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What Are We Doing? Capturing the Uncaptured: Workload Data to Demonstrate Service

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Abstract

Capturing service data can be difficult, particularly for technical services and electronic resources librarians—using standard tools such as RefTracker is cumbersome, and taking more time to enter the transaction than it actually took to perform the task is an impediment to gathering good service data. The services provided by these librarians are equally as public-facing as those provided at the reference desk, but are often not captured or reported. A possible solution is to use sent e-mail as a data source for demonstrating services provided by technical services and electronic resources librarians. This lightning round demonstrates one such approach using the categorization functions in Outlook to classify, export, and report services. The data derived from this can demonstrate public-facing services and workloads related to technical services, and the method can be extended to capturing other service metrics.

Service data is an important part of library management, and there are any number of methods used to demonstrate the amount of service that librarians and library staff provide. This data is used to support staffing decisions as well as allocation of resources and services. The services provided by technical services librarians and staff are equally as public-facing as those provided at the reference desk, but are often not captured or reported. Capturing service data can be difficult, particularly for those who may not be using tools such as RefTracker. Configuring these tools for nonreference use can be cumbersome, and taking more time to enter the transaction than it actually took to perform the task is an impediment to gathering good service data. In the Web design world, this is known as "conversion rate," and the more complex a form is, the less likely it is to be completed.[1] For the myriad of tasks that technical services staff perform on behalf of library users, it is often "too much trouble" to complete a long reference transaction form each time.

What can be done about this lack of data? Other methods of gathering reliable data on workload and service must be explored. Low-tech methods such as tick sheets or spreadsheet files are commonly used to count certain types of transactions, but often are not able to capture any detail to see trends in types of transactions or user groups. These methods also do not easily account for the time spent on transactions.

Service data can accumulate naturally in a number of ways—for example, in processing physical materials, there is usually a paper trail. However, the most common pool of data is in e-mail. Most transactions from technical services involve sending an e-mail, that is, correcting a link, attaching a file, sending instructions, notifying a user that a problem has been resolved. Thus, a possible solution is to use sent e-mail as a data source for demonstrating services provided by technical services and electronic resources librarians. One approach to parsing this data uses the categorization functions in Outlook to classify, export, and report on transactions. For these purposes, flagging those messages that meet the ACRL definition of a reference transaction (as referenced in NISO Z39.7-2013, § 7.3[2]) is the most useful since that corresponds to the standard reported data for other service areas. This of course is not set in stone—any method of categorization can be used, as long as it can meet the needs of the unit in question.

Do not worry about duplication—there are often multiple messages connected to a single transaction—this is addressed in the discussion on limitations of the data. Either as the transaction is completed or on a periodic basis, each staff member will categorize messages in their sent mail folder. As long as this categorization is consistent, generating a report will collect all of these transactions together so that they can be analyzed. At this point, it can also be noted that there are a number of commercial

products that provide e-mail analytics; however, this method requires no additional tools or expense.

At this point, you have a set of flagged e-mails—these need to be gathered to generate a report. In the sent mail folder, change to List View. Sort by the category. Highlight all messages in the "Reference" category (or however you have defined it), and copy/paste into an Excel spreadsheet. Sort by date, and eliminate any outside the date range you are reporting on. Note that you might need to check with your IT department to determine if the retention in your sent mail folder is sufficient, or you may need to adjust your data gathering and reporting process accordingly.

Next, you will need to eliminate the duplicates by subject. One option for this is to use *ASAP Utilities'*[3] "Range-Clear Duplicated Values," but you can use whatever method you like. Re-sort by the subject column; empty fields will fall to the bottom. The number of columns remaining with a subject is the number of transactions to report.

At this point, you need to apply a calculation to the number of transactions to arrive at a time estimate for the number of hour of service provided. This may vary from position to position, depending on what tasks they are performing, and points to limitations of the data:

1. Time spent on transaction(s)

The assumption is that all of the transactions captured in this way are of greater than 10 minutes duration (as categorized in RefTracker and reported to ACRL). Our actual estimate is that the value is closer to 20 minutes, as some transactions are simple and others can take an hour, which evens it out. If actual time data is desired, a mechanism would have to be developed to record this data in the e-mail message, which would then be exported and tallied. A possible solution would be to have

additional categories defined in Outlook such as "Ref < 10 minutes" or "Ref > 10 minutes," which approximates the collection in RefTracker.

2. Duplication

There are times when the same subject line can encompass multiple transactions, such as when a faculty member responds to an earlier e-mail with a new question. This could be eliminated by editing the subject heading at the time of completing the transaction, but that entails additional labor and remembering to do it. Those separated by dates could also be spot edited when reviewing the spreadsheet prior to running the deduplication process.

3. Subject analyses

As with any corpus of data, analyzing for subject content can be difficult. Particularly in this case, the more information that is sought from the data, the more it heads back to the use of a detailed reference tracking system, which is what was being avoided here. E-mail subject lines are often cryptic and thus of limited use in analysis. Certainly the entire e-mail message pool could be exported and textual analysis tools used to derive some trends if that is desired, but this exercise was primarily designed to capture workload data in terms of volume, not detail. For the technical services staff, with positions that are already well defined, the content of the workload can be assumed to be within their functional areas (i.e., a cataloger is answering cataloging-related questions, not acquisition questions).

This is, of course, not a perfect solution. However, it is a better approximation than not collecting any data at all, and it allows for a more painless collection of workload data than completing a reference transaction form for every task that involves public interaction.

Notes

1. https://www.formassembly.com/blog/form-conversion-rate/

2. https://groups.niso.org/apps/group_public/download.php/11283/Z39-7-2013_metrics.pdf

3. https://www.asap-utilities.com/