Desk Tracker Guide

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I. Purpose and Uses:

1. Track all questions asked at service desks

2. Track Gate Counts and Head Counts for Library

II. Logging In

1. Go to http://client.desktracker.com/?uact=login

2. Account Number: 875138

3. Username: Enter your unit’s username

4. Password: Enter the password for this username

Welcome. Please set your location...

Organization: University of Illinois
Branch:
- Central Access Services
- Central Reference
- ESSL
- Undergrad

5. Select your unit for branch
Please select your desk...

Organization: University of Illinois
Branch: Undergrad
Desk: Circulation

Submit

6. Select the appropriate desk

7. Click Continue. You are now logged in.

III. Recording Questions

1. Click on the Activity tab

2. Click the RED checkmark next to the type of question you want to record

   *(ignore the round buttons)*

3. Example: Recording a short (<5 minute) research question:

<table>
<thead>
<tr>
<th>In Person [Clicksheet]</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ □ In Person Information/Directional</td>
</tr>
<tr>
<td>✓ □ In Person Reference &lt;5 Minutes</td>
</tr>
<tr>
<td>✓ □ In Person Reference 5-15 Minutes</td>
</tr>
<tr>
<td>✓ □ In Person Reference 15-30 minutes</td>
</tr>
<tr>
<td>✓ □ In Person Research Consultation &gt;30 minutes</td>
</tr>
</tbody>
</table>

IV. Recording Gate and Head Counts

1. Click on the Gate Count tab

![Gate Count 1 (P: number)]

   54547
   Whole numbers only

   ![Gate Count 2 (P: number)]

   54769
   Whole numbers only

   ![Head/Body Count]

   78
   Whole numbers only

2. Enter all applicable numbers and click Submit
V. Recording Stats Late

If you get delayed in entering a stat (question or gate count/etc.), you can manually change the recorded date/time on the form before submitting the stat

1. Click the Custom Timestamp link in the upper right

2. Enter in the time when the stat occurred (if different from right now)

3. Enter Gate Count/Head Count as normal (Section III above)

4. Example: You meant to enter the 11:00am gate count at 11, but it is now 12:30pm.
   a. Go to the Gate Count Tab
   b. Click Custom Timestamp and change the Date and Time to 11:00am

5. Click the Submit button

VI. Reports

1. Canned Reports (for desk stats)
   a. Click the Reports Tab
   b. Click Activity under Detailed Reports
   c. Choose which options/fields you want in your report, e.g.
d. For individual unit reports, be sure to *Filter by Branch* and choose your unit.

![Filter Options]

- Don't Filter by Location
- Filter by Branch...
- Filter by Desk...

Use only response sets entered at...

- ESSL
- Central Reference
- Undergrad
- Central Access Services

![Options]

e. Click the *Build Report* button to generate the stats.

2. Exporting Results (more advanced stats)

   a. Choose the *Reports* tab
   
   b. Under *Modules*, choose *Data File Generator*
   
   c. Select Start and End dates
   
   d. Click the *Generate File* button
   
   e. This produces a .csv file that will open in Microsoft Excel for manipulation. It can also be imported into Access.