Desk Tracker Guide

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I. Purpose and Uses

1. Track all questions asked at service desks. Analysis of these data can reveal trends (e.g., the growth of IM/Chat, the decrease in directional questions, the average length of in-person vs. chat/IM interactions) and is used some units to help set staffing levels.
2. Track gate counts and head counts for the Library.

II. Logging In

2. Account Number: 875138.
3. Username: Enter your unit's username.
4. Password: Enter your unit's password.
5. Select your unit for Branch.

![Please Select Your Location](image)
6. Select the appropriate Desk. Note: Select the appropriate desk by clicking on the arrow next to the desk selection list.

7. Click Continue. You are now logged in.

III. Recording Reference Questions
1. Click on the *Activity* tab at the top of the page.

2. Fill in all the fields that apply (see *Field Descriptions* below). The core fields are:
   - Patron Type
   - Your Status
   - Mode of communication (e.g. In Person)
   - Time Spent (e.g. 5-15 minutes)
   - Question Type (required field)
   - READ Scale
   - Subject
   - Referred to Specialist
   - Government Information Used (Yes/No)
   - Description

3. **Example:** You, a GA, answer an in-person question from an undergraduate student about locating the full-text of a journal article for which they have a citation. It takes you 7 minutes to track down the article and get a download for the patron, at which point they indicate they are satisfied. You would record the question as follows:
   - Patron Type: *Undergraduate Student*
   - Your Status: *Graduate Assistant*
   - Mode of communication: *In Person*
IV. Recording Gate and Head Counts

1. Click on the Gate Count tab.
2. Enter all applicable numbers and click Submit.

V. Recording Statistics Late

If you get delayed in submitting a Desk Tracker statistic for a reference question or gate/head count, you can manually change the recorded date and time on the form before submitting the entry.

1. Click the Custom Timestamp link in the upper right.
2. Enter in the time when the interaction or count occurred (if different from the current time).
3. Enter the information as you normally would (see instructions above).
4. **Example**: You meant to enter the 11:00 am gate count at 11, but it is now 12:30 pm.
   - Go to the Gate Count tab.
   - Fill in the appropriate data.
VI. Field Descriptions

Patron Type

How to select the appropriate *Patron Type* in Desk Tracker.

**General Guidelines**

Fill out the *Patron Type* field in Desk Tracker if you are able to make a reasonable guess of the patron's status (faculty, undergrad, etc) and affiliation with the University of Illinois. Knowing a patrons status can be helpful in guiding a reference interview, and should be used along with other questions to help determine an individual's level of knowledge about their subject and the research process, the requirements of the assignment or research project, and the resources that are available to them (or not available, in the case of unaffiliated patrons). If the patron type does not become evident during the reference interview, you can explain to the patron at the end of the interaction that "We're trying to get a better sense of who's asking questions at the library," and then ask "Would you mind telling me if you're a student, faculty member, staff, or if you're not affiliated with the university?"

**Example questions**

- Is this for an Undergraduate or Graduate level course?
- Could you tell me more about the requirements of the assignment or research project you are working on?

**Undergraduate Student**

Anyone enrolled in an Undergraduate program at the University of Illinois. Often Undergraduates will ask questions related to the basics of scholarly practice, such as the meaning of secondary versus primary sources, or how to find articles on a particular topic.

Examples:

- Someone asking how to find the course reserves for an Undergraduate course.
- Some asking for help for a class assignment in an Undergraduate Level course.
Graduate Student

Anyone enrolled in a graduate-level program at the University of Illinois. Individuals who are taking a graduate-level class, but not formally enrolled in a program, fall under the Graduate Student category. Graduate students will typically ask more sophisticated questions and may already have some understanding of research techniques and academic databases.

Examples:

- A teaching assistant inquiring as to how they might put articles on E-reserve.
- Anyone asking about a graduate-level course or its related materials.
- Someone who mentions their thesis or assistantship.

Faculty/Staff

Anyone employed by the University of Illinois who is not a graduate student, such as a professor emeritus, adjunct professor, guest lecturer, security guard, or maintenance worker. Questions about library policies are common from this group of people, and professors sometimes have copyright questions. Most professors will already be familiar with the research resources in their field, but may need helping accessing databases or acquiring items through Interlibrary Loan.

Examples:

- A patron asking for information about determining how often one of their papers has been cited.
- A patron asking for information on acquiring materials for use in a course (Graduate Students may also ask about this).

Alumni

Patrons who have graduated from the University of Illinois. Alumni may have graduated with a bachelor's or more advanced degree. Any questions about Alumni access to library resources are liable to fall under this category.

Examples:

- Someone with an @illinoisalumni.org email address.
- Someone inquiring about access to electronic resources for alumni.

Outside UIUC/Non-affiliate

Use this category for anyone outside of Champaign County who is not employed by or attending the University of Illinois, nor has graduated from it. Also use this category for visiting students who have not yet decided to attend the University and/or their relatives if they live outside the county. A user who lives outside Champaign County but is taking a class at the University of Illinois should be classified as a Graduate Student and not in this category. Many of the reflib email questions come from Outside UIUC/Non-Affiliate patrons.

Examples:
• Someone from the United Kingdom inquiring about the marginalia of a rare book in our holdings.
• A prospective student asking about the library's history and how best to get around campus.
• Someone who mentions they are "in town for a conference" and need directions.

**Distance Ed Student**

Use this category for students enrolled in online or off-campus courses.

Examples:

• A student enrolled in an off-campus course who inquires about having a book mailed to them.

**Local Community Member**

Use this category for any resident of Champaign County who is unaffiliated with the University of Illinois; in other words, the patron is not employed by or attending the University, nor are they an alumnus.

Examples:

• Someone who asks if a resident of Urbana can check out books from the University library.
• A non-student looking for tax forms or other state of Illinois documents.

**In Person/IM–Chat/Phone/Email/SMS–Text Message**

Use this category to indicate the mode of communication with the patron.

**Time Spent**

**General Guidelines**

Select a duration fields from the list of time intervals. You should only select one of these for each question, based on the length of the question and how it is asked.

Examples:

• Patron at in person desk asks a quick question about printers – Choose "< 5 minutes" for duration, and "Technical Issues (printers, scanners, etc.)" from Question Type.

**Question Type**
General Guidelines

Indicate Question Type for *ALL* interactions, selecting only one option from drop-down menu. Question type categories have to do with the nature of interactions, rather than their subject.

For interactions that overlap multiple categories, please choose the category upon which the most time was spent. In ambiguous circumstances, use your best judgment. It may be useful to ask, “Which category comes closest to capturing the essence of this interaction?” Talking to a colleague also may help lend some perspective to a tricky question. For bizarre or unclassifiable interactions, feel free to utilize the Other category, but try to never leave the field entirely empty.

Data Assistance

Use for interactions related to datasets, including dataset manipulation, management, access, training, and acquisition. These are typically complex questions that require some back and forth communication with the patron. DO NOT use for questions that only involve statistical facts or statistical tables that will not be manipulated; see Research Assistance.

When completing the Description field for this question, please include the following:

- Data Status: [existing/new/in progress]
- Type of project assistance: [instructional/pre-award grant/post-award grant]

Examples:

- "I need all Cook County, Illinois bankruptcies by address from 2002-2013." BUT NOT "I need to know how many bankruptcies were filed in Cook County, Illinois from 2002-2013." (See Research Assistance.)
- "I would like assistance writing a data management plan for a NSF grant proposal."

Database/eJournal/SFX Access Problems

Use when a patron should be able to access a database or a service within a database, such as a full-text pdf download, but cannot due to issues internal to either the database itself or SFX. These questions will almost always involve reporting an access problem to ER Tech. For our purposes, Refworks and similar services that the library subscribes to will be considered databases. DO NOT
use when a patron does not know how to find a particular database or journal; see *Finding specific library materials*. DO NOT use when the access problem is due to software or hardware issues; see *Technical Issues*.

**Examples:**

- "The Early English Books Online link in Online Journals & Databases (aka SFX) is broken." BUT NOT "How do I access Early English Books Online?" (See *Finding specific library materials*.)
- "I am logged into the proxy server but Wiley Online Library still won't let me access articles." BUT NOT "I went into Wiley Online Library through Google but it won't let me download articles." (See *Finding specific library materials*.)

**Directional/Hours**

Use for directional questions or inquires about library hours.

**Examples:**

- When is the Funk ACES Library open?" BUT NOT “What services are available while the ACES library is open?” (see *Library policies and services*.)
- “Where is the bathroom?” BUT NOT “Where can I find this call number in your library: 636.452B76?” (see *Finding specific library materials*.)

**Finding specific library materials**

Use for questions that involve locating one or more items which the University of Illinois may or may not have access to, including looking for Full Text of journal articles. These are generally “known item” questions wherein you do not have to suggest a resource or material for the patron since they know what they want but may not know A) all the details of the item, B) whether or not we have it, or C) how to retrieve it if we do have it.

**Examples:**

- "Do you have an 1859 edition of Charles Dickens’ *Tale of Two Cities*?” BUT NOT "Who is the main character of Dickens’ *Tale of Two Cities*?” (See *Ready Reference*.)
- "I read a book about a colony of rabbits that could talk when I was a kid but now I cannot recall the title." BUT NOT "Do you have books on talking rabbits?" (See *Research Assistance*.)

**Library policies and services**

Use for questions about the library’s policy on anything or a service offered by the library. This category should be used both for questions about the nature of a policy and how to use it, such as loanable technology or course reserves. These questions will typically be answerable by a library website, the [Rolodex](#), or a policy that has been articulated by library staff.

**Examples:**
• "How do I put articles on reserve for the class I am teaching?" BUT NOT "How do I find the course reserves for the classes I’m taking?" (See Finding specific library materials.)
• "I’m an alumnus; how come I don’t have access to databases anymore?" BUT NOT "Which databases do I have access to as an alumnus?" (See Ready Reference.)

Ready Reference

Use for questions which can be answer in one or two factual sentences or which can be answered with the use of a typical reference source, such as a dictionary, encyclopedia, or directory. DO NOT use for an interaction which involves many one-sentence factual answers from various sources; see Research Assistance.

Examples:

• "What are the political parties of Peru?" BUT NOT "I need information on the history of Peru as it relates to globalization." (See Research Assistance.)
• "How old is Bob Barker?" BUT NOT "Does the University have books about The Price is Right?" (See Research Assistance.)

Research Assistance

Use for interactions where the patron needs assistant choosing a research strategy and/or research resources. These will generally be very broad questions where the patron does not have a single desired item in mind but rather a range of works. Answers which involve the use of multiple databases or which take a long time are usually Research Assistance, even if the question is recreational in nature and not related to a research project. Interactions related to a final research product, such as writing style, citation format, or research proposal format, would also fall under this category.

Examples:

• "Can you help me put my bibliography into MLA format?" BUT NOT "How do you cite newspapers in MLA?" (See Ready Reference.)
• "I need information on socialism in early 20th century Scandinavia." BUT NOT "My professor recommended this specific book on early 20th century Scandinavia, where is it?" (See Finding specific library materials.)

Technical Issues (printers, scanners, software)

Use for instances when a piece of technology is not working as it is supposed to. Also use when a patron is unfamiliar with a piece of technology and needs a large degree of assistance to operate it. DO NOT use for problems internal to a website, database, or other electronic resource; see Database/eJournal Access Problems. DO NOT use for a patron’s minor difficulties which can be answered by showing them a single line in a manual or “how to” guide; see Ready Reference.

Examples:

• "Can you show me how to use the Book Eye Scanner?" BUT NOT "Can I use the Book Eye Scanner?" (See Library policies and services.)
- "The Internet Explorer on this workstation crashes every time I navigate to a certain library website." BUT NOT "Which web browser is best for viewing flash animation?" (See Ready Reference.)

Other

Use for interactions that cannot adequately be classified as falling under any of the above categories. This category is meant as a catchall for odd and difficult to define interactions. If an interaction seems to fall under three or more categories and there is not one clearly dominant category, use Other. DO NOT use for odd or difficult questions that are still classifiable under another category, i.e. a strange Ready Reference question or Research Assistance with an especially obscure topic.

Examples:

- "When was Donald Duck's birthday? Is there a publicly-available copy of his U.S. birth certificate?"

READ Scale

Refer to the READ scale documentation for guidelines on this field. It consists of numbers from 1-6 indicating degree of difficulty and effort based on a very specific assessment tool. Any questions which have a Question Type of “Ready Reference,” “Finding Specific Materials,” or “Research Assistance” must be assigned a READ Scale number.

Subject (Main Heading)

Use this field for questions that have the Question Type of “Ready Reference” or “Research Assistance.” Choose the subject that best fits the question. For more complicated or interdisciplinary questions, use the Description field to provide more details and additional subjects.

Referred to Specialist

General Guidelines

Use this when a referral is made. A referral occurs when the person delivering reference services decides to direct the patron elsewhere for help which is either more in-depth or subject-specific. For more information, see the Library guidelines on how to make reference referrals.

An interaction involves a referral when:

- You forward a non-trivial email inquiry to another librarian
- You forward a phone call involving a complex or subject-specific question to another librarian
- You direct the patron to another librarian's office or call a librarian so that they could come guide the patron
- You forward a chat in IM Collaborator to someone else with subject knowledge

Example:
A Music History PhD student looking for primary sources for a dissertation calls and you end up transferring the call to the Music & Performing Arts Library. You would enter "Phone Information/Directional" from the drop-down menu, but fill "MUX" (see below for more on abbreviations) in the Referred to Specialist field.

Referral Data Entry

- Be sure to click on the radio button next to "Referred to Specialist." If the radio button is not clicked, the text entered in the box will not be recorded.
- In the text box, put the three-letter abbreviation which represents the library receiving the referral in all caps text. You can find these abbreviations by navigating to the library’s website and looking at the last directory enclosed in forward slashes. For instance, if you receive an email about the philosophy behind the Dewey Decimal System, put "LIS" because the URL for the Virtual Library & Information Science Library is http://www.library.illinois.edu/lis/ (note the last three letters of the internet address).
- If you make a referral to a specific person, then enter the full name (first and last name) of the individual to whom you referred the inquiry.

Government Information Used

This is a simple “Yes” checkbox used to help track statistics relative to our standing as a Federal Depository. Click Yes if in the course of answering a question you utilized information from a government publication – including print and online resources, statistics, congressional documents, etc. This field may be checked for questions which have nothing to do with research about the government.

Examples:

- “I need help finding statistics on cancer recovery rates in the U.S.”

Description

General Guidelines

For all reference interactions greater than five minutes in duration, enter a brief description of one or two sentences in the Description text box. Descriptions need not reiterate details captured elsewhere in the Desk Tracker form, such as patron type or mode of communication. Informative aspects which might be included could be what library resources were involved, what library policies were mentioned, how much instruction was involved, how the patron responded to assistance, and a general assessment of the success of the reference service. Don’t be ashamed to admit that a question went unanswered, as such information could prove very useful to assessment practices.

As a precaution, identifying information should never be entered in the Description field. This applies both to the person providing reference service as well as the patron receiving assistance. Identifying information includes names as well as the specific features of someone’s appearance.
Canned reports

For quick desk stats.

1. Click on the *Reports* tab.
2. Next to *Activity*, choose the report format.
   - Bar: generates a bar graph of statistics
   - Line: generates a line graph of statistics
   - Crosstab: compares two parameters in tandem (e.g. In Person questions and Subject)
   - Text: retrieves responses to each question individually, instead of presenting a summary

- This will take you to a new screen. Choose which fields to include in your report. These parameters include:
  - Location
  - Users
  - Date Range
  - Recurring Period (e.g. every day, Monday)
  - Responses
- For individual unit reports, be sure to filter by Branch and choose your unit.
Click the Build Report button to generate the report.

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

Use only response sets entered at...
- Assessment Test - Main Desk
- Classics - Circulation
- Playground - Main

Filter: Users
- Don't Filter by User
- Filter by User

Filter: Date Range
- From
- Through

Filter: Recurring Period
- Every Day
- Sundays
- Mondays
- Tuesdays
- Wednesdays
- Thursdays
- Fridays
- Saturdays

Filter: Responses
- Don't Filter by Response
- Filter by Response

Build Report  reset fields

Exporting data
For more advanced statistics.

1. Click on the Reports tab.
2. Under Download, choose Data File Generator.
3. Under Report Options, click Show Options and select "Flat Format (.CSV)" in the File Format field.
4. Set the parameters as you would for a regular report.
5. Click the Build Report button.
6. This produces a .csv file that can be opened in Microsoft Excel for data cleaning and analysis. It can also be imported into Access.

Example:

- You are interested in running a report on all the reference transactions for the Main Library from August 2014 to December 2014. The following parameters would be selected:
  - File format: flat format
  - Page: Activity
  - Location: Main Library
  - Users: Don't Filter by User
  - Date Range: “August 1, 2014” to “December 30, 2014”
  - Recurring Period: Every Day
  - Responses: Don't Filter by Responses

- Once the report is run, you would be able to analyze the data for how many reference transactions took place through IM compared with in-person. Other modes of communication for reference transactions along with Question Type can be examined with these data.