

INSTRUCTIONS AND DEFINITIONS

MELSA Reference Statistics

GENERAL DEFINITION

For each transaction that takes place at the information desk, complete applicable information for each category on the web form as fully and accurately as possible when the transaction is complete.

Reference transactions are defined as:

A reference transaction is an information contact that involves the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. It includes information and referral services. Information sources include printed and non-printed materials, machine-readable databases, catalogs and other holdings records, and, through communication or referral, other libraries and institutions and people inside and outside the library. The request may come in person, by phone, by fax, mail, or by electronic mail from an adult, a young adult, or a child.

Sign-In Process

After choosing the "Survey" menu option, select your library system from the drop-down menu.

Then select your library location from the drop-down menu and then the service point from which you are reporting.

Select the "Save" button.

Follow the following selection buttons, as explained:

1. PATRON RESIDENCE (Required)

Record the residence of the user. If the user is accompanied by someone else, check the box that describes the person with the question. If the person(s) accompanying the user also ask questions of their own, record them and their question separately. Each library system will choose the appropriate default.

2. NATURE OF CONTACT (Required)

Self explanatory. Virtual reference is currently practiced only at HCL. The web form will default to in-person.

3. QUESTION TYPE (Optional)

If a library user has multiple questions, record each question as a separate transaction. Follow-up questions where the user is seeking clarification or supplementary information should not be counted separately.

INFORMATION/REFERENCE

An Information/Reference request is made directly by a library user and involves the knowledge, use, recommendation, interpretation or instruction in the use of one or more information sources or bibliographic tools by library staff.

Information/reference requests include requests library users make via any means. Information sources include print and non-print materials, electronic databases, catalogs, professional expertise and prior knowledge, and sources outside the library.

If a library user has multiple questions, record each question as a separate transaction if it deals with a new subject.

Include:

- requests for help finding information on a particular subject
- requests for help finding information in an electronic database or in the catalog,
- questions of fact or finding facts,
- referrals to organizations or agencies
- Readers' advisory questions
 - Requests for suggestions or recommendations
 - Requests for assistance selecting a comparable author/title
- Questions about the location of material that requires knowledge of the collection (e.g. what number do I go to for car repair manuals) should be counted as an information request even if you do not need to look up the information in order to respond.
- Inquiries where staff verify the author, title, call number, or citation for a specific item.

Exclude:

- Send list, pick list, or any list generated by the automation system and not directly by a customer.
- Requests for directions
- Requests for information concerning policies and procedures.
- Examples:
 - Booking meeting rooms, audio-visual equipment, tours, etc.
 - Where is the reference desk?
 - Who do I talk to about my overdue bill?
 - May I borrow your tape, white-out, scissors, etc., etc.
 - Where are the internet PC's.
 - What are my fines? Can I still use the computers?

INSTRUCTION

Instruction in the use of library resources, but not the equipment. It is possible that you can count an information request twice if you supply information and also show how to use the database to find additional information.

Include:

Individual instruction on the use of:

- Print resources
- Electronic databases
- Internet resources
- Library catalog, MnLink

Examples

- Help me find an article on diabetes.
- Show me how to find information on fixing my car.
- Show me how to reserve a best seller.
- Help me find current information on economic conditions in Canada.
- I am researching Andre Norton. Please find some information for me. What additional resources should I use? How do I use the Literature Resource Center?

TECHNICAL ASSISTANCE

A request for technical assistance is one where the library user seeks staff assistance in the use of computer hardware, software, applications such as the Microsoft Office suite, and/or equipment such as photocopiers, microform machines, scanners, CD burners, printers, etc.

Examples

- How do I use the photocopier?
- I have my resumé stored on this diskette – can you help me to open it?
- My friend e-mailed me an attachment in Arabic but I'm having trouble displaying it – can you help?
- How do I change the keyboard to French?
- How do I make a photocopy from microfilm?
- How do I create a resume in Word?

Requests for assistance in locating specific websites or searching electronic resources are counted as information requests.

4. LENGTH OF INTERACTION (Optional)

At the conclusion of the transaction, mark the box that you feel best describes the duration of the transaction. You do NOT need to time yourself; this is your best

estimate only. At the conclusion of the transaction, ask yourself whether you were able to deal with that person's request very quickly, whether it took a few minutes, whether it took quite a while.

If a user has a complex information request and you do some preliminary work to help them get started and then do further work afterwards, do not go back and change the duration information you recorded. If you feel confident at the outset of the request that the question will take you a long time to answer, check the amount of time you think it WILL take.

5. SOURCES USED (Optional)

This category is designed to gather information on the types of resources used to respond to information requests, not the total number of resources consulted. For each question, check off the types of information sources that you used to respond.

Example 1: to respond to an information request, you searched the library catalog, searched the internet and located six useful sites, and also consulted a print resource once.

Example 2: to respond to the next information request, you conducted an extensive internet search and located and referred the user to five websites containing the necessary information. In addition, you searched Biography Resource Center and the Literature Resource Center.

1.

Sources Used		
Print Source		
Catalog	X	
Internet	x	
Referral		
MnLINK		
Subscription Database		
Other		

2.

Sources Used		
Print Source		
Catalog		
Internet	X	
Referral		
MnLINK		
Subscription Database	X	
Other		