Gold Rush Incident Tracker

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Gold Rush Incident Tracker

Table of Contents

Introduction

Gold Rush Incident Tracker (GRIT) is a Gold Rush module that allows you to log service outages and other problems that occur with online services offered through your library. GRIT even allows you to track outages or interruptions to services that are not managed through Gold Rush, including your catalog, your Illiad server, or any other service your library subscribes to. With GRIT you can set a message to be displayed on appropriate pages in Gold Rush Public if the affected resource is in your Gold Rush holdings or your Gold Rush subscriptions.

As you work through a problem with a vendor, you can add notes to help you monitor each step of the incident. You can add as many contacts as you need to each incident, and you can easily send an email to one or all of them.

GRIT reports provide a simple way to monitor the performance and stability of the online resources you subscribe to. From the Reports module, you can review and download Open or Closed incidents. From GRIT, you can download a list of all incidents for further processing in the spreadsheet of your choice. A full listing of every action taken for a particular incident is also available when you need the detailed history of the problem.

Accessing Gold Rush Incident Tracker (GRIT)

There are three ways to get to GRIT. If you are logged into the Gold Rush Staff Toolbox, you can find a link to GRIT on both the Holdings menu and the Subscriptions menu.

You can also reach GRIT with a direct URL. To create the URL, use your Gold Rush Staff Toolbox address, followed by "/index.cfm?inst_code=YOUR_INST_CODE&module=Itrack."

For example, if your institution code is "001_AUR" your GRIT URL would be:

http://grstaff.coalliance.org/index.cfm?inst_code=001_AUR&module=Itrack

When you use this URL, you will be prompted to log in to Gold Rush Staff Toolbox. After a successful logon, you will be taken directly to the GRIT tab.

Gold Rush Incident Tracker Tabs

GRIT has 4 tabs that you use to navigate the GRIT pages. On the GRIT pages, you can add an incident, find an incident by searching or browsing, edit an incident, add and edit incident contacts, and download a list of your incidents.

Add Incident

- open the incident
- assign it a name
- enter the vendor and product
- describe the current status of the service
- enter any notes you need to about the incident
- set a message to be displayed in Gold Rush Public
- assign contacts to the incident

Browse/Edit Incident

- browse or search for incidents
- edit the incident record
- add steps, or "actions", to the incident
- add or remove contacts from the incident
- close the incident

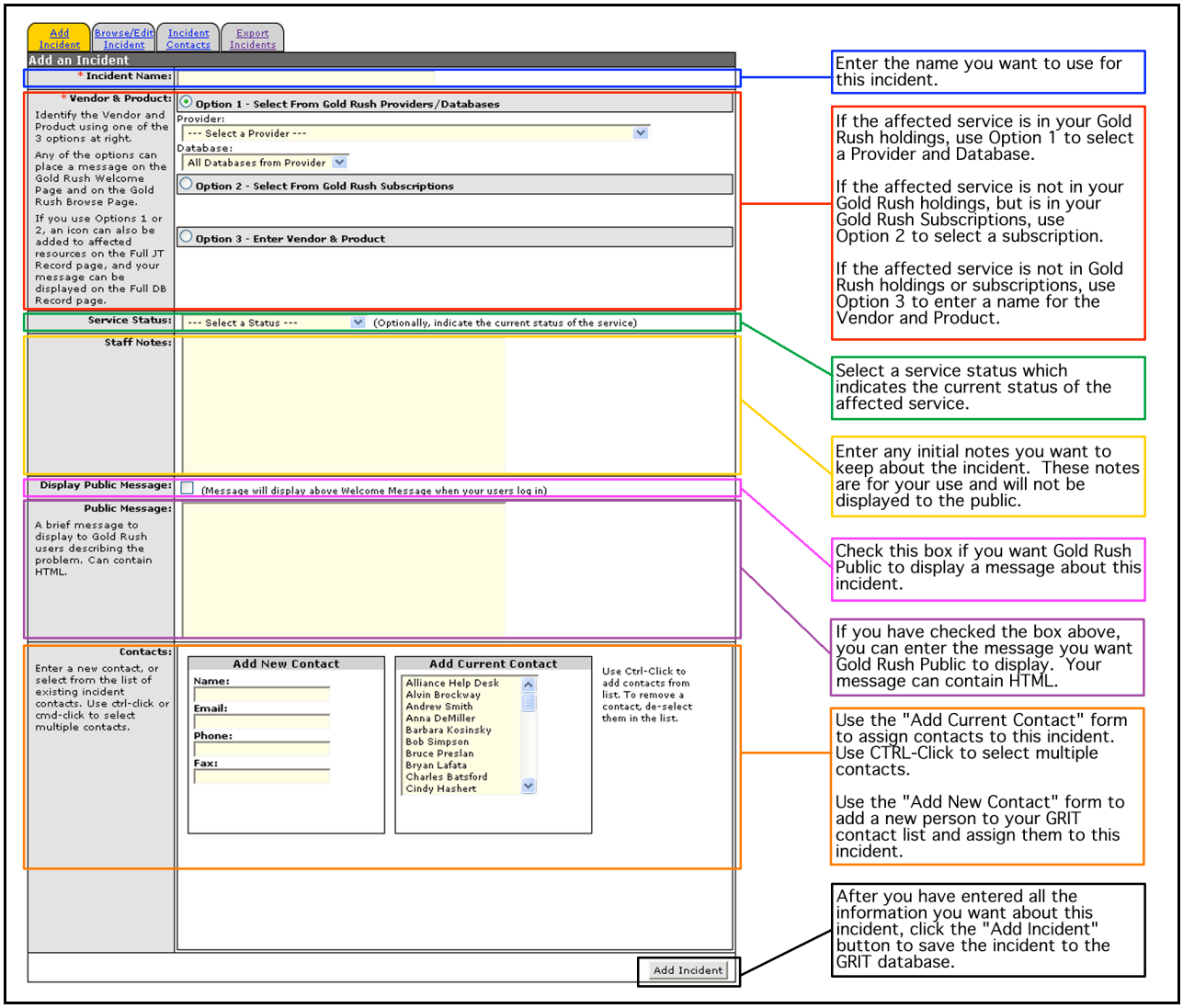
Incident Contacts

- add to the list of contacts used by GRIT
- delete from the list of contacts used by GRIT
- edit the list of contacts used by GRIT

Export Incidents

- download a list of incidents for processing in a spreadsheet application.

Add Incident



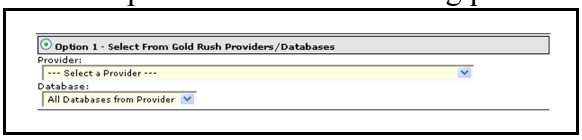
Incident Name

Enter a name for the incident. The name is strictly for ease of recognition, so make it brief but fairly obvious. You may want to establish a standard naming scheme such as "VENDORNAME_PRODUCT NAME OUTAGE." This is not required, but could be helpful if you intend to use GRIT heavily. The incident will also be given a unique ID.

Vendor & Product

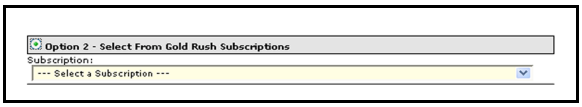
You have three options for setting the vendor and product.

Option 1 – Select From Gold Rush Providers/Databases
This is the preferred option.
Use this option if the service having problems is in your Gold Rush holdings.



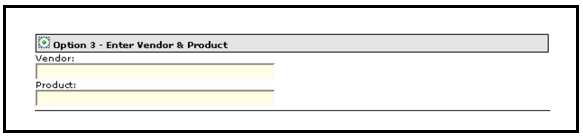
The Provider drop-down will list all providers in your Gold Rush holdings. After you select a provider, the Database drop-down will be populated with a list of your databases from the selected provider. The Database drop-down will default to "All Databases from Provider." Keep this setting if the problem described in the incident encompasses all products from a provider. For example, if you are having problems accessing all resources at EbscoHost.

Option 2 – Select From Gold Rush Subscriptions
Use this option if the service having problems is in your Gold Rush subscriptions. If the provider is also in your Gold Rush holdings, use Option 1. Only use this option for services that are in your subscriptions, but not in your holdings.



If you click the radio-button for Option 2, a drop-down field will appear with a list of all the subscriptions listed in your Gold Rush subscriptions. Selecting one of these subscriptions will usually allow GRIT to set the Gold Rush Provider ID and Database ID, so that messages can be displayed to the public. There are some Gold Rush Subscription records that do not match up with a specific provider and database in your Gold Rush holdings. In these cases, GRIT cannot display a public message on the Full Journal Record and Full Database Record.

Option 3 – Enter Vendor & Product
Use this option if the service is NOT in your Gold Rush holdings or subscriptions.



This option is available if you want to track problems with a non Gold Rush service, like your ILS or Illiad server. No public messages can be displayed on the Full Journal Record or the Full Database Record in Gold Rush Public, but messages will still be displayed on the Welcome page and the Browse page.

Service Status

Service status is an optional setting, which allows you to describe the current status of the service you are having a problem with. The list of Service Statuses is:

- Down
- Intermittent Outages
- Partial Content Available
- Normal/Working
- Slow Response Time
- Access/Authentication Problem

Note: If you feel there are other service statuses that should be added to this list, please contact Gold Rush staff at goldrush@coalliance.org.

Staff Notes

Enter any general notes you want to keep about the incident. These notes are not displayed to the public, and should describe the incident, and perhaps the first action taken. When you add an incident in GRIT, an initial detail record is attached to the incident, with a default action of "Opened Incident." You can add more detail records after adding the incident, and each detail record, or "action", will also include a space for additional notes.

Display Public Message

Check this box if you want Gold Rush Public to display a message on the Welcome page, the Browse Page, and on the Full Journal Record and Full Database Record.

Public Message

Enter the message you want displayed in Gold Rush Public. The message can include simple HTML, so you can include some markup, links or images. The HTML will be used when the message is displayed on the Welcome Page or the Browse Page.

Contacts

GRIT has a list of contacts that was taken from your Site and Vendor contacts in Gold Rush Subscriptions. If you do not use Gold Rush Subscriptions, you will not have any contacts in your list of Current Contacts. While this list was taken from your Subscriptions contacts, the list of contacts that GRIT keeps is separate from the list kept in Subscriptions.

There are two ways to add a contact to an incident.

If you do have a list of contacts in the "Add Current Contact" box, you can select the contacts in this list that you want attached to this incident.

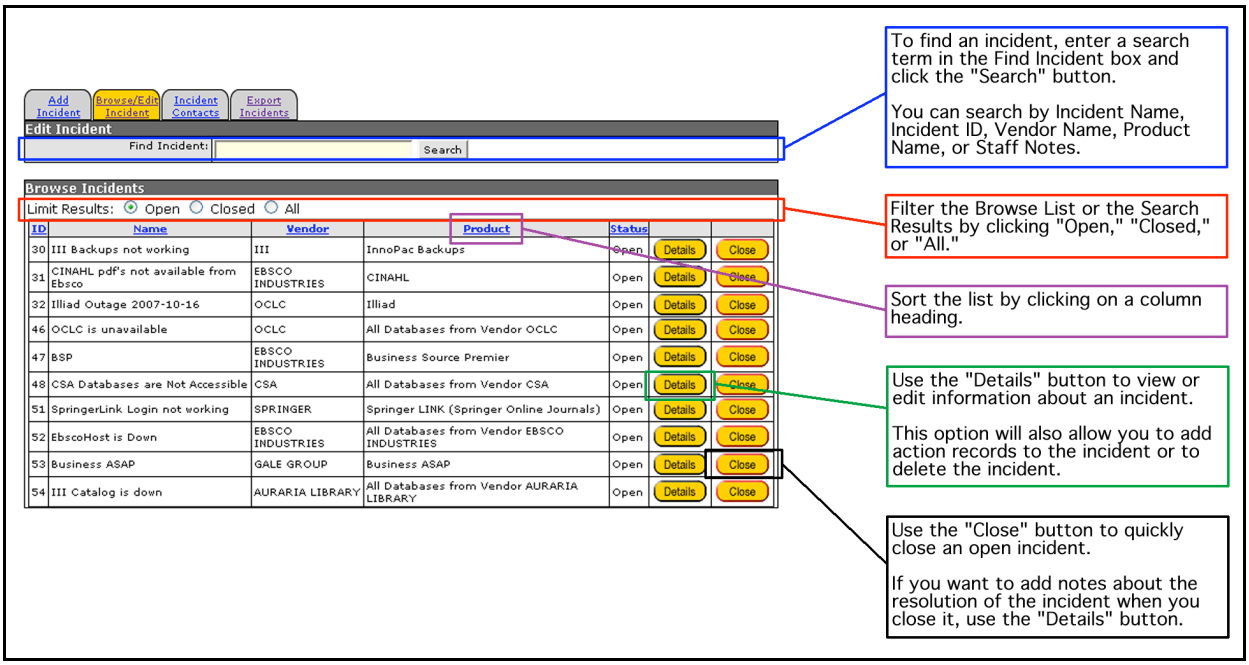
You can also add a new contact to your contact list and attach that contact to this incident, by using the "Add New Contact" form. You can add a new contact whether or not you have a list of current contacts.

Add Incident

After you have entered all of the information you want to enter about the incident, click the "Add Incident" button to submit the form and save the incident.

Browse/Edit Incidents

The Browse/Edit Incidents tab will automatically display all of your Open incidents in the “Browse Incidents” box.



Find Incident

The Find Incident form allows you to search for incidents. You can search for items in the following fields:

- Incident Name
- Incident ID
- Vendor Name
- Product Name
- Staff Notes

After you perform a search, the Browse Incidents box is replaced with a Search Results Box.

Browse Incidents

By default, the Browse Incidents box lists all of your Open incidents. You can sort the list by clicking on the column headers. Clicking on the “Vendor” label will sort the list by vendor name, clicking on the ID label will sort the incidents by ID. The default sort is by incident ID.

Limit Results

You can limit or expand the items in the Browse Incidents list by clicking one of the Limit Results radio buttons. Clicking the "Closed" radio button will allow you to browse your closed incidents. Clicking the "All" radio button will allow you to browse all of your incidents, both Open and Closed.

Details Button

Clicking the "Details" button on any record in the Browse List will take you to a page about that particular incident. This page is described in the "Incident Details" section below.

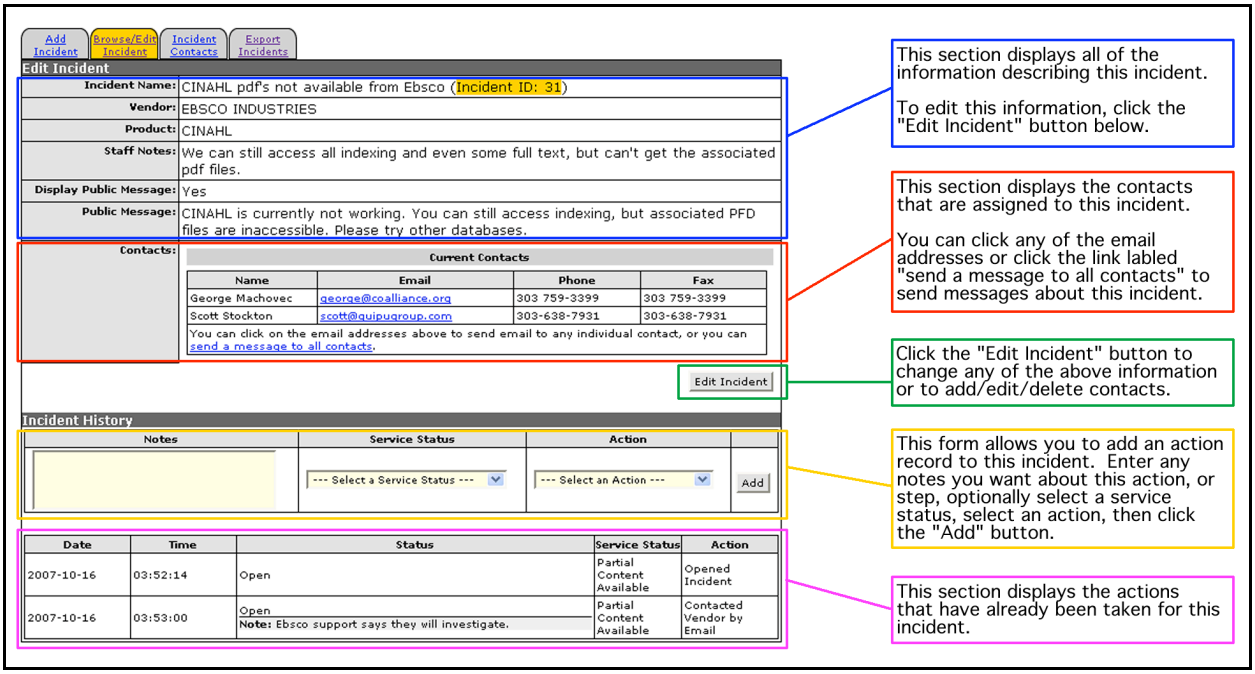
Close Button

Clicking the "Close" button by an incident will close the incident. This will set the incident status to "Closed" and add a simple detail record with an action of "Closed Incident." If you want to add a note to the "Closed Incident" detail record, you should click the details button, and close the incident on the Incident Details page. This button is here for convenience when you just want to close an incident quickly without adding notes about why or how the incident was resolved.

Search Results

The Search Results box works just like the Browse Incidents box described above. If you use the Limit Results radio buttons, they will only apply to the set of incidents found with the search you performed. You can sort these records by clicking on the column headers.

Incident Details



Incident Name

Displays the name assigned to this incident. The incident ID is also displayed in this field. Click the "Edit Incident" button to make changes to this field.

Vendor

Displays the vendor associated with this incident. Click the "Edit Incident" button to make changes to this field.

Product

Displays the product associated with this incident. Click the "Edit Incident" button to make changes to this field.

Staff Notes

Displays the notes entered for this incident. Click the "Edit Incident" button to make changes to this field.

Display Public Message

Displays the current setting of "Display Public Message" for this incident. Click the "Edit Incident" button to make changes to this field.

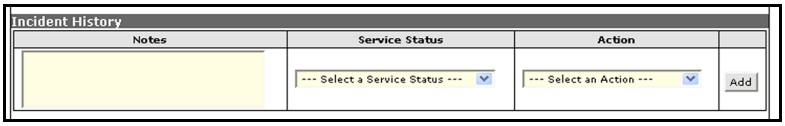
Public Message

Displays the public message that has been defined for this incident, if there is one. Click the "Edit Incident" button to make changes to this field.

Contacts
Displays the contacts associated with this incident. Individual email addresses are linked, and there is a link allowing you to send an email to all of the listed contacts. Both of these links will bring up a form that allows you to edit the list of addresses the message is going to, add more addresses, and enter a message to be sent. Click the "Edit Incident" button to make changes to this field.

Edit Incident
Clicking this button will allow you to edit any of the information in the display above. If you want to change the Staff Notes, Contacts, or Public Message, you will use this button to reach the Edit Incident Details page. The Edit Incident Details page is described in more detail below.

Incident History
The Incident History section allows you to add new action records for this incident.



Notes
Enter any notes you want for the new action in this field. This field does not support HTML, so limit your notes to plain text.

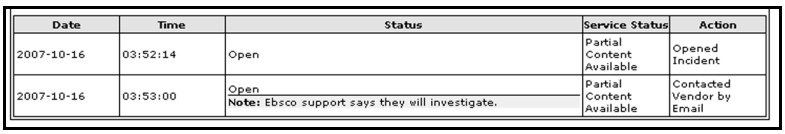
Service Status
Optionally, you can select a Service Status, describing the current state of the service being tracked with this incident. The items in this list are the same as those on the Incident Add Form described above.

Action
Select the action you want for this action record. The available actions are:

- Closed Incident
- Contacted Vendor by Phone
- Contacted Vendor by Email
- Notified Users
- Notified Staff
- Tested Vendor Solution
- Placed on Hold
- Re-Opened Incident
- No Action

Add
When you have entered your notes, selected an action, and optionally selected a service status, click the "Add" button to add the action record to the incident.

Incident History Action Records
Incident History Action Records list each action that has occurred with this incident.



Date	Time	Status	Service Status	Action
2007-10-16	03:52:14	Open	Partial Content Available	Opened Incident
2007-10-16	03:53:00	Open **Note:** Ebsco support says they will investigate.	Partial Content Available	Contacted Vendor by Email

Date
The date a particular action was taken.

Time
The time a particular action was taken

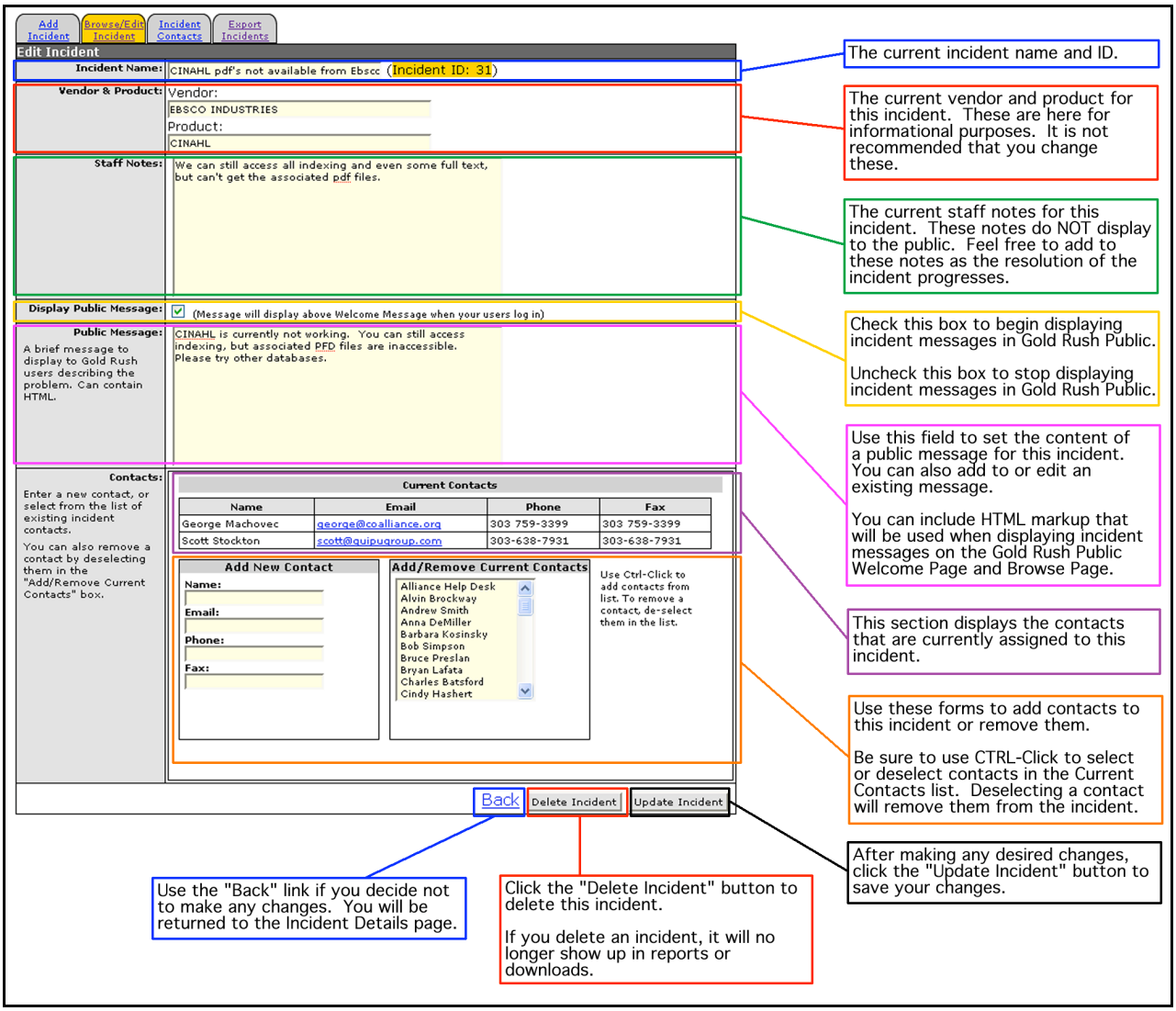
Status
The status of the incident at the time of the action. This will normally be “Open”, but will be “Closed” for the record listing the “Closed Incident” action.

Service Status
The status of the service described in this incident at the time of the action.

Action
The action that was taken.

Edit Incident Details

This page allows you to edit the record for the incident. You can change the name, staff notes, whether or not to display a public message, the content of the public message, and the contacts associated with the incident.



Incident Name

The name associated with this incident.

Vendor & Product

The Vendor and Product associated with this incident. Change these two items with caution. Changing them here will not change the Gold Rush Provider ID and DB ID that are stored for this incident, and could cause Gold Rush public to display messages on inappropriate titles.. If you selected the wrong vendor or product when adding this incident, you should delete this incident and re-add it, selecting the correct vendor and product.

Staff Notes

These are the global notes that apply only to the incident itself, and do not display to the public. You may want to add to these notes as the incident progresses.

Display Public Message

Check the checkbox if you want to add a public message, or uncheck the box if you want to stop displaying messages in Gold Rush Public about this incident.

Public Message

You can add a public message at any time, or change the message that is being displayed in Gold Rush Public.

Contacts

You add contacts to the incident in the same way you add them on the original Incident Add form. Be careful with the list of Current Contacts. It can be a long list, and if contacts are already associated with this incident, they will be selected in the list, even if they are far down the list and aren't displayed in the top of the list.

To add another contact from the list, be sure to Ctrl-Click the name, so it is added to the list. To remove a contact from this incident, scroll down the list until you find the person to remove. Ctrl-Click their name in the list to de-select it.

You can also add a new person to your contact list using the Add New Contact form.

Back

Use the “Back” link to return to the Incident Detail page.

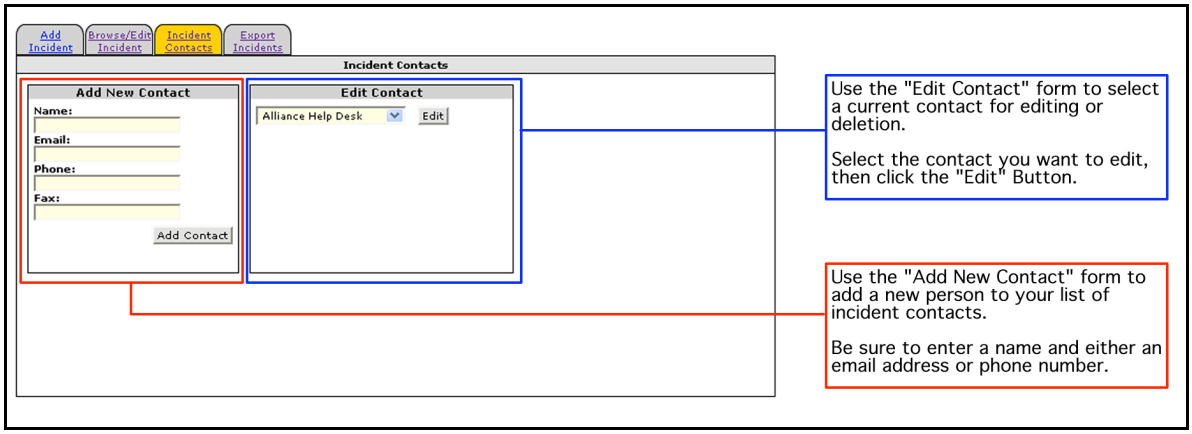
Delete Incident

Use the “Delete Incident” button to delete this incident. This will delete the master incident record and any action records associated with it. No history of the incident will be retained.

Update Incident

After making any changes you want to make for the incident, click the “Update Incident” button to save your changes.

Incident Contacts



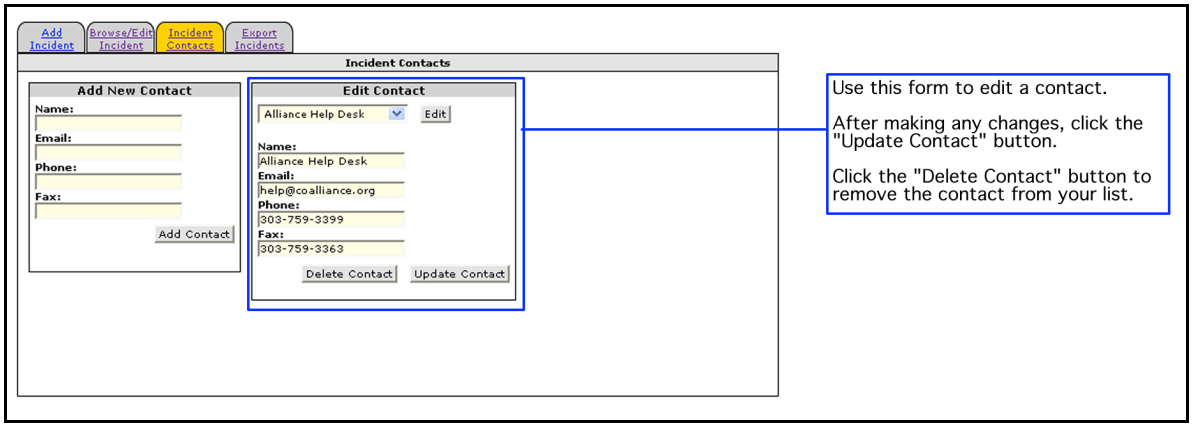
Add New Contact

Use the Add New Contact form to add a new person to your list of incident contacts. Adding a contact here will add them to the list of current GRIT contacts, so you will be able to select them from the list when adding or editing an incident. The GRIT contact list is a separate list from the contacts you have in Gold Rush Subscriptions. Adding to the GRIT list will NOT add a contact to your subscriptions.

The contact Name and Email are very important fields, and are required if you want the contact to be listed with a linked email address. Phone and Fax are optional.

Edit Contact

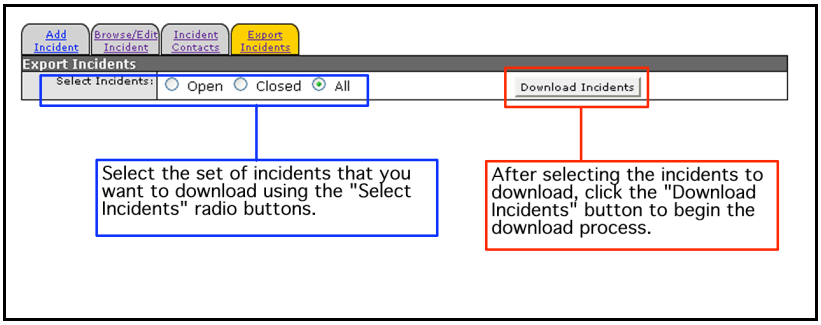
If you need to change a contact's information, their name, email, phone, or fax, select the contact to edit in the drop-down box, then click the “Edit” button.



A form will appear with the contact's information, and you can edit the item or items you need to change. Make any changes you want, then click the “Update Contact” button to save your changes.

You can also delete a contact by clicking the “Delete Contact” button after selecting a contact for editing. This will delete the contact from the GRIT contact list. It will not affect your Subscriptions contacts.

Export Incidents



Select Incidents

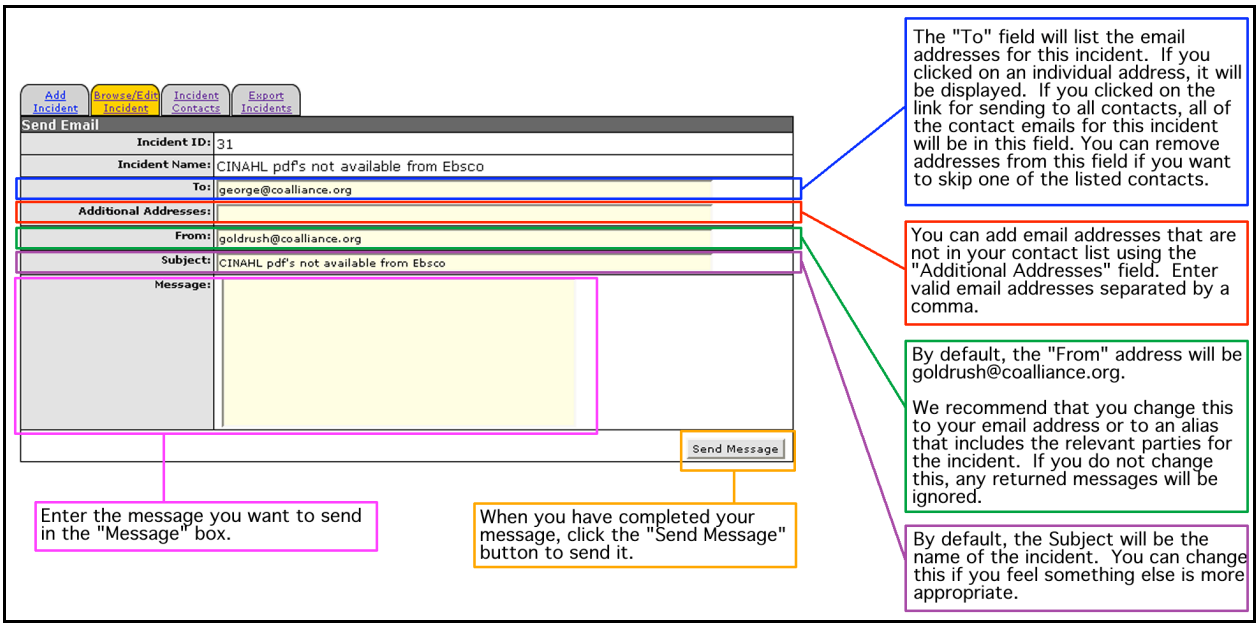
You can select which incidents you want to download by clicking the radio button by “Open”, “Closed”, or “All”. Selecting “Open” will only include incidents that are currently open in the download. Selecting “Closed” will only include incidents that have been closed in the download. And selecting “All” will include all incidents, both open and closed, in the download.

Download Incidents

Click the “Download Incidents' button to begin the download process. This will bring up a dialog box to “open”, “save”, or “display in browser”. This box will vary depending on your browser and system.

Sending Email Messages with GRIT

You can use GRIT to send email messages about an incident. The messages can go to any or all of the contacts you have assigned to an incident. The contacts for an incident might include the staff at your library who need to know about the problem or the support staff at the vendor's help desk. When you are on the Incident Details page or the Edit Incident Details page, you will have links to each individual contact assigned to the incident, as well as a link that allows you to send an email to all of the contacts assigned to the incident. Clicking either link will bring up a form that allows you to adjust the recipients of the message.



To

This field will be filled in with the email address of the contact you clicked on, or a list of all email addresses if you clicked the "send a message to all contacts" link.

Additional Addresses

Add any other address that you want to include in this email. You can add people who need to know about the incident, but are not in your GRIT contacts.

From

This will initially be filled in with "goldrush@coalliance.org", but you should change this to be your email address. If you don't, any returned email and any replies to your email will be sent to goldrush@coalliance.org, and will be ignored.

Subject

The subject of the message defaults to the name you have given this incident. You can change this if you feel something else would make more sense to the recipients.

Message

Enter the text of the message here.

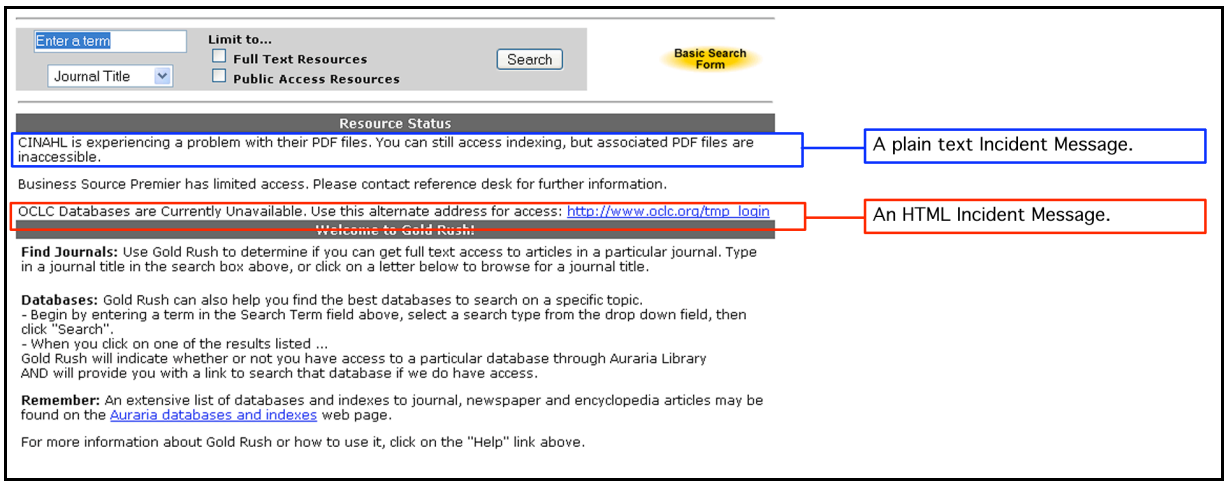
Send Message

When you have completed the form, click the “Send Message” button to send it.

GRIT Messages in Gold Rush Public

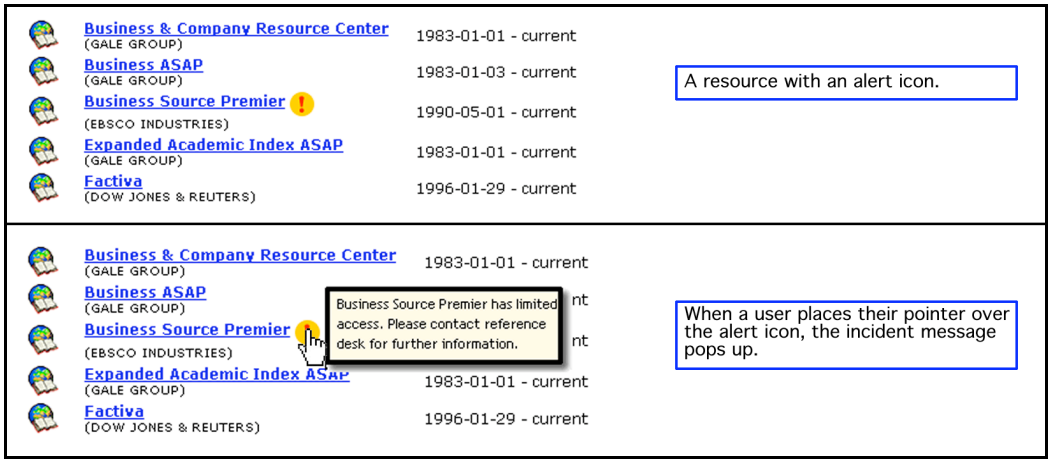
When you have set a public message to display for a particular incident, and have set the text of that message, Gold Rush Public will display the message to your users. These "Resource Status" messages are displayed on the "Welcome" page and on the "Browse" page. Gold Rush Public also adds an alert icon beside resources on the "Full Journal Title Record" page and the "Full Database Record" page.

On the Welcome page and the Browse page, the messages are displayed below the search or browse box, with a heading of "Resource Status". Because these two pages are not tied to a specific Provider and Database, any type of incident can display a message on these pages. This includes incidents for services that are not in your Gold Rush holdings or your Gold Rush subscriptions. On these pages, any HTML that is part of the public message will be used to display the message. If you have multiple incidents with public messages, all of them will be displayed.



On the Full Journal Title Record page and the Full Database Record page, an alert icon is added to each resource that has an incident message attached to that specific database or database and provider. When a user rolls their mouse over the alert icon, a small window pops up with the incident message. Because the message displays in a pop-up, any HTML in the message is ignored, and only the text is displayed.

Sample Alerts from a Full Journal Title Record



Sample alerts from a Full Database Record