t.

- If CONTACT is selected, they will be emailed. If you want to forward the message, click the CC box
  - Enter an email address to cc
Time Spent

Footprints automatically records the duration of time it takes to solve a ticket whenever a ticket is ‘open’, time is added
The Sections - 7

- Attachment

- This is where any attachments that patrons send will be, or where you would attach a file to send to a patron

- Check to attach to email if you’re forwarding it on to someone else
Next Steps

- Move a few more departments into Footprints (ITS, ERM, WEB…)
- Consolidate the number of forms we have on our site to streamline things for the user
- Populate the quick responses
- Populate the knowledgebase
- CELEBRATE one year of tickets! (830 tickets answered as of April 15 2013)
THANK YOU!

- Thank You!
- Randy Oldham
- roldham@uoguelph.ca