# Keeping our statistics up to date

An overview, by Bob Diaz
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## Goal of presentation

- To review our data gathering practices so that everyone is reminded what we are supposed to do.
- To review how to use Libinsights to record statistics.
- To come up with a timeline for reporting statistics on a regular basis.

## Data gathering: What do we have to count?

- Total number of students we reach in instruction.
- Total number of customer questions.
- ARL does not require us to provide anything more than total number of interactions.

## What do we want to count?

- The last time we worked on this, when Wendell Cox was with us, the following elements were chosen:
- Types of customers: Out of State, In State, Visiting Scholars, Faculty/Staff, Graduate students, undergraduate students.
- Departments and courses of study.
- Time spent on responding to questions.
- Referrals.
- Subject of questions.
- Collections used/requested.
- Types of queries: reference questions, donor queries, permissions and copyright requests, Duplications requests, Instruction requests.
- Etc….

## Points of interaction: How we interact with Customers

- Libanswers
- Email to individual curators
- Phone calls to individual curators
- In person visits when we are open
- Since the start of the pandemic, the majority of our interactions have taken place in Libanswers.

## What we get from Libasnwers:

In Libanswers we can easily count the following:

- Total number of queries in a given time period.
- The people tickets were assigned to.
- Permissions requests
- Duplications requests.
- Turnaround time.

## What’s harder to count in Libanswers:

We cannot ***easily*** count (without doing additional work):

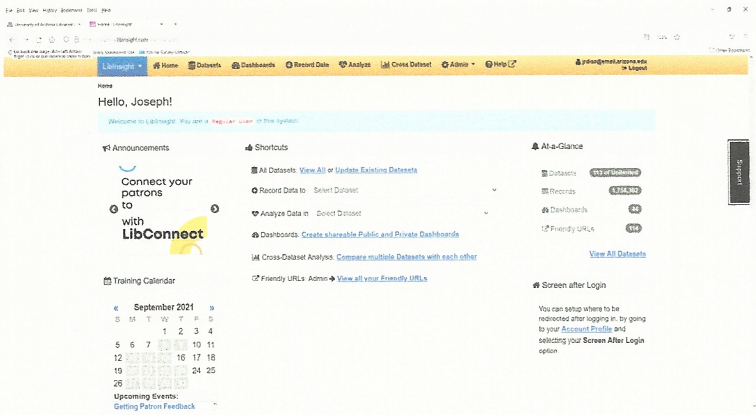
- Type of customer
- Collections requested by name or MS #
- Reference questions by subject
- Requests for visits

## Our current, agreed upon practice:

We are supposed to record our data in Libinsight. This includes:

- Interactions that occur in Libanswers.
- Email interactions with customers.
- Telephone interactions with customers.
- Other reference interactons not covered by the above.

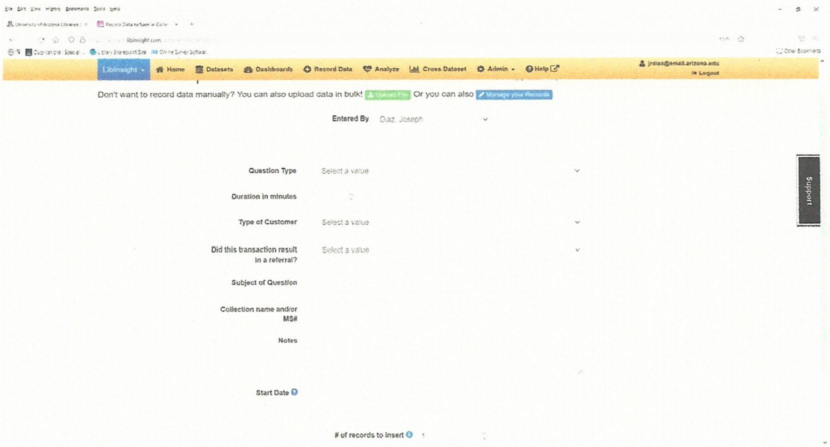
## Here is what Libinsight looks like:




## How to record your off desk data in Libinsight

- Choose "Record data to: Special Collections: off desk reference
- or
- Special Collections: Instruction

## Here is what the off desk reference form looks like:




## Off Desk Reference form continued…

- You'll notice that some of the fields have drop down arrows. Click on the arrow to see what your options are for each field and choose the appropriate ones, to the best of your ability.
- The time stamp is very important. If you do not change the time/date of the interaction manually, all of your interactions are going to be for the actual time you recorded your data. Please, at least change the date, so we know the date of the interaction. Recording the actual time is not as important. If the department agrees that it is important, then everyone will need to keep careful track of that information.
- Click the submit and clear form button to input additional transactions .

## In Summary:

You will need to keep track of your interactions in:

- Libanswers (to sort your tickets in Libanswers, go to the Stats tab and click it. Change the date range and choose yourself as the ticket owner. Then hit the "filter" button.
- Your emails with customers
- Your phone conversations with customers
- Desk interactions with customers that occur on the fly.
- Once a month, at minimum, you will need to record your data into Libinsight.
- I will provide monthly summaries around the middle of each month. You should have your data input by the end of the first week of the month.
- Monthly reminders will be sent to everyone to input their data.

## Additional considerations about Libanswers.

- We could have someone assigned to review each ticket in Libanswers and determine to the best of their ability the collections requested, topic of the reference question, and other variables that would normally be recorded in Libinsight. While it would get rid of the need to re-enter information in Libinsight, it would require a lot of time and effort. To make it easier for the person assigned this work, each ticket owner could use the internal notes field to document some of these variables as they are working with the customer.
- We could also be more systematic about assigning tags to our tickets. We currently use tags to denote appointment requests and who questions are assigned to, but this is not done consistently at the moment. Again someone could go back to each ticket and retroactively assign tags or the ticket owners could do this themselves, by we would all need to be consistent with the language and with following through on this work.

## Final thoughts

- As you use the Libinsight form, please think of other variables that we might want to add to the lists of things we are recording. For example, would it be worthwhile to include Tucson/Pima county as customer type? We currently only record whether a customer is in-state or out of state.
- Are there things that we are recording that we do not need to capture?
- How else could we streamline this work?
- Ultimately, I'm sure we all want credit for the work we do, but if we do not record it, it gets lost. We all need to do our part.