

The Reference Transaction Sampling Web Application

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This spring, the RTS web application created by ITD will replace the MIS paper-based sampling process. All libraries and service points are represented in the application. The application will increase some transparency between MIS and the library service points, as well as increase the accuracy of MIS' data collection process.

The web application provides three basic functions to library units: (1) the ability to enter reference transaction sampling data for a current sampling day; (2) the ability to view historical data and a record of what days and sampling points MIS has received data; (3) the ability to edit a concluded sampling day, in the instance that a discrepancy is found, or library units prefer to collate sampling data at the conclusion of the sampling period.

Multiple stations at the same service point can edit data at the same time. This means, for example, that each workstation at the McKeldin circulation desk can have an instance of the web application running, and the tallies for each will be updated across all instances.

Instructions

Editing Data for the Current Sampling Day

These instructions indicate how to enter data for the current sampling day using the RTS web application.

- (1) In your browser of choice, navigate to the URL:
https://www.lib.umd.edu/PASD/MIS/larc/RTS/sampling_form.php
- (2) If the current day is a RTS day, the sampling form will indicate it. If it is not a sampling day, the form will read: "The next sampling day is: MM-DD-YYYY".
- (3) Click on the link Add Sampling Data.
- (4) Choose the relevant sampling point, i.e, McKeldin Circulation, Non Print.
- (5) A new screen will appear with a format similar to the paper-based sampling process.
- (6) For each reference transaction, enter one tally according to the hour it occurred, and the type of query – walk-in, telephone or email. Click the '+' button to add a tally. Click the '-' button to remove an accidental input, or correct an error.
- (7) At the conclusion of a sampling day, simply close the browser. All data is instantly saved to our database. There is no need to save or print a record of the sampling day.

Viewing Data for a Prior Sampling day

ITD has provided a feature where service points can review their submitted historical data to check for consistency, or to locate missing sampling days.

- (1) In your browser of choice, navigate to the URL:
https://www.lib.umd.edu/PASD/MIS/larc/RTS/sampling_form.php
- (2) Click on the link 'View Submitted Data'
- (3) A new screen showing all available library/units and a tabular display of sampling days will appear.
- (4) If a given service point has a '1' in the box for a respective sampling day, the MIS database has data on file for that day. If not, the data is either missing, or the day has not yet occurred, or finished.
- (5) Return to the main sampling page by clicking the 'Main' link at the top of the screen.

Editing Historical Data for a Concluded Sampling Day

It may be the case that corrections need to be made to submitted data, once the sampling day has concluded. This is an easy problem to fix.

- (1) In your browser of choice, navigate to the URL:
https://www.lib.umd.edu/PASD/MIS/larc/RTS/sampling_form.php
- (2) Click the link: "Edit past sample day"
- (3) A new screen appears with a pull-down menu. Choose the semester you wish to edit.
- (4) Another pull-down menu appears, asking for the service point you wish to edit.
- (5) A third and final pull-down menu is triggered, prompting the user to choose which sampling date they wish to edit. Choose the appropriate date.
- (6) An RTS screen appears. The input text boxes have been pre-populated with data from the MIS database. Find the relevant data you wish to edit, make the necessary changes.
- (7) Click "Submit Changes." An indicator will display "Your sample has been updated", along with a static table which includes your edits to the historical data.
- (8) The data is now updated in the MIS database.
- (9) Return to the main sampling page by clicking the 'Main' link at the top of the screen.