

THE CONTRA COSTA COUNTY LIBRARY EMAIL REFERENCE QUESTION GUIDE

The Contra Costa County Library Email Reference Question Guide

INFO 210-03

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Statement of Purpose

With the increasing prevalence of modern technology, the reference desk at the library has become more accessible than ever. Through avenues such as email, library-hosted chat services, and even text messages, the reference desk is now only a tap or click away (Cassel & Hiremath, 2013), (Nagy, 2015). Patrons can request information at any hour, and know that an information professional will either answer promptly, or message them back with the help they were seeking.

However, while this accessibility has dramatically increased the ability of patrons to reach the library, it has brought about new complications as well. In the absence of face-to-face communication, it can be difficult to deliver a complete reference interview. Feedback on whether provided information is helpful is delayed over email, and over chat, a patron may disappear if they feel they are being made to wait (Kern, 2003). In order to address these concerns and others, many virtual reference interview guides have been created – and as it turns out, digital reference services are not so different from in-person ones. They still rely upon the consistent elements of inclusion, approachability, interest, engagement, searching, and evaluation (RUSA, 2023) – and with proper training, can be just as helpful to patrons as an in-person interview. With this being said, the central purpose of this paper can be discussed.

In Contra Costa County, a large number of reference questions are sent in to the ASK email inbox every week. Largely manned by the smaller branches in the county, the questions received at this virtual reference desk are answered and replied to in (ideally) short order. To better understand the needs of these virtual patrons, and prepare responses that can help staff deal with such a large influx of emails, this paper seeks to analyze recent email queries, determine common issues experienced by patrons, and create premade responses that address patron needs

– without coming across as impersonal. By reviewing the questions that patrons frequently raise, staff will not only be more prepared to tackle the ASK inbox in the future, but the greater understanding of patron needs may also help the Contra Costa County Library identify areas that they may wish to address on a larger platform.

Research Design

In order to gain a representative and useful view of the ASK inbox, the first step was to ensure that my research consisted of an appropriately large sample size. To ensure that I was able to explore the breadth of topics that virtual patrons requested assistance with, I selected a collection of 100 recent emails from October and November of this year. As a part of my duties at the library, I monitor the ASK inbox year-round, and so it did not escape me that patron questions change over time. Certain questions are more common at different times of the year and after system-wide updates. However, I believe that covering roughly a fourth of the emails sent out of the ASK inbox in the past month and a half will still yield a reasonable representation of the virtual reference desk.

After assembling my collection of emails, the next step of my research was to categorize these according to their content. The ASK email form itself was rather helpful in this regard, as it includes several fields that the patron can fill out before sending it in. Their closest library (or the one where they experienced their issue) was especially useful for answering patron questions, but I also appreciated the ‘Tell us about your question/comment’ section. This field offers the

Which library do you use?
Tell us about your question/comment
If you are a student, what grade?
N/A
What can we do for you?
Name
Library Card Number
Email
Contra Costa County Library, (n.d.)

patron a dropdown menu of several options: *I need help finding information*; *This is a comment/question about the Library*; *I have a question about my account*; and *I need an accommodation* (Contra Costa County Library, n.d.). While it would have been simple to classify the emails according to this tag, I decided that the categories were too broad to be useful for this project. Instead, after reviewing the emails, I created six categories that would be more useful for helping staff compartmentalize them. These categories are *Collection Suggestion*; *Online Account Access*; *Redirect to Specific Branch*; *Library Card Information Lookup*; *Renew Library Card*; and *Other Information*, and will be discussed in detail in the upcoming sections of this paper.

After classifying the emails into one of these six categories, there were three final subareas that deserved study. The first of these was whether the given reference question could be answered by a premade response. As mentioned above, prewritten answers, if not crafted carefully, can come across as rude or robotic – and our profession has an ethical responsibility to provide a welcoming environment for questions (Bopp & Smith, 2011). Therefore, I classified the possibility for emails to have a premade response as: Yes; No; and Yes, with Modification. The second category that I grouped ASK emails by was that of *Follow Up*. While I had initially included this as a larger category on par with the six main tags, this felt more helpful as a modifier – and ensured that the reference question was answered according to the RUSA principle of evaluation (RUSA, 2023). The final quality that I found useful to study for this research was response time. Since I had access to the



incoming and outgoing emails, I was able to determine the number of days between question asked and question answered. With email reference, an immediate response is rarely expected, but I am happy to report that our email inbox had an average response time of 1.43 days.

Once I had created my categories, and determined additional information to examine, I placed my findings into simple bar charts, so that I could examine frequencies of different types of questions and perform other analyses. For my full data tables, see Appendix A. Finally, please note that some emails fit into multiple categories, which is why the number of emails in each chart adds up to 105, rather than 100.

Collection Suggestion



I created the category of Collection Suggestion to describe questions that related to requests for the library to purchase specific items. This is not an uncommon request, as in Contra Costa County, each patron account confers the ability to request up to five items each month (Contra Costa County Library, n.d.). By filling out a form on their library account, patrons can justify their selections and be updated on the ultimate decision that the library makes. In the ASK inbox, these requests frequently arise from recently published authors on Amazon, or in the case

of the data I examined, such authors who are interested in donating new copies of their work to the library system.

This category was not highly used across the 100 emails I surveyed. Only two queries addressed this topic – and one was a follow-up to the initial message. Both messages were able to be replied to with either a premade message, or a premade message with modification, and both were replied to on the same day that they were received.

To create a premade response for this type of question, I wrote the following template:

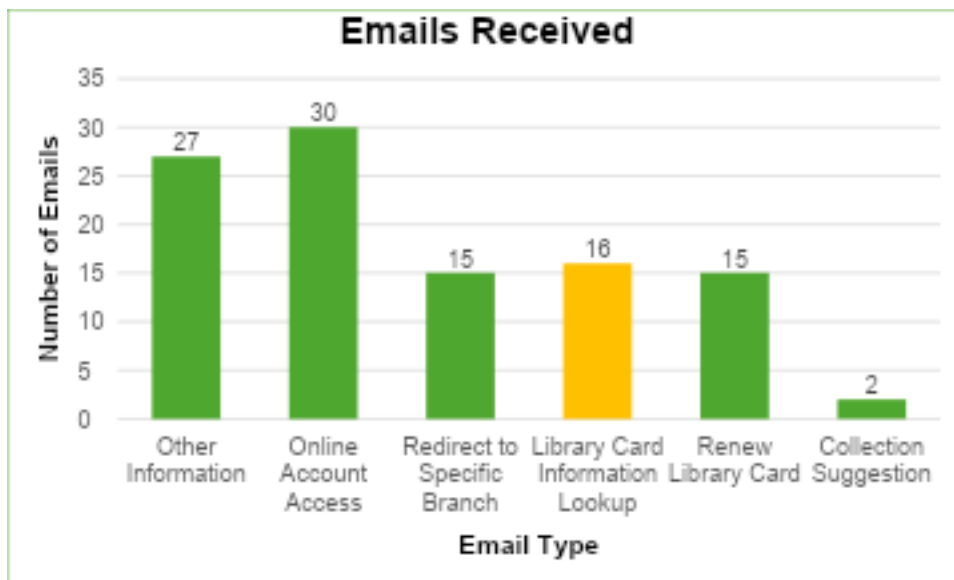
Hello [PATRON NAME REDACTED],

Thank you for the suggestion of an item to add to our collection! The easiest way to make an official recommendation is to follow the instructions below.

This method will also allow you to be notified of our decision on the title you suggested.

This message is easily modified, and strikes an upbeat, yet professional tone. As seen in Kwon and Gregory (2007), approachability takes a different tack in email and chat reference – using the patron’s name and greeting them with a friendly statement becomes even more important online. For added approachability, I recommend including a congratulations to the first few lines if the patron is a recently published author. This template also includes a screenshot of the library’s FAQ page, though if a patron is still confused, a walkthrough of the process can be included in follow-up emails. This reply does require the patron to take further steps, which may seem like negative closure (Ross & Dewdney, 1998), but Library policy requests staff allow patrons to make their own requests. Staff suggestions, which are backed up by demographic and circulation reports, tend to carry more weight when determining collection updates, and it is not always feasible to purchase new titles based on a single request.

Library Card Information Lookup



This category was created to compile questions that pertained to library card information. If a patron had lost their card or forgot their account number, I classified it in this category. Frequent added complications such as an account that had been deleted after a long period of

inactivity or the need to verify a patron's identity led this category of emails to have the highest percentage of follow-up messages.

As seen in the graph above, 16 of the emails received pertained to looking up a patron's information. This was a frequent use of the ASK inbox, though as mentioned earlier, verification of identity was often required before such information could be provided. In order to share information about a patron account to an individual without a card, Contra Costa County Library requires patrons to provide their birthday, phone number, and address, so we can be sure that we aren't giving out private information. Out of the 16 emails received in this category, all were able to be answered with a premade reply, and only four required additional modifications. Emails in this category were replied to in an average of 1.25 days.

Creating premade responses for this type of email required two different tacks. The first requested verification information, and the second provided library card numbers for those patrons who had already sent us their details.

Hello [PATRON NAME REDACTED],

I'm afraid that I can't find you in our system under that card number. It's possible that we just have you under a different number. Could you please provide your date of birth, address, and phone number, so that I can be sure that I'm looking at the right account?

This

Hello again [PATRON NAME REDACTED],

Thank you for providing your information! I was able to find you in our system. Your library card number is [REDACTED].

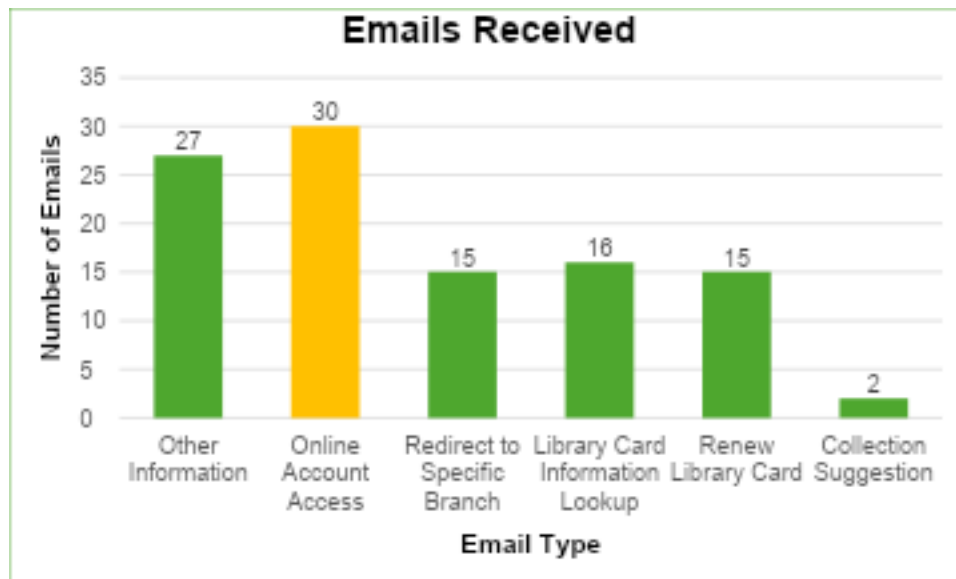
You should now be able to log in to your account online with your PIN. By default, your PIN is your birthday in **MMDDYY** format. For you, your PIN is [REDACTED]. I just attempted to log in, and was able to do so.

Give that a try, and be sure to let us know if that doesn't allow you in.

template can be attuned to a patron's specific needs, especially in instances when they were having trouble with another category, Online Account Access. In both examples, the process is

still explained, and any requests are justified, the same as would be done in an in-person reference interview. While this type of question does not require the same type of search strategy as many other reference interviews, it is still essential to communicate to the patron your thought process (Cassel & Hiremath, 2013).

Online Account Access



As mentioned in the above category, the Online Account Access was a question topic that could often bleed over into other areas. Frequently, the reason a patron was unable to access their account was due to an incorrect library card number, necessitating a two-part question. However, the more common cause for this category of question was due to the shift to a PIN system. In 2020, the Contra Costa County Library system was hit with a ransomware attack (Kelly, 2020). While this attack shut down the library network and online services only temporarily, it raised concerns over safety. Although there was no evidence that patron information was compromised (Converse, 2020), the Library still decided to implement a PIN system. Instead of using one's last name to log in to an online account, a PIN would now be created. This process, while

offering better security, has made up the highest number of email queries since the new system was put into place in March 2024.

Thirty emails were received during the monitoring period that related to accessing online accounts, making up over a fourth of all the emails viewed. Fortunately, the library was very aware of the PIN change, and have developed several FAQs to assist the public in adapting to this change. As such, all but three of these queries were able to be responded to with an abbreviated, but comprehensive, version of this FAQ. Several had other elements that required further explanation or assistance. These emails received responses in 1.42 days on average.

The premade response for this category was written to cover a wide variety of potential errors, to allow patrons to regain access to their online accounts as quickly as possible.

Hello [PATRON NAME REDACTED],

Thank you for reaching out! Let me see how I can help you with this issue.

By default, your PIN will be your date of birth, in **MMDDYY** format. You will **not** need to put in the year in its totality, only the last two digits.

I just attempted to log in on your behalf, and was able to succeed - it may be that you were inputting the first two digits of the year, rather than just the last two digits.

If this doesn't give you access to your account, and you find yourself needing to reset your PIN, please follow the steps below:

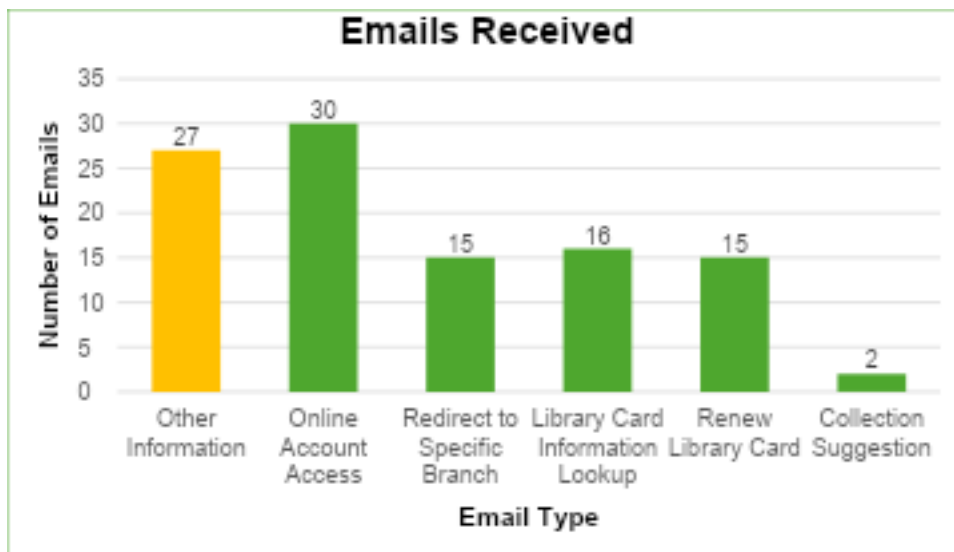
- Go to ccclib.org
- In the top right corner, click on "Log In/My CCCLib."
- Click on the "Forgot your PIN" link to receive an email to reset your PIN.

If you do not get an email, or this fails to work for any other reason, please let us know, and we can reset your PIN manually. You will need your library card number, or be able to provide verification of your identity.

The other aspect that led to this email's effectiveness (only five of the thirty received required additional follow-up) is contained in the third paragraph. By logging into patron accounts as a test, library staff can be sure that their solution meets the patron's needs. While a

more generic email could simply remind patrons about their PIN format, adding this step lends legitimacy to the staff's solution, and allows staff to run across other underlying issues. This occurred once in my research, where the library had the wrong birthday recorded for a patron – therefore tying their account to an incorrect PIN. No matter how good a premade response, an additional check by staff always helps to catch uncommon errors.

Other Information



The second largest category that I saw throughout my research, Other Information was my miscellaneous section. The questions here were incredibly varied – and as such, required a customized response for every single one. From requests for books on Christian missionaries for kids to the availability of 3D printing to the times that the library held computer assistance for seniors, this section covered a lot of ground. This section also included patrons who filled out the email form with their name, card number, and email – then did not pose a question or comment in the provided field. I was unsurprised to see this as the second largest category of emails received, as it demonstrates the wide variety of resources that Contra Costa County has available.

Twenty-seven emails, 25.7% of the reviewed messages, related to information that didn't fit into one of the other categories. However, only one of these emails required a follow-up message. I believe the apparent high level of patron satisfaction was due to the fact that there were no premade responses available. Each query required research to be done by library staff, which ensured a more thorough answer the first time around. All messages that fell into this category were replied to in 1.69 days on average, a higher rate than the other categories.

While there was no premade response that could be created for a category that included questions on laser cutters access, verification of a charity's legitimacy, and ballot box placement, I was able to still create a premade farewell – one I found to work well on most outgoing emails.

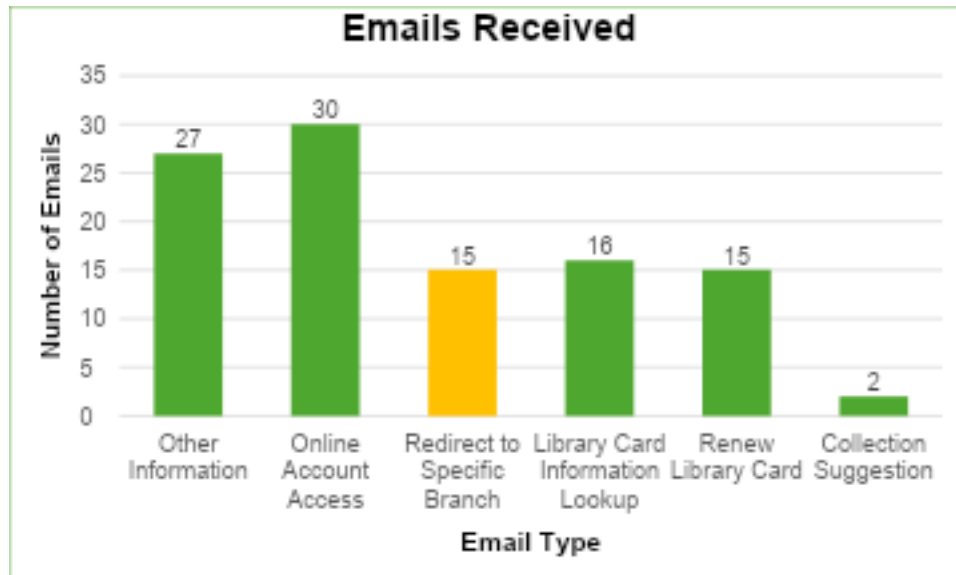
Please let us know if you have any additional questions.

Thank you for contacting the library,

[STAFF INITIAL AND LAST NAME]

Above, I mentioned that the primary difficulty of an email transaction is avoiding negative closure. By thanking the patron for reaching out to us, offering assistance with further concerns, and attaching a name to each email, we can demonstrate a respectful and helpful attitude, and show that there was a real-life human there to help them.

Redirect to Specific Branch



This category was created for messages that were intended for particular libraries or staff. The ASK inbox receives mail from everywhere in the county, and while the dropdown on the online form allows patrons to add which branch their question pertains to, it does not send it to that location. As such, questions about volunteer hours and shelf checks have to be redirected as appropriate.

Fifteen of the email queries reviewed needed to be passed on to other libraries, though some were able to be addressed with a phone call, and then a direct response to the patron. Most of the time, however, a unique message was required. This was the second category to have no emails that were able to be completely answered by with a premade response – though a few were able to make do with a modified one. The average rate of response for this category was 1.6 days.

The unique and branch-specific needs of these queries meant that there was going to be a longer delay than usual for responses. To alleviate this wait, and ensure that the patron felt heard,

I found that an acknowledgement that their question had been received was an important part of

Hello [PATRON NAME REDACTED],

Thank you for reaching out! Let me forward your query over to the Concord branch. If they are able to assist you with obtaining a study room, they will be able to reach out.

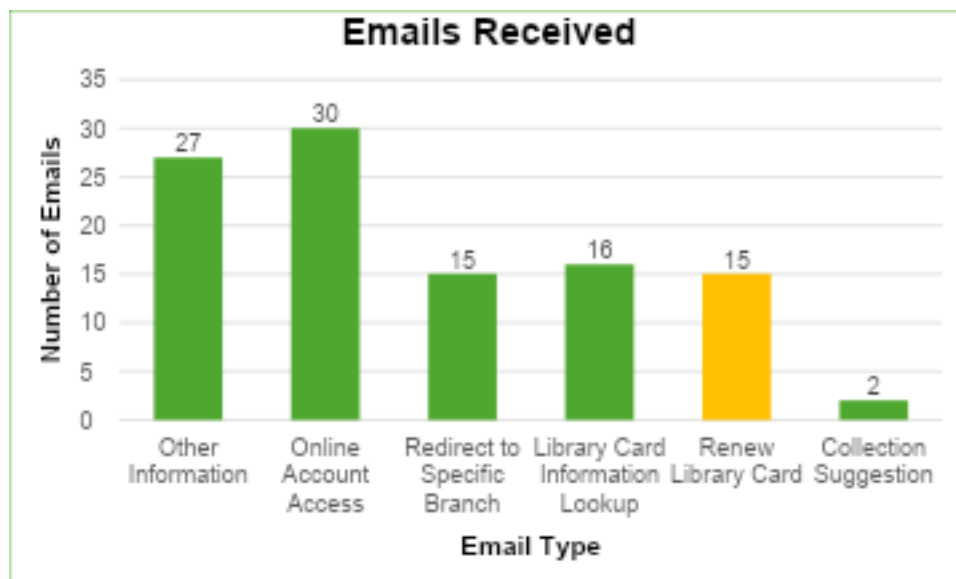
For additional information on how to reserve study rooms at specific branches, please take a look at this page, which details the requirements and spaces available:

<https://ccclib.org/rooms/>

a response.

Additionally, if there was something I could do to help them answer their own question while they were waiting, I made sure to include that in the message. I made sure to put the most important part of the message first, that their request to reach out to a specific branch was heard and passed along, but I hope that by providing them tools to solve their own problems at least one patron proceeded to use those resources.

Renew Library Card



A common category with a simple response, the request to renew a library card is a perennial in the ASK inbox. While many patrons choose to come in to a branch's physical location to get a card, many more instead create an online card to access Libby and explore the

virtual catalog. However, due to the fact that online cards can be created with a few simple clicks, and abandoned just as easily, e-cards in Contra Costa County have a one-year expiration. Accounts are not deleted after this expiration, but until a patron reaches out to the library, they cannot access digital material.

Fifteen of the 100 emails surveyed requested that their library cards be renewed, and those patrons regained access to their accounts in less than a day on average. Furthermore, nearly all of these emails were able to be replied to with a pregenerated response. The cases where these were not sufficient were ones where patrons sent the wrong library card number by mistake or when they had not used their card in such a long time that their account had been deleted – but explaining the situation still resulted in understanding and a solution.

The premade response for this category of email focused on the patron request, but also included the opportunity to eliminate the issue entirely.

Hello [PATRON NAME REDACTED],

Our e-cards expire every year to prevent old accounts from clogging up the system, but you can always call or email the library to have it renewed.

I have renewed your card for another year.

Additionally, if you like, you can visit your local branch to obtain a physical card, and those only expire every three years. If you would like to do this, you'll need to bring in a photo ID with your current address, or a photo ID and some other information that documents your address (utility bill, bank statement, etc).

Full-access library cards confer access to an even wider variety of resources than e-cards, which will only benefit the patron – and ensure that they no longer need email the library to fix a yearly recurring issue. Additionally, I made sure to include what documents a patron would need if they took this option, so that they do not arrive at their local branch unprepared.

Reflection

In assembling this email reference question guide, my goals were threefold. I wished to observe and categorize what types of questions were received in the ASK inbox. I wanted to analyze response times, common patron troubles, and most importantly, I wanted to develop premade answers that could better aid library staff in replying to these virtual patrons in an efficient yet comprehensive manner. These goals aligned well with two of the major Course Learning Objectives for this course. It allowed me to view, practice, and provide advice on how to conduct effective reference interviews. Simultaneously, it allowed me to explore how technology has impacted reference interviews – and how to apply technology to better answer patron questions. Furthermore, the research this paper found applies directly to the iSchool's Core Competency J. After compiling, categorizing, and analyzing the emails received in the ASK inbox, I feel that I have dramatically improved my understanding of how best to connect individuals using this information-seeking method with the answers they are looking for. I also am excited to share my findings with my supervisors at the Contra Costa County Library system, so that others may be able to learn from the analyses I have conducted, and so that the Library will be able to keep this data in mind when determining community needs.

Virtual patrons are no different than ones who come to visit a branch in person. They have similar questions, and deserve the same level of respect and professionalism. And although it is more complicated to deliver a complete reference interview over email, by providing abundant and relevant information, and clearly communicating our thought processes, we can provide effective, rapid, and positive patron interactions.

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<https://www.ala.org/rusa/resources/guidelines/guidelinesbehavioral>

Appendix A

ASK Inbox Findings

Type of Email	Date Received	Date Answered	Premade Response?	Follow Up?	Notable Variances	Response Time
Online Account Access	10/11/2024	10/11/2024	Yes			0
Online Account Access	10/12/2024	10/14/2024	Yes			2
Redirect to Specific Branch	10/12/2024	10/14/2024	No	Yes	Follow up on volunteer application	2
Library Card Information Lookup	10/13/2024	10/14/2024	Yes, with Modification		Library card stolen	1
Other Information	10/13/2024	10/14/2024	No		Combining accounts	1
Other Information	10/13/2024	10/14/2024	No		Damaged book	1
Renew Library Card	10/13/2024	10/14/2024	No		Included PIN information	1
Library Card Information Lookup	10/14/2024	10/14/2024	Yes, with Modification	Yes		0
Library Card Information Lookup	10/14/2024	10/14/2024	Yes			0
Online Account Access	10/14/2024	10/14/2024	Yes			0
Online Account Access	10/14/2024	10/14/2024	Yes			0
Other Information	10/14/2024	10/14/2024	No		No question asked	0
Renew Library Card	10/14/2024	10/14/2024	Yes, with Modification	Yes		0
Other Information	10/16/2024	10/21/2024	No		Delete library account	5
Renew Library Card	10/16/2024	10/21/2024	Yes			5
Online Account Access	10/17/2024	10/21/2024	Yes			4
Other Information	10/17/2024	10/21/2024	No		ILL from Michigan	4
Redirect to Specific Branch	10/17/2024	10/21/2024	No		Contact old library employee	4
Online Account Access	10/18/2024	10/21/2024	No	Yes	Bibliocommons down	3
Online Account Access	10/18/2024	10/21/2024	Yes			3
Online Account Access, Renew Library Card	10/18/2024	10/21/2024	Yes, with Modification			3
Other Information	10/18/2024	10/21/2024	No		Ballot box placement	3

Other Information	10/18/2024	10/21/2024	No		Ebook download	3
Other Information	10/19/2024	10/21/2024	No		Change of address	2
Other Information	10/19/2024	10/21/2024	No		Overdue items	2
Other Information	10/19/2024	10/21/2024	No		Library book sale	2
Other Information	10/19/2024	10/21/2024	No		Park pass availability	2
Other Information	10/19/2024	10/21/2024	No		No question asked	2
Redirect to Specific Branch	10/19/2024	10/21/2024	No		Friends of the Library information	2
Library Card Information Lookup	10/20/2024	10/21/2024	Yes			1
Library Card Information Lookup	10/20/2024	10/21/2024	Yes			1
Library Card Information Lookup	10/20/2024	10/21/2024	Yes			1
Redirect to Specific Branch	10/20/2024	10/21/2024	No		Request for storytime visit	1
Renew Library Card	10/20/2024	10/21/2024	Yes			1
Online Account Access, Library Card Information Lookup	10/21/2024	10/21/2024	Yes	Yes		0
Redirect to Specific Branch	10/21/2024	10/21/2024	No	Yes	Contact old library employee	0
Renew Library Card	10/21/2024	10/21/2024	Yes			0
Renew Library Card	10/21/2024	10/21/2024	Yes			0
Library Card Information Lookup	10/23/2024	10/25/2024	Yes			2
Online Account Access	10/24/2024	10/25/2024	Yes			1
Collection Suggestion, Online Account Access	10/25/2024	10/25/2024	Yes			0
Library Card Information Lookup	10/25/2024	10/28/2024	Yes, with Modification		Wrong birthday	3
Library Card Information Lookup	10/25/2024	10/28/2024	Yes	Yes		3
Online Account Access	10/25/2024	10/28/2024	No	Yes	Libby book limit	3
Online Account Access	10/25/2024	10/28/2024	Yes			3
Online Account Access	10/25/2024	10/25/2024	Yes			0
Redirect to Specific Branch	10/25/2024	10/25/2024	No		Shelf check for item	0
Renew Library Card	10/25/2024	10/25/2024	Yes		No card under this number	0

Renew Library Card	10/25/2024	10/25/2024	Yes			0
Library Card Information Lookup	10/26/2024	10/28/2024	Yes			2
Online Account Access	10/26/2024	10/28/2024	Yes			2
Online Account Access	10/26/2024	10/28/2024	No		PIN reset required	2
Other Information	10/26/2024	10/28/2024	No		PDF download of book	2
Other Information	10/26/2024	10/28/2024	No		3D printing availability	2
Redirect to Specific Branch	10/26/2024	10/28/2024	Yes, with Modification		Donations to branch	2
Redirect to Specific Branch	10/26/2024	10/28/2024	No		Shelf check for item	2
Renew Library Card	10/26/2024	10/28/2024	Yes			2
Renew Library Card	10/26/2024	10/28/2024	Yes, with Modification	Yes	Patron sent wrong card number	2
Collection Suggestion, Online Account Access	10/27/2024	10/27/2024	Yes, with Modification	Yes	Obtain new library card, questions about suggestions	0
Online Account Access	10/27/2024	10/28/2024	Yes			1
Online Account Access	10/27/2024	10/28/2024	Yes			1
Online Account Access	10/27/2024	10/28/2024	Yes			1
Other Information	10/27/2024	10/28/2024	No		Room use	1
Other Information	10/27/2024	10/28/2024	No		Lost books	1
Other Information	10/27/2024	10/28/2024	No		Deleting kanopy account	1
Library Card Information Lookup	10/28/2024	10/28/2024	Yes, with Modification	Yes		0
Library Card Information Lookup	11/2/2024	11/4/2024	Yes			2
Online Account Access	11/2/2024	11/4/2024	Yes	Yes	Wrong birthday	2
Other Information	11/2/2024	11/4/2024	No		Overdrive sunseting	2
Redirect to Specific Branch	11/2/2024	11/4/2024	No		Volunteer hours	2
Online Account Access	11/3/2024	11/4/2024	Yes			1
Online Account Access	11/3/2024	11/4/2024	Yes			1
Other Information	11/3/2024	11/4/2024	No	Yes	Computer help for seniors	1

Other Information	11/3/2024	11/4/2024	No		How to renew Link+	1
Redirect to Specific Branch	11/3/2024	11/4/2024	No		Jewish Heritage Month	1
Renew Library Card	11/3/2024	11/4/2024	Yes			1
Other Information	11/4/2024	11/4/2024	No		Verification of charity legitimacy	0
Other Information	11/4/2024	11/4/2024	No		Computer help for seniors	0
Online Account Access	11/8/2024	11/8/2024	No		New card sign-up	0
Other Information, Online Account Access	11/11/2024	11/13/2024	No, Yes			2
Library Card Information Lookup	11/11/2024	11/13/2024	Yes			2
Library Card Information Lookup	11/11/2024	11/13/2024	Yes			2
Online Account Access	11/11/2024	11/13/2024	Yes			2
Online Account Access	11/11/2024	11/13/2024	No		Ebook download	2
Online Account Access	11/11/2024	11/13/2024	Yes			2
Other Information	11/11/2024	11/13/2024	No		Laser cutter access	2
Redirect to Specific Branch	11/11/2024	11/13/2024	Yes, with Modification			2
Redirect to Specific Branch	11/11/2024	11/13/2024	Yes, with Modification			2
Redirect to Specific Branch	11/11/2024	11/13/2024	Yes, with Modification			2
Online Account Access	11/12/2024	11/13/2024	Yes			1
Online Account Access	11/12/2024	11/13/2024	Yes		Card number no longer in system	1
Online Account Access	11/12/2024	11/13/2024	Yes			1
Other Information	11/12/2024	11/13/2024	No			1
Other Information	11/12/2024	11/13/2024	No		Book reference on Christian missionary	1
Redirect to Specific Branch	11/12/2024	11/13/2024	Yes, with Modification		Repeat email	1
Redirect to Specific Branch	11/12/2024	11/13/2024	Yes, with Modification		Repeat email	1
Renew Library Card	11/12/2024	11/13/2024	Yes			1
Library Card Information Lookup	11/13/2024	11/13/2024	Yes			0
Renew Library Card	11/13/2024	11/13/2024	Yes			0

Renew Library Card	11/13/2024	11/13/2024	Yes			0
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