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Let's Get Technical--Desk Tracker: A New Way of Tracking Cataloging Statistics

Stacey Marien
American University Library, smarien@american.edu

Alayne Mundt
American University Library, mundt@american.edu

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Let's Get Technical — Desk Tracker: A New Way of Tracking Cataloging Statistics

Column Editors: **Stacey Marien** (Acquisitions Librarian, American University Library) <smarien@american.edu>

and **Alayne Mundt** (Resource Description Librarian, American University Library) <mundt@american.edu>

For many years, the Resource Description Unit at **American University** kept track of cataloging and related statistics using Excel spreadsheets, a frequently used method for tracking statistics in units across our library. As Resource Description staff members are increasingly working in more customer-service focused roles and performing work that is unique to their position, tracking and reporting of an individual's statistics in spreadsheets has become more cumbersome. The accumulation of statistics on a spreadsheet does not always fully capture the scope of the work being performed. The Resource Description Unit wanted to brainstorm alternate methods of capturing information about our work. A Resource Description Specialist who had previously worked in the Reference and Circulation departments in the library suggested that we consider trying Desk Tracker to document our unit's work. Desk Tracker is a commonly used tool in public services departments that tallies statistics about reference and other customer interactions. Our Resource Description Specialist thought that with some customization, Desk Tracker could become an easier, more efficient, and standardized way to capture detailed statistics about the work we perform.

The Trial

When we initially set up Desk Tracker, we agreed to also keep statistics in our regular spreadsheets for three months. This gave us ample time to be sure information was being captured accurately and no data was lost in case we made any modifications to how we input information over the course of the trial. Our first act was to meet as a group to decide specifics of what we wanted to track. These include the layout of the input page, what elements would be required, and new items we weren't currently tracking. We wanted to be able to record the amount of time spent on specific types of work or collection. Additionally, we wanted the option to document specific cataloging issues such as which MARC fields were edited or languages cataloged.

We also wanted to be able to capture non-cataloging related data that was not always easily captured in a spreadsheet. Since the Resource Description Unit has two positions that have large customer-focused elements in the campus community, we felt it was important to record the types of customer interactions and time spent on those interactions. Other examples of information to record include the ability to add ancillary information about trips to the stacks, consultations with other library units to solve problems, and any other work that isn't merely cataloging. *See Screenshot 1.*

At the end of the trial and with many rounds of feedback among unit staff, we settled on a multiple tab configuration. The tabs contain general cataloging-related work, special projects and metadata work, customer service-related work, and professional development. Over the course of the trial, we also removed or combined some specific elements of information to track, such as MARC fields we collectively felt were extraneous in the "Copy cataloging, issue(s) addressed" section, and removed some options entirely in order to simplify input without losing nuanced data we wanted to capture. Any specifics we want to capture could be added in an "Additional Info" note in each tab.

The Results

After the trial, we collectively agreed that we wanted to switch over to capturing our unit's statistics using Desk Tracker. There has been very little resistance among staff about the switch. The program offers the ability to add multiple entries and custom time and date stamp entries. Entering an individual's statistics is generally very fast depending on how much granularity one needs to add.

Running Reports

From an administrator's perspective, one of the best aspects of the switch to Desk Tracker is the ability to pull out data into reports in an almost unlimited number of ways using different visualization tools. This has provided us multiple ways of analyzing data beyond just the numbers. This can include crosscutting statistics entered by specific dates or date ranges, types of work performed, formats of materials cataloged, and amount of time spent cataloging items. For example, we have been able to determine the percentage of monographs that take less than 15 minutes, between 15 and 30 minutes, and more than 30 minutes to copy catalog. We can further subdivide this by other formats, language of the material, staff member performing the work, or even specific MARC fields in the cataloging record that needed editing. Desk Tracker allows for visualization of data in a variety of formats. This includes pie charts and line charts that can show, or percentages and quantities of types of work performed over time. This functionality has a great deal of potential as a tool to show the value of cataloging, trends, the amount of time spent on different types of work, or almost anything else to library administration. This has made analyzing trends in our work much easier.

With the ability to log specifics, we have been able to observe trends over time.

Screenshot 1: Sample tab for tracking cataloging activities.

Examples include volumes of materials being cataloged in foreign languages, particular fields needing editing and ebbs and flows in quality of vendor-provided records. This information is very useful in regard to allocating staff time to particular workflows, identifying areas of work that need specific expertise or attention, and quantifying how staff is using their time. For example, our library has three separate rush workflows — one each for 4-hour Interlibrary Loans, Rush Reserves, and Hold/Notify. We have been able to determine when each of these separate types of rush book workflows is heaviest, and have allocated or adjusted staff time accordingly. There is a great deal of potential in using these types of analytics in determining where staff training is needed most, in terms of what formats or workflows are taking the most time or are heaviest. *See Screenshot 2 and 3.*

Challenges

There have been a few challenges and some tweaking regarding how we have input data since we began trialing this tool in spring of 2015. First, when there is staff turnover, one cannot delete an individual's profile without deleting his or her statistics, which we need to have for library-wide annual reports. So we must keep logins for staff who have left their positions, at least until the end of a fiscal year. Secondly, tracking statistics for work performed in batch has required special customizations. When we originally set up Desk Tracker, we had it configured to track statistics for batch adds or edits in the catalog by creating multiple duplicate entries. When we realized that this created difficulties in both running reports and adding any notes in the "Additional Information" field, we changed this to a single entry with an option to input how many records, which is, in fact, easier to input. The system requires an initial investment of staff time to set up and configure the tool to work per a particular department's criteria, as well as the requirement of the unit head or another designated person to serve as an administrator.

After using Desk Tracker for a year, the Resource Description Unit staff has been mostly happy with the transition to a new statistical tracking tool. It is worth the investment in time it has taken to set up and modify the tool to make it function for our unit's cataloging and related work. Since adopting the Desk Tracker, staff has reported that they can enter data quickly, and modifications such as custom time stamps and adding multiple entries at once are very efficient. We have presented on the customizations and reports we have been able to run to other departments in our division and have encouraged them to try it out. 🐾
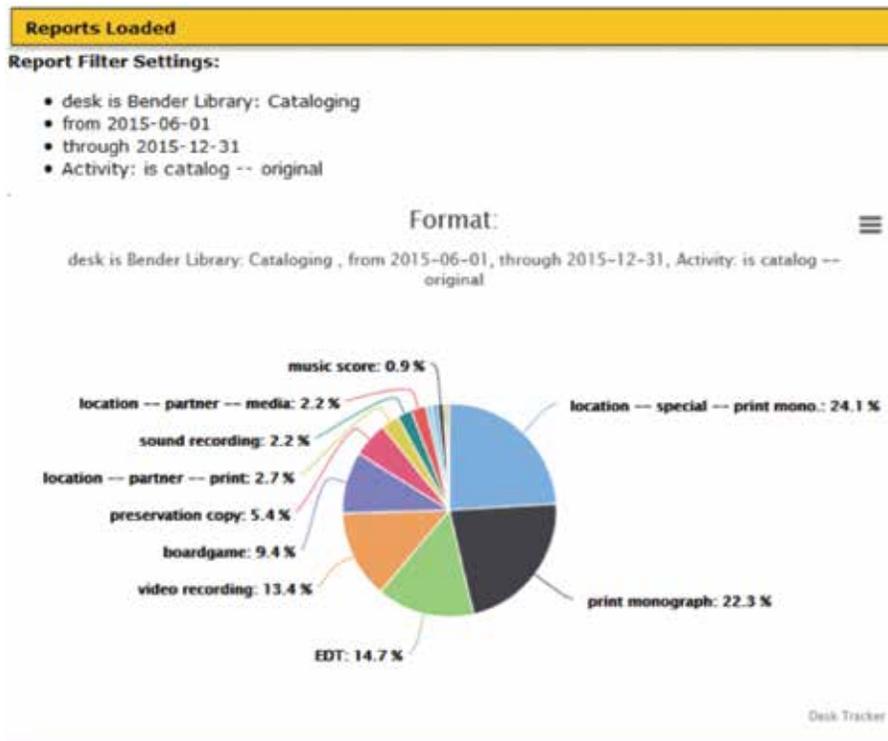
Screenshot 2: Example of chart created from a report of all original cataloging performed between June 1 and December 31 2015, broken down by format.
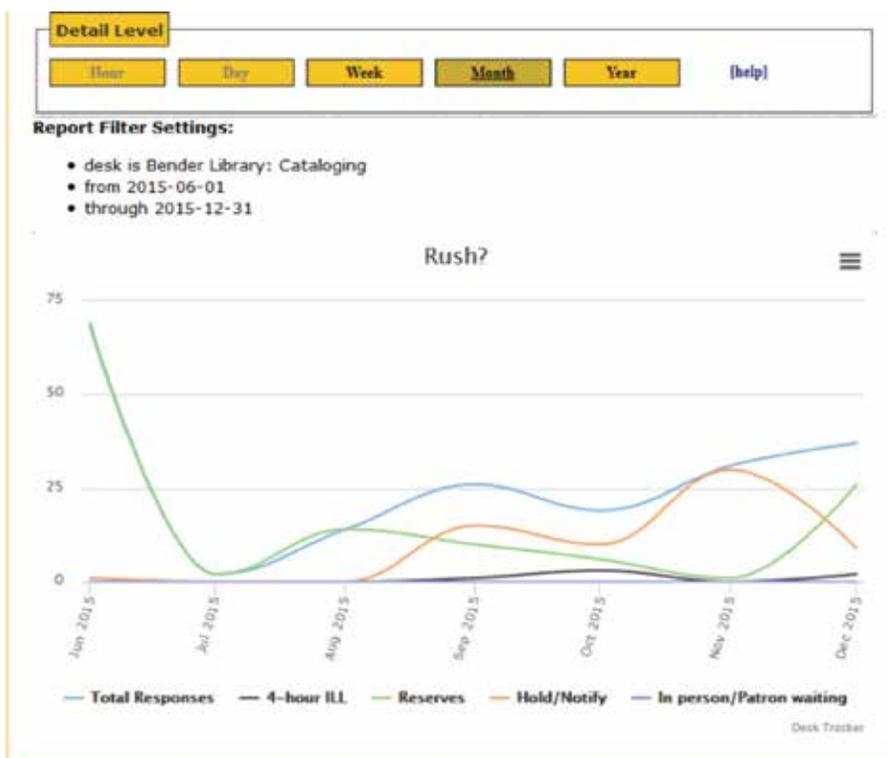
Screenshot 3: Example of chart created from a report of amount and type of rush cataloging performed between June 1 and December 31, 2015.