Desk Tracker Instructions and Glossary
For Consultations & Instruction

LOGIN
1. Log in to the Desk Tracker system at https://client.desktracker.com
2. Account number: ask Kristan or Chris
3. Once logged in, select “Main” from the “Branch” dropdown and submit
4. Select “Consultation/ Instruction” from the “Desk” dropdown
5. Click on “continue”

CONSULTATION FORM
In addition, to using this data for Services Division reports, this data is submitted to ARL/ACRL/IPEDS for reporting reference transactions and the LITS Assessment Office for reporting information interactions in the By the Numbers.

Event Date required
Type in the following order year, month, date e.g. 2014-08-13

Instruction Session Follow-up
Indicate if the session is a result of or follow-up of an instruction session in which the patron was a participant.

Contact Type required as of 10/5/16
Note how the initial interaction occurred.

Interaction Type required
Choose the appropriate response. If contacted for an instruction session do NOT count this initially as a consultation, but any subsequent planning with faculty can be counted likely as outreach or directional. Not everything SLs do are counted (see customer instructions for more details).

1. Outreach can take on several forms including:
   - Departmental seminars
   - Liaison office hours
   - Departmental meetings
   - New Books lists
   - Sharing library announcements/news with departments via email or in person
   - Prospective faculty/graduate student library tours during campus interviews

2. Collection Request is when one of the following occurs:
   - A faculty or student requests the purchase of a title either in print, online, or other format.
   - A purchase request is made yet Emory owns the title.
3. **Research Consultation** is when you provide research assistance either in person or via email to a researcher that has requested assistance. Note, for e-journal/database access trouble-shooting count as a consultation. This can include a research appointment with one or many.

4. **Directional/referral** is when you point someone to another office or librarian.

If the interaction involves more than one interaction type, count every interaction and make a separate entry for each. Examples:

- If you go to a departmental seminar and two faculty and one grad student ask you research related questions, you would record 4 separate transactions. 1) Outreach – Department 2) Consultation (Faculty), 3) Consultation (Faculty), 4) Consultation (grad student).
- By attending a departmental seminar you receive a collection request. Then you count both the outreach event and the collection request. 1) outreach and 2) collection request.

**Customer** *required*

You can select multiple customers at a time. Include intra-library staff work that is research-related (i.e., meant to help a patron, e.g., help with an ILL request). Do NOT include behind-the-scenes collection activities (e.g., responding to a request from acquisitions as to whether we should continue receiving or claiming a particular serial).

**Faculty (NetID)**

You will be able to copy and paste the ID from email. You may also look up the name in the Emory directory: [http://directory.service.emory.edu](http://directory.service.emory.edu)

**Total Time (Prep and Consultation), Hours and Minutes (two separate fields)**

You can note the total time spent on the consultation/interaction, including advance preparation time. Place hours in the hour box and minutes in the minute box. If the time spent is less than one hour, enter in a “0” in the “hours” field. For example, if you spend 1 hour and a half, put “1” in the hours field and “30” in the minutes field.

**Subject** *required*

Only 1 department/subject can be selected at a time. If you provide the same interaction for multiple departments, then make multiple entries. If you cannot identify the department, then select the subject most closely related or select “other”. Preference is noting the department of the patron, but if you cannot identify the department, then select the subject most closely related to the topic or select “other”. If you find you are selecting “other” frequently for the same topic, please contact Kristan or Chris P. so a new subject can be added.

**Question/Issue/Feedback**

Additional notes may be provided here. This box is optional. The information included is available to anyone that runs a report.
Fields not required are optional and will not be used in the Services Division’s annual reports. These additional fields are offered in case individuals want to create their own reports.

**INSTRUCTION FORM**

Use this form when you provide tours, orientations, new research guides, workshops, and instruction sessions. ARL defines this as “presentations to groups” and is further explained as being a part of a formal bibliographic instruction program, planned class presentations, orientation sessions, and can be educational, recreational, cultural, or BI. In addition to using this data for Services Division reports, the data is submitted to ARL as Presentations to Groups and Participants in Group Presentations in September.

**Subject or Department required**
Only list one department or subject even if the course is cross-listed. Select the primary department of the instructor that contacted you.

**Event Date required**
Type in the following order year, month, date e.g. 2014-08-13

**Session Type required**
Select the type of activity: instruction session, workshop, research guide only, tour, orientation, other.

**Did you use a research guide? required**
Did you create or reuse a research guide for this instruction session?

**Session Level/Audience required**
Please indicate the level/audience of the session from the dropdown menu. Please be sure to note if this is a QEP seminar course *(added 10/12/16)*.

**Department & Course Number**
Enter the course number as [Department] [Number], e.g., Anthropology 201.

**Course Name**
Enter the course title, e.g., Econometrics

**Faculty email required**
If not applicable, please type “NONE.” If applicable, please provide the faculty member’s complete Emory email address, so that we can email them for surveys.

**Number of participants required**
Can be obtained from OPUS or a headcount.

**Library Instructor required**

**Session Length, Hours and Minutes**
List the total time spent in the classroom. If the time spent is less than one hour, please enter in a “0” in the “hours” field. For example, if you spend 1 hour and a half, put “1” in the hour’s field and “30” in the minutes' field. This measure is could provide a clearer picture of how much time liaisons spend on said activities.

**Library Co-Instructor**

**Instruction Preparation Time, Hours and Minutes**
To list the amount of time spent preparing for the session. If the time spent is less than one hour, please enter in a “0” in the hour’s field.

**Room Used**
Can be used to measure how often library classrooms are used for instruction. *(Changed this to not required 7/31/18)*

**Notes/Feedback**
Additional notes may be provided here. This box is optional. The information included is available to anyone that runs a report.

*Fields not required are optional and will not be used in the Services Division’s annual reports. These additional fields are offered in case individuals want to create their own reports.*
Generating Reports for Main: Instruction or Main: Consultation

For quick charts to print.

*Note: Desk tracker allows printing or downloading as a jpeg or pdf.*

1. Select bar or line
2. Choose reports. Note certain reports do not generate enough data to create a graph. Using the required fields will be your best bet. For example:
   a. Instruction: session type & number of participants will generate reports.
   b. Consultation: subject & interaction
3. Filter location – optional (leave as is)
4. Filter users – for individuals, select Filter by User
5. Select date range *(note this only searches the time stamp of when you entered the data)*
6. Filter recurring period – (leave as is)
7. Filter: Responses – (leave as is)
8. Numeric Report Behavior – (leave as is)
9. Build Report

To identify the last transaction, you entered into Desktracker:
1. Select Text
2. Filter by user
3. Date Range *(note this only searches the time stamp of when you entered the data)*
4. Ignore the following fields: location, recurring period, and responses

To preform your own analysis and create additional charts/graphs using a spreadsheet:
1. Select “Download Data File Generator."
2. Select “Show Options"
3. Select “Flat format"
4. Select split date and time into separate columns.
5. Select Main: Instruction or Main: Consultation
6. Filter location: “Main: Instruction/Consultation"
7. Filter by User
8. Select Date Range
9. Build report

*Note: Event dates are NOT the same as the entry date. Desk tracker runs reports based on the entry date timestamp. If you are looking for August data but you did not enter the data until September, you will need to set the date range using your entry dates (September in this example). The two dates are included in the downloaded spreadsheet files and can be sorted, but they are not included in the quick bar/line graphs.*

For assistance or questions about Desk tracker, contact Chris or Kristan.

Updated 7/31/2018