Definitions—Reference and Directional Transactions

Reference Transaction
A contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use or creation of one or more information sources. Sources include:
- Printed and nonprinted materials
- Databases
- The library’s own catalogs and other holding records
- Other libraries and institutions through communication or referral
- Persons both inside and outside the library
When a staff member draws on information gained from previous use of information sources to answer a question, report as a reference transaction even if the source is not consulted during this transaction. Thus, reaching for the World Almanac—even though you know its location—counts as a reference transaction. Count assistance with software as reference. Duration should not be an element in determining whether a transaction is a reference transaction.

Directional Transaction
An information contact that facilitates the logistical use of the library and that does not involve the knowledge, use, recommendation, interpretation, or instruction in the use of any information sources other than those that describe the library such as schedules, floor plans, handbooks, and internal policy statements. (Note: Count all local assistance with the offices of the University as “the library” and thus as directional transactions.) Assistance with computers, printers, and other hardware is normally directional; individual departments will document specific exceptions.

Examples:
- Find a person on Senior Walk—Directional (think of the walk as a floorplan)
- Find a history of the Senior Walk—Reference (research on University)
- Retrieve phone number for dean on campus—Directional
- Retrieve phone number for state senator—Reference
- Unjam printer—Directional
- Assist with Microsoft Excel—Reference

Multiple Transactions
*If a contact includes both reference and directional services, it should be reported as one reference transaction.* Therefore, helping a patron with the online catalog and showing the location of a call number resulting from that search is one reference transaction.

Do not count multiple questions from the same patron as multiple transactions UNLESS the patron returns to the reference desk unexpectedly. If you seat a patron whom you get started and continue to help, count one reference transaction. However, if the patron returns later, this represents another reference transaction.

Multiple staff can work on one question and it remains one reference transaction.

6/14/12 - pj