Steps to Success: Troubleshooting

Sometimes technology is not our friend! Here are some steps to find a solution when errors and issues occur.

Before you begin to troubleshoot, ask your Site Supervisor about library policies concerning troubleshooting. Some libraries have a policy that their staff should not touch patron devices. Write your library’s policy in the box below:

**Scope of Service**

Ask about the library’s scope of service. Generally speaking, most libraries troubleshoot technology products or services that the library provides such as eBooks or wireless in-house connections, but don’t troubleshoot technology that was purchased elsewhere. For example, generally it’s outside the library’s scope of service to fix operating system issues on a computer, such as Windows 8 not loading properly on a Dell laptop. Each library is unique, though, so ask your Site Supervisor:

Questions I should definitely answer are:

Questions that I should definitely refer to an outside organization are:

One local company/individual that we can refer patrons to for questions that are outside our scope is:

**Step 1: Define the problem.** Often patrons will say “My computer’s not working.” Since computers are complex machines, there can be several different areas that can fail. It’s your job to figure out what exactly is going wrong. Is it a problem with the computer hardware (the touchscreen stopped working, for example), a problem with the internet connection (for example, the patron has not entered the wireless password) or a software problem (for example, a bug in Adobe Digital Editions)?

**Step 2: Gather detailed information.**  So that the problem can be resolved, you now need to gather detailed information from the patron. Good details to ask for include:

Are you receiving an error message and if so what is that message?

What kind of computer, eReader or tablet are you using?

Have you had this device a long time or is it new to you?

Which browser (Internet Explorer, Firefox, Chrome, Safari) are you using?

What is your library card number and is there a phone number I can call you back at?

Is this happening with one ebook (or audiobook) title or with all titles?

The patron might not know the answer to all of these questions—and that’s okay. If you suspect an issue is due to a particular factor and the patron is unable to tell you the answer, think of alternate ways to ask the question. For example, if you suspect an issue is occurring because of Internet Explorer but your patron is on the phone and doesn’t know what a browser is (a common occurrence) you might ask them if they click on a blue “e” to go on the internet.

**Step 3: Consider probable causes for the failure.**

What are some reasons the issue can occur? This will vary between computer programs , vendors, and library systems somewhat, so you might want to begin by asking a fellow library staff member if they have had a patron ask about the issue before and if so, what they’ve done about it.

**If an issue is happening with multiple patrons at the same time, then you’ll know** that the issue is not particular to one scenario. If the same issue is happening to all patrons at the same time from the same service, this is what’s known as a service outage. Report a service outage to your Site Supervisor immediately.

One of the most common troubleshooting issues that you’ll experience in the public library is called operator error or user error. This means that the patron is doing a step incorrectly or simply missing a step, but believes that the machine is not working correctly. You can somewhat surmise the likelihood of an operator error by asking the patron how long they’ve had their device or how often they use computers. Typically, the shorter they’ve had their device or the less likely they are to have used computers in the past, the more likely a troubleshooting issue is to be operator error. However, don’t assume an error from a computer novice is always operator error—troubleshooting issues occur to patrons at all skill levels.

Another good way to find probable causes is to search the internet for people experiencing similar difficulties. This works especially well when the patron can provide you with a specific error message. Be sure to also **check the vendor's website—both the vendor of the software (Overdrive, 3M, etc) that the patron is using as well as the manufacturer (Apple, Dell, Motorola, etc).**

**Step 4: Devise a plan to solve the problem.** Now that we have some background about the problem, and we’ve thought about some probable causes, let’s make a plan to solve the issue. Here are a few of the most important guidelines to follow when implementing a solution:

* Make one change at a time.
* Make simple changes first. This means if there are multiple possible causes for a problem, solve those problems that will be easiest for your patron first. For example, turning the device off and on again will be relatively easy and unobtrusive while a factory reset for the device will be difficult and change the device dramatically. Simple fixes may include:
  + Rebooting the computer/device (AKA turn it off and on again)
  + Delete and re-download an ebook/audiobook.
  + Look for updates to an App or patches to a computer program
* Know when to refer the patron to an outside company. Part of your plan can be to refer the patron to a company that can fix their issue including the product’s manufacturer.
* Finally, and most importantly, always be sure you can back out of any changes you make. Although there are times you’ll be learning as you go on the job, don’t make changes to a patron’s device that cannot be undone—especially without their knowledge or permission!

**Step 5: Implement the plan.**

Now that we have a plan in place, it’s time to do it! If you believe that the issue the patron is experiencing is due to an operator error, you want to be careful. Telling the patron that the issue is due to operator error can be a delicate transaction from a customer service prospective, so you want to tread lightly when correcting the patron.

Don’t say “You’re doing it wrong.” Instead say “I’m concerned we missed a step. Would you be willing to walk me step by step through your process?”

Don’t say “You forgot a step.” Instead say “I think there might be one more button we need to click on to make this work.”

**Step 6: Observe the results.**

Did your plan fix the stated issue? If not, don’t despair. You might try one of the following :

1. If the patron is on the phone, suggest to the patron that he/she schedule a time to meet with you so that he/she can walk you through the issue—there maybe items you notice that the patron does not pick up on.
2. Let the patron know that you need some more time to research this issue. Take their phone number or email address as appropriate.
3. Go back to Step 3 and try another probable cause.

**Step 7: Document the changes made to solve the problem.**

You’ve solved the issue! That’s awesome!! What worked?

Now tell your fellow AmeriCorps members so they can learn from your experience. It’s okay to brag a little ☺.