

Desk Tracker Guide

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I. Purpose and Uses:

1. Track all questions asked at service desks
2. Track Gate Counts and Head Counts for Library

II. Logging In

1. Go to <http://client.desktracker.com/?uact=login>
2. *Account Number:* 875138
3. *Username:* Enter your unit's username
4. *Password:* Enter the password for this username

Welcome. Please set your location...

Organization: University of Illinois

Branch:

Central Access Services
Central Access Services
Central Reference
ESSL
Undergrad

Submit

5. Select your unit for branch

Please select your desk...

Organization: University of Illinois

Branch: Undergrad

Desk:

6. Select the appropriate desk
7. Click *Continue*. You are now logged in.

III. Recording Questions

1. Click on the *Activity* tab
2. Click the RED checkmark next to the type of question you want to record
(ignore the round buttons)
3. Example: Recording a short (<5 minute) research question:

In Person *[ticketsheet]*

- In Person Information/Directional
- In Person Reference <5 Minutes
- In Person Reference 5-15 Minutes
- In Person Reference 15-30 minutes
- In Person Research Consultation >30 minutes

IV. Recording Gate and Head Counts

1. Click on the *Gate Count* tab

Gate Count 1 (P: number) <input type="text" value="94567"/> <i>Whole numbers only</i>
Gate Count 2 (P: number) <input type="text" value="34789"/> <i>Whole numbers only</i>
Head/Body Count <input type="text" value="78"/> <i>Whole numbers only</i>
<input type="button" value="Submit"/>

2. Enter all applicable numbers and click Submit

V. Recording Stats Late

If you get delayed in entering a stat (question or gate count/etc.), you can manually change the recorded date/time on the form before submitting the stat

1. Click the *Custom Timestamp* link in the upper right
2. Enter in the time when the stat occurred (if different from right now)
3. Enter Gate Count/Head Count as normal (Section III above)
4. Example: You meant to enter the 11:00am gate count at 11, but it is now 12:30pm.
 - a. Go to the *Gate Count* Tab
 - b. Click *Custom Timestamp* and change the Date and Time to 11:00am

[custom timestamp] [help]

default (now) custom...

Date:

Time: (hh:mm)

5. Click the *Submit* button

VI. Reports

1. Canned Reports (for desk stats)

- a. Click the *Reports* Tab
- b. Click *Activity* under *Detailed Reports*
- c. Choose which options/fields you want in your report, e.g.:

Choose Reports

<input type="checkbox"/> Summary of Response Totals	<input checked="" type="checkbox"/> Phone
<input checked="" type="checkbox"/> In Person	<input type="checkbox"/> description
<input checked="" type="checkbox"/> IM/Chat	<input type="checkbox"/> Patron Type
<input checked="" type="checkbox"/> Email	
select all / deselect all	

- d. For individual unit reports, be sure to *Filter by Branch* and choose your unit

Filter: Location

Don't Filter by Location Filter by Branch... Filter by Desk...

Use only response sets entered at...

<input type="checkbox"/> ESSL	<input type="checkbox"/> Undergrad
<input type="checkbox"/> Central Reference	<input type="checkbox"/> Central Access Services

- e. Click the *Build Report* button to generate the stats.

2. Exporting Results (more advanced stats)

- Choose the *Reports* tab
- Under *Modules*, choose *Data File Generator*
- Select Start and End dates
- Click the *Generate File* button
- This produces a .csv file that will open in Microsoft Excel for manipulation. It can also be imported into Access.