

# **Introduction to Libstats**

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# Standard data format?

- RUSA defines a reference transaction
- ACRL, etc. want to know our stats
- Need to compare ourselves to peers
- Speaks to the need for a standard
  - But, “we’re all unique”
  - Other aspects of library work do have standards



# Standard format benefits

- Meaningful comparison between institutions
  - Not just random numbers, but meaningful numbers
  - Support for staffing and marketing efforts
- We're more alike than different, so we should be able to articulate what we do clearly



# Choosing Web applications

- Choices abound
- If you have some service or feature in mind, someone has probably done it
- Main question: commercial or open source?



# Commercial software

- Cons
  - Costs money
  - Recurring costs
  - Vendor must serve many needs
  - Does not allow much tweaking
- Pros
  - Generally requires minimal tweaking
  - Vendor provides support
  - This can also be a con!



# Open source software

- Pros
  - No purchase costs – just download
  - Access to code, change it to fit
  - If it doesn't work, getting rid of it isn't painful
- Cons
  - No dedicated support – just a community
  - Bugs/issues
- With a little work, however, OSS can be an excellent choice



# Reasonable expectations

- The software will work, but will require patience
- Support from the community may be good, but requires participation
- If no programmers available, you'll have to use it as is
- Cost is minimal, so switching solutions/platforms is likely



# Reasonable expectations

- Interesting discussion of OSS for libraries
  - “what should be an under 15 minute install could drag out for days if the person doing the install is relatively uninitiated to open source software”
  - “knocking all of open source because one developer with one program doesn’t list necessary specs is a little silly”





# Open source ref tracking

- Bad news
  - Not a lot of options
- Good news
  - Not a lot of options, period 😞
- Most important: making the move to digital stat collection 😊



# Ref tracking options

- Three options
  - Commercial
    - Altarama's RefTracker
    - Lack of options should tell us something
  - Locally developed
    - Extra programmers laying around?
    - Excel spreadsheets are less than ideal
  - Open source
    - Several floating around
    - Only Libstats has established itself



# Why Libstats?

- Developed at U of Wisconsin-Madison
- Now truly open source, with code freely available
- Even as is, it's quite functional
- Not publicly exposed – doesn't need to be beautiful or sexy



# Why Libstats, cont.

- Installs in mere minutes
- Tiny application (< 200KB)
- Small database footprint (big library, one year = 1.5 MB)
- Free, built by a library for library use
- Feature rich
- If many use it, greater chance that it will continue to evolve



# Why not use Excel?

- Can't be open in multiple locations
- Not accessible from off-network
- Not a foolproof interface
- Searching is tedious, at best
- Simply will not scale well for a busy location



# But it uses PHP!!!

- Many IT shops not fond of PHP, or at least PHP they didn't write
- Libstats uses a PHP package that may not be installed locally
- Even if allowed, may require haggling, begging, wheedling, bribing, etc.
- *Do not let this be an obstacle*



# A way out of the PHP box

- Use a commercial Web host
  - Application neutral
  - Less than \$2/month, or free!
- No need for a domain name
- Moral: don't let technology issues get in the way; it costs more to argue about than to use a commercial host
- K-State Libraries is in this boat



# What you'll need: Server

- Basic **LAMP** or **AMP** Webserver
  - Yours or commercial
  - **A**pache (the Webserver software)
  - **M**ySQL (open source database server)
  - **P**HP (the code)
- *Teeny* amount of disk space (less than 20 MB for *years* of data)
- Uses common versions of **AMP**





# What you'll need: Staff

- Necessary skills
  - Comfortable with command-line UNIX, at least as a user
  - Minimal MySQL knowledge
- Highly desired skills
  - Sense of humor
  - Patience



# What you'll need: Extras

- Server-side work is minimal, unless you want to modify the application
- Helpful to have intermediate Excel skills to work with the reports



# History of Libstats at K-State



**Photo by David Domingo**



# History of Libstats at K-State



**Photo by Steve Bridger**



# History of Libstats at K-State

- Summer 2006



- Fall 2006: War on



# History of Libstats at K-State

- Oct. 19: General Information Services Department decides to explore options
- Nov. 2: Dale shares several implementations he found:  
[http://del.icio.us/daskey/ref\\_stats](http://del.icio.us/daskey/ref_stats).





# History of Libstats at K-State

- Nov. 5: I send the following query to LIBREF-L

Do any of you know of a user-friendly program that facilitates recording of information about reference transactions, e.g. length, type, patron category, general topic?

The desk at which I work is staffed by two people at all times. We currently record statistics on a paper form and then have one of our students type them in to an excel file. In the interest of streamlining the process and saving trees, we'd like to switch to recording the data in electronic form. We've considered the obvious solution of simply recording the data directly into the excel file, but would like to find something that would allow both of our stations to record data simultaneously to the same location.

I'd be grateful for any leads/advice.



# History of Libstats at K-State

- I received several suggestions:
  - Google Docs
  - Microsoft Access
  - Microsoft Excel
    - share a workbook following the instructions at:  
[http://exceltips.vitalnews.com/Pages/T0857\\_Sharing\\_Your\\_Workbook.html](http://exceltips.vitalnews.com/Pages/T0857_Sharing_Your_Workbook.html)  
and <http://meredith.wolfwater.com/wordpress/index.php/2005/10/28/tick-marks-or-high-tech/>
  - RefTracker by Altarama Information Systems
  - Libstats





# History of Libstats at K-State

- Nov. 6: Dale downloads and installs Libstats.
- Nov. 7: The Hale Library Help Desk begins testing Libstats
- Nov.-Dec.: It's love.
- Jan. 3, 2007: The Hale Library Help Desk officially adopts Libstats and stops recording statistics on paper .



# History of Libstats at K-State

- Customizing Libstats:

<b><u>Location</u></b> help desk reception room <b>office</b> home	<b><u>Patron Type</u></b> undergrad grad faculty staff <b>other/unknown</b>	<b><u>Question Type</u></b> directional reference tech referral technical <b>referral</b>	<b>Time Spent</b> 0-1 1-5 6-10 <b>10-30</b> 30+	<b><u>Question Format</u></b> in person email phone <b>im</b> text
<b>Initials</b> <input type="text"/>	<b><u>Backdate</u></b> <input type="text"/>			
<b><u>Question</u></b> <input type="text"/>				



# History of Libstats at K-State

- Instructions:
  - Customized text for [clickable help](#) for the location, patron type, backdate, question, and answer fields.
  - Created a [document](#) with detailed instructions.



# History of Libstats at K-State

- Staff's Initial Reaction
  - Seemed mostly positive
  - Hesitant to record initials
  - Uncertain how much to record.
- Danielle's response to concerns
  - Assured staff that there would be no repercussions for incorrect answers
  - Allowed each person to record as much or as little as he/she wanted.
  - Surveyed staff to learn more.



# History of Libstats at K-State

- Adoption by other K-State Libraries' reference desks:
  - July 1, 2007: Government Documents, Maps, Microforms
  - August 11, 2007: Dow Chemical Multicultural Resource Center
  - September 20, 2007: Weigel Architecture Library
  - February 11, 2008: Love Science Library
  - February 18, 2008: Feidler Engineering Library
  - February 18, 2008: Math/Physics Library



# Potential changes to Libstats

- Violating the 5 option per list rule:
  - Adding an n/a option for each choice field
  - Adding “building” and “techprob” to the question type field
  - Adding “K-12 student” and “other college” to the patron type field



# Potential changes to Libstats

- Use for purposes other than recording transactions
  - Record essential knowledge and facts
  - Record policies and procedures
  - Post messages
  - Track the status of building and technology problems



# Potential changes to Libstats

- Develop codes to make it easier to record common questions and answers
  - qqprint, qqscan, qqcallnumber





# Potential changes to Libstats

- More difficult changes:
  - Create a new field for effort it takes to answer a question. Use the READ scale.
  - Develop a method for commenting to transactions
  - Enhance the built-in reports



# History of Libstats at K-State



**Photo by Steve Bridger**



# Applications for Management

- Querying the database
- Making staffing decisions
- Promoting reference
- Improving the quality of reference service
- Helping the library meet users' needs.



# Querying the database

- Searching Libstats
  - Two methods: quick search and advanced search

Library Stats : Add Question Hale Library Help Desk | [Add Question Page](#) | [Reports](#) | [Log out](#)  
Quick Search:   | [Advanced Search](#)

<u>Location</u>	<u>Patron Type</u>	<u>Question Type</u>	<u>Time Spent</u>	<u>Question Format</u>	<u>Initials</u>	<u>Backdate</u>
help desk reception room <b>office</b> home	undergrad grad faculty staff <b>other/unknown</b>	directional reference tech referral technical <b>referral</b>	0-1 1-5 6-10 <b>10-30</b> 30+	in person email phone <b>im</b> text	jmc	



# Querying the database

- Quick Search

- Searches the question, answer, and initials fields
- Can use quotation marks to search for phrases
- Returns all transactions with ALL the terms and phrases in the query
- Can use \* as a truncation symbol
- Useful for staff and management to see how particular questions are being answered.



# Querying the database

## Library Stats : Advanced Search

Library

Hale Help

Location

All Locations

Initials

Start Date

End Date

Containing Text:

Notes:

- Use quotes for phrases: "ISO 9000"
- Use \* for truncation: standard\*
- Words shorter than three letters are not searchable.
- Dates can be of the forms:
  - Standard mm/dd/yy (6/15/05)
  - Standard with time (6/15/05 3:12 PM)
  - Time only (3:12 pm)
  - Text dates (June 15, 2005)
  - Relative dates (3 months ago)
  - Try other things; you'll see if they work.

Run Search



# Querying the database

## Library Stats : Advanced Search

Library

Hale Help

Hale Help

All Libraries

Architecture

Fiedler

GovPub-Microforms

Hale Circ

Hale Help

Hale MRC

Love Science

Math/Physics

Salina

Vet Med

Location

All Locations

Initials

Start Date

End Date

es: "ISO 9000"

t standard\*

three letters are not searchable.

forms:

/dd/yy (6/15/05)

n time (6/15/05 3:12 PM)

12 pm)

June 15, 2005)

- Relative dates (3 months ago)
- Try other things; you'll see if they work.

Run Search



# Querying the database

## Library Stats : Advanced Search

<b>Library</b> Hale Help	<b>Location</b> All Locations	<b>Initials</b> 	<b>Start Date</b> 	<b>End Date</b> 
-----------------------------	----------------------------------	---------------------	-----------------------	---------------------

**Containing Text:**

**Notes:**

- Use quotes for phrases office
- Use \* for truncation: s home
- Words shorter than three letters are not searchable.
- Dates can be of the forms:
  - Standard mm/dd/yy (6/15/05)
  - Standard with time (6/15/05 3:12 PM)
  - Time only (3:12 pm)
  - Text dates (June 15, 2005)
  - Relative dates (3 months ago)
  - Try other things; you'll see if they work.





# Querying the database

- Reasons to use the Advanced Search
  - See how many times a particular question came up during a certain time period
    - e.g. search for color print\* in January
  - See how many questions a particular staff person answered over a certain time period



# Querying the database

## Library Stats : Advanced Search

<b>Library</b> Hale Help	<b>Location</b> All Locations	<b>Initials</b> jmc	<b>Start Date</b> 3/09/08 12:00 AM	<b>End Date</b> 3/16/08 12:00 AM
-----------------------------	----------------------------------	------------------------	---------------------------------------	-------------------------------------

Containing Text:

### Notes:

- Use quotes for phrases: "ISO 9000"
- Use \* for truncation: standard\*
- Words shorter than three letters are not searchable.
- Dates can be of the forms:
  - Standard mm/dd/yy (6/15/05)
  - Standard with time (6/15/05 3:12 PM)
  - Time only (3:12 pm)
  - Text dates (June 15, 2005)
  - Relative dates (3 months ago)
  - Try other things; you'll see if they work.

Run Search



# Querying the database

- How else might you use the Advanced Search?



# Querying the database

- Running Reports

## Library Stats : Add Question

Hale Library Help Desk | [Add Question Page](#) | [Reports](#) | [Log out](#)

Quick Search:   | [Advanced Search](#)

### Location

help desk  
reception  
room  
office  
home

### Patron Type

undergrad  
grad  
faculty  
staff  
other/unknown

### Question Type

directional  
reference  
tech referral  
technical  
referral

### Time Spent

0-1  
1-5  
6-10  
10-30  
30+

### Question Format

in person  
email  
phone  
im  
text

### Initials

jmc

### Backdate



# Querying the database

## Library Stats : Reports

---

Please choose from these 7 reports.

### 1 [Data Dump](#)

Sends a complete dump of report data to your computer for manipulation in a spreadsheet. [Pivot Tables](#) are fantastic for this.

---

### 2 [Data Dump with Questions and Answers](#)

Send a complete dump of data including questions and answers in CSV format

---

### 3 [Questions by Date](#)

This report provides the count of questions for each day.

---

### 4 [Questions by Patron Type](#)

This report provides the count of questions for every patron type.

---

### 5 [Questions by Question Format](#)

This report provides the count of questions for every question format.

---

### 6 [Questions by Time of Day](#)

This report provides the count of questions for each hour of the day.

---

### 7 [Questions by Weekday](#)

This report provides the count of questions, counted for each day of the week.



# Querying the database

## Library Stats : Add Date Criteria

You have chosen this report:

### Questions by Date

This report provides the count of questions for each day.

Begin Date:

End Date:

Library: Hale Help



Location: All Locations



Run Report



# Querying the database

## Hale Help

Questions by Date from 03-01-2008 through 03-14-2008

Date	Weekday	Question Count	Percentage
03-13-2008	Thursday	134	9.3%
03-12-2008	Wednesday	161	11.2%
03-11-2008	Tuesday	150	10.5%
03-10-2008	Monday	139	9.7%
03-09-2008	Sunday	86	6%
03-08-2008	Saturday	45	3.1%
03-07-2008	Friday	86	6%
03-06-2008	Thursday	122	8.5%
03-05-2008	Wednesday	152	10.6%
03-04-2008	Tuesday	129	9%
03-03-2008	Monday	136	9.5%
03-02-2008	Sunday	61	4.3%
03-01-2008	Saturday	34	2.4%
<b>Totals</b>	<b>13</b>	<b>1435</b>	<b>100.1%</b>



# Querying the database

## Library Stats : Reports

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Please choose from these 7 reports.

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---

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This report provides the count of questions, counted for each day of the week.





# Querying the database

## Data Dump

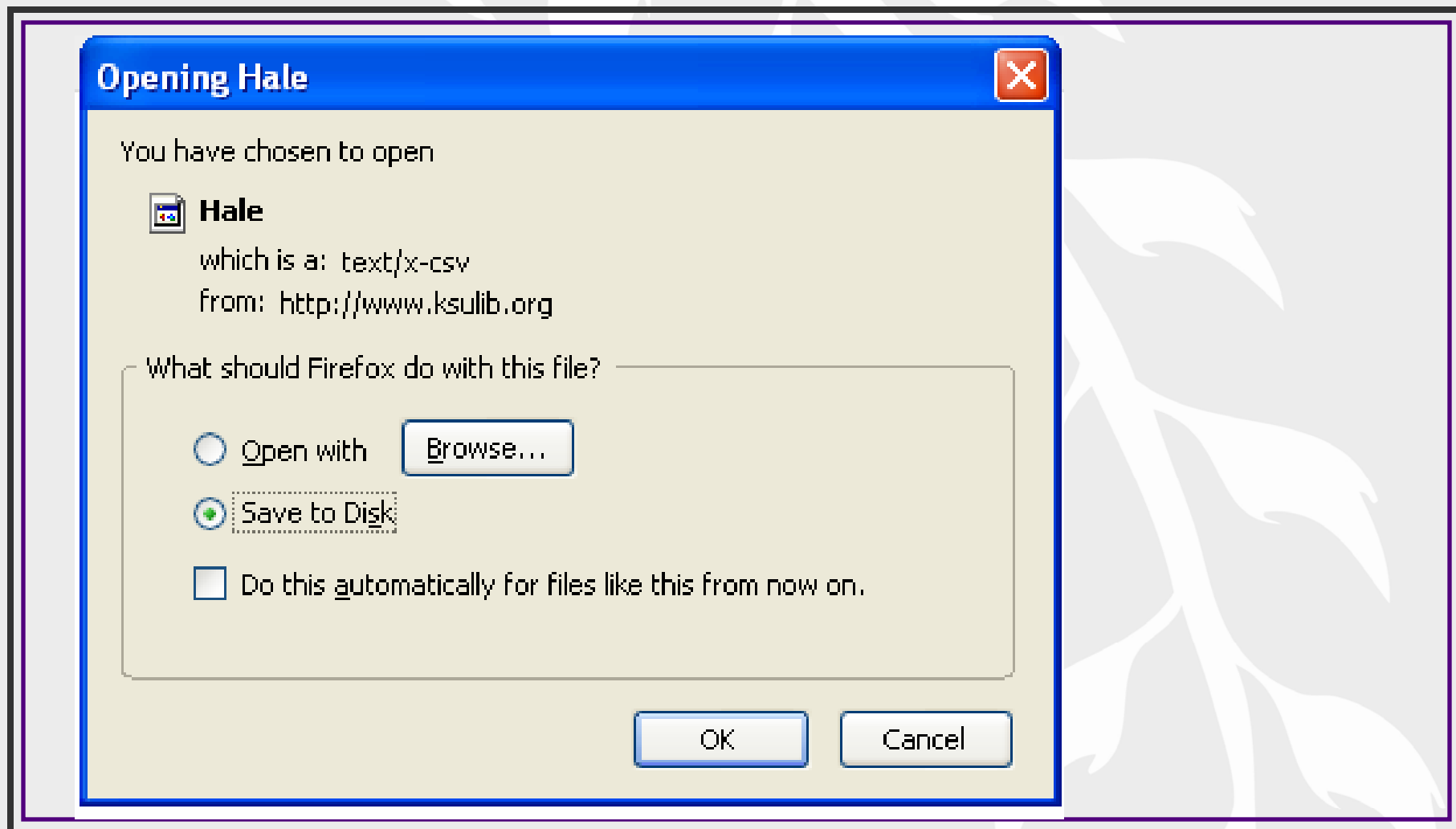
Sends a complete dump of report data to your computer for manipulation in a spreadsheet. [Pivot Tables](#) are fantastic for this.

Begin Date:  End Date:

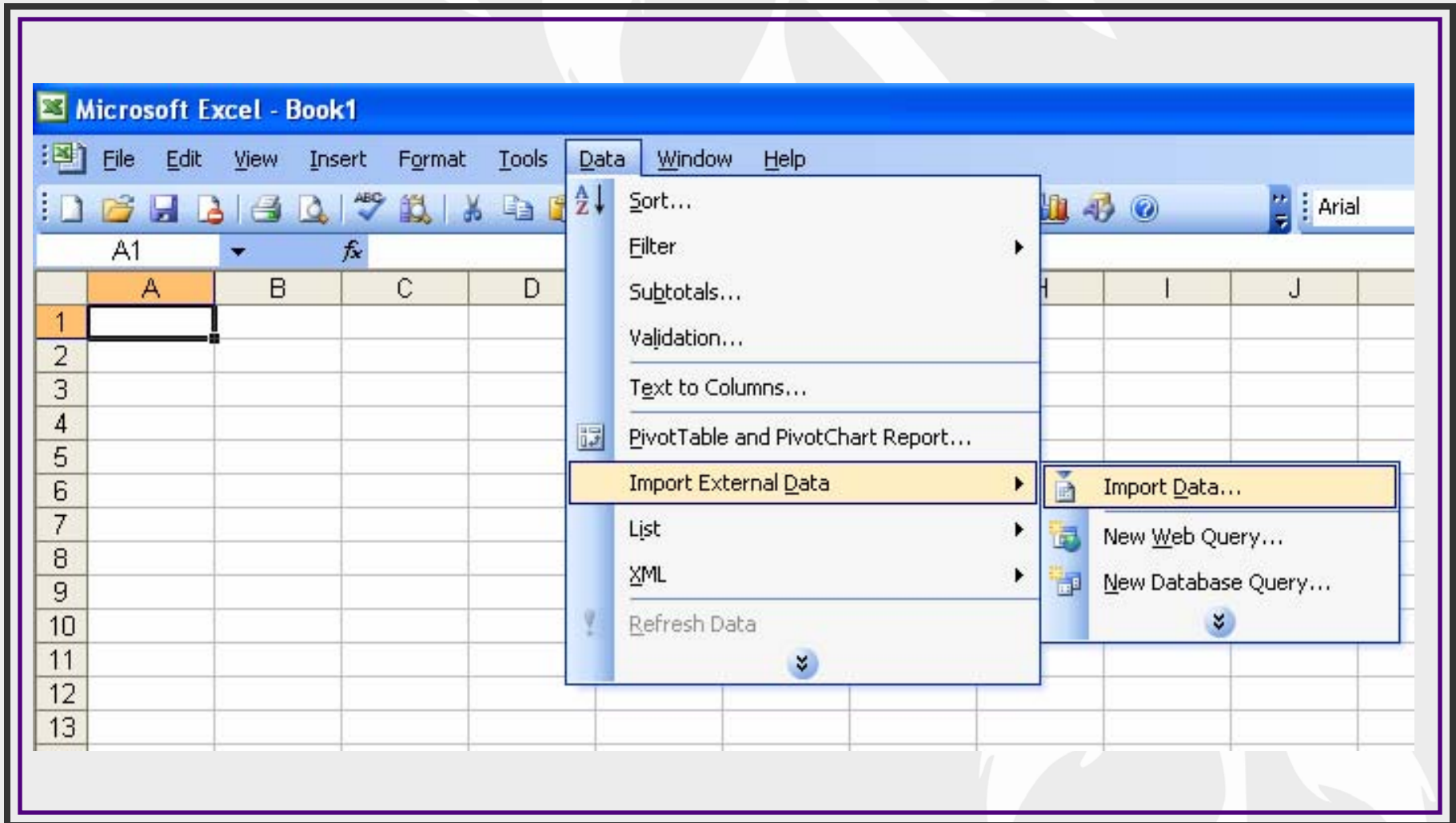
Library:  Location:



# Querying the database



# Querying the database



# Querying the database

**Text Import Wizard - Step 1 of 3** [?] [X]

The Text Wizard has determined that your data is Fixed Width.  
If this is correct, choose Next, or choose the data type that best describes your data.

**Original data type**  
Choose the file type that best describes your data:

**Delimited** - Characters such as commas or tabs separate each field.  
 **Fixed width** - Fields are aligned in columns with spaces between each field.

Start import at row:  File origin:

Preview of file C:\Documents and Settings\coleman\Desktop\Hale.

1	question_id,patron_type,question_type,time_spent,question_format
2	2,undergrad,technical,1-5,in person,help desk,1/04/2007 09:17:3
3	3,grad,tech referral,1-5,in person,help desk,1/04/2007 09:24:19
4	4,undergrad,referral,1-5,in person,help desk,1/04/2007 09:53:59
5	5,undergrad,technical,1-5,in person,help desk,1/04/2007 10:45:4

Cancel < Back **Next >** Finish



# Querying the database

**Text Import Wizard - Step 2 of 3**

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

**Delimiters**

Tab     Semicolon     Comma  
 Space     Other:

Treat consecutive delimiters as one

Text qualifier:  ▾

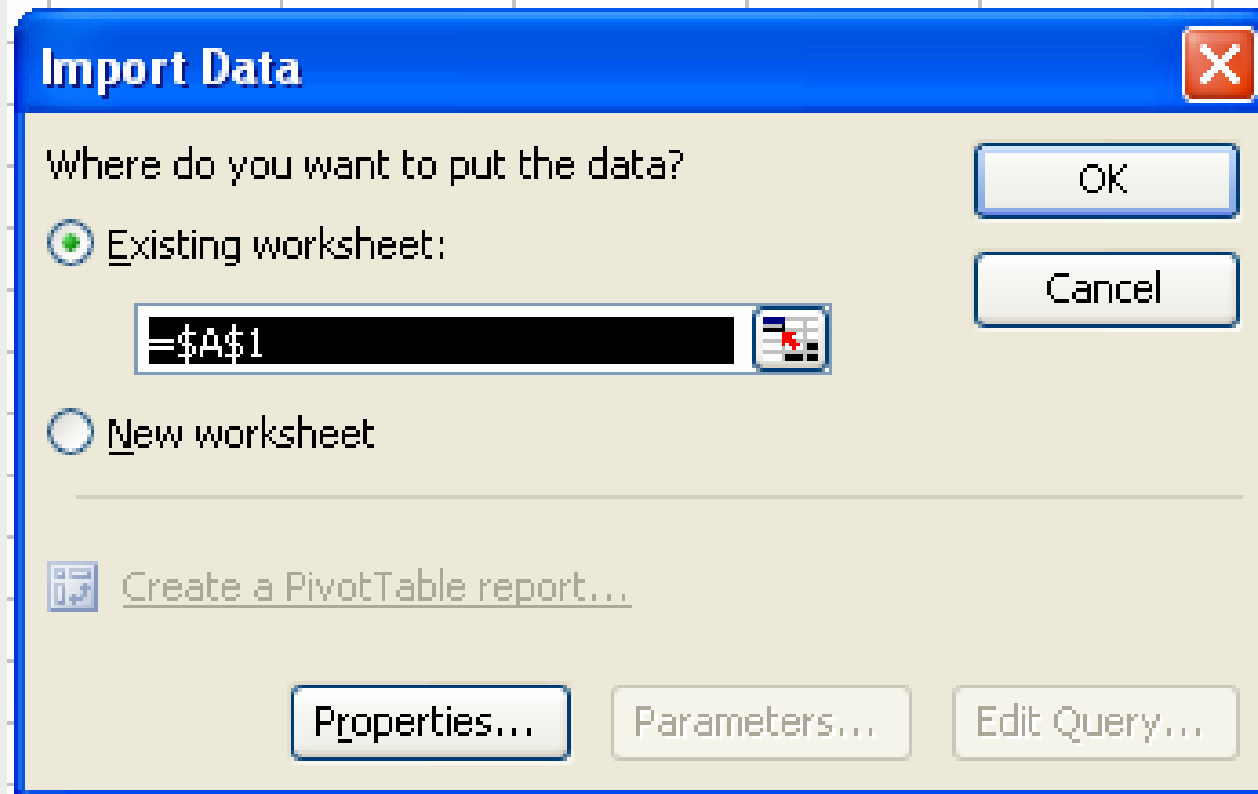
**Data preview**

question_id	patron_type	question_type	time_spent	question_format
2	undergrad	technical	1-5	in person
3	grad	tech referral	1-5	in person
4	undergrad	referral	1-5	in person
6	undergrad	technical	1-5	in person

Cancel    < Back    Next >    Finish



# Querying the database



# Querying the database

	A	B	C	D	E	F	G	H
1	question_id	patron_type	question_type	question_format	location_name	question_time	question_date	question_weekday
2	2	undergrad	technical	in person	help desk	9:17:33 AM	1/4/2007	Thursday
3	3	grad	tech referral	in person	help desk	9:24:19 AM	1/4/2007	Thursday
4	4	undergrad	referral	in person	help desk	9:53:59 AM	1/4/2007	Thursday
5	6	undergrad	technical	in person	help desk	10:45:48 AM	1/4/2007	Thursday
6	7	undergrad	technical	in person	help desk	10:45:54 AM	1/4/2007	Thursday
7	9	faculty	referral	in person	help desk	11:34:09 AM	1/4/2007	Thursday
8	10	grad	technical	in person	help desk	11:34:22 AM	1/4/2007	Thursday
9	11	other/unknown	reference	in person	help desk	1:48:24 PM	1/4/2007	Thursday
10	12	other/unknown	tech referral	in person	help desk	1:52:17 PM	1/4/2007	Thursday
11	14	undergrad	reference	in person	help desk	1:56:46 PM	1/4/2007	Thursday
12	15	other/unknown	technical	in person	help desk	2:03:13 PM	1/4/2007	Thursday
13	33	undergrad	reference	in person	help desk	2:31:08 PM	1/4/2007	Thursday
14	34	undergrad	reference	in person	help desk	2:31:40 PM	1/4/2007	Thursday
15	35	undergrad	reference	in person	help desk	2:32:43 PM	1/4/2007	Thursday
16	37	other/unknown	tech referral	in person	help desk	5:03:54 PM	1/4/2007	Thursday
17	41	other/unknown	reference	in person	help desk	5:11:44 PM	1/4/2007	Thursday
18	45	faculty	directional	in person	help desk	9:28:14 AM	1/5/2007	Friday
19	46	faculty	reference	in person	help desk	9:28:38 AM	1/5/2007	Friday
20	47	undergrad	directional	in person	help desk	9:36:24 AM	1/5/2007	Friday
21	48	undergrad	technical	in person	help desk	9:42:07 AM	1/5/2007	Friday
22	51	other/unknown	reference	in person	help desk	10:34:03 AM	1/5/2007	Friday
23	52	other/unknown	directional	in person	help desk	10:35:12 AM	1/5/2007	Friday
24	53	other/unknown	directional	in person	help desk	10:45:40 AM	1/5/2007	Friday
25	54	grad	reference	in person	help desk	11:03:54 AM	1/5/2007	Friday
26	56	other/unknown	directional	in person	help desk	12:56:34 PM	1/5/2007	Friday
27	59	undergrad	technical	in person	help desk	1:18:56 PM	1/5/2007	Friday



# Staffing Decisions

## Examples

- When to staff IM off the desk
- When to single staff the desk
- When to request additional staffing to help with technology questions.





# Staffing decisions

**Question:** When is IM service too busy between 8-5 M-F to staff from the Hale Library Help Desk?

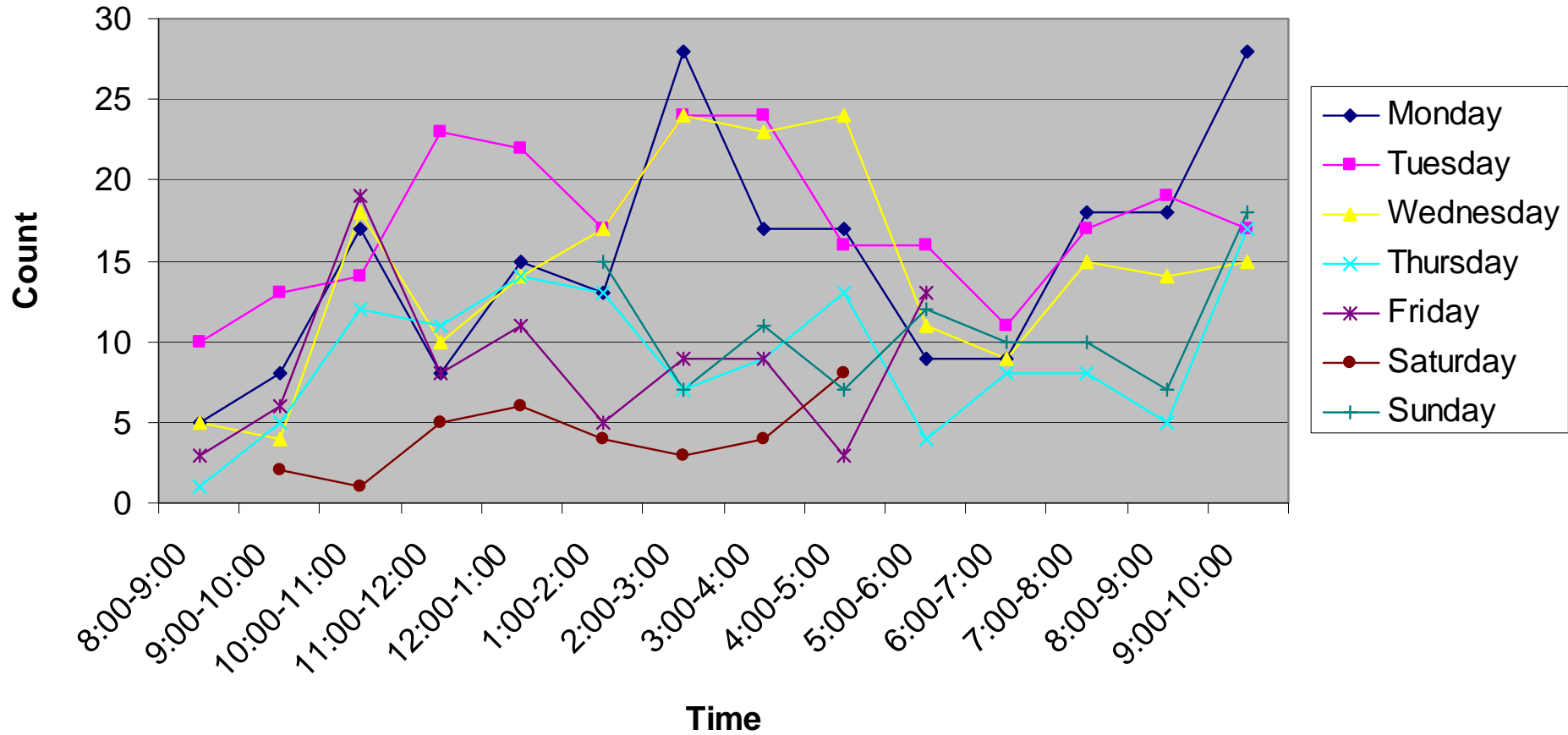
**Analysis:**

1. Sort data by question format
2. Sort IM by day of week, then by time
3. Count number of IM transactions for each hour of each day.

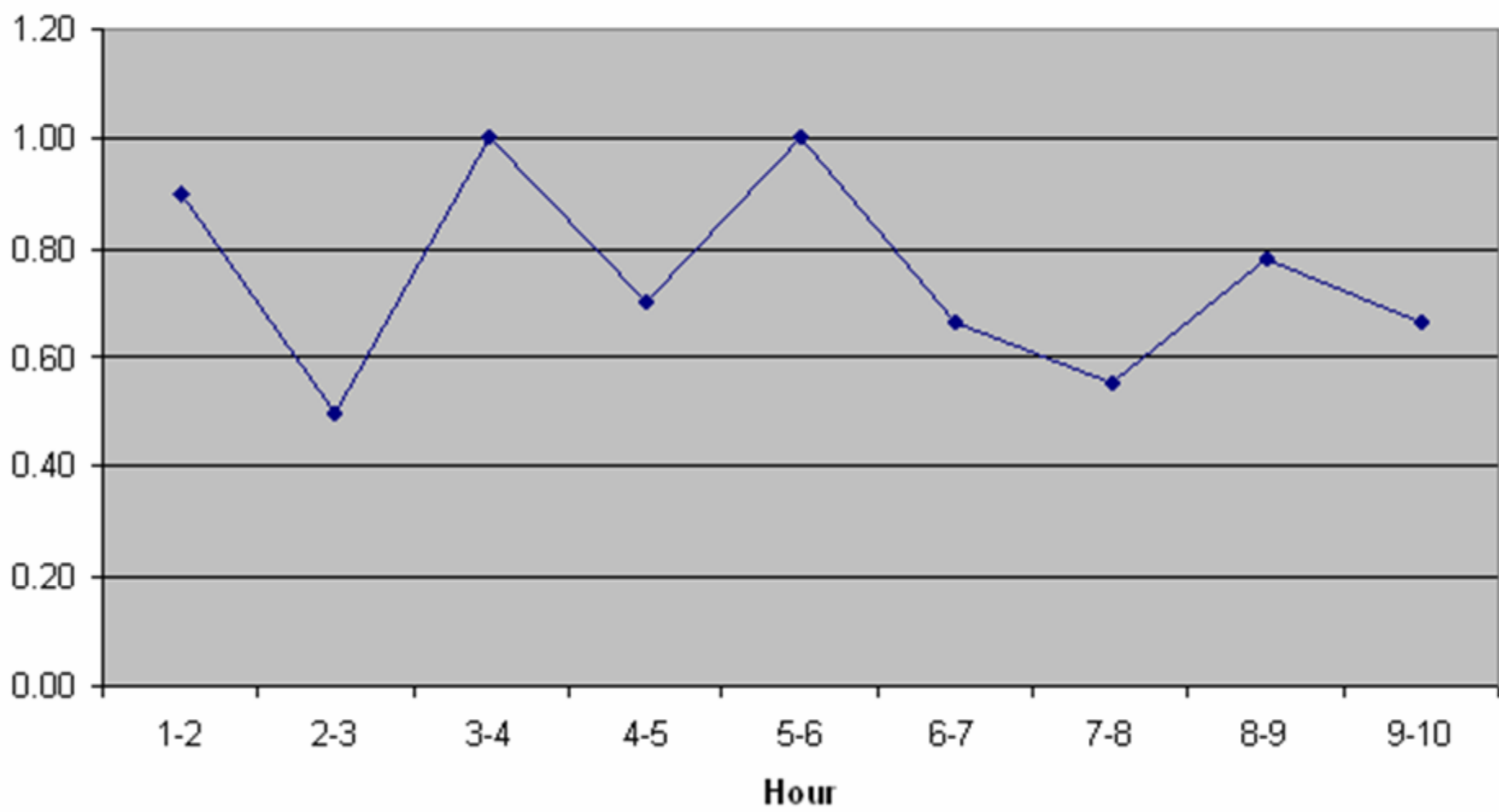


# Staffing decisions

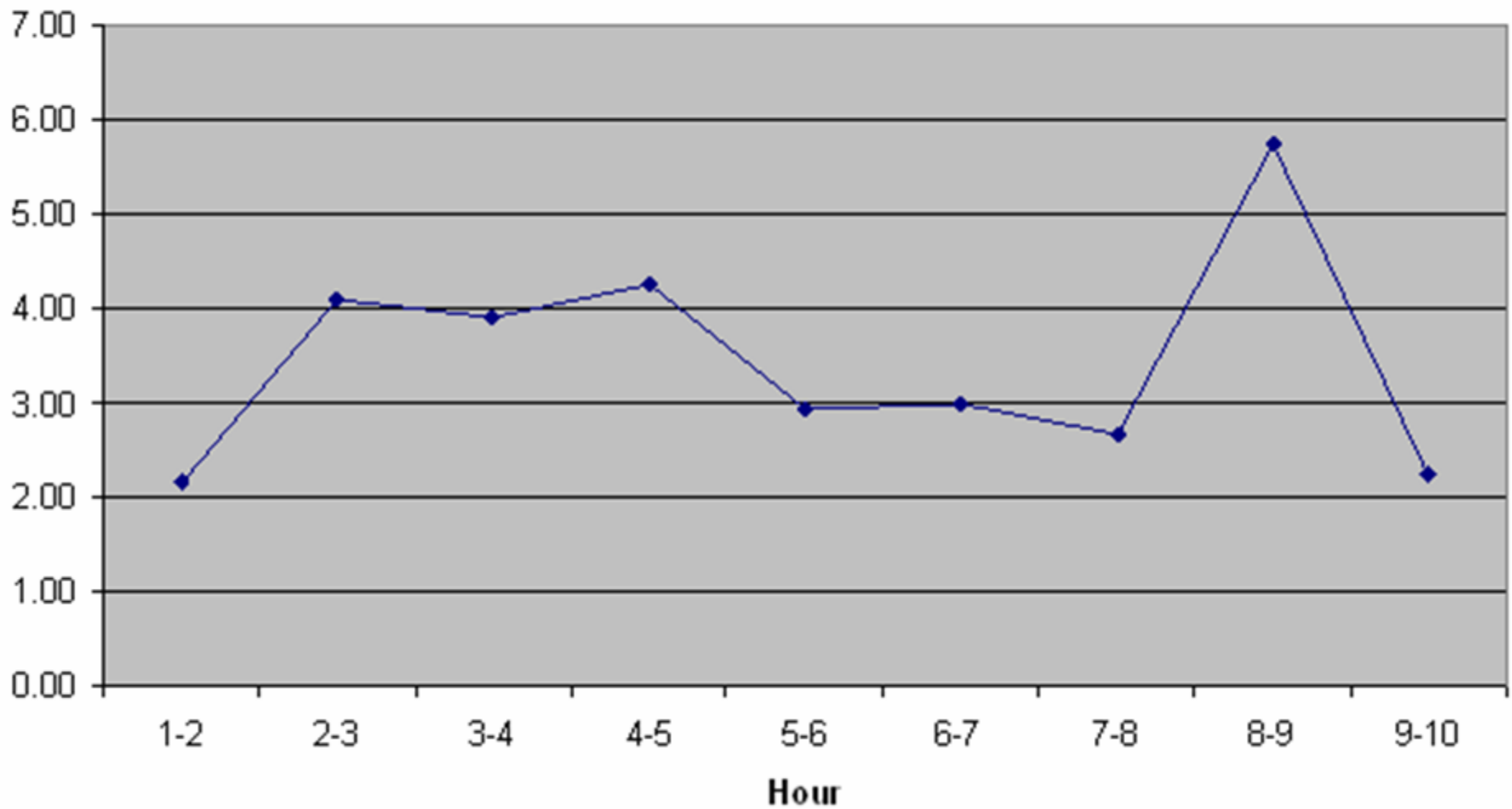
## Total IM for 2007 Fall Semester by Hour



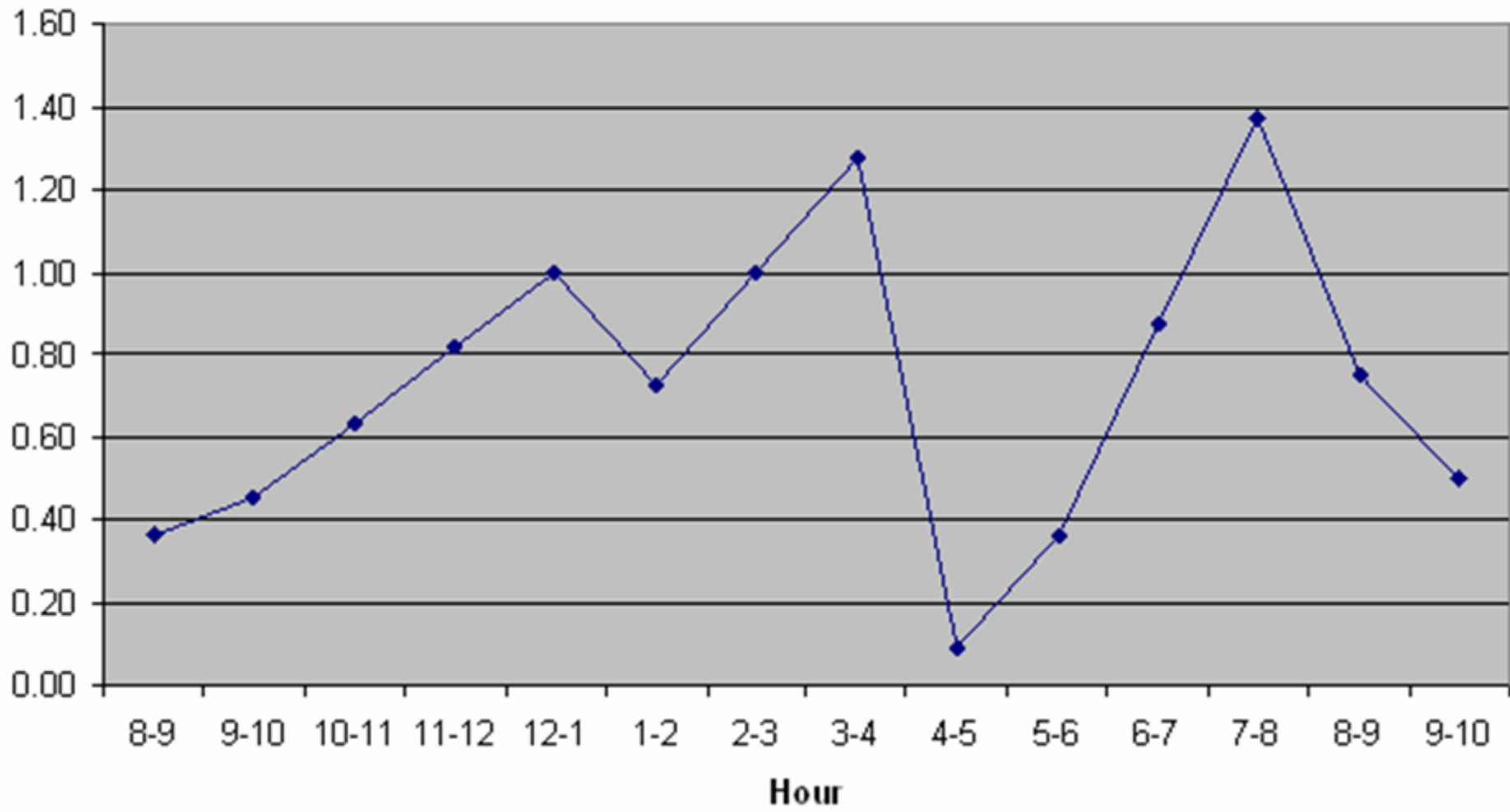
**Sundays: Avg # IM questions per hour 1/1/08-3/29/08**



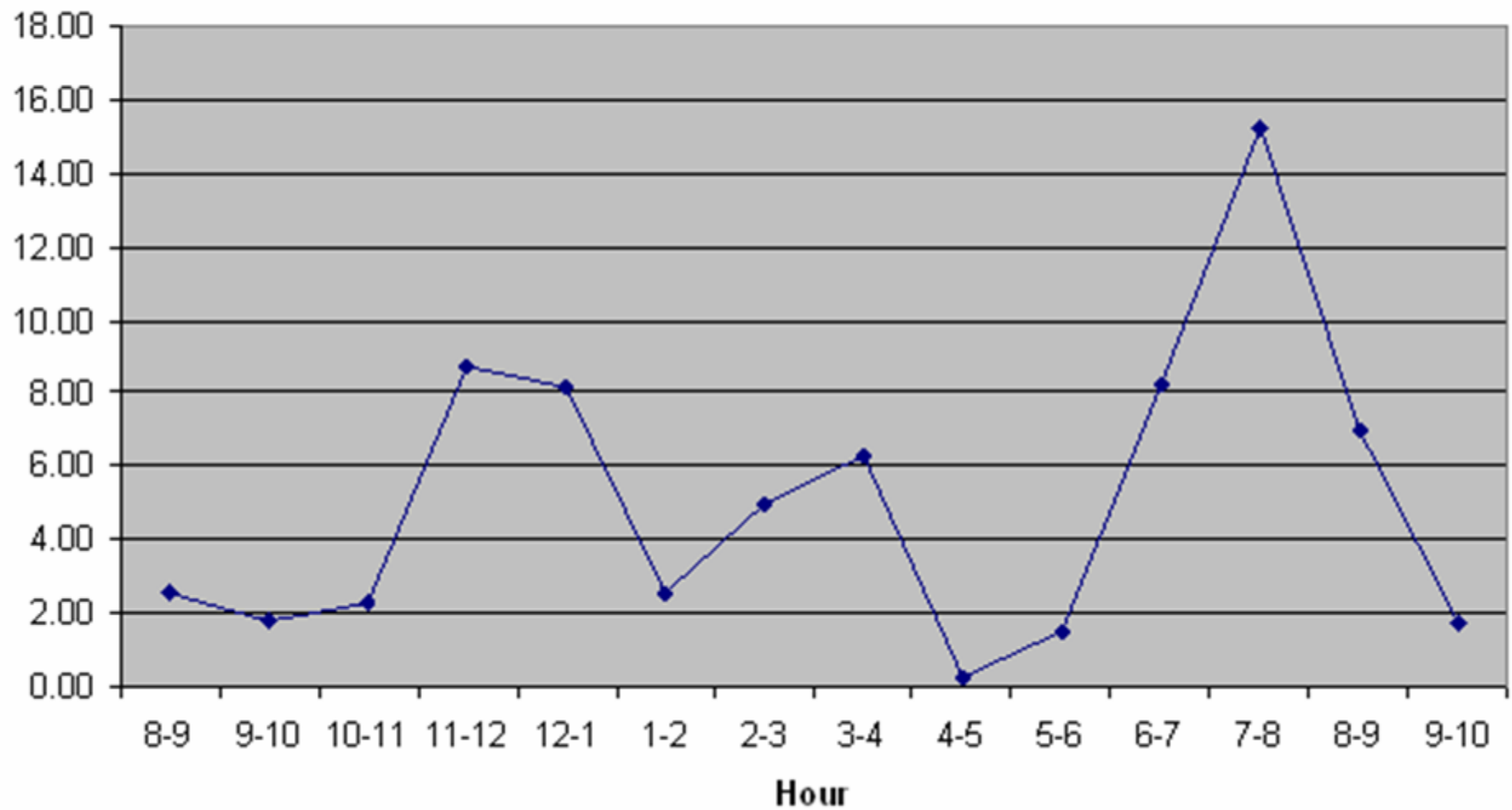
**Sundays: Avg Minutes answering IM questions 1/1/08 - 3/29/08**



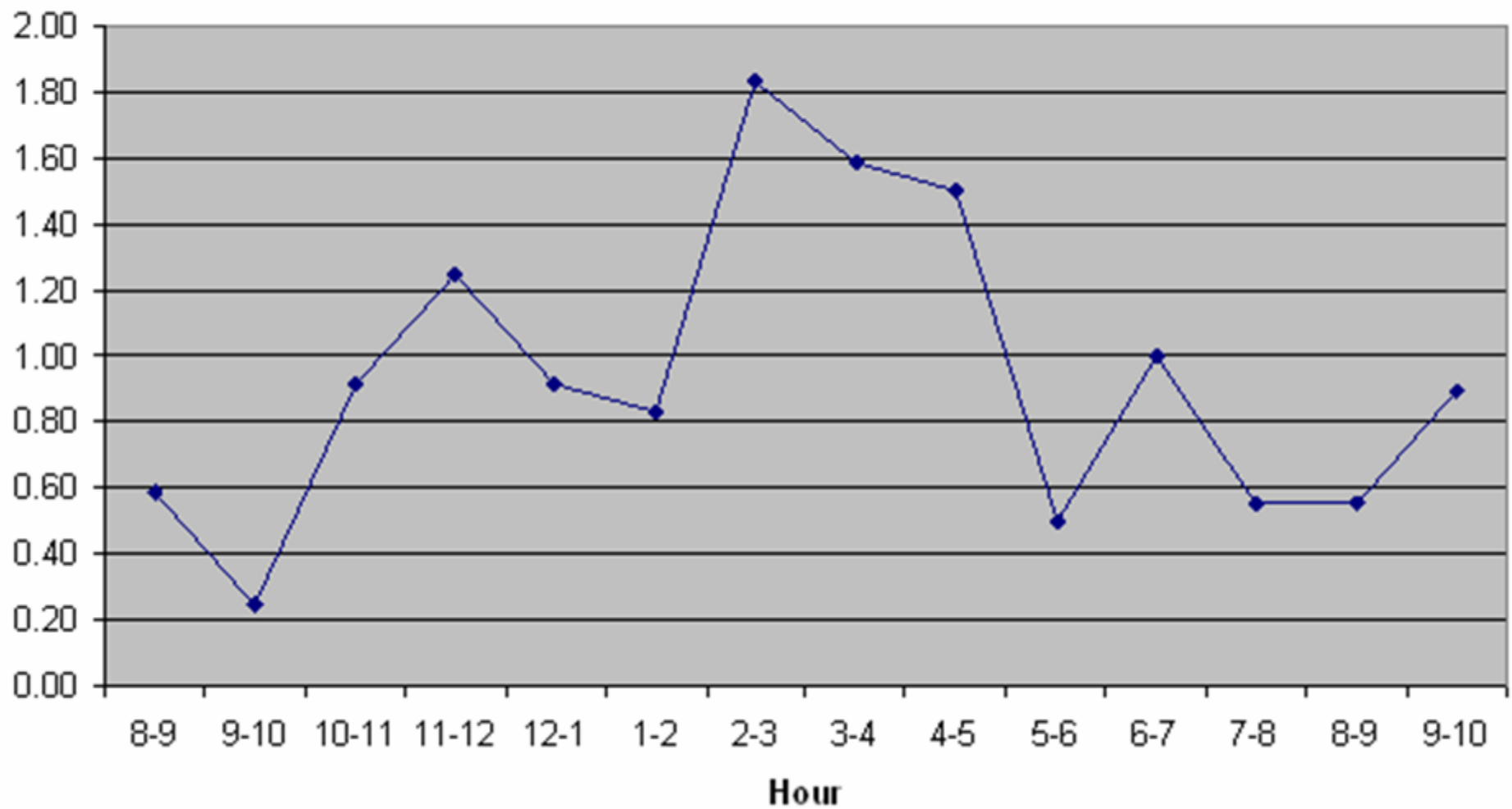
**Mondays: Avg # IM questions per hour 1/1/08-3/29/08**



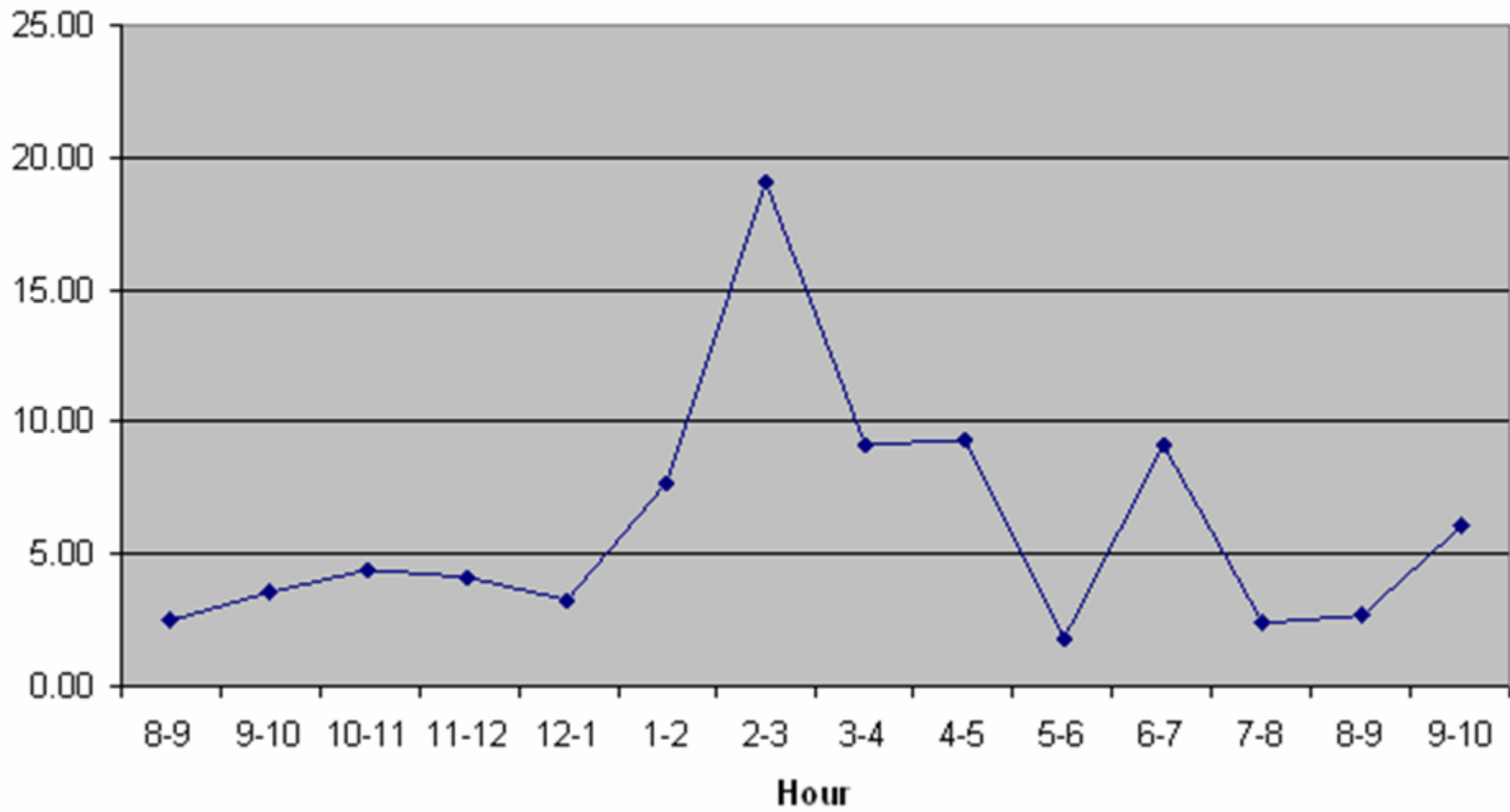
**Mondays: Avg Minutes answering IM questions 1/1/08 - 3/29/08**



**Tuesdays: Avg # IM questions per hour 1/1/08-3/29/08**

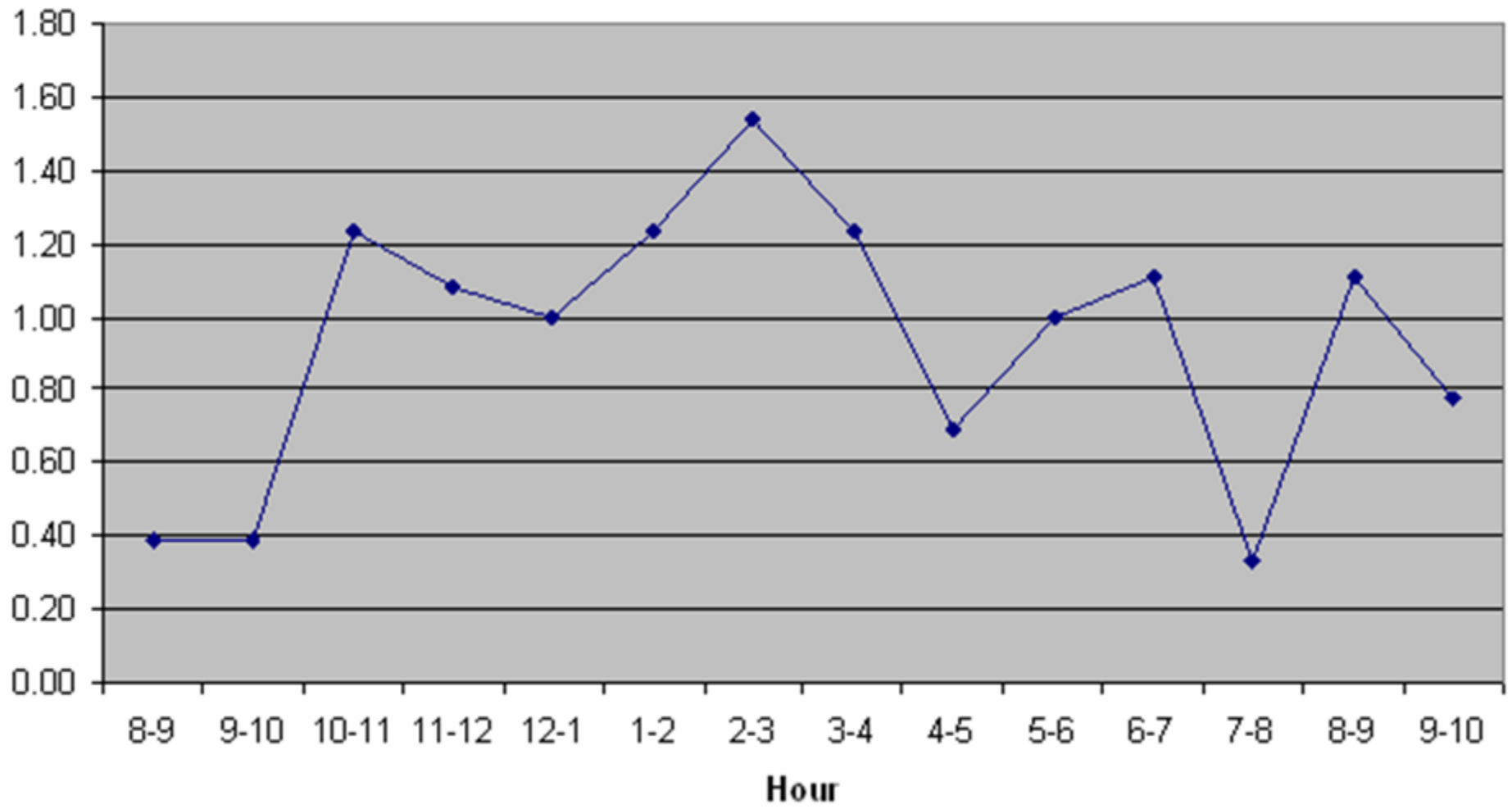


**Tuesdays: Avg Minutes answering IM questions 1/1/08 - 3/29/08**

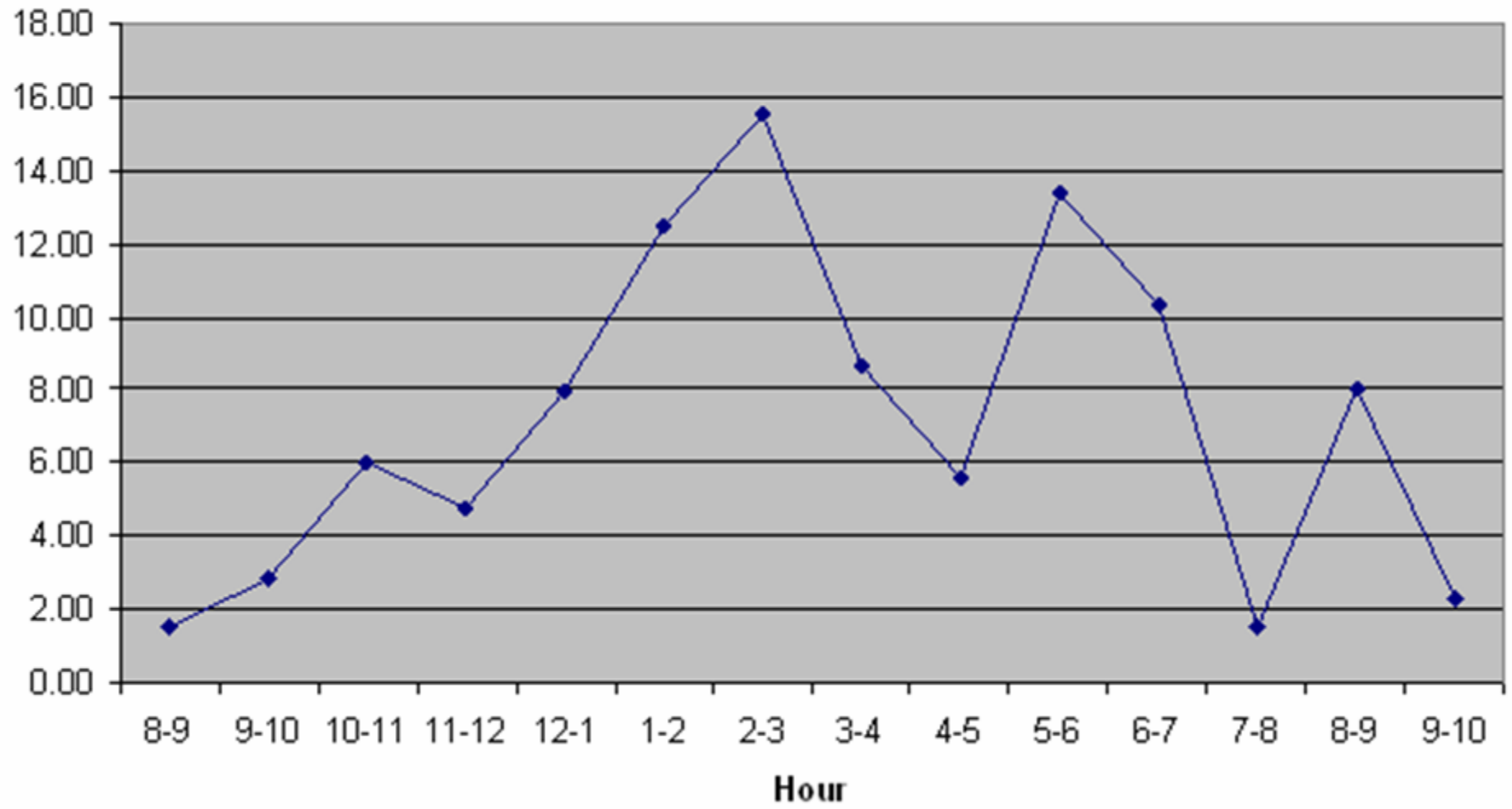




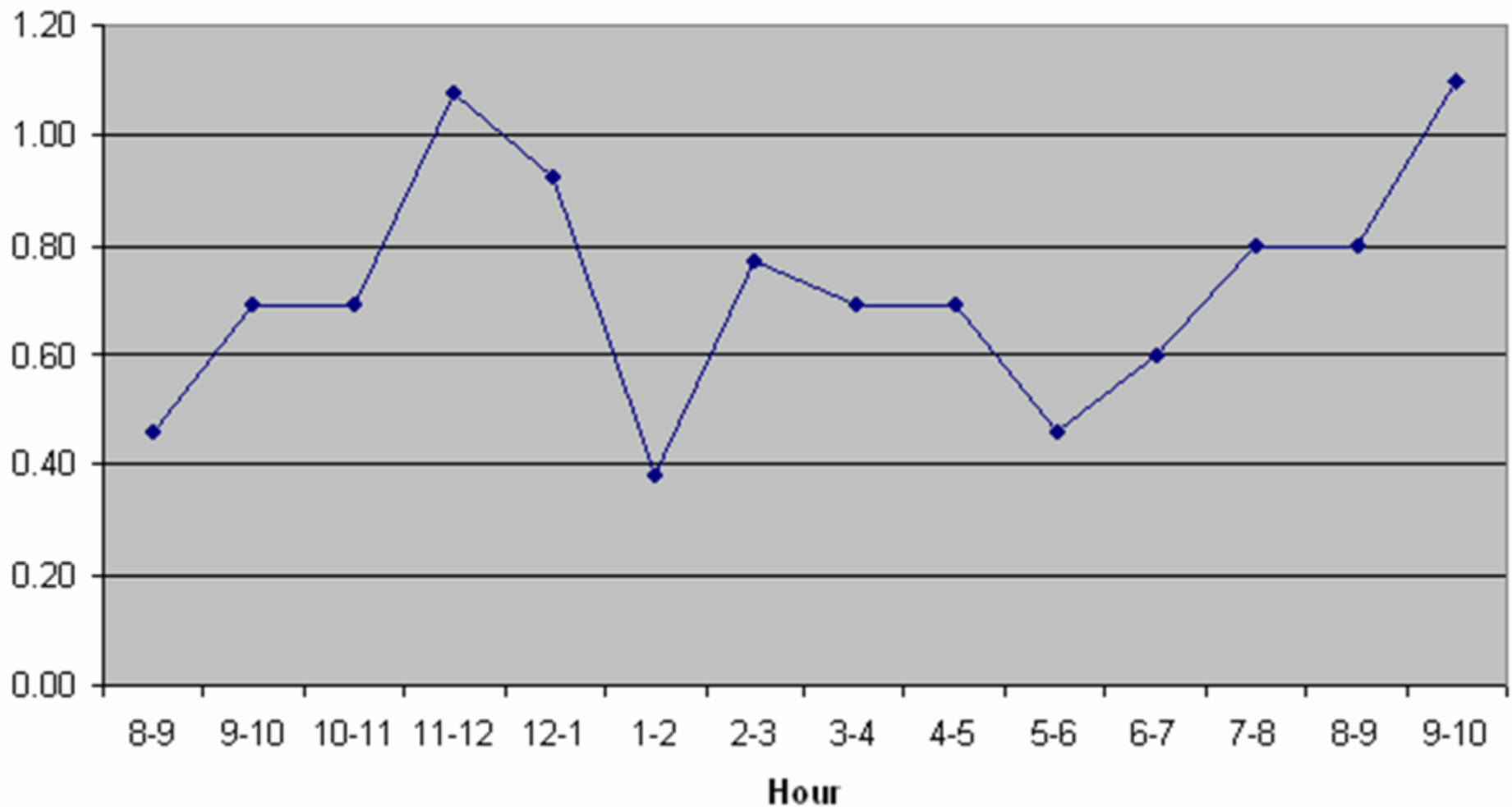
Wednesdays Avg # IM questions per hour 1/1/08-3/29/08



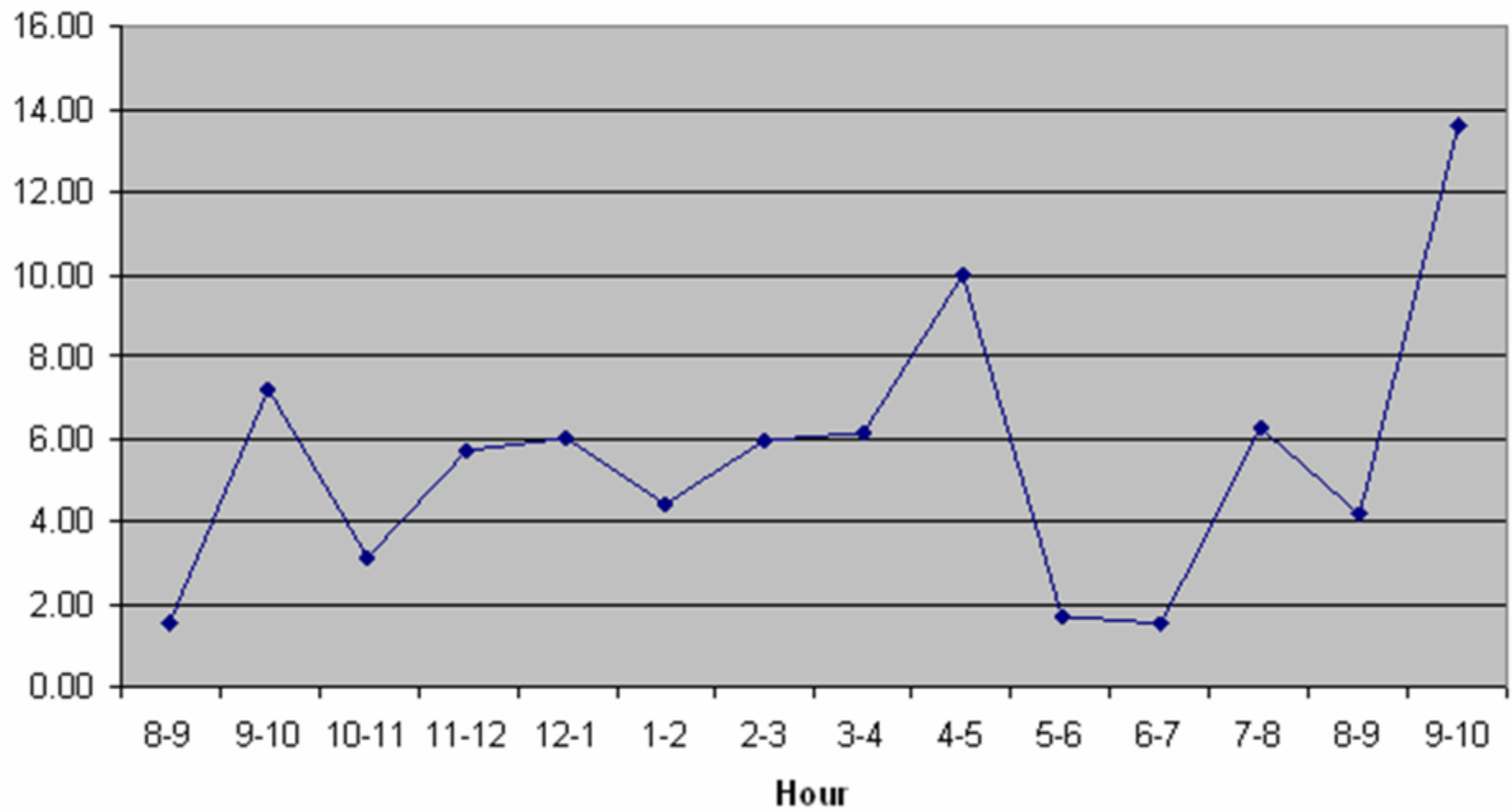
**Wednesdays: Avg Minutes answering IM questions 1/1/08 - 3/29/08**



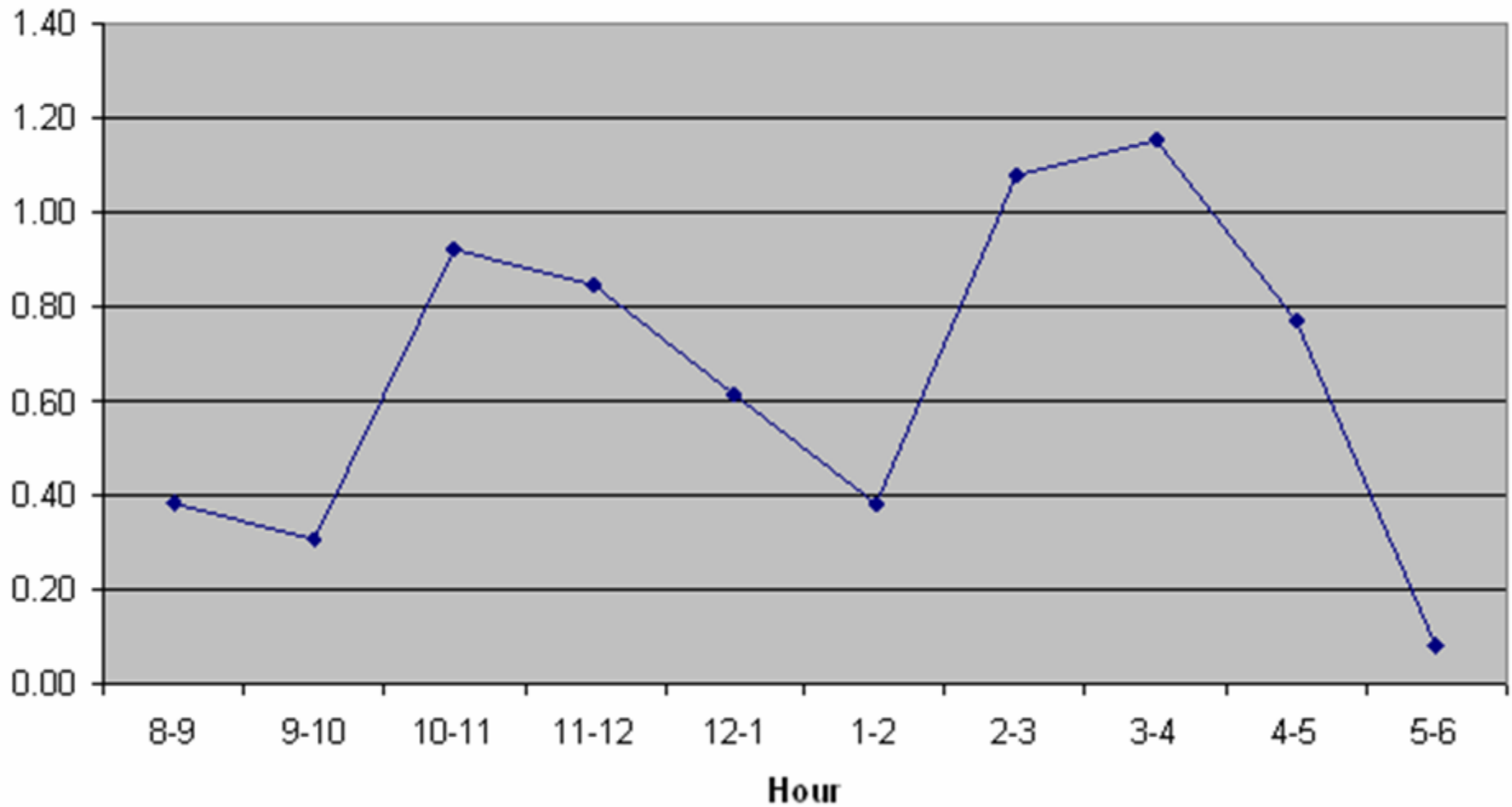
**Thursdays: Avg # IM questions per hour 1/1/08-3/29/08**



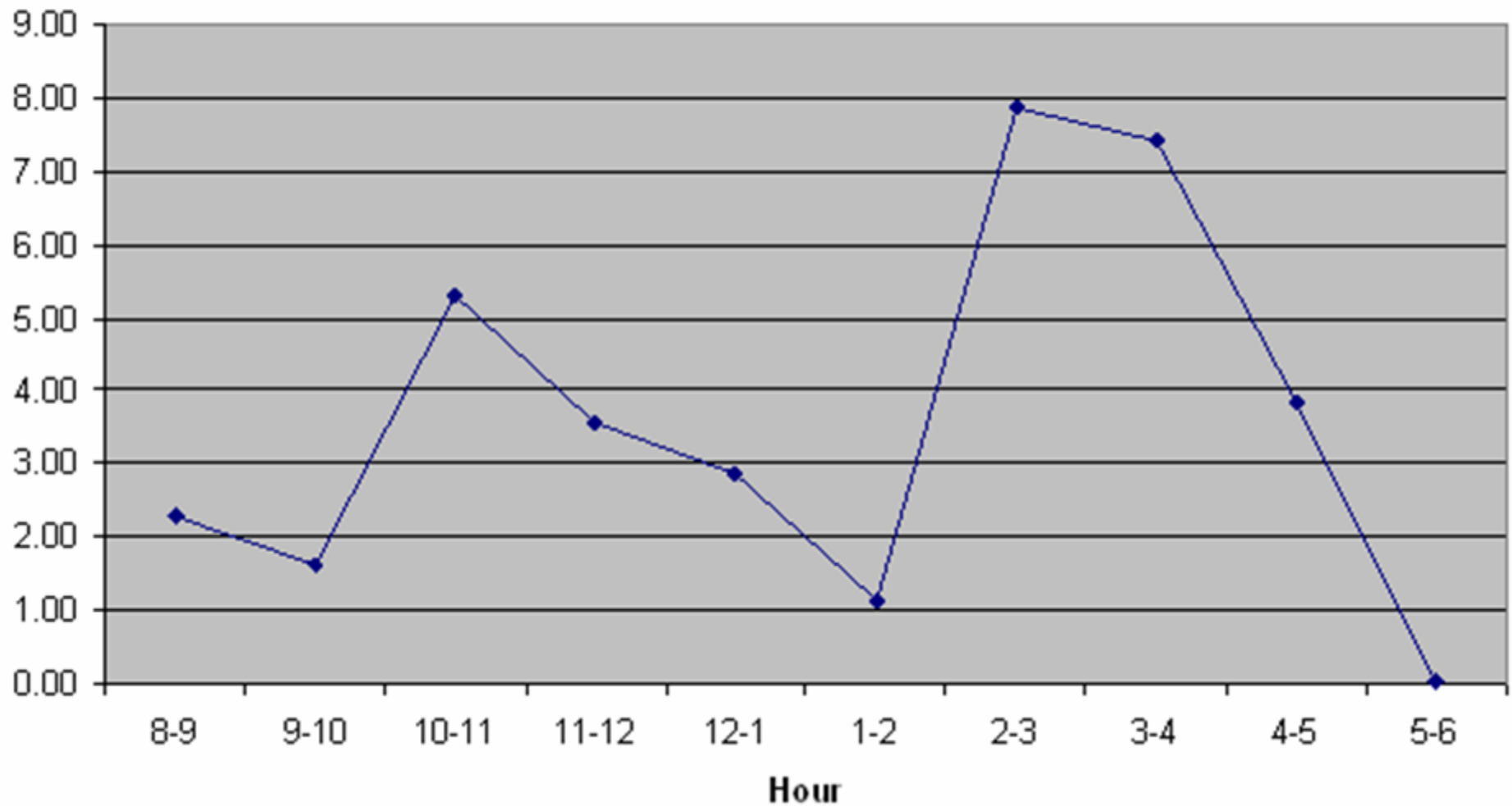
Thursdays: Avg Minutes answering IM questions 1/1/08 - 3/29/08



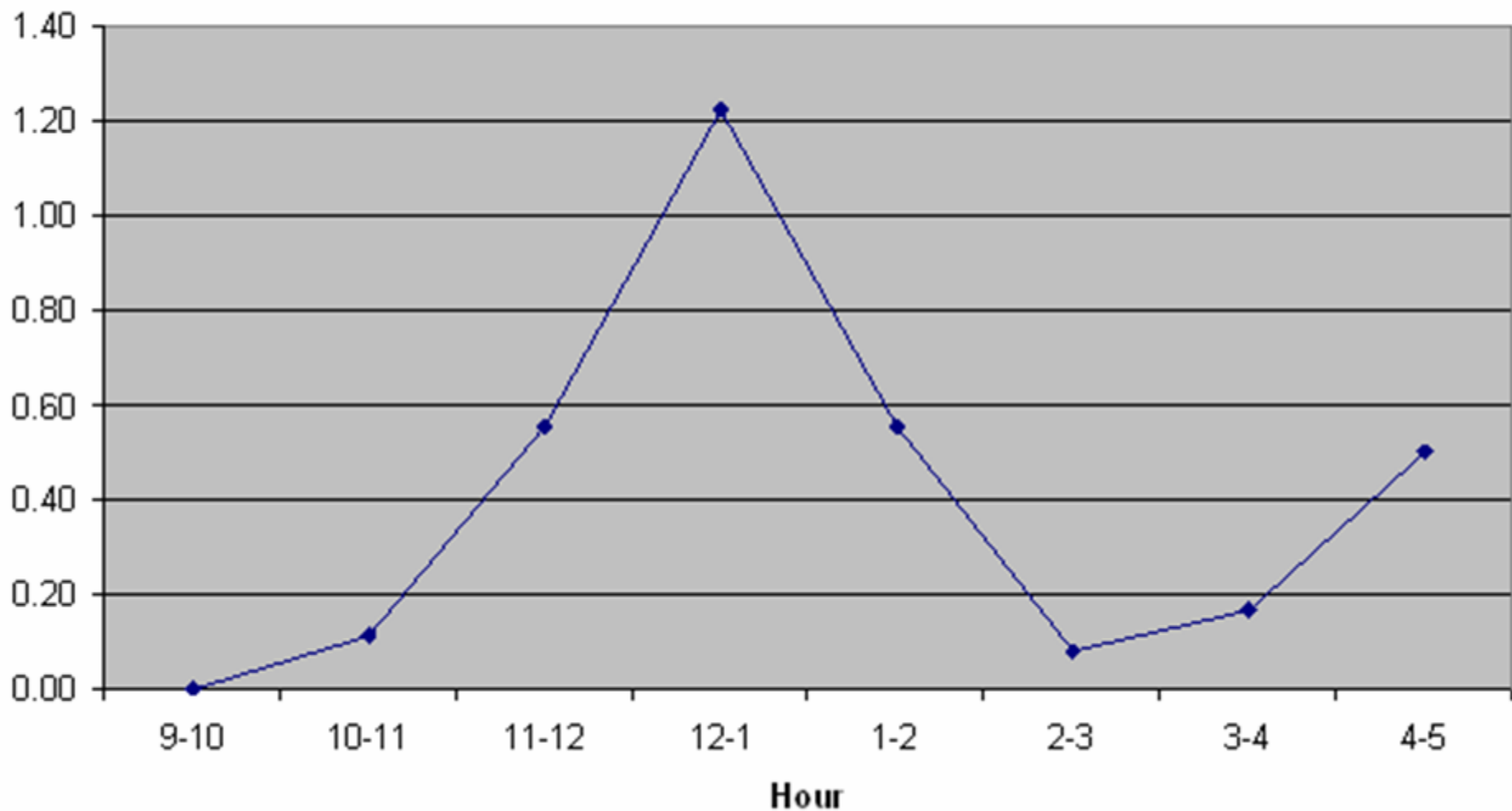
**Fridays: Avg # IM questions per hour 1/1/08-3/29/08**



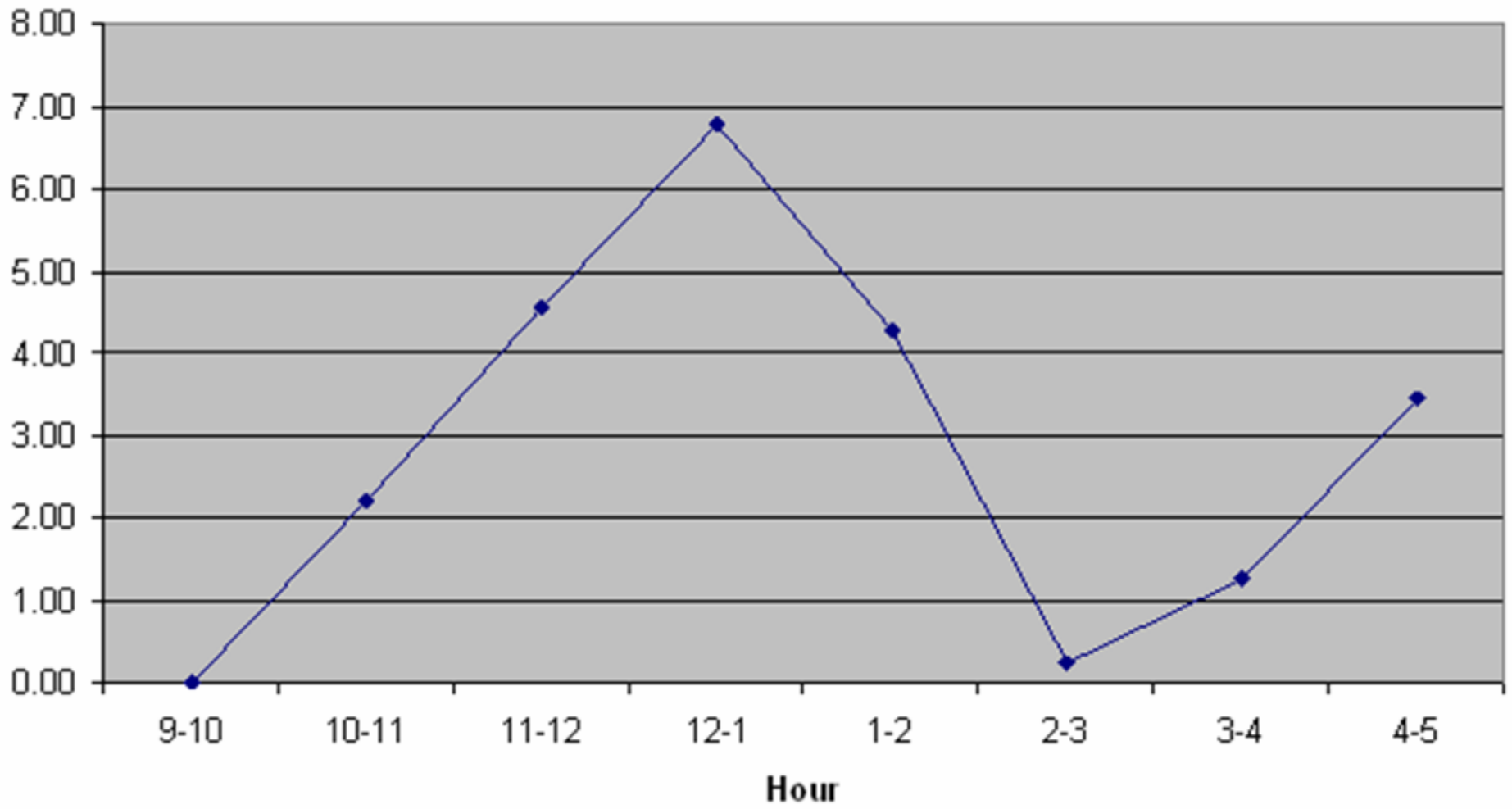
**Fridays: Avg Minutes answering IM questions 1/1/08 - 3/29/08**



**Saturdays: Avg # IM questions per hour 1/1/08-3/29/08**

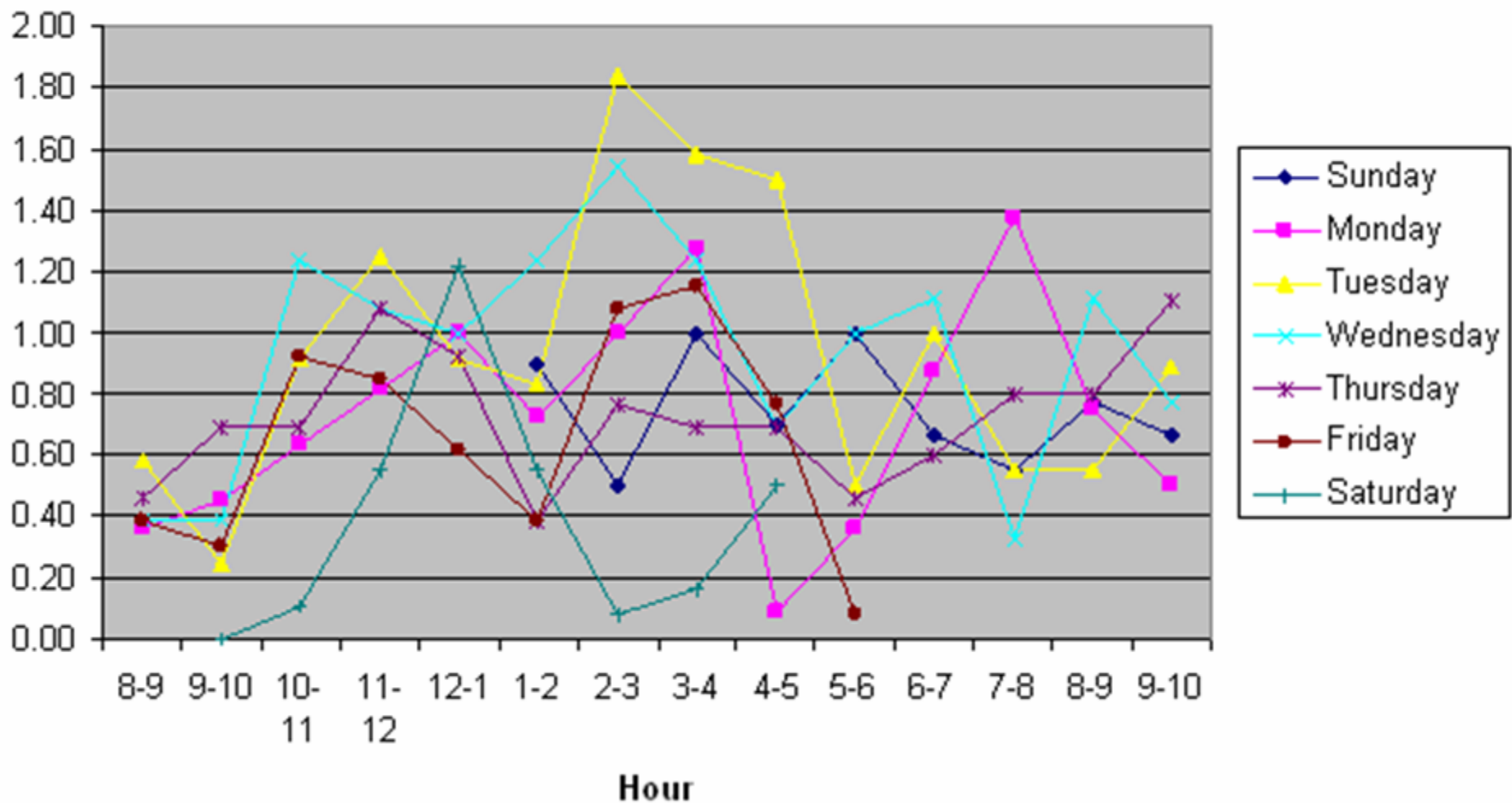


**Saturdays: Avg Minutes answering IM questions 1/1/08 - 3/29/08**

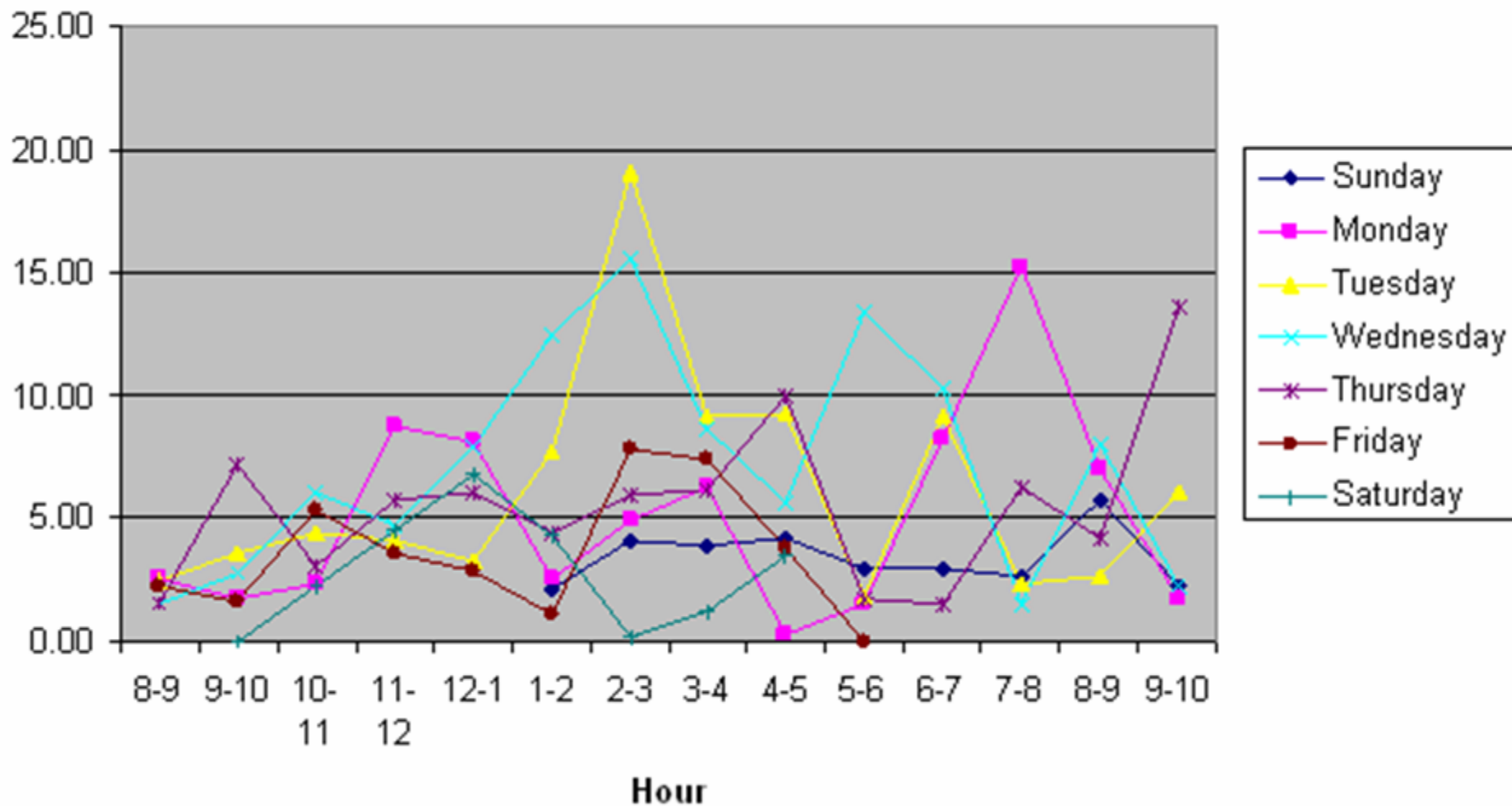




Average # of IM transactions per hour 1/1/08 - 3/29/08



Average Minutes Answering IM questions 1/1/08 - 3/29/08



# Staffing Decisions

**Question:** When is the Hale Library Help Desk slow enough to have just one staff person working there?

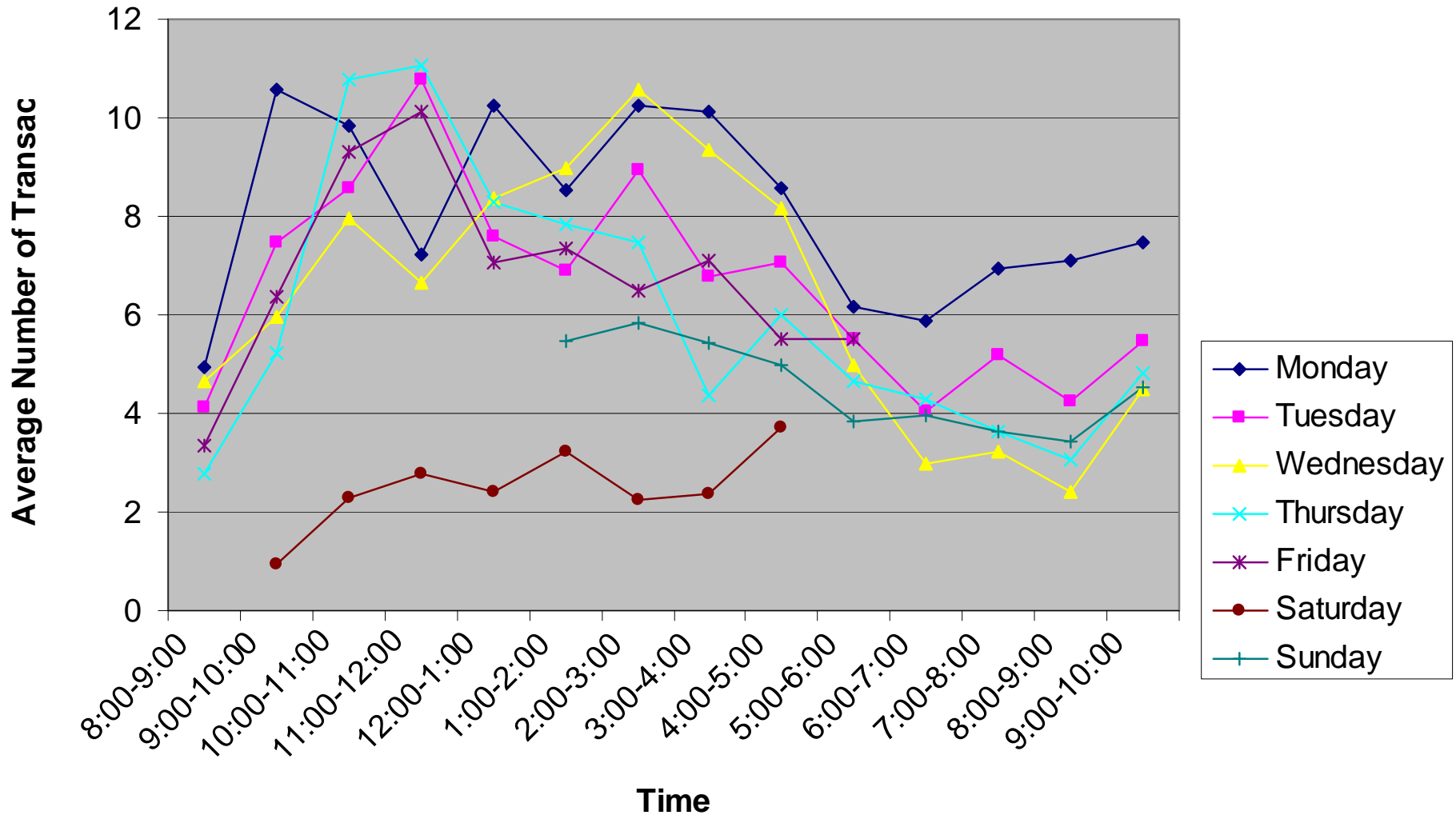
**Analysis:**

1. Sort data by day of week, then by time
2. Count number of transactions for each hour for each day.
3. Calculate average number of transactions for each hour for each day.

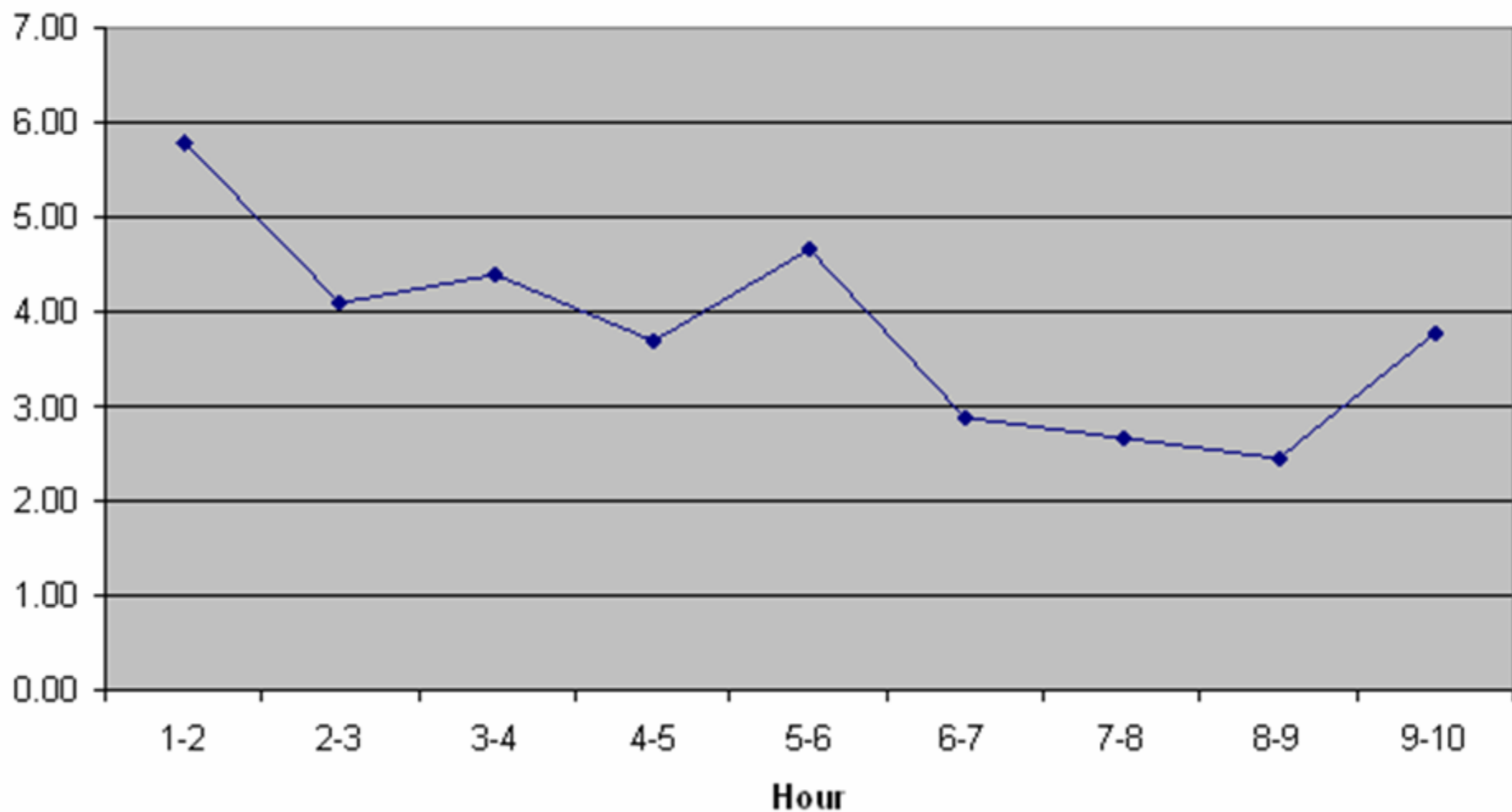


# Staffing decisions

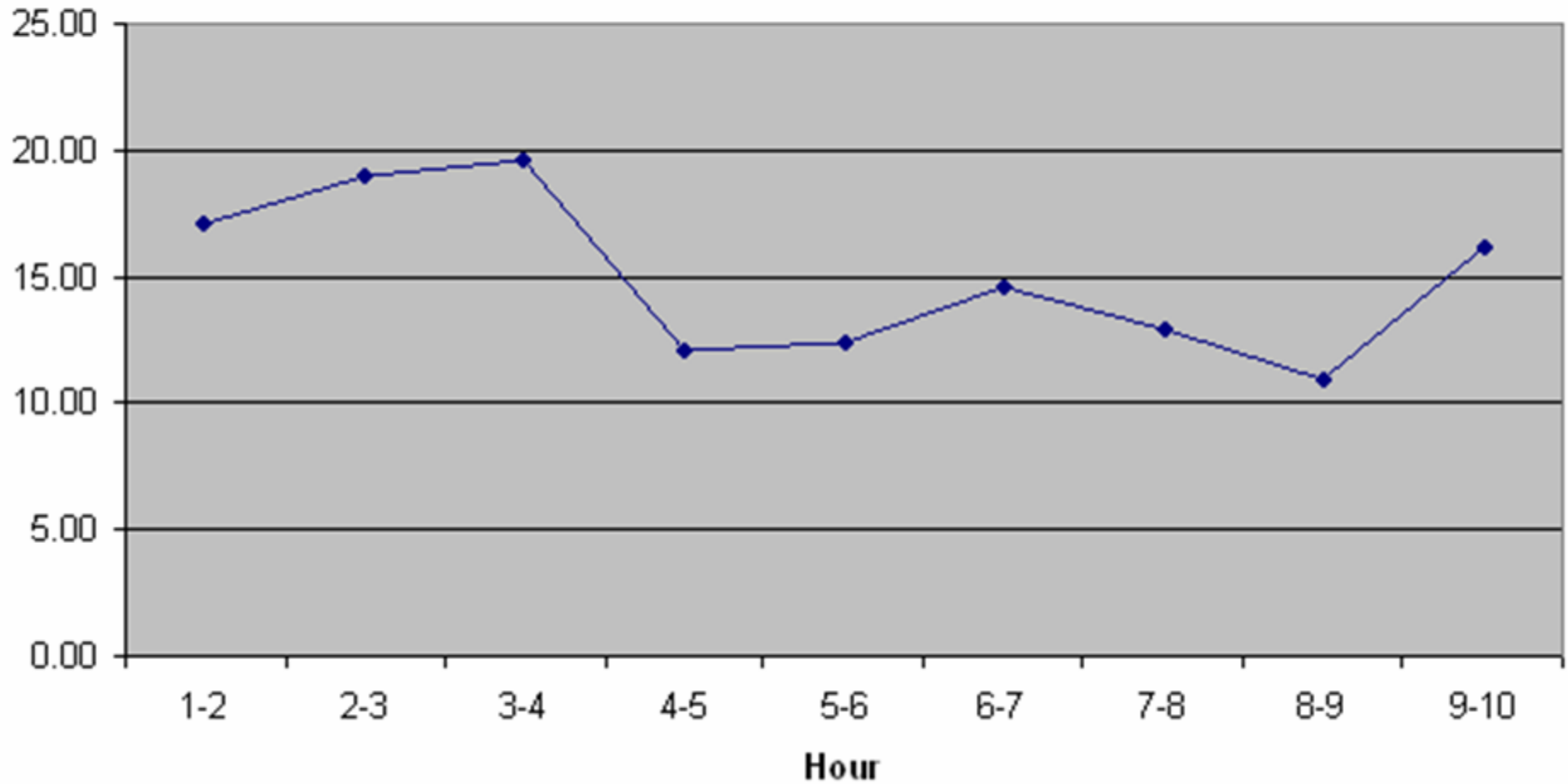
## Fall 2007 Average Hourly Transactions



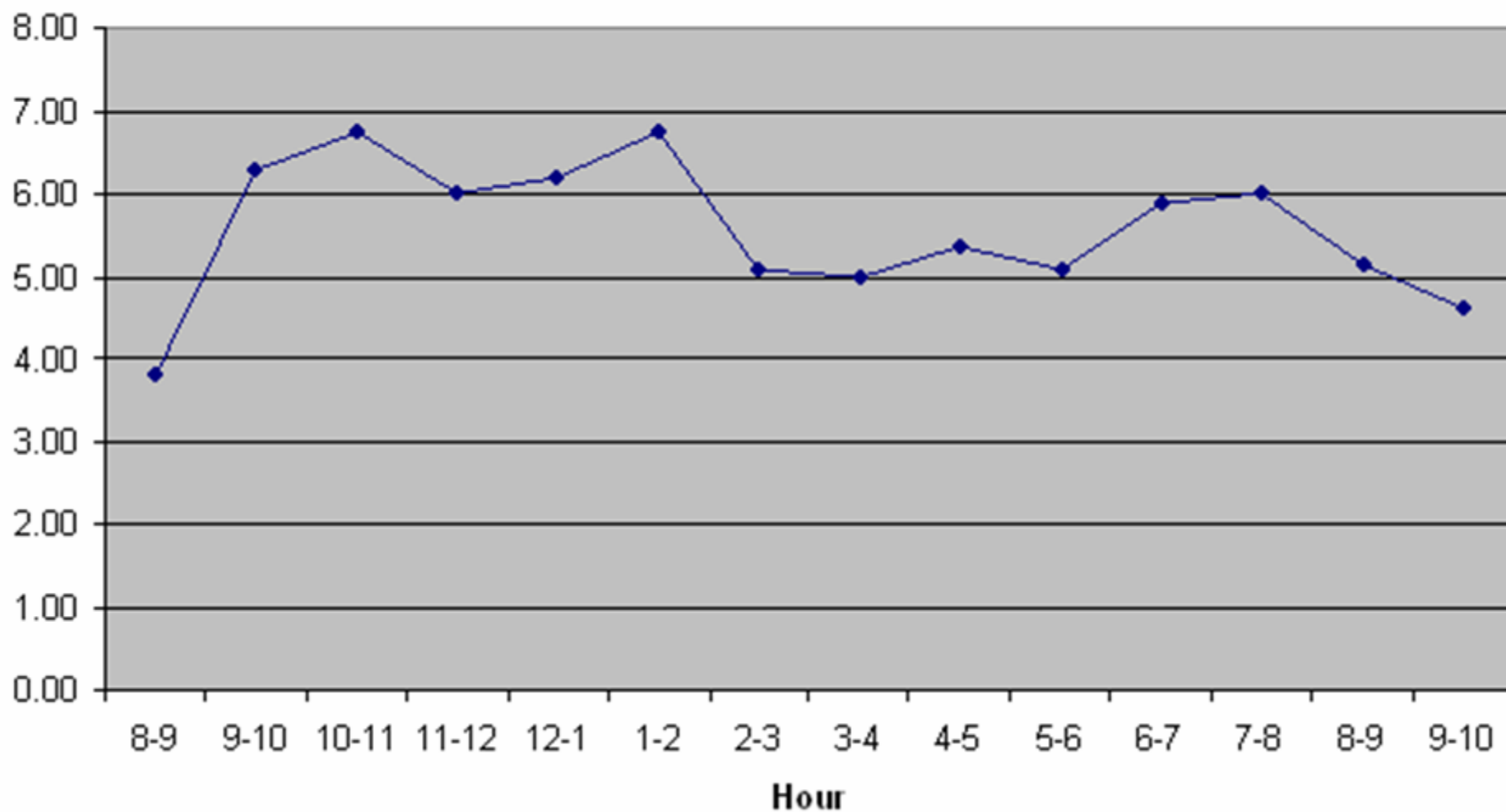
**Sundays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**



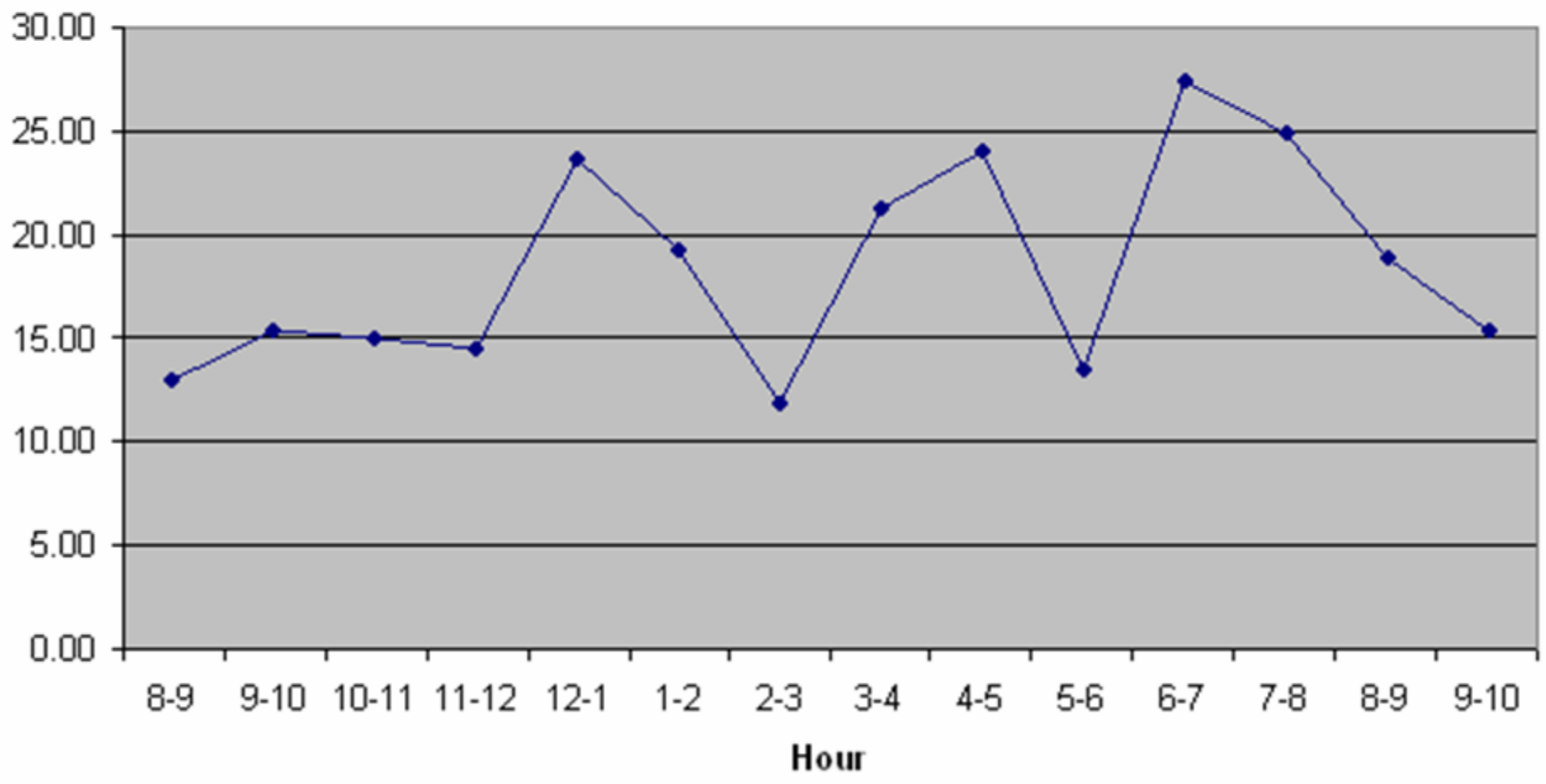
**Sundays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08**



**Mondays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**

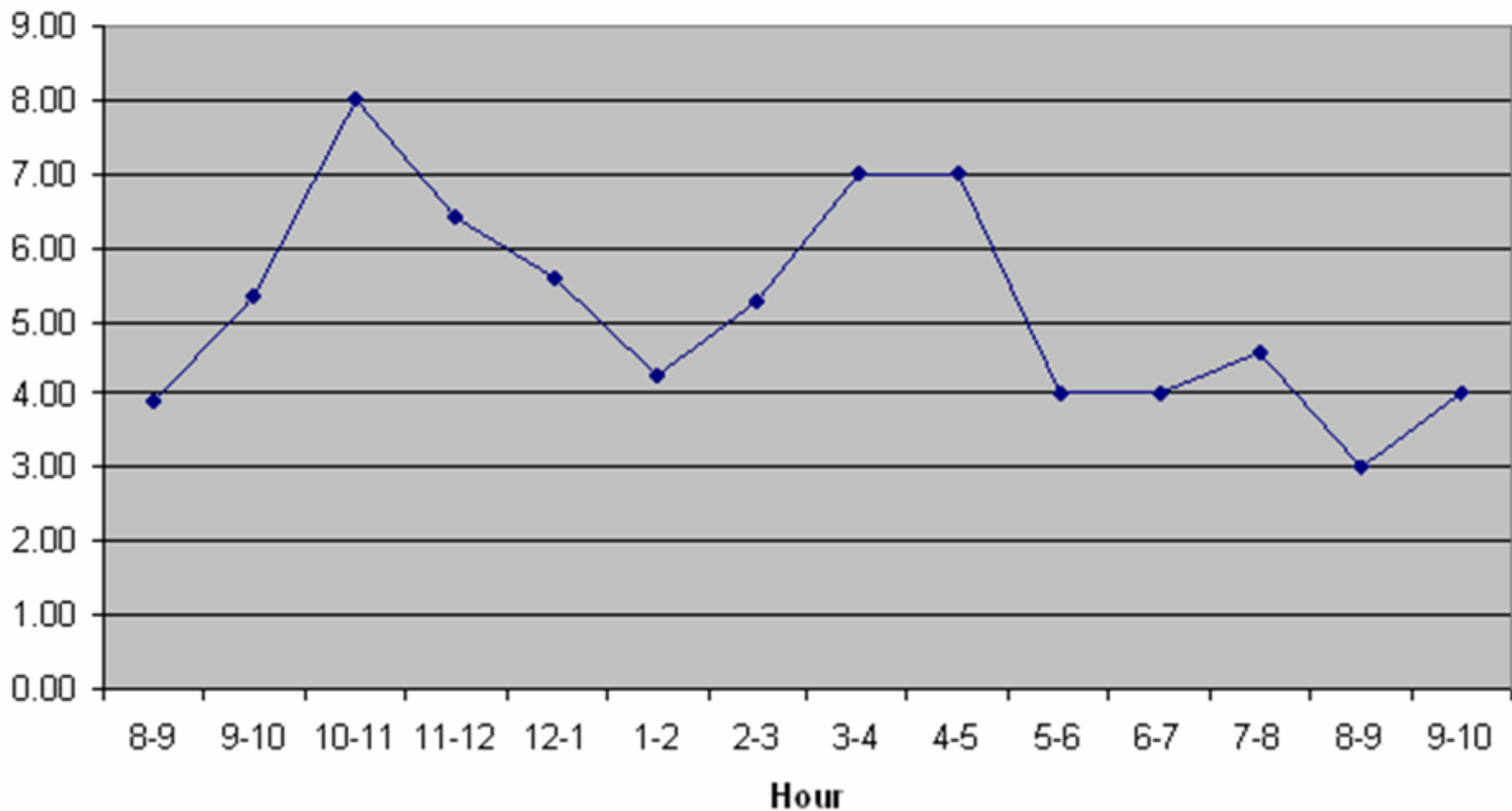


**Mondays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08**

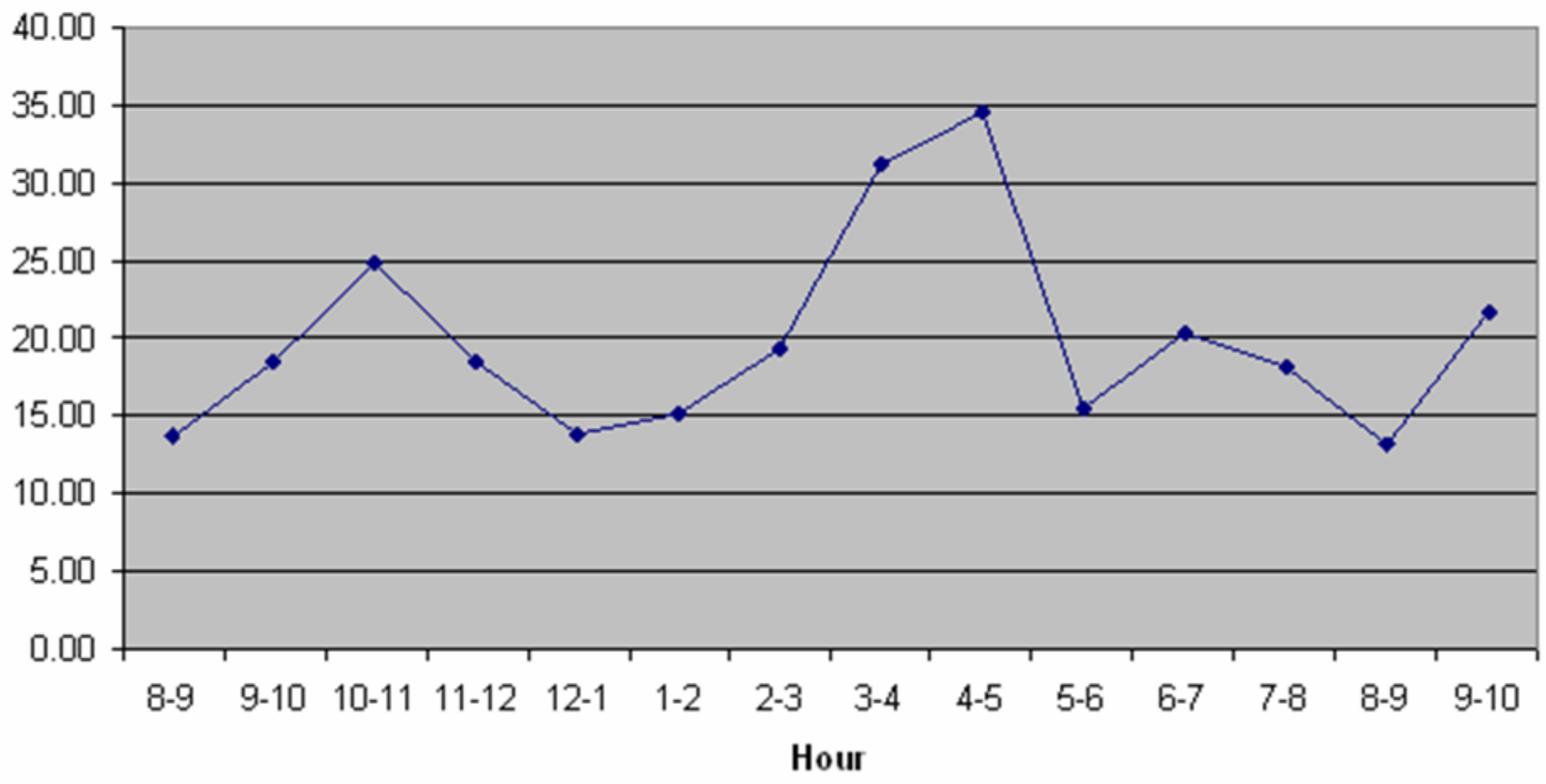




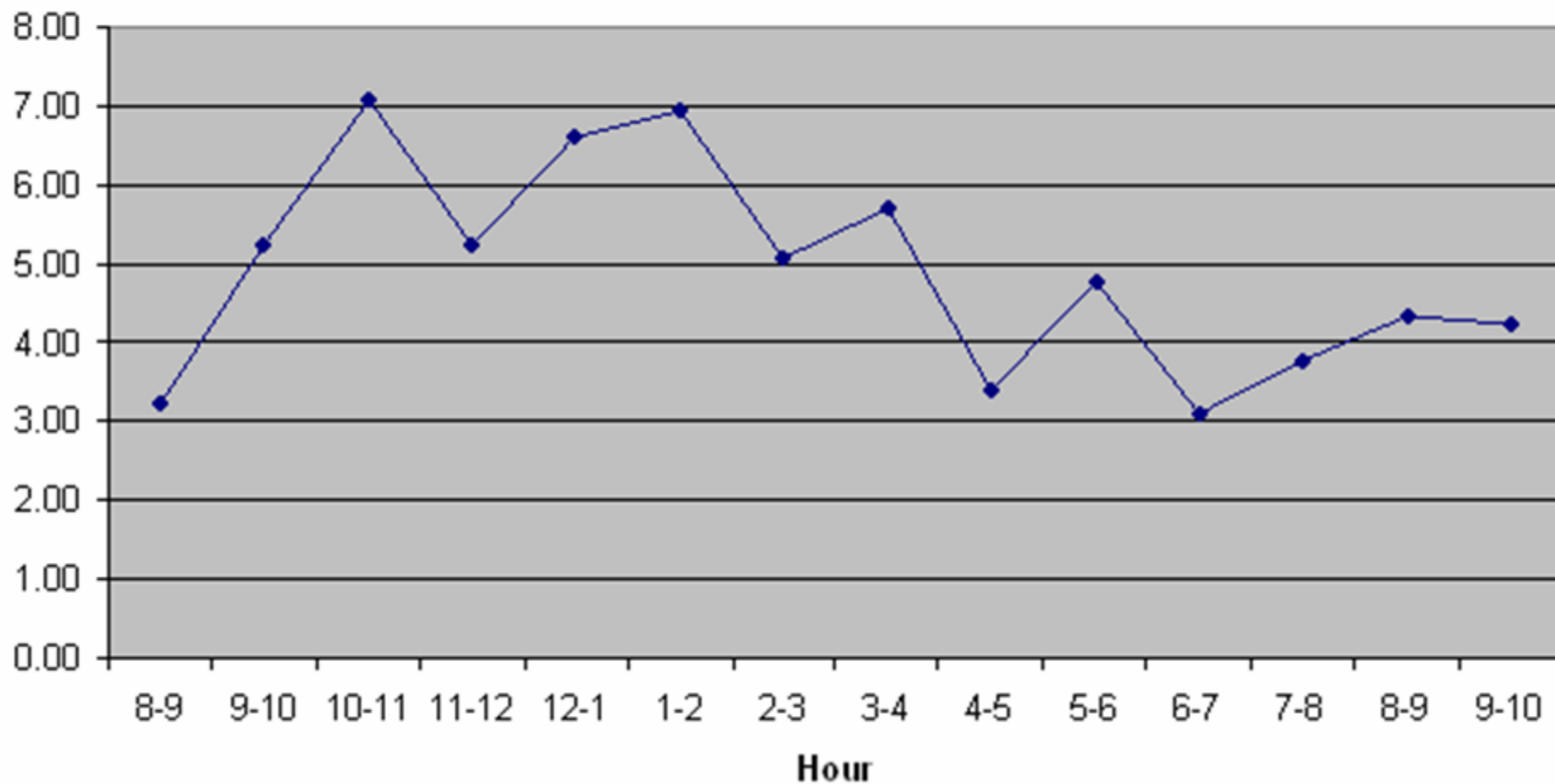
**Tuesdays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**



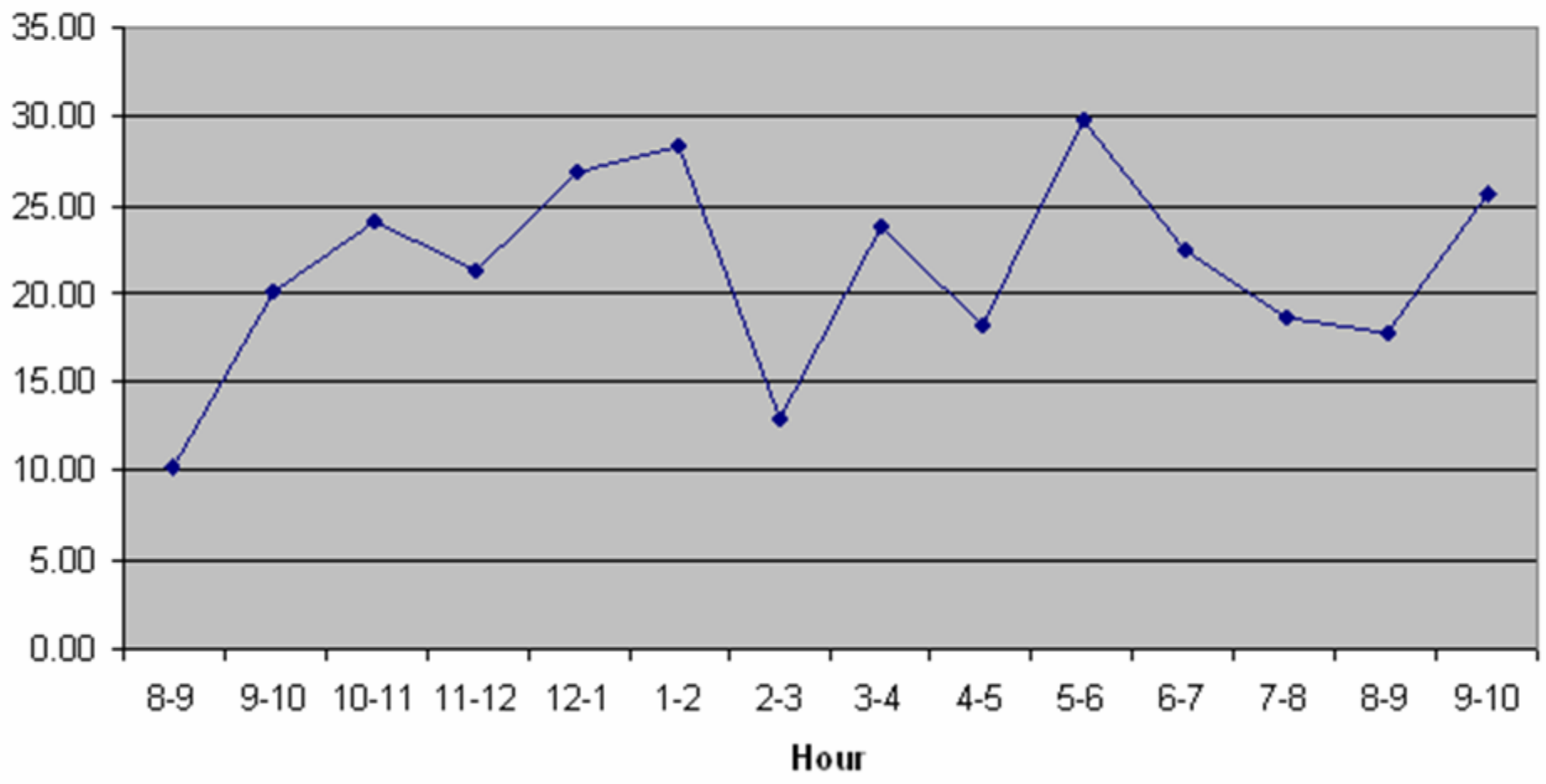
### Tuesdays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08



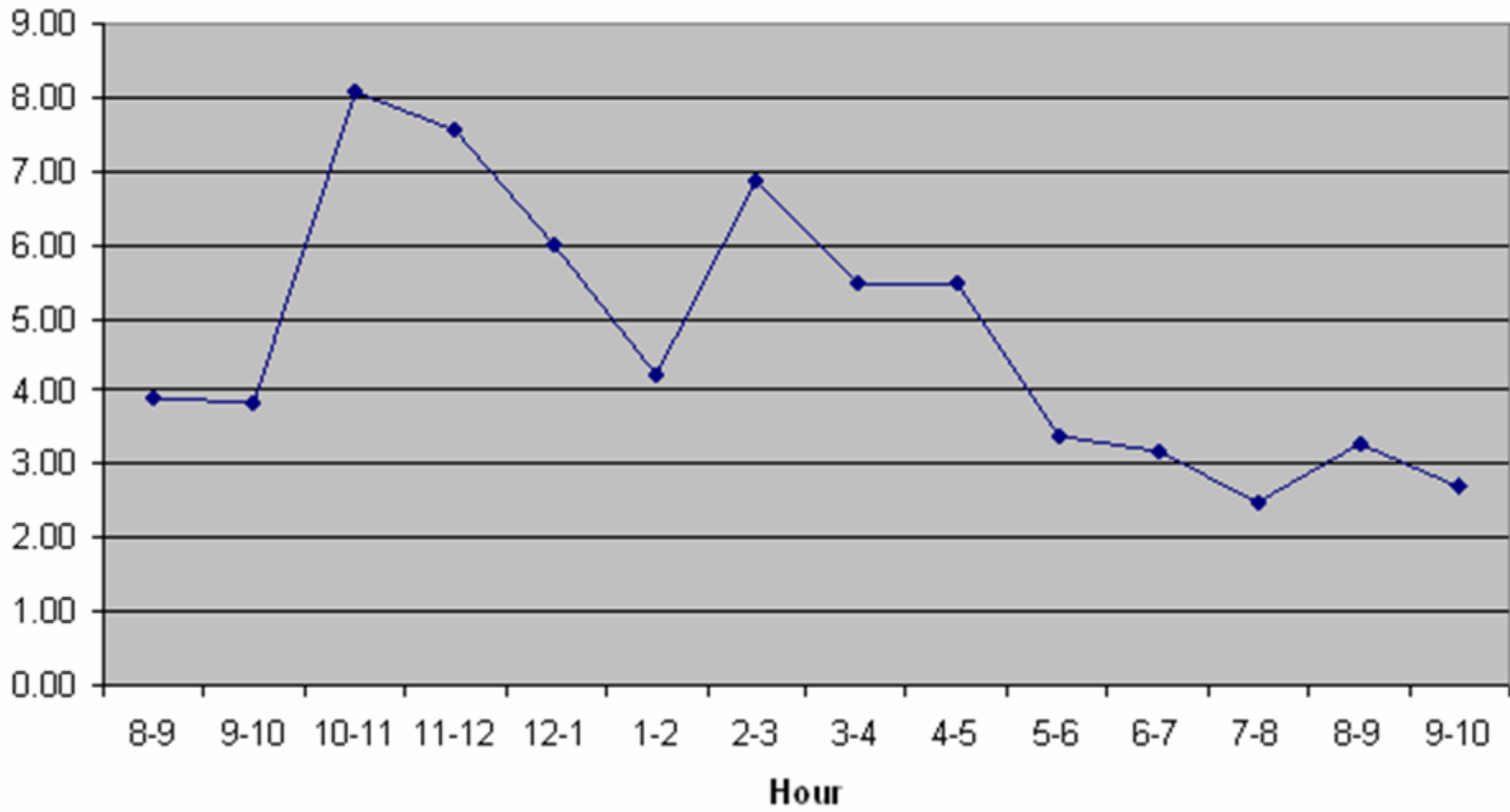
**Wednesdays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**



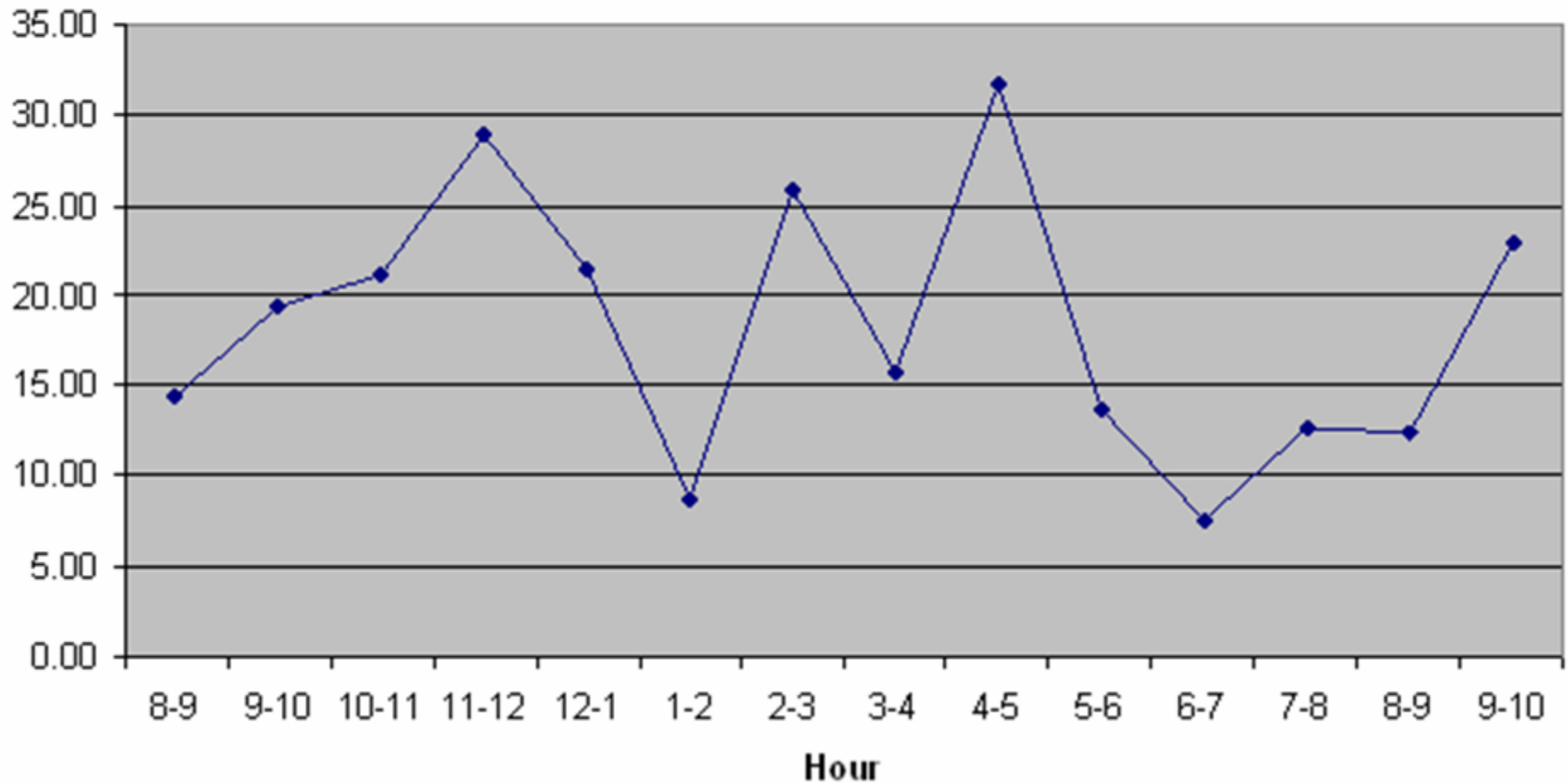
### Wednesdays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08



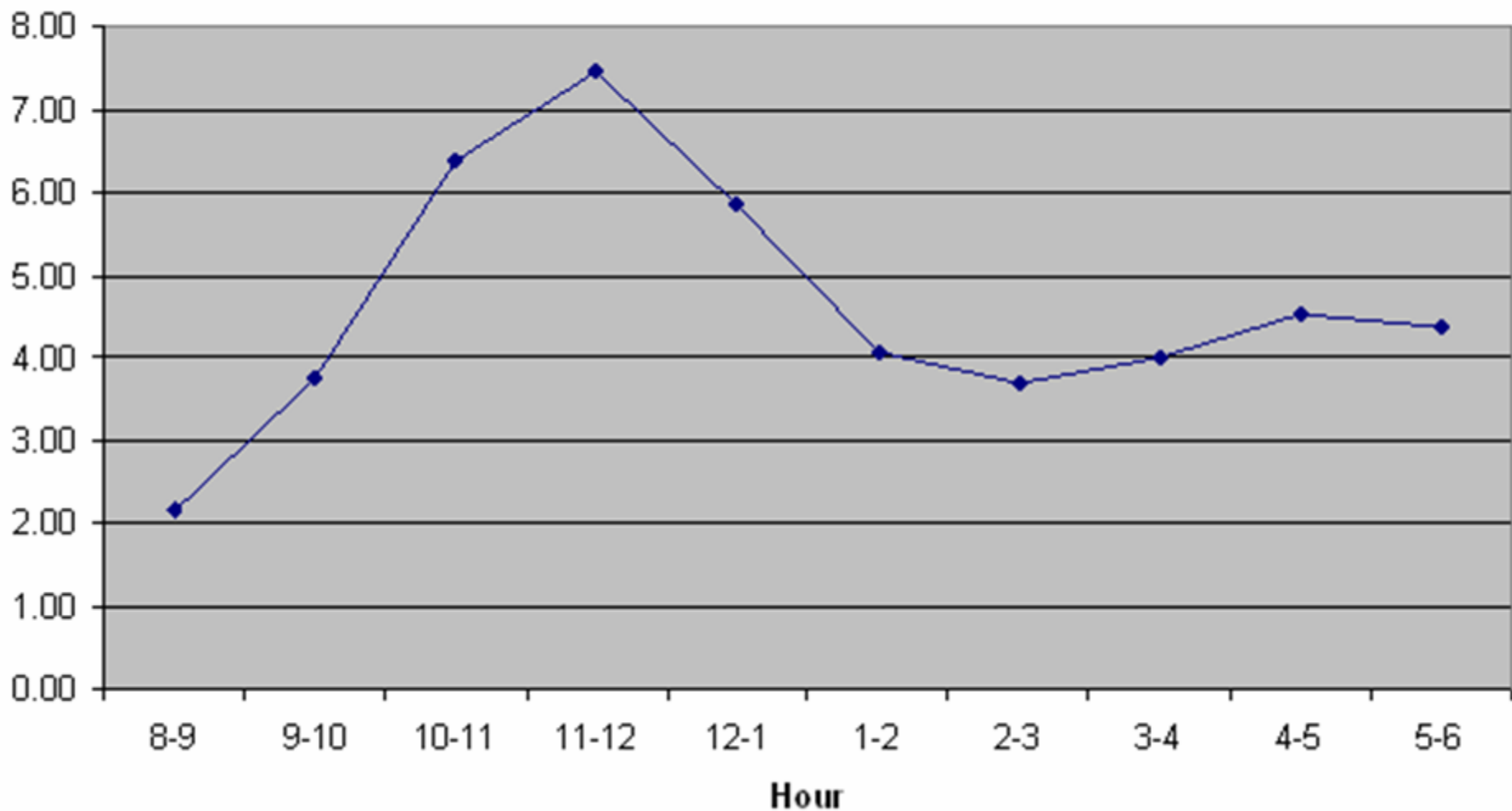
**Thursdays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**



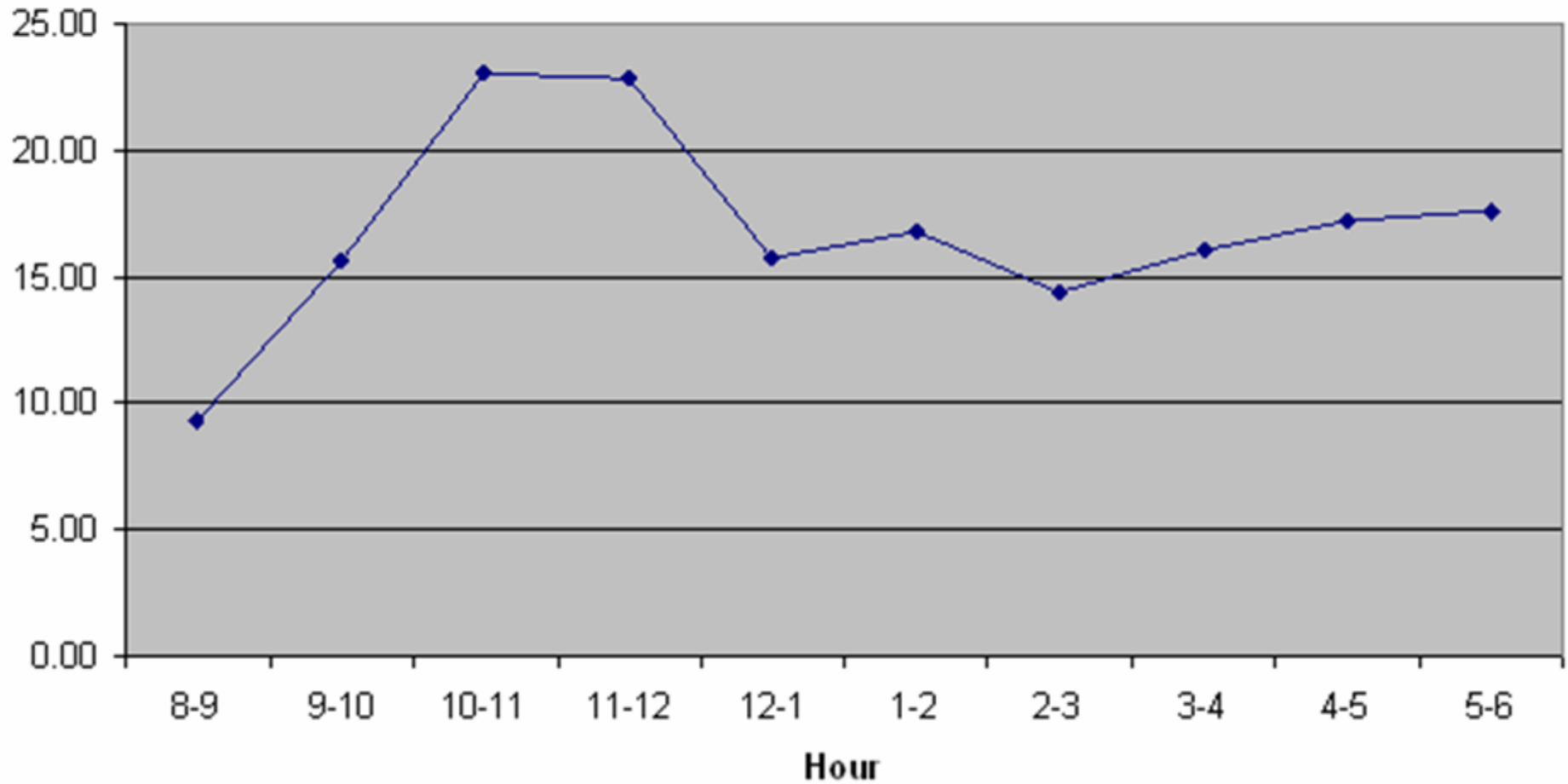
### Thursdays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08



**Fridays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**

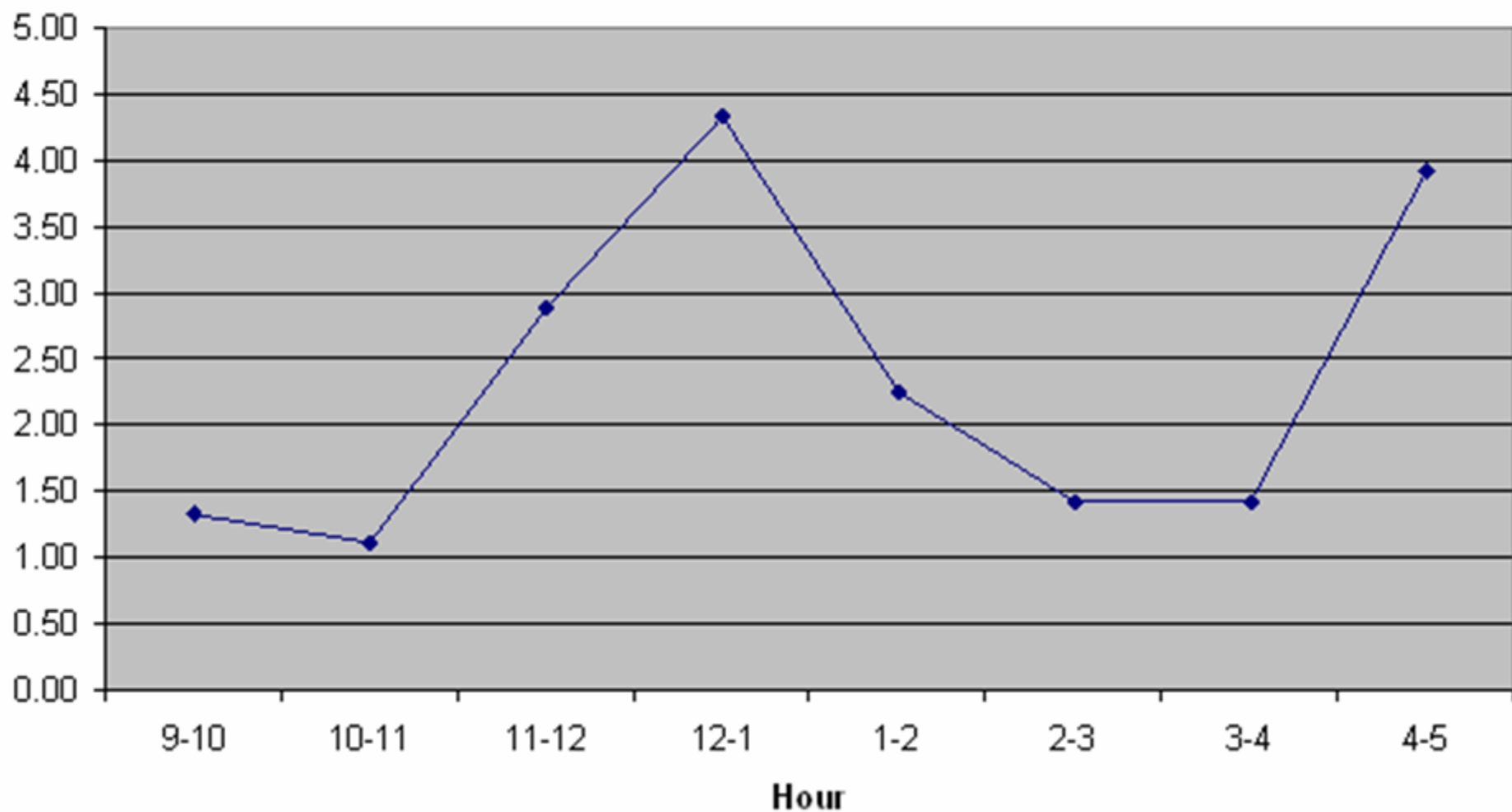


### Fridays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08

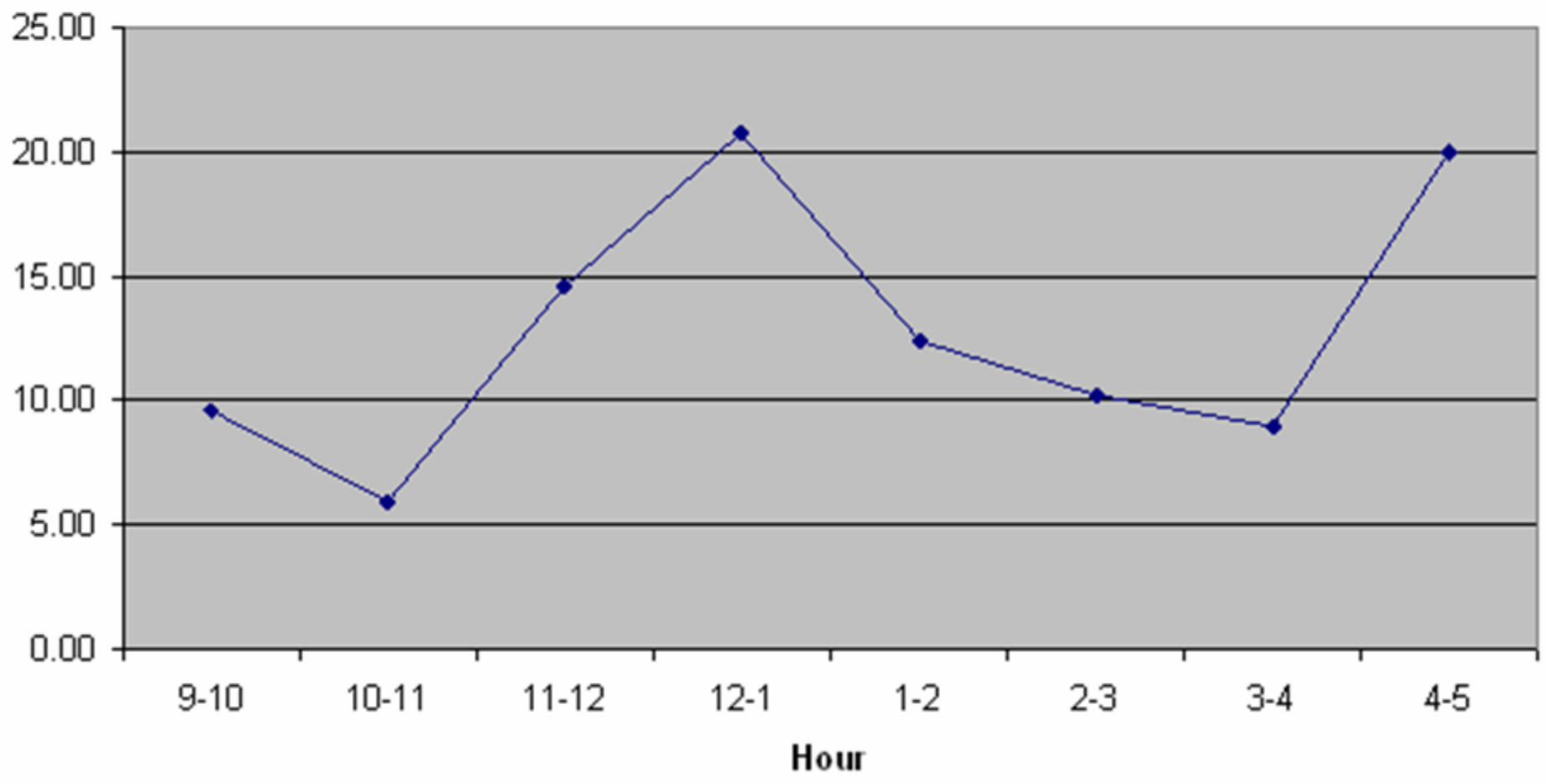




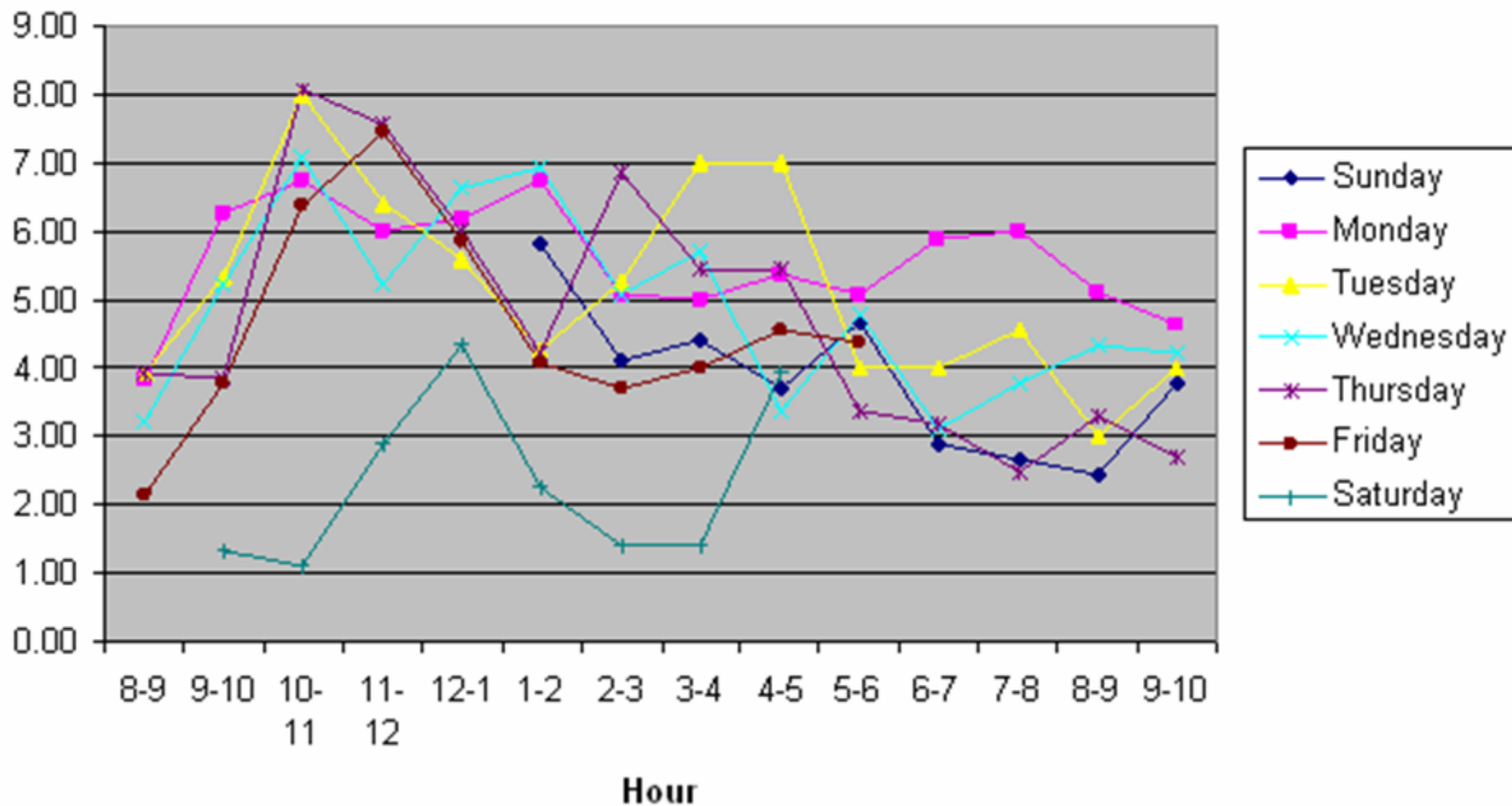
**Saturdays: Avg # of Questions at the HLHD per hour 1/1/08 - 3/29/08**



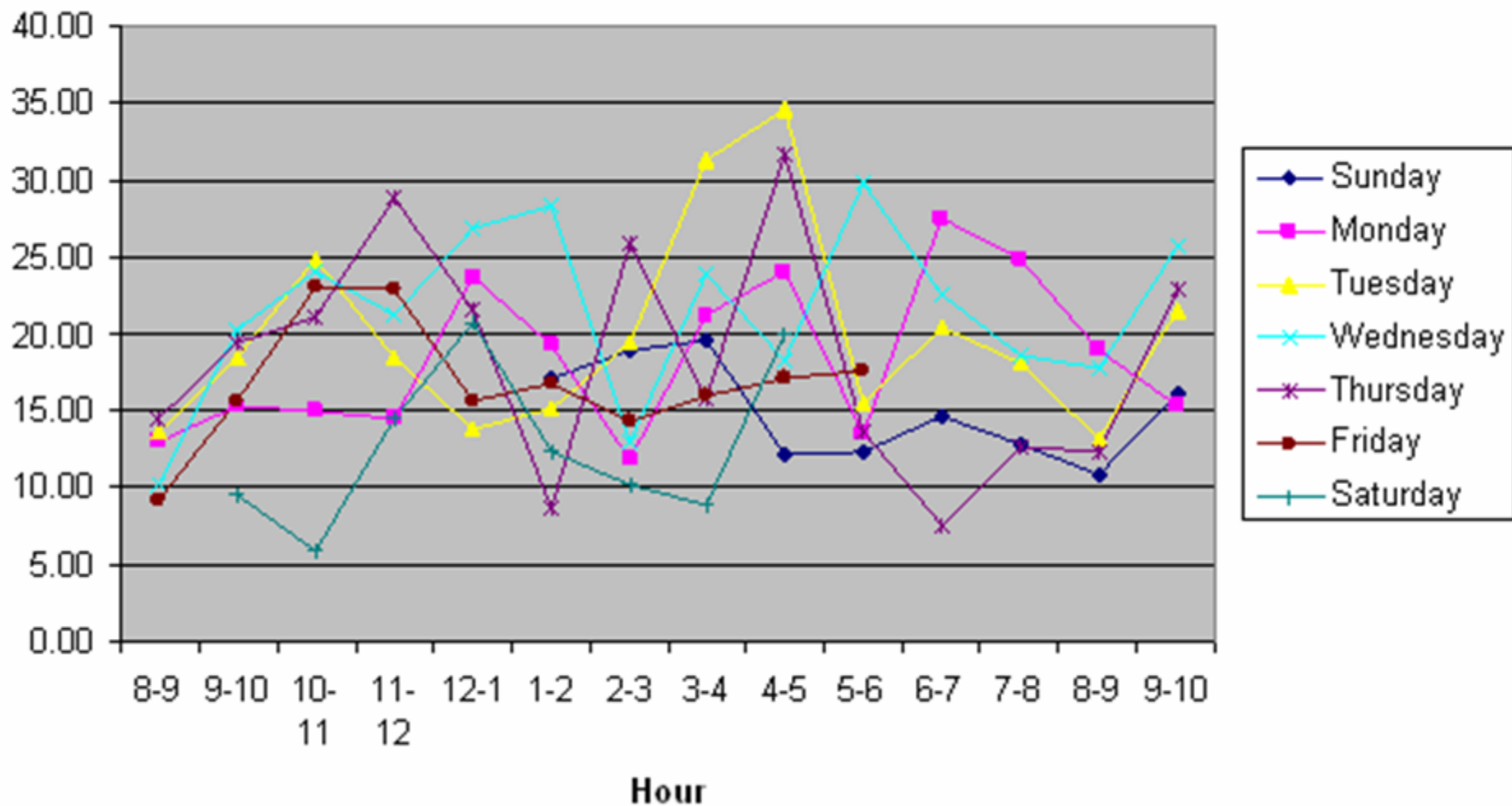
**Saturdays: Avg Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08**



Average # of Questions at the HLHD per hour 1/1/08 - 3/29/08



## Average Minutes Answering Questions at the HLHD 1/1/08 - 3/29/08



# Staffing Decisions

**Question:** When does the desk receive the most technology related questions?

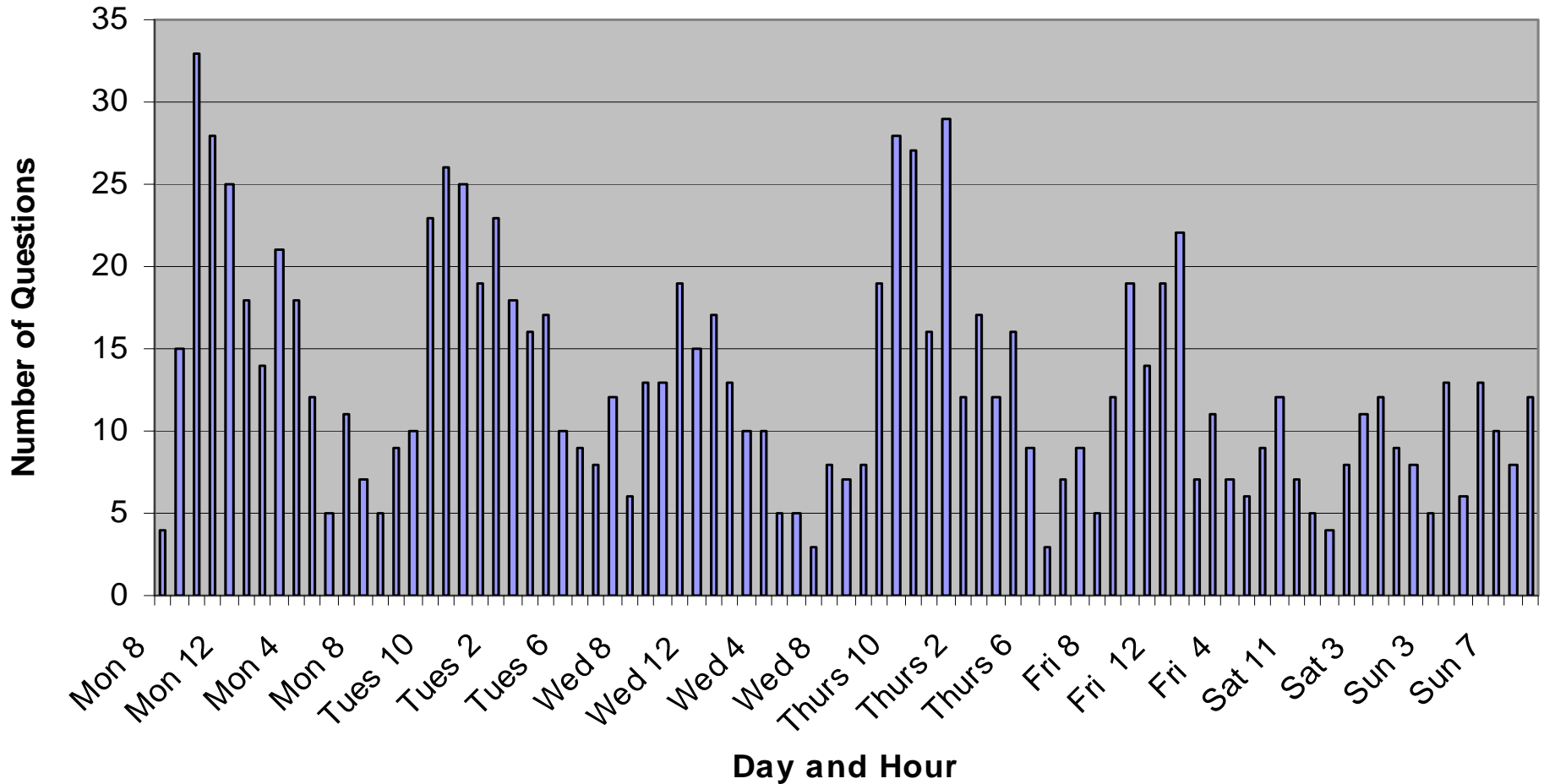
**Analysis:**

1. Sort data by question type
2. Sort technology and technology referrals by day and then by time.
3. Count total for each day and time.



# Staffing Decisions

## Tech Questions



# Staffing Decisions

- Other types of staffing decisions
  - When to have most experienced staff
  - When to request additional help from technically adept staff
- Can you think of other ways to use Libstats to help with staffing decisions?



# Promoting Reference

- Share examples with colleagues to show them what reference services are all about.
- Use data on question frequency and length to demonstrate need for highly trained staff.
- Share example questions with patrons.
- [How else could the information be used to promote reference?](#)





# Improving the quality of reference service

- Train for common questions
- Use database as a knowledge base
  - Expand answers
  - Tag high quality answers to enable staff to find them via a search, e.g., aaaaaa
- Develop a public FAQ based on authentic questions.



# Improving the quality of reference service

- Encourage staff to read and search Libstats
- Turn Libstats into a knowledge base
  - Expand answers
  - Tag high quality answers to enable staff to find them via a search, e.g., aaaaaa
- Develop a public FAQ based on authentic questions.
- How else could Libstats help improve the quality of reference service?



# Helping the library meet users' needs

- Data on questions is a rich source of information about users' needs
- Having the data helps public services make a strong case for changes to better meet those needs.



# Helping the library meet users' needs

## Example: Helping patrons pay for printing

Edit	Patron Type	Question Type	Question Format	Location	Question / Answer <input type="checkbox"/> Show Empty Questions	Date
<a href="#">2109</a>	undergrad	technical 0-1	in person	Hale Help help desk	Q: guy wanted to print but no card and no allotment A: I printed off mine and he tried to pay me. I told him to give it to charity.	2/22/2007 10:05 AM
<a href="#">2137</a>	undergrad	reference 0-1	in person	Hale Help help desk	Q: how can I print out my 3 page paper when I only have 20 cents left on my eID; and I need to have it in 10 minutes A: add some money to id card chip (but she didn't have any money); or ask someone nicely if they will print if for you with their eID (which some nice young man did)	2/22/2007 4:02 PM
<a href="#">2918</a>	undergrad	technical 0-1	in person	Hale Help help desk	Q: I'm trying to add money to my K-State ID so I can do more printing, but the machine is saying my chip is mute. A: I lent her one of our Generic Smart Cards and had her put money on it to pay for her prints. When she gave it back she said she put two much money on it, but that she was happy to donate it for the good of the library!	3/11/2007 8:14 PM



# Helping the library meet users' needs

- Other examples:
  - Change default settings on scanners
  - Acquire a change machine that can break bills greater than \$5
- Possibilities
  - Document demand for a public fax machine
  - Inform collection development
  - Inform design of website
- How else could Libstats be used to help meet users' needs?



# Applications for Management

- Querying the database
- Making staffing decisions
- Promoting reference
- Improving the quality of reference service
- Helping the library meet users' needs.
- [How else could managers use Libstats?](#)



# Staff Training and Evaluation



# Staff Training and Evaluation

- Are other libraries using a web-based tracking system for reference staff training?
- 2007 HLHD staff survey results
- 2008 Tracking Reference Statistics Survey results
- Staff Training
- Reference Reflection & Assessment





# Are other libraries using this type of tool for staff training?

Barton, Emily and Arlene Westmantel. 2006. Ref Logs Now. *Library Journal* (1976) 131(16):28-30.

Smith, M. (2006). "A Tool for All Places: a Web-Based Reference Statistics System" *Reference Services Review*, 34 (2), 298-315.



# What are other librarians saying?

## Pegasus Librarian

[View my complete profile](#)

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FRIDAY, OCTOBER 13, 2006

### [Making reference Desk Statistics Fun and Even More Useful](#)

Up until this year, librarians have made little tick marks on a grid to indicate questions answered at the reference desk. We had a new grid every day, and we could tick off how many short questions and long questions we answered every hour, as well as how many questions we'd solved jointly with the IT help people, and how many questions we simply referred to the IT people (I'll write more about our IT help later, but for now suffice it to say that we have joint service point in the library). I hate to think how much time was put into compiling these paper tick marks each week.

But this year, we've beefed up our statistics. In fact, it's becoming much more than a statistics-collection project. We're building a knowledge base and learning from our co-workers' reference interactions.

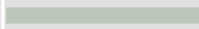



# 2007 Hale Library Help Desk Survey

<https://online.ksu.edu/Survey/PublicReport?offeringId=70782>

## Question 1


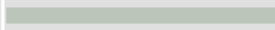

I find the process of entering transactions in LibStats ...

Very Difficult		0 (0%)
Somewhat Difficult		0 (0%)
Fairly Easy		5 (38.46%)
Extremely Easy		8 (61.54%)
N/R		0 (0%)

[View Comments Text](#)

## Question 2

How often do you struggle to find time to record your transactions?

Never		4 (30.77%)
Very infrequently		0 (0%)
Fairly infrequently		7 (53.85%)
Fairly often		2 (15.38%)
Very often		0 (0%)
N/R		0 (0%)

[View Comments Text](#)



# What do you like about Libstats?

Search to find answers to frequently asked questions

I like that Libstats is keyword searchable and you can look up your own initials to see all the transactions you've entered.

I like that there is a record of the actual transaction, and you can learn from what other people have done.



# Training Staff to use Libstats

“It's easy to use” Staff Survey Response

- [Recording Reference Transactions](#) guide was created and posted to General Reference wiki
  - Updates added continually
- Training sessions held on case by case basis for new staff along with yearly refresher sessions for returning Help Desk staff



# Staff Training

“I think it’s useful to know what has been going on, especially if there are ongoing or similar questions. Also, it’s a learning tool because sometimes people give different answers than I would.”

Staff Survey Response



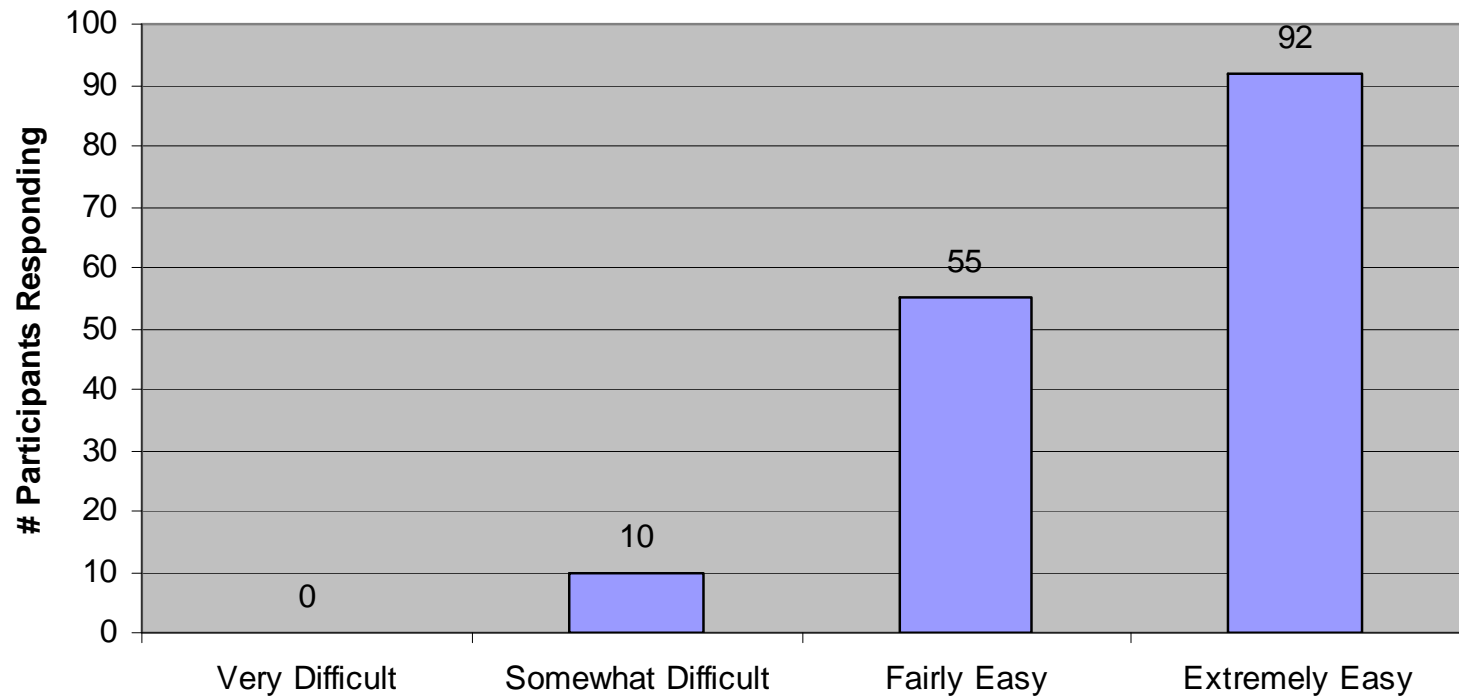
# 2008 Tracking Reference Statistics Survey Results

- Survey active from February 28, 2008-March 13, 2008
- 659 respondents
- 70% claim to use paper tally sheet
- 30% using a web-based, desktop, or other type of tracking system to capture reference transactions



# 2008 Survey Results

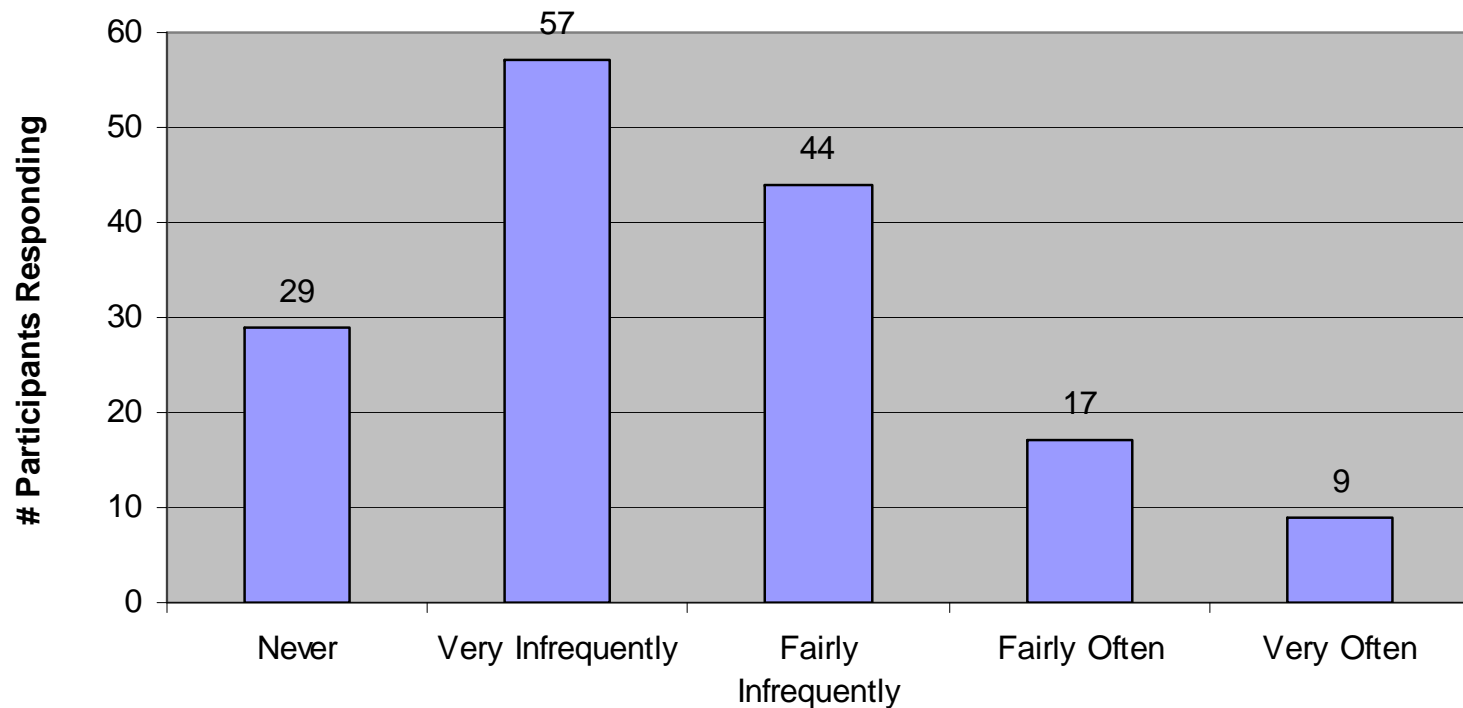
I Find the Process of Entering Transactions in this Reference Tracking System...





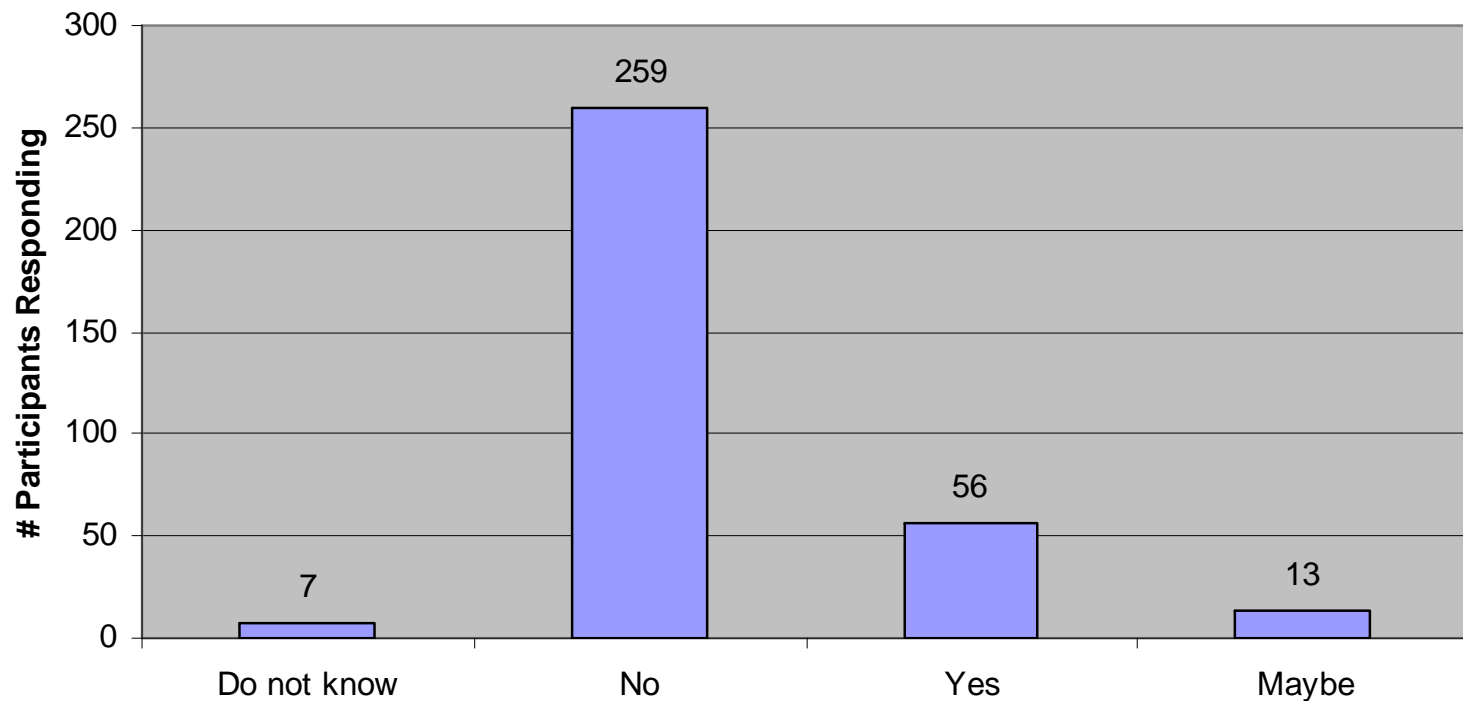
# 2008 Survey Results

How Often do You Struggle to Find Time to Enter Your Transactions?



# 2008 Survey Results

**Is Your Library Currently Thinking of Moving to a Web-based or Desktop Tracking System?**



# University of Kansas' Libstats Experience

Fran Devlin, Anschutz/Watson  
Reference Coordinator and  
Humanities Librarian



# Training Perspectives on Libstats

- Determine training needs and strengths of reference staff
- Learn how to handle certain types of questions
- See how others answer similar questions
- Form of staff communication
- Use for reference evaluation
- Allows collaborative learning



# Training Needs

Q: looking for ASTM special technical publication n.1256 Citation: Fatigue crack growth behavior of Al-Li alloy 1441 Prakash, Raghu V. (Natl Aerospace Lab); Farida, Basant K. Source: ASTM Special Technical Publication, n 1256, Dec, 1995, p 603-616 Database: Compendex

A: they were using Compendex, and Get It took them to the right catalog record. But the link for "special searching instructions..." is not working. So there was no way to find the call no. for the issue that they needed, even though it appears that we have it. Tried Circulation to see if there was additional information in Voyager, but from there it appears that we do not have the item. Reported problem using the link from the catalog record. Referred patron to Alice or Asha at Fiedler, since this was their subject area and subject librarian.



# Strengths

Q: I'm looking for finance journals. Can I do this from any computer in the library?

A: K-state libraries home page for catalog, database, E-journals links. Patron choose e-journals. Database home page & E-journals for citation linker. Yes, you can do this from all the computers in the library. -Showed patron link to KSU libraries homepage on the K-State homepage. Left patron with reference to stacks guide for hardcopies.



# Strengths

Q: Looking for articles about "the New Social Contract"

A: Said he had been searching for a LONG time and did not know what he was doing. He was trying to find "new social contract" as a database. Got some more info about what he was looking for - it's a business concept, but for a communication class. Found some articles in ProQuest. He needed articles of different types, so it helped that it broke the articles down by type. Showed him how to e-mail them to himself. He said "you make this easy" and "you saved me about 10 hours of work". Very happy!



# Answer Certain Types of Questions

- Scavenger hunts
- Class assignments
- Known Problems/Issues





# Scavenger Hunts

Q: Where can I find the volume and issue numbers for Jan.-March 1983 issues of Time? Is the microfilm collection stored in alphabetical or call number order? How can I find out the major headline on the New York times for December 8, 1941?

- A: v. 121, no. 1 thru v. 121, no. 13/call number order/Microforms (3rd Floor, Hale) \*Note: this is a Speech "scavenger hunt" assignment we also got thru IM last week.



## Class Assignments

“Use in case of recurring class project questions”

### Libstats Survey Response

- **Q: Marketing class assignment MKTG 542 - looking for industry info using list of sources from instructor**
- **A: student was looking for U.S. Market Trends and Forecasts - it is in Stacks due to old age. We looked at the Marketing & Int'l Business subject guide page. Used Business and Company Resource Center, Industry: Child Care - had some more recent info that looked helpful. She also used ABI/Inform for articles.**



# Known Issue/Problem

“See if there have been any computer or technical problems”

Libstats Survey Response

- **Q: What does it mean when the Cash to Chip machine says "Card is Mute"?**
- **A: Not sure--anyone know this? [Yes - from staff member X - it means that their chip is bad. Sometimes you can fix it by rubbing it with a piece of cloth, such as your shirt. Cotton seems to work best. But if that doesn't work, they need to go to the ID card center and get a new one]**



# Similar Question, but Different Answer

Q: How do I do in-text citations in APA?

A: I referred her to the APA citation manual and showed her the section in chapter 3 that addresses in-text citations.

Q: how to cite information from a website in APA style

A: used APA manual, plus examples on APA web page, plus KSUL APA guide under Citing Resources

Q: questions about APA style and electronic resources

A: suggested where to find more information on citation style for e-resources (OWL at Purdue)



# Evaluation: Reference Batting Practice

- Group Discussion and Reflection
  - Grand Slam, Home Run, Strike Out, Bunt, Ball



# Personal

Q: cited reference search

A: okay, so if I am trying to find an article published before 1996 on a certain topic, I can narrow the search accordingly... [21:52] meeboguest275707: but if I want to find an article published later than references that article, the how do I use the SSCI to do that? [21:52] halelibraryhelpdesk: you would do a "Cited Reference Search" [21:52] halelibraryhelpdesk: this is located next to the "search" screen. do you see it? [21:52] meeboguest275707: I see it now. Thank you. [21:53] halelibraryhelpdesk: sure

9/06/2007  
9:52 PM

dtw

Q: how to locate social sciences citation index

A: [21:49] meeboguest275707: how do I find the Social Sciences Citation Index? [21:49] halelibraryhelpdesk: hi [21:49] meeboguest275707: hello [21:49] halelibraryhelpdesk: It's listed under "finding articles and databases" off the library home page under S [21:50] meeboguest275707: can I reference the SSCI from off-campus? [21:50] halelibraryhelpdesk: yes, you will be asked for your eID and password

9/06/2007  
9:51 PM

dtw

Q: need help on coronary heart disease resources

A: couldn't answer in time--helping a face to face patron

9/06/2007  
9:47 PM

dtw

Q: how to locate an article if there's no full-text

A:

9/06/2007  
9:46 PM

dtw

Q: citation help

A: how to tell how long an article is by looking at the citation

9/06/2007  
9:46 PM

dtw

Q: library hours

A: 1:31] asoka250: hi [21:32] halelibraryhelpdesk: hi, can I help you? [21:32] asoka250: is the 3rd floor open all night [21:32] halelibraryhelpdesk: yes, it is [21:32] asoka250: ok whts the difference b/w 24hr study area and rest of the floors [21:33] halelibraryhelpdesk: the 24 hours study area is open 24 hours 7 days a week whereas the rest of the library is only open 24 hours 5 days a week (close early Friday and Saturday nights) [21:33] asoka250: ok got it [21:33] asoka250: thankyou very much [21:34] halelibraryhelpdesk: sure [21:34] halelibraryhelpdesk: have a good evening

9/06/2007  
9:33 PM

dtw

Q: helped patron locate citations for business research paper

A: showed ABI/Inform and how to find citations

9/06/2007  
9:27 PM

dtw

Q: Where's PR?

A: third floor, stack level e

9/06/2007  
8:35 PM

dtw

Q: need to find book

A: found in catalog and showed how to locate it

9/06/2007  
8:12 PM

dtw

Q: wireless key

A: referral to ITAC

9/06/2007  
7:30 PM

dtw

Q: patron needed to find article on recent developments in math and education

A: expanded academic had several she liked

9/06/2007  
7:01 PM

dtw

Q: could you have someone come tell a fraternity group to be quiet?

A: 8:44] meeboguest440697: could we have someone come up to the 4th floor and suggest to the 5 guys to take their group study session to another place in the Library, they are on the East side of the building. [18:44] meeboguest440697: Thanks [18:45] halelibraryhelpdesk: Thanks for letting us know. [18:45] halelibraryhelpdesk: Our security guard should be up there walking around and will talk to them [18:45] meeboguest440697: not a problem, I just like a library to be a nice quiet place to study...gee imagine that! [18:45] meeboguest440697: thanks again

9/06/2007  
6:48 PM

dtw

Q: patron couldn't find book in stacks

A: was looking in an incorrect location

9/06/2007  
6:08 PM

dtw

Q: question on how to unlock a room upstairs

A: patron's group was listed as having reserved the room. so gave out key and requested it to be brought back asan

9/06/2007  
5:57 PM

dtw



# Colleagues

Q: Where do I find the link to JSTOR?

A: [10:55] meeboguest538578: Hi, My Lit Prof asked us to us KSU Library's J-store to read about Lanston Hughes? Where do I find this link? Thanks (\*\*withheld\*\*) [10:55] halelibraryhelpdesk: Hi. [10:55] halelibraryhelpdesk: You can get to the link by doing the following: [10:56] halelibraryhelpdesk: 1. go to [www.lib.ksu.edu](http://www.lib.ksu.edu) [10:56] meeboguest538578: yes [10:56] halelibraryhelpdesk: 2. click on the databases link at the top of the page. [10:56] meeboguest538578: yes [10:56] halelibraryhelpdesk: 3. click on the "J" in the list of letters across the top. [10:57] halelibraryhelpdesk: Scroll down the page and you'll see JSTOR [10:57] Meebo Message: meeboguest538578 has left your page [10:57] meeboguest284402: Is there a direct "j-store" tab label under data bases? [10:57] halelibraryhelpdesk: There isn't a direct tab, but you can get to it by browsing alphabetically. [10:58] meeboguest284402: oic... thank you very much [10:58] halelibraryhelpdesk: Here is a direct link to it: <http://er.lib.ksu.edu/login?url=http://www.jstor.org/cgi-bin/jstor/gensearch> [10:58] meeboguest284402: thank you very much for your help [10:58] halelibraryhelpdesk: Happy to help. [10:59] Meebo Message: meeboguest284402 has left your page

9/18/2007  
10:59 AM

jmc

Q: What was the French and Indian War?

A: [10:28] meeboguest395318: What was the French and Indian War? [10:28] halelibraryhelpdesk: Hi. [10:28] halelibraryhelpdesk: Just a second and I'll find you a link to information about it. [10:29] meeboguest395318: Thank you! [10:29] meeboguest395318: Bye. [10:30] Meebo Message: meeboguest395318 has left your page They left before I could send them this link: <http://www.answers.com/french%20and%20indian%20war>

9/18/2007  
10:36 AM

jmc

Q: where's ILL?

A: downstairs

9/17/2007  
3:48 PM

jmc

Q: Where can I find a photocopier?

A:

9/17/2007  
3:43 PM

jmc

Q: How can I add money to my card? I've used all the money on my printing account.

A: I showed him the machine.

9/17/2007  
3:24 PM

jmc

Q: I went to look for Invisible by Hautman but it wasn't on the shelf. The catalog says it is Not Checked Out.

A: I went to look for it but couldn't find it either. I went with her to ask at Circulation and I suggested that she fill out a search request form if they didn't have it.

9/17/2007  
3:13 PM

jmc

Q: Can you show me how to search for a specific journal? The title is NCTM. I tried using the database link, but didn't have any luck.

A: I explained that she should search the catalog if she is looking for a specific journal and knows the title. We did that and the catalog pulled up the record for News bulletin / National Council fo Teachers of Mathematics. She said that is what she wants. I explained how to find it and that she couldn't check them out, but could photocopy or scan the article. She was excited about the ability to scan and send to e-mail for free. I advised her to ask the staff at the Science Reference Desk to show her how to scan and send to e-mail.

9/17/2007  
2:55 PM

jmc

Q: I just recharged my print account by adding \$5.00 to my card. When I sign in with my eID, the money isn't showing up.

A: I explained that the money is actually on his chip and that he needs to insert his card to access it.

9/17/2007  
2:50 PM

jmc

Q: Can you show me how to search the catalog? I am looking for the Grimm version and the Perrault version of Cinderella.

A: I showed her how to use a keyword search to find them and then gave her directions to the Juvenile Literature collection.

9/17/2007  
2:47 PM

jmc

Q: Do you have a section with fiction? I am looking for Star Wars fiction, specifically a book titled "Darth Bane"

A: I explained that we organize our fiction by LC call number, which usually ends up putting things in order by author. I explained that the best way to look for it is to search our catalog. He searched by title, but we didn't have it. I suggested that he do a keyword search for "star wars" to see what else we might have. I explained that the fiction would have a call number starting with a P. We found that we do have several titles. We pulled one up and I showed him that he could use the subject headings to browse.

9/17/2007  
2:44 PM

jmc

Q: I am looking for these three citations (shows bibliography with three of the listings starred. All three are books).

A: I showed him how to look them up by title. We had all three.

9/17/2007  
2:41 PM

jmc

Q: I need to photocopy a notecard and then e-mail it to my father.

A: I told him that he'd need to use a scanner to get the information into digital form so he could e-mail it. I explained that he could

9/17/2007



# Subject Librarian Assessment

“To see what types of questions are being asked, whether any are from my departments, and how questions are being answered”

Staff Survey Response

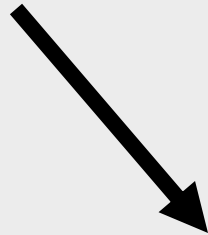
- Subject librarians read and evaluate questions answered by other library staff
  - Discuss questions/answers as a group or individually to provide training in subject area of need



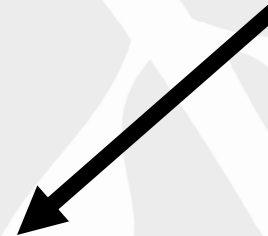


# Collaborative Learning

Batting Practice



Subject  
Librarian  
Sessions



Dialogue, Reflection,  
Assessment

What can  
we do  
differently?



Challenge  
Assumptions

**New Collective Knowledge**



# Future Training Considerations

- Utilize more controlled vocabulary or codes in the question/answer areas for more refined search capability
- Create FAQs for future training purposes based on actual Libstats questions
- Have subject librarians create stock answers to common questions

