



Chat With A Librarian

**Western New York
Virtual Reference Policy Manual
for Training on QuestionPoint 24/7 Reference Software**

**Originally created by Shannon Wilson and Sheryl Knab
2003**

adapted from 24/7 Reference Training Curriculum, Pasadena, CA

Revised by Dawn Eckenrode February 2006

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Currently available online at: <http://www.wnylrc.org/vreferen/partinfo.htm>

Ask Us 24/7 is a project of the Western New York Library Resources Council (WNYLRC) a non-profit consortium of 90 member libraries and library systems serving Cattaraugus, Chautauqua, Erie, Genesee, Niagara and Orleans Counties.

This project is funded through the Federal Library Services and Technology Act funds (LSTA), awarded to the New York State Library by the Federal Institute of Museum and Library Services.

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Introduction: About the Project

In 2001, the Western New York Library Resources Council wrote a Library Services and Technology Act (LSTA) grant to bring in nationally recognized experts in the field of virtual (or digital) reference to provide a broad overview of virtual reference in libraries. Overall 11 workshops and vendor demonstrations were held between October 1, 2001 and September 30, 2002.

In addition to vendors of virtual reference software, presenters included Charles R. McClure of Florida State University, Abby Kasowitz-Scheer of Syracuse University, Anne Lipow of Library Solutions Institute and Press, Diane Nester-Kresh of Library of Congress, Steve Coffman of LSSI, and Susan McGlamery of the Metropolitan Cooperative Library System in Los Angeles, CA. Each presented on a variety of topics, from getting started with digital reference to virtual reference in a multi-type consortium.

From this group of workshops and vendors, over 40 librarians from WNYLRC member libraries and library systems attended to verse themselves on this cutting edge technology that could enhance current reference services in their libraries. From a group of volunteers, 12 members formed the Virtual Reference Advisory Task Group that was charged with implementing a regional virtual reference service. Therefore, WNYLRC applied for a second LSTA grant for the 2002-2003 funding year to implement a virtual reference pilot project. Initially seven libraries and the Hospital Library Services Program agreed to provide time manning the virtual desk or answering follow-up questions. The service was called Ask A WNY Librarian.

The project started with 24 hours of service per week (Monday – Thursday from 12:00 pm to 6:00 pm). We quickly realized that we were stretched too thin staff-wise and that very little traffic was coming between the hours of 5:00 pm and 6:00 pm. We soon cut the hours to 20 per week ending the service at 5:00 pm. Traffic to the service was slow. Marketing needed to be funded and developed to get the word out to patrons that the service existed and to let other libraries know that their participation was needed. Domain names askawnylibrarian.org and [.com](http://askawnylibrarian.com) were purchased to assist in the marketing since it would have been difficult to list all participating libraries' websites as links to the service. Pencils with the new logo were purchased for distribution to patrons, and posters were developed for distribution to other WNYLRC member libraries and library systems. Although the notion of implementing this service slowly was the general agreement, it became apparent to the participating libraries in June to increase usage of the service would require a bold action.

The participating libraries decided to go to 24 hours, 7 days per week service by joining the 24/7 Reference consortium and going live with the new hours by September 1, 2003. As rumors circulated about the migration to 24/7, other libraries and library systems started to express a greater interest in participating in the project. After all, it is desirable that our own libraries staff the service as much as possible to serve our patrons in the Western New York area. When confusion arose among patrons expecting to always have a librarian from Western New York on the virtual desk, it became clear that the service was misnamed and not indicative of the round the clock service. So, the participating libraries agreed to have LSTA fund not only a marketing consultant, but also a graphics art consultant to create a new logo and name identifier. Domain names – www.askus247.org and [.com](http://askus247.com) were purchased and Ask Us 24/7 was born.

Now that you've learned the history behind the regional virtual reference service, we are very pleased to have you and your library become part of its future. Welcome to Ask Us 24/7!

Introduction: Updates to Ask Us 24/7

May 2005: Please note that since 24/7 Reference began merging with OCLC's QuestionPoint in 2004, issues such as login procedures and follow-up questions procedures are still in transition. The chat component has not changed and is anticipated to remain the same for the near future. Not all components of additional features such as the integration of library email service into QuestionPoint are covered in this manual.

February 2006: After months of intensive development, the official release of the next generation QuestionPoint software occurred on Sunday, February 12. All eGain-based chat users (including the entire 24/7 Reference Cooperative) will switch over to this new version of QuestionPoint on Saturday March 18, 2006. The actual cutover will occur between 1 AM to 3 AM EST. At the time this manual was compiled, it was anticipated that the QuestionPoint software would continue to incorporate additional software enhancements. The next version of QuestionPoint is expected to be released in June/July 2006.

Much of the information included here was derived from documents included in the documentation section of the QuestionPoint website, <http://questionpoint.org/support/documentation/gettingstarted/index.html>

April 2006: Several new features were installed on the software as of April 23rd.

October 2006: Several updates have been added to QuestionPoint software.

Introduction: Training Agenda

9:00 am—10:30 am	Introduction, Demonstration & Overview
10:30 am—10:45 am	Break
10:45 am—12:00 pm	Hands-On Practice
12:00 pm—1:30 pm	Lunch – on your own
1:30 pm—2:30pm	Shared Follow-Up
2:30 pm—2:45 pm	Break
2:45 pm—3:30 pm	An introduction additional to “Main Page” functions: reports and knowledge base
3:30 pm—4:00 pm	Discussion and wrap-up

IMPORTANT URLS

Ask Us 24/7 Librarian Log-in:

- o <http://www.questionpoint.org>

Ask Us 24/7 Patron Login generic URL:

- o <http://www.askus247.org> or <http://www.askus247.com>

Ask Us 24/7 local help page on wnylrc.org:

- o Project information: <http://www.wnylrc.org/vreferen/index.htm>
- o Participating librarians info page: <http://www.wnylrc.org/vreferen/partinfo.htm>

Ask Us 24/7 Local Reference Schedule:

(Note: this URL has not yet changed, but may change in the future)

- o <http://www.247ref.org/wnylrcschedule/libschedule.cfm>

Global (Cooperative) Reference Schedules

(Note: this URL has not yet changed, but may change in the future)

- o Public: <http://www.247ref.org/schedule/libschedule.cfm>
- o Academic: <http://www.247ref.org/academicschedule/libschedule.cfm>

QuestionPoint Resources:

- o Training and videos at <http://www.questionpoint.org/education/index.html>
- o Documentation page at <http://www.questionpoint.org/support/documentation/gettingstarted/index.html>
(all QuestionPoint documentation)

Buffalo Freenet:

- o Main: <http://www.bfn.org>
- o Librarian's Reference Resources: <http://library.bfn.org/reference.html>

RUSA:

- o "Guidelines for Behavioral Performance of Reference and Information Service Providers"
<http://www.ala.org/ala/rusa/rusaprotocols/referenceguide/guidelinesbehavioral.htm>
- o Guidelines for Implementing and Maintaining Virtual Reference Services:
<http://www.ala.org/ala/rusa/rusaprotocols/referenceguide/virtrefguidelines.htm>

IMPORTANT VIRTUAL REFERENCE LISTSERVS AND BLOGS

Ask Us 24/7 Local Listserv:

As a library joins Ask Us 24/7, their participating librarians are automatically added to the WNY Virtual Reference listserv by a WNYLRC staff member. Its address is: wnyvvp@wnylrc.org.

Digital Reference Listserv (Syracuse):

Important issues are raised by virtual librarians from across the country. To join:

Go to http://www.vrd.org/Dig_Ref/dig_ref.shtml and follow the instructions. Messages will be posted with this address: DIG_REF@LISTSERV.SYR.EDU

QuestionPoint-L:

QuestionPoint-L is an e-mail list (listserv) dedicated to the discussion of the QuestionPoint service. The list is open to current QuestionPoint subscribers and QuestionPoint team members from OCLC and the Library of Congress.

Subscribe to QuestionPoint-L

All QuestionPoint users associated with an active QuestionPoint account are welcome to subscribe to this list. To request a subscription, send an e-mail message to David Leslie at leslied@oclc.org with the subject of "QuestionPoint list request". In the body of your message, include your name, e-mail address, library name, and institution ID.

Once your subscription is activated, you will receive two e-mail messages:

- A confirmation of your subscription, with information about sending a message to the list, options for receiving a message, and removing yourself from the list. Save this confirmation so you can refer to it later if needed.
- Usage guidelines for the list.

QuestionPoint Blog:

Keep up on new events and developments via:

<http://questionpoint.blogs.com> (this blog no longer requires a password)

This is also an excellent place to voice your opinions and discuss various issues with your QuestionPoint colleagues.

II Co-browse Console

A. Chat History

B Back/Forward

C. Pause Co-Browse

D. Chat box

E. Script/Messages

F. Web Pages

G. Exit

Microsoft Internet Explorer provided by OCLC, Inc.

Welcome to Live Online Reference.

Please enter the information requested on the right hand side of your browser window.

- The **'Email Address'** field is a recommended field. At the conclusion of the session, a complete transcript, including all chat and links to Web sites visited will be emailed to you. If you do not have an email address, or do not wish to have a transcript sent to you, you may leave that field blank.
- If you are using **Internet Explorer**, or **Netscape 4.79, 7.1 or 7.2, Mozilla or Firefox**, and have "session cookies" enabled in your browser, the librarian should be able to take you to various Web sites to show you the answers. We will be able to "chat" with you in real time and send you Web pages via your browser during the session.
- If you have a software firewall enabled**, such as Norton Internet Security, you may not be able to see chat from the librarian after you connect. If you experience such a problem, please exit the service, and, if you wish to reconnect, either disable the firewall before you return, or [check these](#)

Attendees

Name	Time
Tester Librarian	1 min
Mary	1 min
Agent	

Tester Librarian: Hello, this is the reference librarian. I'm reading your question...

[Tester Librarian: A librarian has joined the session.]

Please hold for the next available librarian. If you would

Messages

Web Pages

Script/Messages

A. Chat History

B. Back/Forward

C. Pause Co-Browse

D. Chat box

E. Script/Messages

F. Web Pages

G. Exit

Chat Monitor - QuestionPoint - Microsoft Internet Explorer provided by OCLC, Inc.

QuestionPoint | Chat

QA Consortium Master 1005 (1005)

Chat Transcript (Mary)

Chat Transcript (Mary):
Question: Chat Transcript: What are the moons of Jupiter?
[Librarian 0030:13]: Hello, how may I help you today?

Personal Scripts

SCRIPTS	URLS	MESS
Personal Scripts	Text	
Home Library Scripts	Text	



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Browser Settings and Software Requirements:

Minimum System Requirements for Flash-based Chat Librarians not using co-browse

- A web browser: Microsoft Internet Explorer 6, Netscape 6 + Firefox 1.5+, Opera and Safari
- A high speed connection to the Internet
- Adobe-Macromedia Flash Player: Version 7 is supported; Version 8 is recommended

Minimum System Requirements for Patrons (Note: Full two-way co-browsing is NOT possible with this configuration)

- A web browser: Microsoft Internet Explorer 6, Netscape, Firefox, Opera and Safari
- A connection to the internet (the faster the connection the better the experience)

Recommended System Requirements for Flash-based Chat Librarians wanting to use co-browse

- A web browser: Microsoft Internet Explorer 6 using Microsoft Windows (2000 or XP) (Requirement. No other OS/browser combination possible for librarians using Flash Chat with co-browse.)
- A high speed connection to the internet
- Adobe-Macromedia Flash Player: Version 7 is supported; Version 8 is recommended
- A virtual machine (Java engine) from either Microsoft (version 1.1.4) or Sun Run Time Environment 1.4 or 1.5

Requirements for a Patron who wishes to be able to co-browse: (co-browse IS supported)

- A web browser: Microsoft Internet Explorer 6.
- Microsoft Windows (2000 or XP)
- A virtual machine (Java engine) from either Microsoft (version 1.1.4) or Sun Run Time Environment 1.4 or 1.5
- A connection to the internet (the faster the connection the better the experience)

Your web browser will need to have the following settings in order for the chat tool to work properly:

- Clear the browser cache of temporary Internet files.
 - In IE: Tools > Internet Options > General > Delete Files (and all offline content) > OK > OK
- Delete Cookies
 - In IE: Tools > Internet Options > General > Delete Cookies > OK > OK
- Days in Page History
 - In IE: Tools > Internet Options > General > Days to keep page in history > 1 (or zero)
- Check for newer versions of stored pages every visit.
 - In IE: Tools > Internet Options > General > Settings > Every visit > OK > OK
- Set the amount of disk space for temporary Internet files as low as possible
 - In IE: Tools > Internet Options > General > Settings > Amount of disk space 1 MB > OK > OK
- Turn off pop-up blocker
 - In IE: Tools > Pop-up Blocker > Turn off pop-up blocker (Note: This may not be the only pop-up blocker on your computer. Tools, such as the Google toolbar, may also have built in pop-up blockers that will need to be disabled)
- Set your security settings:
 - In IE Tools > Internet Options > Security > Internet > Medium
 - In IE Tools > Internet Options > Security > Trusted Sites > Low
- Set your HTTP 1.1 Settings and Java Applications
 - In IE Tools > Internet Options > Advanced Settings > Scroll down until you see HTTP1.1 Setting > If you use a server between your workstation and the Internet, select HTTP 1.1 through proxy connections
 - In IE Tools > Internet Options > Advanced Settings > Scroll down to your Java options > Select either Java Sun or Microsoft VM

Logging on to Question Point:

- 1** Clear the browser cache of temporary Internet files. In IE: Tools > Internet Options > General > Delete Files (and all offline content) > OK > OK
 - 2** Delete Cookies. In IE: Tools > Internet Options > General > Delete Cookies > OK > OK
 - 3** Go to **<http://www.questionpoint.org/>**
 - 4** Click **Librarian Logon** (at top of page).
The QuestionPoint Logon page appears in a separate window. **Tip:** Bookmark the Logon page as a shortcut for steps 2–3.
 - 5** Type your **QuestionPoint authorization** (User ID). (Note: If you are a site supervisor you will have two User IDs, one for administrator privileges and one for chat.)
 - 6** Type your **QuestionPoint password**. **Tip:** Case sensitive; be sure that Caps Lock is off.
 - 7** Click the **Logon** button. The My QuestionPoint page appears.
-

The My QuestionPoint Page:





The My QuestionPoint page is:

- The starting point for every QuestionPoint session
- Your access point to the QuestionPoint areas that you use most often
- The place for the latest QuestionPoint announcements, news and information
- Located in the My QuestionPoint/Home module

The work area of the My QuestionPoint page contains the following elements:

Element	Definition
Welcome	Your account name
Institution	Your library and its QuestionPoint ID number
OCLC Symbol	Your library's OCLC symbol
Select Language	Select the language in which to use QuestionPoint in the drop-down list and click the arrow

Chart continues on next page...

My Questions	<p>Links to lists of questions that are assigned to you. The number of questions appears next to each link.</p> <p>New link leads to the My New Questions page that lists:</p> <ul style="list-style-type: none"> • New questions that you need to answer or act upon <p style="text-align: center;">?</p> <p>Active link leads to the My Active Questions page that lists:</p> <ul style="list-style-type: none"> • New questions that you need to answer or act upon <p style="text-align: center;">?</p> <ul style="list-style-type: none"> • Pending questions that you are waiting for someone else to act upon: the patron or a library or expert who is answering the question for you <p style="text-align: center;"></p> <ul style="list-style-type: none"> • Answered questions for which an answer has been sent to the patron <p style="text-align: center;"></p>
Question Lists	<p>Links to lists of your library's questions, including questions that are unassigned, assigned to you or assigned to others. The number of questions appears next to each link.</p> <p>New link leads to the New Questions page that lists:</p> <ul style="list-style-type: none"> • New questions that your library needs to answer or act upon <p style="text-align: center;">?</p> <p>Unassigned link also leads to the New Questions page however it lists only:</p> <ul style="list-style-type: none"> • New questions that are not yet assigned to anyone at your library <p style="text-align: center;">?</p> <p>Active link leads to the Active Questions page that lists:</p> <ul style="list-style-type: none"> • New questions that your library needs to answer or act upon <p style="text-align: center;">?</p> <ul style="list-style-type: none"> • Pending questions that your library is waiting for someone else to act upon: the patron or a library or expert who is answering the question for your library <p style="text-align: center;"></p> <ul style="list-style-type: none"> • Answered questions for which an answer has been sent to the patron <p style="text-align: center;"></p>
Quick Links	<p>Links and search boxes for quick access to frequently used areas of QuestionPoint. The links and boxes that you see are appropriate to your account privileges</p>
QuestionPoint Announcements	<p>Announcements from the QuestionPoint team at OCLC</p>
Institution Announcements	<p>Announcements from your library's QuestionPoint institution administrator</p>
News, Resources and Feedback	<p>Links to news and information and to a form for sharing your comments and suggestions about QuestionPoint</p>

Launch Chat and Select the Queue to Monitor:

1. In order to launch your chat session, you will need to click on the “Launch Chat” link found on your My QuestionPoint page.
2. Two new windows open with the QuestionPoint Queues window on top. Use it to select the queues to monitor. The queues that are listed vary by library. You will want to select the all WNYLRC Queues and depending on if you are an academic library or public library you want to select as well either the “24/7 Reference: Public Cooperative” or “24/7 Reference: Academic Cooperative” from the queues list. (The chat monitor is the other window that opens. You see it after you select queues. QuestionPoint plans to move queue selection into the chat monitor so only that window opens.)

./04 Queues (0) IM (0) Settings Help Logout
Monitoring: No Queues

Librarians (1)

Question

Queues
Select queues to monitor and click "Save".
Note: Primary queue is monitored when any live queue is selected.

Queues	
<input checked="" type="checkbox"/>	Primary Queue: A WNYLRC P
<input checked="" type="checkbox"/>	BME Queues: B WNYLRC A
<input checked="" type="checkbox"/>	24/7 Reference: Public Cooperative
<input type="checkbox"/>	24/7 Reference: Academic Cooperative

Monitor 'Practice Queue' Only

Save Return

3. Click “Save.” A window will pop up to verify which queues you are monitoring. Click okay.
4. The Chat Monitor window appears. You are now ready to participate in chat sessions.

Navigating the Chat Monitor Console:

Chat monitor illustration

In the chat monitor shown below, the librarian (John Smith) has 1 active session. 1 new session request has just arrived and no other (0) librarians are monitoring the same queues that John is.

Chat monitor parts

The following information describes major parts of the chat monitor.

Branding of the chat monitor	
Name and account number of the monitoring librarian and time and date that the information in the monitor was last updated. If the time continues to change (about every 10 seconds), the monitor continues to receive new session requests and messages.	John Smith (100247431) Updated: 16:11:46 2005/11/10
Global tools:	Queues IM Help Logout
A live or running ticker showing real time notes about new session requests	New Chat Patron - Patron: Sue

<p>Tabs and lists for information and selection: (The tab in use appears in black.)</p> <ul style="list-style-type: none"> Click the New tab to view and select requests waiting for a librarian. Tab shows the number of requests. Click the My Active tab to view and move between your active sessions. The list shows each patron's most recent message, the time that it was sent, and the time when the patron requested the session. Tab shows the number of sessions. Click the All tab to view and select active sessions of librarians monitoring your queues. Tab shows the number of sessions. (This tab appears only for Ask Administrators and Administrators. It is blank for others) Click the Librarians tab to view and select other librarians monitoring your queues. Tab shows the number of librarians. 	<table border="1"> <thead> <tr> <th>New (1)</th> <th>My Active (1)</th> <th>All (0)</th> <th>Librarians (0)</th> </tr> </thead> <tbody> <tr> <td colspan="2">My Sessions</td> <td>Time</td> <td>Patron's Last Message</td> </tr> <tr> <td colspan="2">Ken</td> <td>15:53:41</td> <td>15:55 I need 2 pictures too.</td> </tr> </tbody> </table>	New (1)	My Active (1)	All (0)	Librarians (0)	My Sessions		Time	Patron's Last Message	Ken		15:53:41	15:55 I need 2 pictures too.						
New (1)	My Active (1)	All (0)	Librarians (0)																
My Sessions		Time	Patron's Last Message																
Ken		15:53:41	15:55 I need 2 pictures too.																
<p>Patron information:</p> <ul style="list-style-type: none"> The full patron information is available in a scrollable box. Click Policies to view the policy page for the patron's home library. (Currently this shows only policy information included in QuestionPoint and is for testing and training only. Your institution administrator can add test policy information and change its status to "viewable" in QuestionPoint at Profile > Institution Services > Policies.) 	<table border="1"> <thead> <tr> <th>Ken</th> <th>Policies</th> </tr> </thead> <tbody> <tr> <td colspan="2">Question: [1169279] What is California?</td> </tr> <tr> <td colspan="2">Patron: Ken (kenalthom@yahoo.com)</td> </tr> <tr> <td colspan="2">Library: Elmstree Public Library</td> </tr> <tr> <td colspan="2">IP Address: 132.174.21.205</td> </tr> </tbody> </table>	Ken	Policies	Question: [1169279] What is California?		Patron: Ken (kenalthom@yahoo.com)		Library: Elmstree Public Library		IP Address: 132.174.21.205									
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<p>Scrollable chat transcript with the most recent messages at the bottom. Includes:</p> <ul style="list-style-type: none"> Messages between the librarian and patron Librarian notes added, and seen only, by librarians 	<p>Chat Transcript (Ken)</p> <p>Chat Transcript (Ken): Question: Chat Transcript What is California? [Librarian]: Hello, how can I help? [Patron]: My report is due tomorrow. I need 250 words. [Patron]: I need 2 pictures too.</p>																		
<p>Tools that let you:</p> <ul style="list-style-type: none"> Send messages Send scripts (patron's home library's scripts and answering library's scripts) Send URLs (push pages) Add librarian notes to transcripts (seen only by librarians) Start co-browse (available to full chat users only; grayed-out for traditional chat users) Transfer a session End a session 	<p>OK. I think I know wha Send</p> <table border="1"> <thead> <tr> <th>Scripts</th> <th>URLs</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Patron Library's Scripts</td> <td>Text</td> <td></td> </tr> <tr> <td>genealogy i1</td> <td>We have great genealo</td> <td></td> </tr> <tr> <td>My Library's Scripts</td> <td>Text</td> <td></td> </tr> <tr> <td>Me m1</td> <td>I'm a librarian at</td> <td></td> </tr> <tr> <td>Cobrowse</td> <td>Transfer</td> <td>End Session</td> </tr> </tbody> </table>	Scripts	URLs	Notes	Patron Library's Scripts	Text		genealogy i1	We have great genealo		My Library's Scripts	Text		Me m1	I'm a librarian at		Cobrowse	Transfer	End Session
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Cobrowse	Transfer	End Session																	

Accept a request

To accept a patron's request for a chat session:

- 1 Click the **OK** button in the box that pops up to alert you to the request.

New patron chat session has arrived!

OK

- 2 Click on the patron in the list under the **New** tab.

QuestionPoint | Chat John Smith (100247431) Queues IM Help Logout
Updated: 10:36:58 2005/11/04

New (1) My Active (0) All (0) Librarians (0) Waiting for a selected chat session...

Patron	Time	Queue	Question
Ken	10:25:19	My Institution	What is California?

The session is moved to the list under the **My Active** tab. The transcript and communication tools for the session appear on the right side of the monitor.

QuestionPoint | Chat John Smith (100247431) Queues IM Help Logout
Updated: 12:53:00 2005/11/04

New (1) My Active (1) All (0) Librarians (1)

My Sessions	Time	Patron's Last Message
Ken	12:49:53	

Chat Transcript (Ken)

Chat Transcript (Ken):
Question: Chat Transcript What is California?

Send

Scripts URLs Notes

Personal Scripts Text
Student What year of school ar

Home Library Scripts Text

Patron Information Policies

Ken kenalthom@yahoo.com

IP Address:

Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)

Referer: http://rinuqa2.dev.oclc.org:9567/hrs/serve/oclc.asik.PatronChatForm

Console Transfer End Session

Move between your active sessions

To move between your active sessions:

You are in a session with Sue and you want to move to your session with Ken.

QuestionPoint | Chat John Smith (100247431) Queues IM Help Logout
Updated: 13:38:19 2005/11/04

New (0)	My Active (2)	All (0)	Librarians (1)
	Ken		
	Sue		

My Sessions

Time	Patron's Last Message
12:49:53	I need 2 pictures too.
12:51:09	Well, one would be non-English s

Chat Transcript (Sue)

[Librarian 13:26:30]: Please tell me more about your question.
 [Patron 13:31:29]: I have an ESL class for Somalians. I'd like to tell them about baseball.
 [Librarian 13:32:16]: Any particular aspects of baseball?
 [Patron 13:33:09]: Well, one would be non-English speakers in pro-baseball.

Send

Scripts **URLs** **Notes**

Personal Scripts * Text
 Student What year of school are you in?
Home Library Scripts Text

Console Transfer End Session

Patron Information Policies
Sue sueone@chat.org
 IP Address:
 Browser/OS: Mozilla/5.0 (Windows; U; Windows NT 5.0; en-US; rv:1.0.1) Gecko/20020823
 Referrer: http://linuxqa2.dev.oclc.org:9567/ircserver/irc.org.oclc.asik.PatronChatForm

Click on the session with Ken under the **My Active** tab.

QuestionPoint | Chat John Smith (100247431) Queues IM Help Logout
Updated: 13:41:46 2005/11/04

New (0)	My Active (2)	All (0)	Librarians (1)
	Ken		
	Sue		

My Sessions

Time	Patron's Last Message
12:49:53	I need 2 pictures too.
12:51:09	Well, one would be non-English s

Chat Transcript (Ken)

Chat Transcript (Ken)

Send

Scripts **URLs** **Notes**

Personal Scripts * Text
 Student What year of school are you in?
Home Library Scripts Text

Console Transfer End Session

Patron Information Policies
Ken kenalthom@yahoo.com
 IP Address:
 Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)
 Referrer: http://linuxqa2.dev.oclc.org:9567/ircserver/irc.org.oclc.asik.PatronChatForm

The session with Ken appears.

QuestionPoint | Chat John Smith (100247431) Queues IM Help Logout
Updated: 13:44:57 2005/11/04

New (0)	My Active (2)	All (0)	Librarians (1)
	Ken		
	Sue		

My Sessions

Time	Patron's Last Message
12:49:53	I need 2 pictures too.
12:51:09	Well, one would be non-English s

Chat Transcript (Ken)

Question: Chat Transcript What is California?
 [Librarian 13:25:06]: Hello, how can I help?
 [Patron 13:26:17]: My report is due tomorrow. I need 250 words.
 [Patron 13:26:34]: I need 2 pictures too.

Send

Scripts **URLs** **Notes**

Personal Scripts * Text
 Student What year of school are you in?
Home Library Scripts Text

Console Transfer End Session

Patron Information Policies
Ken kenalthom@yahoo.com
 IP Address:
 Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)
 Referrer: http://linuxqa2.dev.oclc.org:9567/ircserver/irc.org.oclc.asik.PatronChatForm


Add a librarian note

To add a note in the transcript that only librarians see:

<p>Click the Notes tab.</p>	<p>Chat Transcript (Ken)</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Chat Transcript (Ken): Question: Chat Transcript: What is California? [Librarian]: Hello, how can I help? [Patron]: My report is due tomorrow. I need 250 words. [Patron]: I need 2 pictures too.</p> </div> <div style="margin-top: 10px;"> <input style="width: 100%;" type="text"/> <input type="button" value="Send"/> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">Scripts</td> <td style="text-align: center;">URLs</td> <td style="text-align: center;">Notes</td> </tr> <tr> <td>Patron Library's Scripts</td> <td colspan="2">Text</td> </tr> <tr> <td>My Library's Scripts</td> <td colspan="2">Text</td> </tr> </table> <div style="margin-top: 10px;"> <input type="button" value="Cobrowse"/> <input type="button" value="Transfer"/> <input type="button" value="End Session"/> </div>	Scripts	URLs	Notes	Patron Library's Scripts	Text		My Library's Scripts	Text				
Scripts	URLs	Notes											
Patron Library's Scripts	Text												
My Library's Scripts	Text												
<p>Type your note in the box and click the Send button.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">Scripts</td> <td style="text-align: center;">URLs</td> <td style="text-align: center;">Notes</td> </tr> <tr> <td colspan="3">Add a 'librarian only note':</td> </tr> <tr> <td colspan="2"> <input style="width: 90%;" type="text" value="Check with Principal Ogden about assignments like this"/> </td> <td style="text-align: right;"> <input type="button" value="Send"/> </td> </tr> <tr> <td colspan="3"> <input type="button" value="Cobrowse"/> <input type="button" value="Transfer"/> <input type="button" value="End Session"/> </td> </tr> </table>	Scripts	URLs	Notes	Add a 'librarian only note':			<input style="width: 90%;" type="text" value="Check with Principal Ogden about assignments like this"/>		<input type="button" value="Send"/>	<input type="button" value="Cobrowse"/> <input type="button" value="Transfer"/> <input type="button" value="End Session"/>		
Scripts	URLs	Notes											
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<input style="width: 90%;" type="text" value="Check with Principal Ogden about assignments like this"/>		<input type="button" value="Send"/>											
<input type="button" value="Cobrowse"/> <input type="button" value="Transfer"/> <input type="button" value="End Session"/>													
<p>The note appears in the transcript that you see but not in the one that the patron sees. The note also appears in the transcript added to QuestionPoint when the session ends.</p>	<p>Chat Transcript (Ken)</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Chat Transcript (Ken): Question: Chat Transcript: What is California? [Librarian]: Hello, how can I help? [Patron]: My report is due tomorrow. I need 250 words. [Patron]: I need 2 pictures too. [Librarian]: Note: Check with Principal Ogden about assignments like this</p> </div>												

Instant message with other librarians

To send instant messages to other librarians who are currently monitoring the same queues as you are:

Click the IM link.	<p>Queues IM Help Logout</p>																
Click on the librarian to whom you want to send messages.	<table border="1"> <thead> <tr> <th>New (0)</th> <th>My Active (2)</th> <th>All (0)</th> <th>Librarians (1)</th> </tr> </thead> <tbody> <tr> <td>Librarian</td> <td># Queues</td> <td>Library</td> <td># Active Time</td> </tr> <tr> <td>Anne Middleton</td> <td>0</td> <td>Heartland University L</td> <td>0 11:20:32</td> </tr> </tbody> </table>	New (0)	My Active (2)	All (0)	Librarians (1)	Librarian	# Queues	Library	# Active Time	Anne Middleton	0	Heartland University L	0 11:20:32				
New (0)	My Active (2)	All (0)	Librarians (1)														
Librarian	# Queues	Library	# Active Time														
Anne Middleton	0	Heartland University L	0 11:20:32														
An IM transcript, message box, and active IM sessions list appear in the chat monitor.	<table border="1"> <thead> <tr> <th>New (0)</th> <th>My Active (0)</th> <th>All (0)</th> <th>Librarians (1)</th> </tr> </thead> <tbody> <tr> <td>Librarian</td> <td># Queues</td> <td>Library</td> <td># Active Time</td> </tr> <tr> <td>Anne Middleton</td> <td>0</td> <td>Heartland University L</td> <td>0 09:58:11</td> </tr> </tbody> </table> <p>IM Transcript (Anne Middleton)</p> <p>[John Smith 10:13:17]: Instant Message request from librarian: John Smith (100247431) to librarian: Anne Middleton (103136).</p> <p><input type="text"/> <input type="button" value="Send"/></p> <p>End IM Session</p> <table border="1"> <thead> <tr> <th>My Active IM Sessions</th> <th>Library</th> </tr> </thead> <tbody> <tr> <td>Anne Middleton (103136)</td> <td>Heartland University Library</td> </tr> </tbody> </table>	New (0)	My Active (0)	All (0)	Librarians (1)	Librarian	# Queues	Library	# Active Time	Anne Middleton	0	Heartland University L	0 09:58:11	My Active IM Sessions	Library	Anne Middleton (103136)	Heartland University Library
New (0)	My Active (0)	All (0)	Librarians (1)														
Librarian	# Queues	Library	# Active Time														
Anne Middleton	0	Heartland University L	0 09:58:11														
My Active IM Sessions	Library																
Anne Middleton (103136)	Heartland University Library																
Type a message and click the Send button.	<p>Any new information about school assignments? <input type="button" value="Send"/></p> <p>End IM Session</p>																
The other librarian receives a pop-up message and clicks its OK button.	<p> New IM request has arrived!</p> <p><input type="button" value="OK"/></p>																
The other librarian clicks the IM link.	<p>Queues IM Help Logout</p>																
The other librarian clicks on your name in the active IM sessions link.	<table border="1"> <thead> <tr> <th>My Active IM Sessions</th> <th>Library</th> </tr> </thead> <tbody> <tr> <td>John Smith (100247431)</td> <td>Heartland University Library</td> </tr> </tbody> </table>	My Active IM Sessions	Library	John Smith (100247431)	Heartland University Library												
My Active IM Sessions	Library																
John Smith (100247431)	Heartland University Library																

The other librarian sends a message to you.

IM Transcript (John Smith)

[John Smith 10:13:17]: Instant Message request from librarian: John Smith (100247431) to librarian: Anne Middleton (103136).

[John Smith 10:24:28]: Any new information about school assignments?

Yes, let's talk


Send 

End IM Session

Transfer an active session to another librarian

To transfer an active session to another librarian who is monitoring the same queues that you are:

<p>1 Click the Transfer link.</p>	<p>Chat Transcript (Sue)</p> <p>Chat Transcript (Sue): Question: Chat Transcript: What is baseball? [Librarian 13:28:30]: Please tell me more about your question. [Patron 13:31:29]: I have an ESL class for Somalians. I'd like to tell them about baseball. [Librarian 13:32:16]: Any particular aspects of baseball?</p> <p><input type="text"/> <input type="button" value="Send"/></p> <table border="1"> <thead> <tr> <th>Scripts</th> <th>URLs</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Personal Scripts</td> <td>Text</td> <td></td> </tr> <tr> <td>Student</td> <td>What year of school are</td> <td></td> </tr> <tr> <td>Home Library Scripts</td> <td>Text</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p><input type="button" value="Console"/> <input type="button" value="Transfer"/> <input type="button" value="End Session"/></p>	Scripts	URLs	Notes	Personal Scripts	Text		Student	What year of school are		Home Library Scripts	Text				
Scripts	URLs	Notes														
Personal Scripts	Text															
Student	What year of school are															
Home Library Scripts	Text															
<p>2 Select the librarian in the list that appears. (In the future, you will be able to transfer a session to a queue or a librarian.)</p>	<p>Chat Transcript (Sue)</p> <p>Chat Transcript (Sue): Question: Chat Transcript: What is baseball? [Librarian]: Please tell me more about your question. [Patron]: I have an ESL class for Somalians. I'd like to tell them about baseball.</p> <p><input type="text"/> <input type="button" value="Send"/></p> <p>Transfer Request</p> <p>Transfer Session to:</p> <table border="1"> <thead> <tr> <th>Librarian</th> <th>Library</th> </tr> </thead> <tbody> <tr> <td>Anne Middleton (103136)</td> <td>Heartland University Lit</td> </tr> </tbody> </table> <p><input type="button" value="Cancel"/></p>	Librarian	Library	Anne Middleton (103136)	Heartland University Lit											
Librarian	Library															
Anne Middleton (103136)	Heartland University Lit															

<p>3 Type and send a note to the librarian to confirm that he or she can take the session. (Your messages with the other librarian are an IM session. The messages are included in the transcript as librarian notes. The patron does not see them.) (If you get no response, you can cancel the transfer to choose another librarian or complete the session yourself.)</p>	<p>Chat Transcript (Sue)</p> <p>Chat Transcript (Sue): Question: Chat Transcript: What is baseball? [Librarian]: Please tell me more about your question. [Patron]: I have an ESL class for Somalians. I'd</p> <p><input type="text"/> <input type="button" value="Send"/></p> <p>IM Transcript (Anne Middleton)</p> <p>[John Smith]: Instant Message request from librarian: John Smith (100247431) to librarian: Anne Middleton (103136).</p> <p>Please help me with this one. <input type="button" value="Send"/></p> <p><input type="button" value="Cancel"/> <input type="button" value="Transfer"/></p>
<p>The other librarian receives a pop-up message and clicks its OK button.</p>	<p> New IM request has arrived!</p> <p><input type="button" value="OK"/></p>
<p>The other librarian sends a message to you.</p>	<p>IM Transcript (John Smith)</p> <p>[John Smith]: Instant Message request from librarian: John Smith (100247431) to librarian: Anne Middleton (103136). [John Smith]: Please help me with this one.</p> <p>OK. I'll take it. <input type="button" value="Send"/></p> <p>End IM Session</p>
<p>You click the Transfer link.</p>	<p>IM Transcript (Anne Middleton)</p> <p>[John Smith]: Instant Message request from librarian: John Smith (100247431) to librarian: Anne Middleton (103136). [John Smith]: Please help me with this one. [Anne Middleton]: OK. I'll take it.</p> <p><input type="text"/> <input type="button" value="Send"/></p> <p><input type="button" value="Cancel"/> <input type="button" value="Transfer"/></p>

<p>Your part in the session ends. The session is moved from your active questions list to the other librarian's active questions list. Click Close to remove the session from your monitor.</p>	<p>Chat Session Ended Close</p> <p>Chat Transcript (Sue)</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Chat Transcript (Sue): Question: Chat Transcript: What is baseball? [Librarian]: Please tell me more about your question. [Patron]: I have an ESL class for Somalians. I'd like to tell them about baseball. [Librarian]: Any particular aspects of baseball?</p> </div>												
<p>The other librarian receives a confirmation message about the transfer.</p>	<p>Anne Middleton (103136) Queues IM Help Logout Updated: 15:48:59 2005/11/04 New 'transferred' chat session has arrived!</p>												
<p>The other librarian clicks the My Active tab.</p>	<p>New (0) My Active (1) All (1) Librarians (1)</p>												
<p>The other librarian clicks on the session.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%;">New (0)</th> <th style="width: 33%;">My Active (1)</th> <th style="width: 33%;">All (1)</th> <th style="width: 33%;">Librarians (1)</th> </tr> </thead> <tbody> <tr> <td colspan="2">My Sessions</td> <td>Time</td> <td>Patron's Last Message</td> </tr> <tr> <td colspan="2">[!] Sue</td> <td>12:51:09</td> <td>Well, one would be non-English speaking</td> </tr> </tbody> </table>	New (0)	My Active (1)	All (1)	Librarians (1)	My Sessions		Time	Patron's Last Message	[!] Sue		12:51:09	Well, one would be non-English speaking
New (0)	My Active (1)	All (1)	Librarians (1)										
My Sessions		Time	Patron's Last Message										
[!] Sue		12:51:09	Well, one would be non-English speaking										
<p>The other librarian sends a message to the patron.</p>	<p>Chat Transcript (Sue)</p> <div style="border: 1px solid gray; padding: 5px;"> <p>[Librarian (100247431)]: Note: Chat Transfer Session request from librarian: 'John Smith' (100247431) at Institution 'Heartland University Library' (10178) to librarian: 'Anne Middleton' (103136) at Institution 'Heartland University Library' (10178). [Patron]: Well, one would be non-English speaking baseball players.</p> </div> <p>Hello, I have some information to send you. Send</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%;">Scripts</th> <th style="width: 33%;">URLs</th> <th style="width: 33%;">Notes</th> </tr> </thead> <tbody> <tr> <td>Patron Library's Script</td> <td>Text</td> <td></td> </tr> <tr> <td>My Library's Scripts</td> <td>Text</td> <td></td> </tr> </tbody> </table> <p style="text-align: center;"> Cobrowse Transfer End Session </p>	Scripts	URLs	Notes	Patron Library's Script	Text		My Library's Scripts	Text				
Scripts	URLs	Notes											
Patron Library's Script	Text												
My Library's Scripts	Text												

End a session

To end a session:

Either you or the patron can click the **End Session** link to end the session.

In this example, the patron clicks it.

[Patron 09:37:22]: Great!

[Librarian 09:39:12]: Could I send it to you in an e-mail in a few minutes?

[Patron 09:39:37]: Yes, please do.

[Librarian 09:40:29]: OK. Let's end our session. Check your e-mail shortly.

[Patron 09:40:52]: OK, Thanks.

QuestionPoint | Chat [End Session](#)

Hello, Sue.
You are now chatting live with a librarian.

Type message and click 'Send':

Send

The session remains in your active sessions list if the patron:

- Ends the session,
- Closes the chat window without ending the session, or
- Loses the session due to technical problems.

If the patron ends the session, a message is added to the transcript.

You must end the session in order to remove the session from your active list.

Click **End Session**.

Chat Transcript (Sue)

[Patron]: Great!

[Librarian]: Could I send it to you in an e-mail in a few minutes?

[Patron]: Yes, please do.

[Librarian]: OK. Let's end our session. Check your e-mail shortly.

[Patron]: OK, Thanks.

[Patron]: Patron ended chat session.

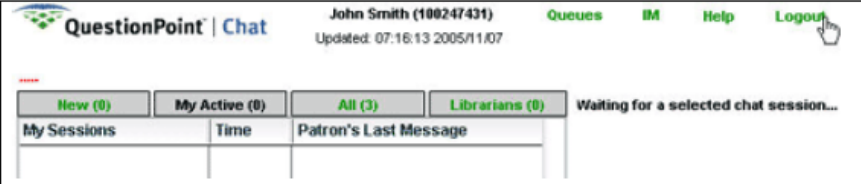
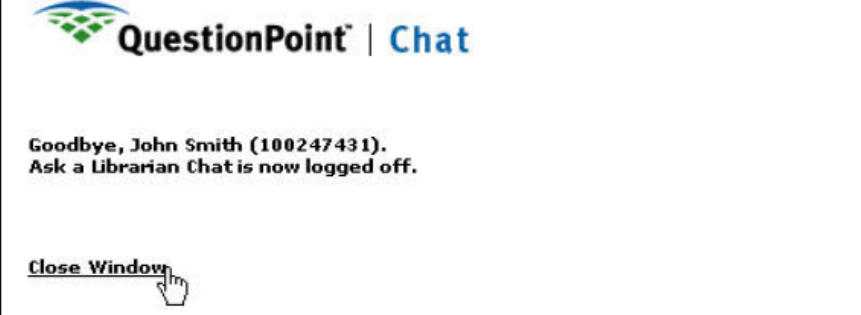
Send

Scripts	URLs	Notes
Patron Library's Script	Text	
My Library's Scripts	Text	
Cobrowse	Transfer	End Session

<p>The session is removed from the active sessions list.</p>	<table border="1"> <thead> <tr> <th>New (1)</th> <th>My Active (0)</th> <th>All (0)</th> <th>Librarians (0)</th> </tr> </thead> <tbody> <tr> <td>My Sessions</td> <td>Time</td> <td>Patron's Last Message</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	New (1)	My Active (0)	All (0)	Librarians (0)	My Sessions	Time	Patron's Last Message													
New (1)	My Active (0)	All (0)	Librarians (0)																		
My Sessions	Time	Patron's Last Message																			
<p>Chat Session Ended message appears. You can add a librarian note. You can add a message to the patron that would be included as part of any followup message sent to the patron from QuestionPoint. You click a resolution. It determines the status of the transcript in QuestionPoint and the question list in which the transcript is placed. These are the resolution codes:</p> <p>Answered Followup by me Followup by patron's library Practice</p> <p>You can click up-to-4 descriptions from these descriptive codes:</p> <table border="0"> <tr> <td>Access</td> <td>Local – catalog</td> </tr> <tr> <td>Catalog</td> <td>Local – non-catalog</td> </tr> <tr> <td>Circulation</td> <td>Medical</td> </tr> <tr> <td>Directional</td> <td>No question</td> </tr> <tr> <td>Duplicate question</td> <td>Other</td> </tr> <tr> <td>Genealogy</td> <td>Ready Reference</td> </tr> <tr> <td>Homework</td> <td>Reference</td> </tr> <tr> <td>Inappropriate</td> <td>Research</td> </tr> <tr> <td>Instructional</td> <td>Technical</td> </tr> <tr> <td>Law</td> <td>Test</td> </tr> </table>	Access	Local – catalog	Catalog	Local – non-catalog	Circulation	Medical	Directional	No question	Duplicate question	Other	Genealogy	Ready Reference	Homework	Reference	Inappropriate	Research	Instructional	Technical	Law	Test	<p>Chat Session Ended Close</p> <p>Chat Transcript (Sue)</p> <p>[Librarian]: Could I send it to you in an e-mail in a few minutes. [Patron]: Yes, please do. [Librarian]: OK. Let's end our session. Check your e-mail shortly. [Patron]: OK, thanks. [Patron]: Patron ended chat session.</p> <p>Add a 'librarian only note':</p> <input type="text"/> Send <p>Add a 'message for the patron':</p> <input type="text"/> Send <p>Select Resolution</p> <p>Followup By Me</p> <p>Select Description</p> <p>Instructional</p>
Access	Local – catalog																				
Catalog	Local – non-catalog																				
Circulation	Medical																				
Directional	No question																				
Duplicate question	Other																				
Genealogy	Ready Reference																				
Homework	Reference																				
Inappropriate	Research																				
Instructional	Technical																				
Law	Test																				
<p>A note about the resolution is added to the transcript. Any description, librarian notes, or messages to the patron are also added to the transcript.</p>	<p>Chat Session Ended Close</p> <p>Chat Transcript (Sue)</p> <p>[Patron]: OK, thanks. [Patron]: Patron ended chat session. [Librarian]: Note: Set Resolution: Followup By Me [Librarian]: Note: Set Description: Instructional [Librarian]: Note: Set Description: Reference</p>																				
<p>Click the Close button to remove the session from the chat monitor.</p>	<p>Chat Session Ended Close</p> <p>Chat Transcript (Sue)</p>																				

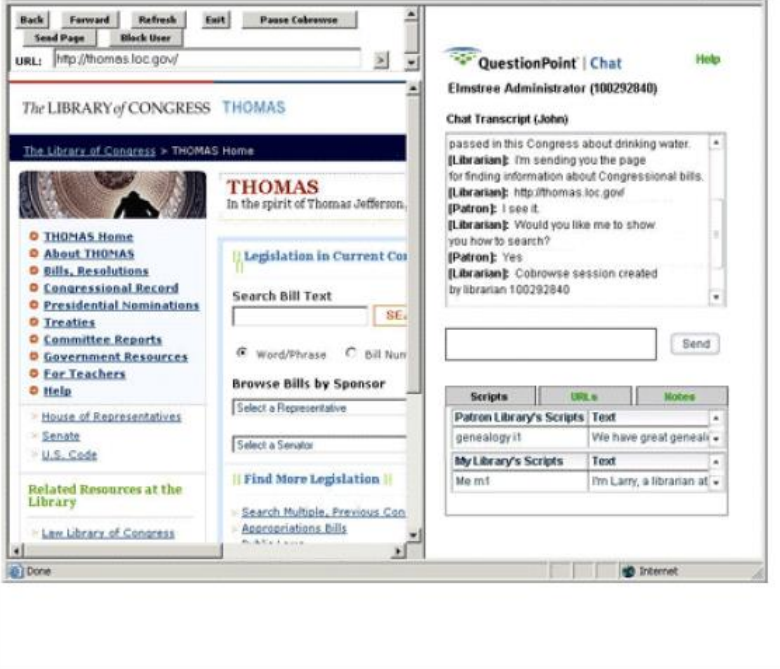
Log off from chat (stop monitoring)

To log off from chat (stop monitoring):

<p>End any active sessions and click the Logout link.</p>	 <p>QuestionPoint Chat John Smith (100247431) Queues IM Help Logout</p> <p>Updated: 07:16:13 2005/11/07</p> <p>New (0) My Active (0) All (3) Librarians (0) Waiting for a selected chat session...</p> <table border="1"><thead><tr><th>My Sessions</th><th>Time</th><th>Patron's Last Message</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td></tr></tbody></table>	My Sessions	Time	Patron's Last Message			
My Sessions	Time	Patron's Last Message					
<p>Click the Close Window link. The chat monitor closes. If you have finished using QuestionPoint, go the QuestionPoint window and exit.</p>	 <p>QuestionPoint Chat</p> <p>Goodbye, John Smith (100247431). Ask a Librarian Chat is now logged off.</p> <p><u>Close Window</u></p>						

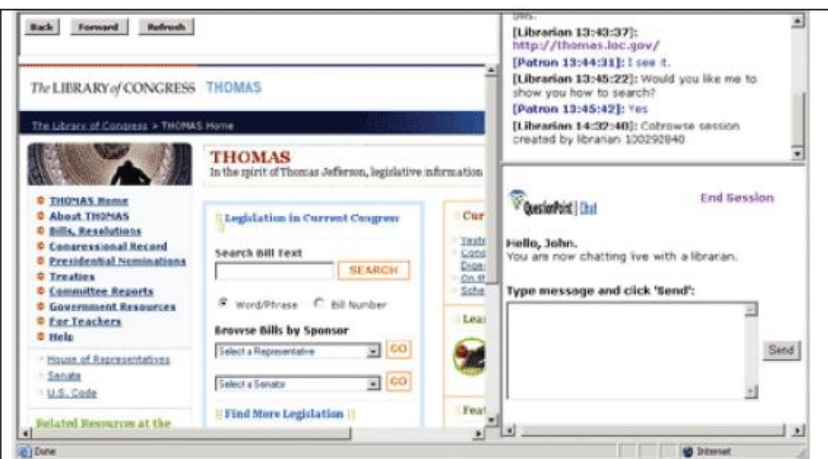
Co-browse

You must be a 24/7 Reference chat user to use co-browse.

<p>Ask the patron if he or she wants to co-browse.</p>	<p>Chat Transcript (John)</p> <p>passed in this Congress about drinking water. [Librarian]: I'm sending you the page for finding information about Congressional bills. [Librarian]: http://thomas.loc.gov/ [Patron]: I see it. [Librarian]: Would you like me to show you how to search? [Patron]: Yes</p>																		
<p>Click the green Cobrowse link.</p>	<table border="1"> <thead> <tr> <th>Scripts</th> <th>URLs</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>Patron Library's Scripts</td> <td>Text</td> <td></td> </tr> <tr> <td>g1</td> <td>g1</td> <td>Hello, thank you for you</td> </tr> <tr> <td>My Library's Scripts</td> <td>Text</td> <td></td> </tr> <tr> <td>thomaslocgov m5</td> <td>m5</td> <td>I'm sending you the pa</td> </tr> <tr> <td>Cobrowse</td> <td>Transfer</td> <td>End Session</td> </tr> </tbody> </table>	Scripts	URLs	Notes	Patron Library's Scripts	Text		g1	g1	Hello, thank you for you	My Library's Scripts	Text		thomaslocgov m5	m5	I'm sending you the pa	Cobrowse	Transfer	End Session
Scripts	URLs	Notes																	
Patron Library's Scripts	Text																		
g1	g1	Hello, thank you for you																	
My Library's Scripts	Text																		
thomaslocgov m5	m5	I'm sending you the pa																	
Cobrowse	Transfer	End Session																	
<p>If the Cobrowse link is grayed-out, you cannot co-browse because your library uses traditional chat.</p>	<table border="1"> <tbody> <tr> <td>Cobrowse</td> <td>Transfer</td> <td>End Session</td> </tr> </tbody> </table>	Cobrowse	Transfer	End Session															
Cobrowse	Transfer	End Session																	
<p>A separate window opens, containing the librarian co-browse console. It contains co-browse and chat tools.</p> <p>A message in the transcript indicates that a co-browse session was started.</p> <p>If the patron's browser is compatible with co-browse, Co-browse is automatically active and a Pause Cobrowse button appears in the tools.</p> <p>In Co-browse, results of clicks or actions by the librarian or patron are seen by both.</p> <p>If the patron's browser is not compatible with co-browse, Escort is not automatically active and a Start Escort button appears in the tools. In Escort, patron's clicks and actions are seen only by the patron. Results of clicks or actions by the librarian are seen by both.</p> <p>If you sent (pushed) a page to the patron before you clicked Cobrowse, that page appears in the page viewing area on the left side of the console.</p>																			

In the patron's chat window, a message in the transcript indicates that a co-browse session was started.

The **Back**, **Forward**, and **Refresh** buttons appear in co-browse but not in escort.



Right click on a hard-coded link or an image to display a red, triangle pointer in the librarian console and in the patron chat window. You and the patron can each use this to focus each others' attention.

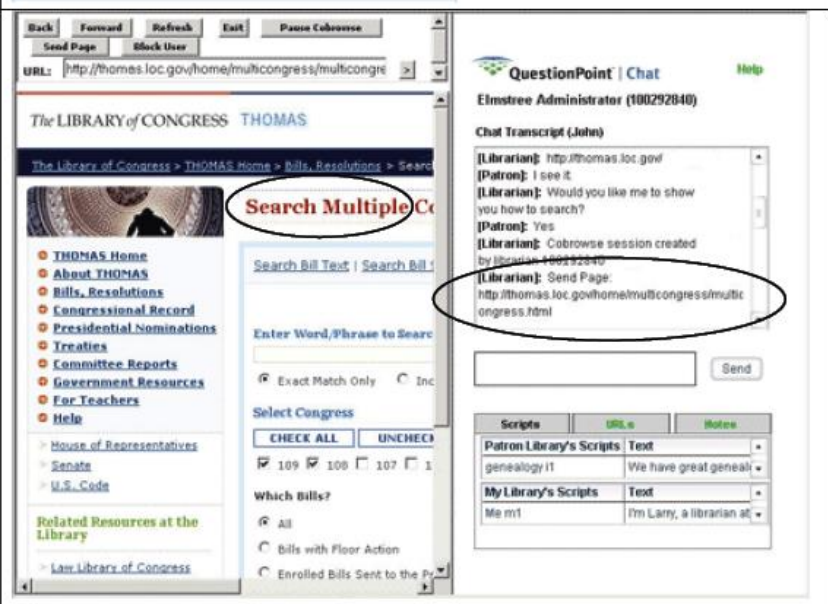


Click a link to follow the link.



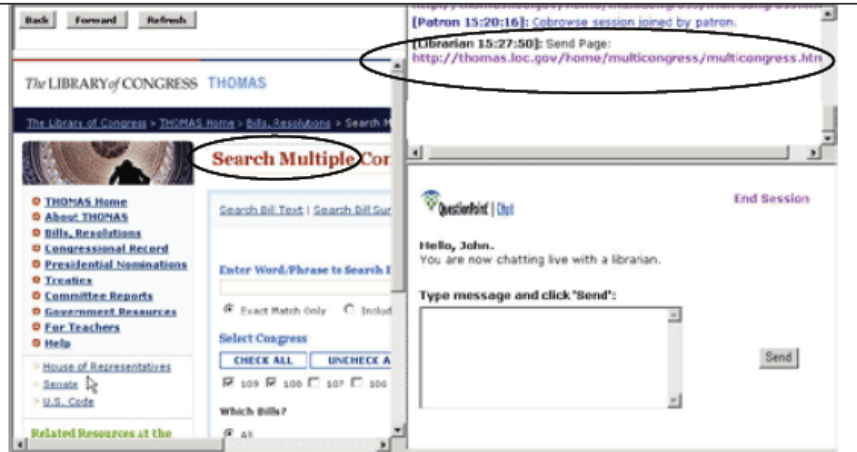
The new page displays in the librarian's console.

A Send Page entry appears in the transcript.



The new page displays in the patron's chat window.

A Send Page entry appears in the transcript. The URL is hot linked. If the patron clicks a link, the page for the link opens in a separate window.

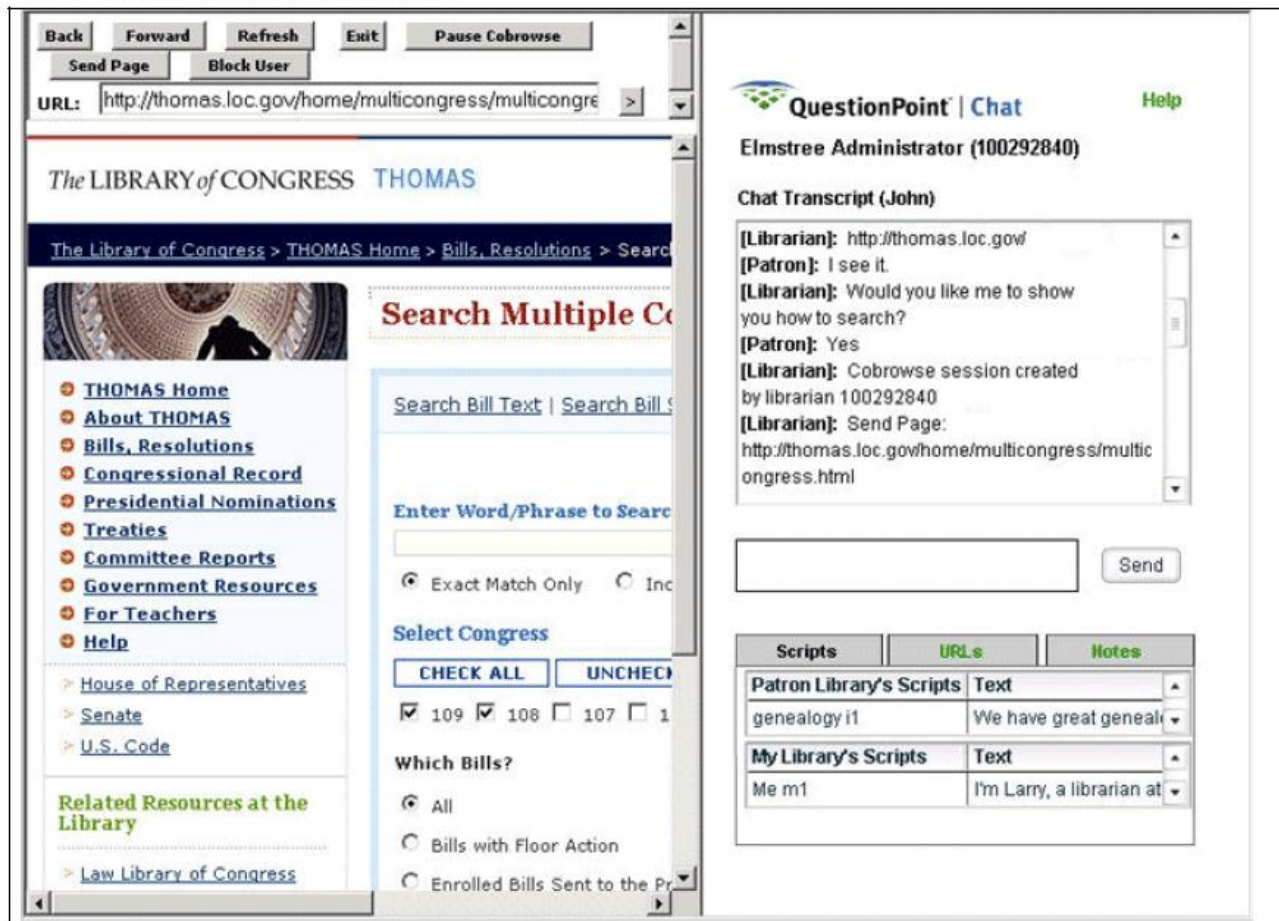


Click the **Exit** button in the librarian's console when you are ready to end the co-browse, close the console, and return to the chat monitor. This does not end the chat session. You complete and end the chat session in the chat monitor.

Exit



What are the parts of the co-browse console?

Co-browse console illustration



Co-browse console parts

Co-browse tools appear at the top of the left side of the co-browse console. These are the tools for full co-browsing.	
Escort tools appear instead if the patron's browser does not support full co-browsing.	
Tools for navigation among pages viewed. Use these instead of your browser's navigation buttons.	
Tool to refresh the page currently viewed.	
Tool to end co-browse (or escort) and close the console. Does not end the chat session.	

<p>When you click the Cobrowse link to start co-browse, co-browse is automatically active. Click Pause Cobrowse to stop co-browse so the patron cannot see your actions. The button changes to Start Cobrowse. Click it to resume co-browsing.</p>	<p>Pause Cobrowse Start Cobrowse</p>
<p>If the patron's browser does not support full co-browsing, escort does not start automatically. Click Start Escort to begin. The button changes to Pause Escort. Click it to pause escort so the patron cannot see your actions.</p>	<p>Start Escort Pause Escort</p>
<p>Tool to send the page you are viewing to the patron.</p>	<p>Send Page</p>
<p>When co-browse starts, the patron's actions are seen by you and the patron. Click Block User to prevent the patron from acting. The button changes to Unblock User. Click it to let the patron act.</p>	<p>Block User Unblock User</p>
<p>Type or paste a URL in the box and click the arrow button to go to the page for the URL. If co-browse or escort is active, the patron also goes to the page.</p>	<p>URL: <input type="text" value="http://thomas.loc.gov/home/multicongress/multicongre"/> ></p>
<p>Area of the console for viewing pages, clicking links and using web pages.</p>	
<p>Branding of the co-browse console.</p>	<p> QuestionPoint Chat</p>
<p>Click to view online help.</p>	<p>Help</p>
<p>Name and account number of the librarian.</p>	<p>Elmstree Administrator (100292840)</p>



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Chat Follow-Up and Referral

Overview

Select a resolution code at the end of each chat session

- 1 When a chat session ends, the librarian selects one of the following resolution codes in the chat monitor:
(Your library or group should provide guidance on your use of the resolution codes.)
 - **Followup by patron's library** (the patron's home library or group will follow up)
 - **Followup by me** (the librarian who chatted with the patron will follow up)
 - **Answered** (no followup is needed; or, a technical problem prevents followup)
 - **Practice** (no followup is needed; it was a practice session)
- 2 QuestionPoint sends the session transcript to the patron's e-mail address.
- 3 QuestionPoint creates a *question* (reference transaction) for the session and places it in the QuestionPoint system, including the chat transcript and other information about the session.
Note: A *question* can be added in QuestionPoint through a chat session, web form, telephone call, reference-desk visit, etc. Any expression of a patron's information need can be managed in QuestionPoint as a question.
- 4 Based on the resolution code selected, QuestionPoint assigns a status to the question and adds it to a question list:

Resolution code	Question status	Question list*
Followup by patron's library	 New for the patron's home library	New Questions
Followup by me	 New for the chatting librarian's library and for the chatting librarian	New Questions My New Questions
Answered	 Answered	Answered Questions
Practice	 Answered	Answered Questions

- * All questions with New, Answered, or Pending status are also listed in the Active Questions list.
Questions with  Pending status are awaiting response by another library, a subject-matter expert, or a patron.
Questions with  Closed status are considered to be complete; they are listed in the Closed Questions list only.

Follow up a chat session in QuestionPoint or refer the followup to others

- 1 The librarian logs on to QuestionPoint.
- 2 The librarian goes to one of the lists of questions that need followup:
(Your library or group should provide guidance on which question list you will go to.)
 - List of questions for you to follow up (My New Questions)
 - List of questions for your library to follow up (New Questions)
 - List of questions for libraries in your group to follow up (Shared Followup Questions)
- 3 The librarian selects a question in the list to follow up.
- 4 From the Full Question page for the selected question, the librarian:
 - Sends a message to the patron, or
 - Refers the question to another library or a subject-matter expert for followup.

Log on to QuestionPoint

Log on to QuestionPoint:

- 1 Go to <http://www.questionpoint.org/>
- 2 Click **Librarian Logon** (at top of page). The QuestionPoint Logon page appears.
Tip: Bookmark the Logon page as a shortcut for steps 1–2.
- 3 Type your **QuestionPoint authorization** (User ID).
- 4 Type your **QuestionPoint password**.
Tip: Case sensitive; be sure that Caps Lock is off.
- 5 Click the **Logon** button. The My QuestionPoint page appears.

Go to questions (including chat sessions) that need followup

Your library or group should provide guidance on which question list you will use to select questions for followup:

- List of questions for you to follow up (My New Questions),
- List of questions for your library to follow up (New Questions), or
- List of questions for libraries in your group to follow up (Shared Followup Questions).

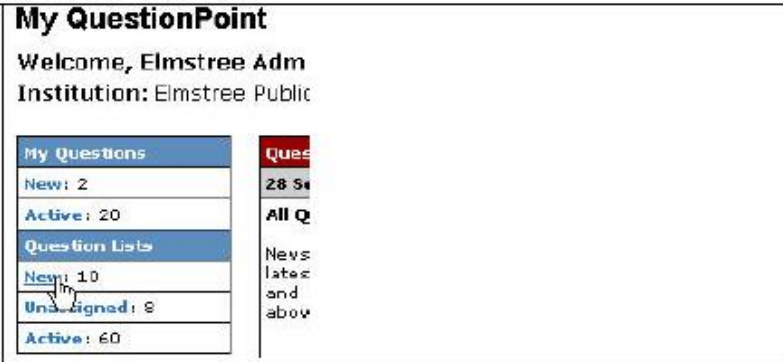


List of questions for you to follow up (My New Questions)

To go to the list of questions for you to follow up (questions assigned to you):

<p>1 Click the New link under My Questions on the My QuestionPoint page.</p>	<div style="border: 1px solid black; padding: 5px;"> <h4 style="margin: 0;">My QuestionPoint</h4> <p style="margin: 0;">Welcome, Elmstree Admin Institution: Elmstree Public</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border: 1px solid black; padding: 2px;"> <table style="width: 100%; border-collapse: collapse;"> <tr style="background-color: #4CAF50; color: white;"><th style="padding: 2px;">My Questions</th></tr> <tr><td style="padding: 2px;">New: 3</td></tr> <tr><td style="padding: 2px;">Active: 105</td></tr> <tr style="background-color: #4CAF50; color: white;"><th style="padding: 2px;">Question Lists</th></tr> <tr><td style="padding: 2px;">New: 3</td></tr> <tr><td style="padding: 2px;">Unassigned: 0</td></tr> <tr><td style="padding: 2px;">Active: 191</td></tr> </table> </td> <td style="width: 50%; border: 1px solid black; padding: 2px;"> <table style="width: 100%; border-collapse: collapse;"> <tr style="background-color: #f44336; color: white;"><th style="padding: 2px;">Questions</th></tr> <tr><td style="padding: 2px;">24 Jan</td></tr> <tr><td style="padding: 2px;">Online available after registration at the</td></tr> </table> </td> </tr> </table> </div>	<table style="width: 100%; border-collapse: collapse;"> <tr style="background-color: #4CAF50; color: white;"><th style="padding: 2px;">My Questions</th></tr> <tr><td style="padding: 2px;">New: 3</td></tr> <tr><td style="padding: 2px;">Active: 105</td></tr> <tr style="background-color: #4CAF50; color: white;"><th style="padding: 2px;">Question Lists</th></tr> <tr><td style="padding: 2px;">New: 3</td></tr> <tr><td style="padding: 2px;">Unassigned: 0</td></tr> <tr><td style="padding: 2px;">Active: 191</td></tr> </table>	My Questions	New : 3	Active: 105	Question Lists	New: 3	Unassigned: 0	Active: 191	<table style="width: 100%; border-collapse: collapse;"> <tr style="background-color: #f44336; color: white;"><th style="padding: 2px;">Questions</th></tr> <tr><td style="padding: 2px;">24 Jan</td></tr> <tr><td style="padding: 2px;">Online available after registration at the</td></tr> </table>	Questions	24 Jan	Online available after registration at the
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My Questions													
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Active: 191													
Questions													
24 Jan													
Online available after registration at the													
<p>2 Click a question in the list.</p> <p>QuestionPoint displays the My New Questions list. It is located under the My Questions tab in the Ask a Librarian module.</p> <p>Questions in this list need followup. They have the New status icon: ?</p> <p>QuestionPoint displays the Full Question page.</p> <p>See "Send a message to the patron" on page 7 for the next steps.</p>	<div style="border: 1px solid black; padding: 5px;"> </div>												

List of questions for your library to follow up (New Questions)

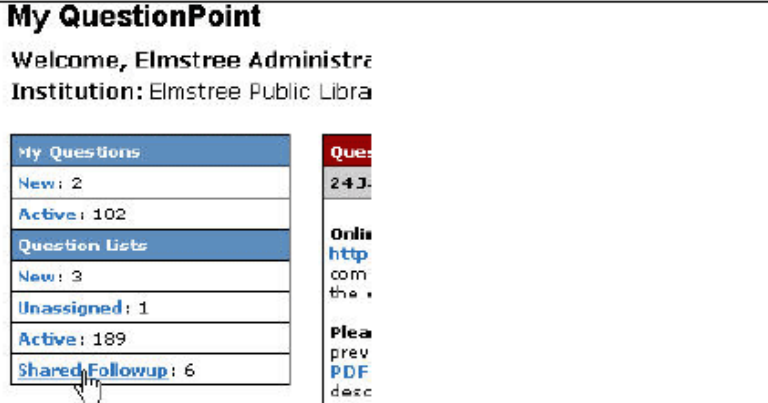


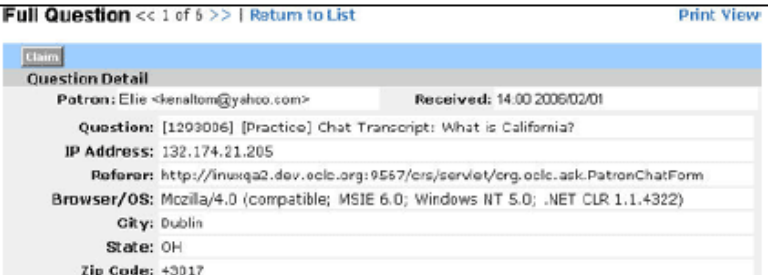
To go to the list of questions for librarians at your library to follow up:

<p>1 Click the New link under Question Lists on the My QuestionPoint page.</p>	 <p>My QuestionPoint Welcome, Elmstree Adm Institution: Elmstree Public</p> <table border="1"> <tr> <th>My Questions</th> </tr> <tr> <td>New: 2</td> </tr> <tr> <td>Active: 20</td> </tr> <tr> <th>Question Lists</th> </tr> <tr> <td>New: 10</td> </tr> <tr> <td>Unassigned: 9</td> </tr> <tr> <td>Active: 60</td> </tr> </table> <p>Questions: 28 Se All Q News Latest and above</p>	My Questions	New: 2	Active: 20	Question Lists	New: 10	Unassigned: 9	Active: 60
My Questions								
New: 2								
Active: 20								
Question Lists								
New: 10								
Unassigned: 9								
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<input type="checkbox"/>	1058897: Chat Transcript: How does this question appear to my library, Elmstree Public, after EL... Received: 2005/10/11	Assigned to: Elmstree Art Inst Admin Patrons: Paula (Shared Followup)						
<input type="checkbox"/>	1058436: Chat Transcript: elmstpub patron elmstpub lib followup Received: 2005/10/11	Assigned to: Elmstree Administrator Patrons: Ed Ferraris (Shared Followup)						

List of questions for libraries in your group to follow up (Shared Followup Questions)

Your library may belong to a group that uses full chat (chat with co-browse) and shares responsibility for followup.

To go to the list of questions for librarians in your group to follow up:

<p>1 Click the Shared Followup link under Question Lists on the My QuestionPoint page.</p> <p>Note: If there is no link, the group administrator has not turned on shared followup.</p>	 <p>My QuestionPoint Welcome, Elmstree Administrator Institution: Elmstree Public Library</p> <p>My Questions New: 2 Active: 102</p> <p>Question Lists New: 3 Unassigned: 1 Active: 189 Shared Followup: 6</p> <p>Questions 243</p> <p>Online http://www.oclc.org</p> <p>Please prev PDF desc ...</p>
<p>2 Click a question in the list.</p>	 <p>QuestionPoint Ask a Librarian</p> <p>Support Help  Working on behalf of libraries</p> <p>Questions My Questions Add Question Settings Reports Service History</p> <p>Active New Pending Referred Answered Closed Shared Followup</p> <p>Shared Followup Questions Find ID: <input type="text"/></p> <p>[Refresh List] Records 1 - 2 of 6</p> <p>Sort by: ID Received Updated</p> <p>1293006: [Practice] Chat Transcript: What is California? Received: 2006/02/01 Updated: 2006/01/11 Patron: Elie Elmstree Public Library</p> <p>1291279: [Practice] Chat Transcript: fdfdfdd Received: 2006/01/25 Updated: 2006/01/25 Patron: Anonymous Patron Elmstree Public Library</p>
<p>QuestionPoint displays the Full Question page for claiming the transcript. The page has two parts.</p> <p>The top part contains the question detail and a Claim button. The detail contains the patron information from the chat session.</p>	 <p>Full Question << 1 of 6 >> Return to List Print View</p> <p>Claim</p> <p>Question Detail</p> <p>Patron: Elie <enallom@yahoo.com> Received: 14:00 2006/02/01</p> <p>Question: [1291279] [Practice] Chat Transcript: What is California?</p> <p>IP Address: 132.174.21.205</p> <p>Referrer: http://inuvqa2.dev.oclc.org:9567/crs/servlet/org.oclc.ask.PatronChatForm</p> <p>Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)</p> <p>City: Dublin</p> <p>State: OH</p> <p>Zip Code: 43017</p>

Send a message to the patron

Send a message to the patron from the Full Question page.

The Full Question page has two parts. The top part contains the question detail with patron information from the chat request form. It also contains various action buttons, lists, and links. The patron field contains the patron's e-mail address as provided on the chat request form.

Tip: If the patron field does not contain a valid e-mail address, you cannot successfully send a message to the patron from this question, even if a valid address is included in the transcript. If you know the e-mail address, you can add a new question manually and include the address and information from this question in the new one. Then you can send your message or refer the followup to others from the new question. To do this, click the **Print View link at the top of this page to display this question's information in a separate window. Then click the **Add Question** tab above the Full Question to begin to add the new question manually.**

Full Question | [Return to List](#)
[Print View](#)

Answer Reject Assignment Add Note Add Descriptive Codes
-- Refer To --
-- Move To --

Question Detail

Patron: Elia <kanaltem@yahoo.com> **Status:** ?

Assigned: Elmstree Administrator (103) **Received:** 14:00 2006/02/01

Wait Time: 13 **Session Time:** 412

Question: [1293006] [Practice] Chat Transcript: What is California?

Descriptive Codes: Homework

IP Address: 132.174.21.205

Referrer: http://linuxq2.dev.oclc.org:9567/crs/servlet/org.oclc.ask.PatronChatForm

Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)

City: Dublin

State: OH

Zip Code: 43017

The bottom part of the page contains the question history and action buttons. The history contains the transcript of the chat session, librarian notes, and system notes about librarian or patron actions.

Question History

Patron:	[Practice] Chat Transcript: What is California?
14:00 2006/02/01	
Librarian 1:	That's a very basic question. Please tell me more about what you need.
14:01 2006/02/01	
Patron:	My son needs to write a general 500 word report with 2-5 pictures about California for his 4th grade class, emphasis on its history.
14:04 2006/02/01	
Librarian 1:	Ahh, for Mr. LaRue?
14:05 2006/02/01	
Patron:	That's him!
14:05 2006/02/01	
Librarian 1:	Did your son bring home the study guide?
14:06 2006/02/01	
Patron:	No!
14:06 2006/02/01	
Librarian 1:	I'll send it to you shortly by e-mail. OK?
14:06 2006/02/01	
Patron:	Terrific! Thanks!
14:07 2006/02/01	
Patron:	Patron ended chat session.
14:07 2006/02/01	
Librarian 1:	Note: Set Resolution: Followup By Patron's Library
14:07 2006/02/01	
Librarian 1:	Referred from: Chat Transcript to Shared Followup
14:07 2006/02/01	
Librarian 1:	Note: Set Description: Homework
14:07 2006/02/01	
Librarian 1:	Note: LaRue assignment folder
14:08 2006/02/01	
Librarian 1:	Claimed by: Elmstree Public Library(10957): Elmstree Administrator(100252840) From Shared Followup
14:19 2006/02/01	

Answer Reject Assignment Add Note Add Descriptive Codes

1 Click the **Answer** button (if the patron field contains a valid patron e-mail address.)



QuestionPoint displays the Answer Question page. The page has two parts.

The top part contains the work area with various boxes, buttons, and lists for preparing a message to the patron.

From this page, you can send two types of messages to a patron: an answer or a clarification request.

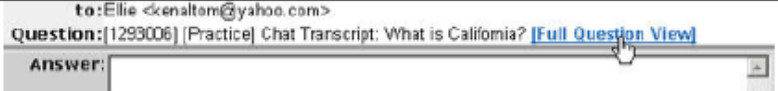
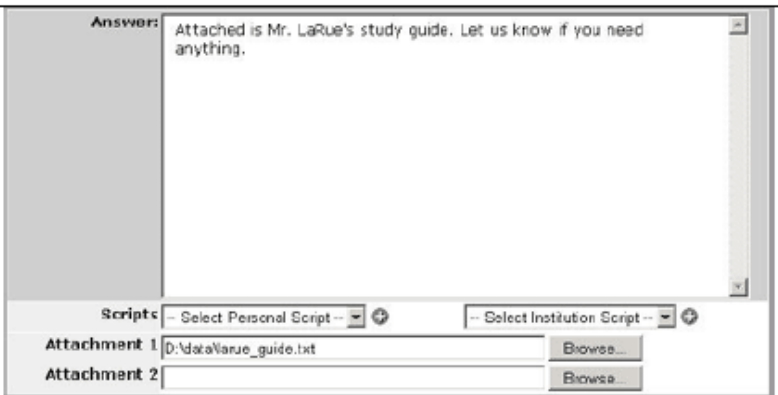





Send an answer if you believe that you have the information that the patron needs.

Request clarification if you need more information from the patron before you can prepare an answer.

Answer Question

The bottom part contains all the information from the Full Question page.

Question ID: 1293005	
Question:	[Practice] Chat Transcript: What is California?
Patron Name:	Ellie E-mail: kenaltom@yahoo.com
Currently Assigned to:	Elmstree Administrator At Elmstree Public Library
Wait Time:	13
Session Time:	412
Status:	?
Descriptive Codes:	Homework
IP Address:	132.174.21.205
Referer:	http://linuxqa2.dev.oclc.org:9567/crs/servlet/org.oclc.ask.PatronChatForm
Browser/OS:	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)
City:	Dublin
State:	OH
Zip Code:	43017
Patron:	[Practice] Chat Transcript: What is California? 14:00 2006/02/01
Librarian 1:	That's a very basic question. Please tell me more about what you need. 14:01 2006/02/01
Patron:	My son needs to write a general 500 word report with 25 pictures about California for his 4th grade class, emphasis on its history. 14:04 2006/02/01
Librarian 1:	Ahh, for Mr. LaRue? 14:05 2006/02/01
Patron:	That's him! 14:05 2006/02/01
Librarian 1:	Did your son bring home the study guide? 14:06 2006/02/01
Patron:	No! 14:06 2006/02/01
Librarian 1:	I'll send it to you shortly by e-mail. OK? 14:06 2006/02/01
Patron:	Terrific! Thanks! 14:07 2006/02/01
Patron:	Patron ended chat session. 14:07 2006/02/01
Librarian 1:	Note: Set Resolution: Followup By Patron's Library 14:07 2006/02/01
Librarian 1:	Referred from: Chat Transcript to Shared Followup 14:07 2006/02/01
Librarian 1:	Note: Set Description: Homework 14:07 2006/02/01
Librarian 1:	Note: LaRue assignment folder 14:08 2006/02/01
Librarian 1:	Claimed by: Elmstree Public Library(10957): Elmstree Administrator(100292840) From Shared Followup 14:19 2006/02/01

<p>2 Click the Full Question View link if you want to view all the information in a separate window while you work.</p>	 <p>to:Ellie <kenaltem@yahoo.com> Question: [1293006] [Practice] Chat Transcript: What is California? [Full Question View] Answer: [Empty text box]</p>
<p>3 Prepare your message: include text and insert scripts or attach files as needed.</p>	 <p>Answer: Attached is Mr. LaRue's study guide. Let us know if you need anything. Scripts: -- Select Personal Script -- + -- Select Institution Script -- + Attachment 1: D:\data\larue_guide.txt [Browse...] Attachment 2: [Browse...]</p>
<p>4 Click the Send Answer button to send an answer. The message is sent, the question status changes to answered , and the question is moved to the Answered Questions list.</p> <p>Or</p> <p>Click the Request Clarification button to send a clarification request. The message is sent, the question status changes to pending , and the question is moved to the Pending Questions list.</p> <p>When the patron responds to the clarification request:</p> <ul style="list-style-type: none"> • You receive an e-mail notice, • The response is added to the question, • The question status changes to new , and • The question is moved to your library's New Questions list and your My New Questions list for followup. 	 <p>Send Answer</p> <p>Or</p>  <p>Request Clarification</p>

Or, refer followup to another library or a subject-matter expert

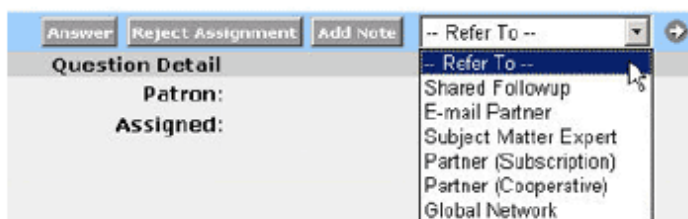
Referral steps

To refer followup to another library or a subject-matter expert:

- 1 Select a referral option in the Refer To drop-down list in the Full Question page and click the arrow.

Note: The figure below shows all referral options; some options may not be available to your library. Your library or group should provide guidance on which referral options you will use.

Full Question << 1 of 9 >> | [Return to List](#)



- 2 QuestionPoint displays the request form for the referral option selected.
- 3 Select a library or subject-matter expert to receive the request, provide any other needed information in the form, and send the request.
- 4 For your library, QuestionPoint changes the status of the question to Pending and moves it to the Pending Questions list and the Referred Questions list.

For the library or expert receiving the request, QuestionPoint changes the status of the question to New and places it in the New Questions list.

- 5 The library or expert receives the request and sends an answer to the patron.
- 6 QuestionPoint changes the status of the question to Answered and moves it to the Answered Questions list.

Referral options

The referral options shown in the Refer To drop-down list are described in the following table:

Option	Description	Availability
Shared Followup	Places the question in the Shared Followup Questions list for any library in your subscription group to claim	If your group uses full chat and the group administrator activates shared followup
E-mail Partner	Sends the request via e-mail to one of your personal subject-matter experts who does not have a QuestionPoint account	Yes, available to every library
Subject Matter Expert	Sends the request to one of the 24/7 Reference Cooperative's subject-matter experts.	If your library is a member of the 24/7 Reference Cooperative
Partner (Subscription)	Sends the request to a library or subject-matter expert in your subscription group.	If activated by administrators
Partner (Cooperative)	Sends the request to a library or subject-matter expert in your cooperative group.	If activated by administrators
Global Network	Sends the request to the Global Reference Network, which routes the request to a qualified library or organization.	If your library joined the Global Reference Network



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An Introduction to Statistical Reports

Who can view statistical reports?

In the Home module, librarians and administrators can view data on the combined activity of all QuestionPoint members in the QuestionPoint Usage Report. Also, librarians can view reports of their libraries' and their own QuestionPoint activity if their institution administrators permit this. In the Administration module, administrators can view reports of their groups', libraries', and librarians' QuestionPoint activity.

What kinds of statistical reports can administrators view?

- A variety of reports are available to institution and group administrators.
- Reports cover various levels of activity: a single librarian, a single library or institution, a group, all of QuestionPoint.
- Reports provide historical information and current status information.
- Reports cover many activities. For information about the fields in reports and the activities they cover, see Glossary: QuestionPoint statistical reports at http://www.questionpoint.org/crs/html/help/en/admin/ad_reports_glossary.html

What time periods do the history reports cover?

The history reports provide:

- Monthly data for the previous calendar year.
- Monthly data for the completed months of the current calendar year.
- Daily data for the previous month.
- Daily data for the completed days of the current month.
- Hourly data by month and by day, for some activities.

Why are reports Important?

- Quality control – The site supervisor can review patron sessions to determine whether they were handled by a local librarian or a librarian across the country!
- Performance standards – Librarians and supervisors can view “Hold Time” and “Service Time” for each librarian plus his average hold and service times. The reports function makes it easy to evaluate staff.
- Local usage – With reports, it is easy to see how many questions are being generated from your local patrons regardless of who serviced them. Are your local statistics low? Maybe you need to do more marketing!
- Technical difficulties – Since you can sort reports by “Resolution Codes,” it is easy to see how many calls are actually completed, how many need further follow up (QRC) and how many had technical difficulties. This is important because if patrons experience too many technical difficulties they are unlikely to use the service again.
- Surveys – You can view the completed surveys plus access a chart of how well you did in meeting your patrons' needs.
- Funding!!! – Reports give you the statistics you need for directors and local boards when you need to request money for future needs.

An Introduction to the Knowledge Base

What is a knowledge base (KB)?

A knowledge base (KB), as used in QuestionPoint, is a searchable database of selected, edited questions and answers. A KB makes the answer prepared for one patron available to serve other patrons.

Records containing questions and answers are added to one or more KBs. KB records are edited, activated, indexed, and made available for searching and viewing.

QuestionPoint provides two types of KBs:

- The Global KB
- Local KBs

What is the Global KB?

The Global KB is shared by all libraries that participate in QuestionPoint. It is a cooperatively built resource for reference support and discovery work. All QuestionPoint librarians can search the Global KB in the Knowledge Base module.

How the Global KB is built:

1. Answers to questions referred to the Global Reference Network or to a virtual-group partner are automatically added to the Global KB as inactive records. In addition, libraries can add other questions and answers as inactive records.
2. Editors of the Global KB review each inactive record to decide whether or not it is appropriate for the Global KB.
3. If it is appropriate, the editor follows guidelines to remove references to particular patrons or librarians and to correct errors in grammar and spelling while preserving the integrity of the information.
4. Then the editor activates the record to make it available for searching and viewing by all QuestionPoint librarians. The editor may also mark the record for public access so patrons may use it.

What is a local KB?

QuestionPoint has many local KBs. Each one is controlled by a library or group of libraries. Only the librarians in the controlling library or group can search a local KB.

What can a local KB do?

A local KB can:

- Grow into a valuable, time-saving reference resource
- Help librarians work more efficiently
- Help patrons receive faster and better reference service

A local KB can include:

- Records added from online questions, chat questions, walk-up questions, and telephone questions
- Specialized local information added through an entry form

How is a local KB implemented?

To implement a local KB:

1. The group or library sets up its local KB.
2. The group or library decides:
 - Which types of questions and answers to include for librarians and which (if any) to make available for public access as well.
 - Who will be its KB editors
 - What its editors will do and what guidelines they will follow
3. Librarians add questions and answers as inactive records.
4. KB editors activate records to make them available for searching.

For more information on Knowledge Bases, visit:

Search or browse KBs: contents of help

http://www.questionpoint.org/crs/html/help/en/ask/ask_process_kbfindmenu.html

Publish questions and answers in KBs: contents of help

http://www.questionpoint.org/crs/html/help/en/ask/ask_publish_menu.html

Ask a Librarian and KB: Contents of Help

http://www.questionpoint.org/crs/html/help/en/ask/ask_contents.html

ASK US 24/7

POLICIES AND PROCEDURES

Ask Us 24/7 Mission Statement

No patron is turned away based on his/her question or library affiliation

Ask Us 24/7 Quality Statement

AskUs 24/7 librarians will adhere to:

- *24/7 Reference Collaborative Polices and Procedures*
http://www.questionpoint.org/ordering/cooperative_guidelines_247rev3.htm
- *LC QuestionPoint User Guidelines on Quality Assessment and Establishing Quality Reference Services* http://www.loc.gov/rr/digiref/QP_best_practices.pdf
- *RUSA Guidelines for Behavioral Performance of Reference and Information Service Providers*
<http://www.ala.org/ala/rusa/rusaprotools/referenceguide/guidelinesbehavioral.htm>
- *Ask Us 24/7 Reference Session Evaluation Criteria Checklist benchmarks.*
http://www.wnylrc.org/vreferen/CriteriaChecklistupdated8_06.pdf

Through rigorous quality control we train Ask Us 24/7 Librarians to consistently apply best practices to serve as an example of outstanding virtual reference work, eventually improving the overall quality of the 24/7 QuestionPoint service.

Ask Us 24/7 Policies and Procedures

1. Notification and Staffing

<p>Policy #1A Notifying librarians who have not signed on for their shift</p>	<p>The policy is: Call the person (use the phone tree) who is supposed to be on the next shift if they have not signed on. As of November 2006, this policy is no longer necessary. Make a phone call to the person scheduled next, and if no one answers, do not stay on.</p>
<p>Policy # 1B Notifying the entire group of librarians who call in sick on the day of their virtual shifts.</p>	<p>The policy is: Libraries with more than one staff member participating will fill in first from their staff members and then put out to the list (wnyvrp@wnylrc.org) if they need to. One-person libraries who are unable to email the list from home will call the WNYLRC VR Program Coordinator to report they are out sick and need someone to cover their shift and the WNYLRC VR Program Coordinator will put it out to the local VR list. If the WNYLRC VR Program Coordinator does not answer or return your phone call within a short period of time, call another person on the phone tree. However, it is encouraged that a copy of the phone tree and email list URL be available from home. Please see policy # 1E below.</p>
<p>Policy # 1C Notifying and staffing desk for Vacation Days</p>	<p>The policy is: Libraries with more than one staff member participating will fill in first from their own library staff members and then put out to the list (wnyvrp@wnylrc.org) if they need to. One-person libraries will put out to the list well in advance (try three weeks or more) to get a replacement.</p>
<p>Policy # 1D Notifying and staffing desk for weather</p>	<p>The policy is:</p> <ul style="list-style-type: none"> • Contact a library in our service by phone to see if anyone may be open who can cover your hours.

related closings	<ul style="list-style-type: none"> • Send a message to the list (or ask the library you contact to send the message) to let them know that your library is closed due to weather and needs coverage. • Email Victor to let them know of weather related closings and that you may not have firm coverage because you have no way of knowing who will be affected by the weather or who will be able to cover since your library is closed. Lake effect patterns can make it difficult to determine who is getting slammed. • Victor's email: daloriv@oclc.org • Phone: 310-391-7444 or toll free: 877-247-733 • When a shift is missed due to the <u>closing</u> of the library for whatever reason or downed Internet access, the shift does not need to be made up. Notify the WNYLRC VR Coordinator of the closure when possible.
Policy # 1E Missed Shift – Not Scheduled	<p>The policy is: If the library is <u>open</u> on the day of the missed shift, 24/7 requires that you make up the time. Shifts should be made up as soon as possible, but can be done within 4 weeks of the missed date.</p> <p>To choose a make-up time:</p> <ul style="list-style-type: none"> • Access the public schedule at: http://www.247ref.org/schedule/libschedule.cfm or the academic schedule at: http://www.247ref.org/academicschedule/libschedule.cfm • Review the schedule to find a slot where the coverage is thin, (3 or fewer libraries listed) • Once you find a time that you can cover, e-mail Victor D'Altorio <u>and</u> the WNYLRC VR Coordinator with your slot so that they can update the schedules. Victor's email: daloriv@oclc.org <p style="text-align: center;">Remember 24/7 works off of Pacific Time! All time references should be done as Pacific Time.</p> <ul style="list-style-type: none"> • Most of the "thin" slots will occur quite early or rather late in the day. The coverage from 8am to 6pm Pacific Time (11am -9pm EST) is fairly solid. • <u>Contact Information:</u> Victor D'Altorio daloriv@oclc.org <p style="text-align: center;">Laura Osterhout losterhout@wnylrc.org</p> <ul style="list-style-type: none"> • When a shift is missed due to the <u>closing</u> of the library, for whatever reason, it does not need to be made up.

2. Follow-up Questions

Policy # 2A Follow-up and question referral	<p>Ann Tenglund (St. Bonaventure University) is responsible for answering and referring questions that are coded for follow-up from our region. Here is the process she has outlined:</p> <p>1. Questions that are coded for follow-up from our region come into our shared follow-up folder in QuestionPoint for all of WNYLRC. Questions that originated from a member library's page (i.e. patron entered via St. Bonaventure's page, SUNY Fredonia's page, etc.) would show up in the New folder in the library's My QuestionPoint page. For questions that are referred from the Ask Us 24/7 generic URL (www.askus247.org), Ann will send an email to the library the patron appears to be associated with or refer it to a subject specialist if necessary. Even though It seems questions requiring follow-up by a specific library should automatically show up in that library's question list, that does not always happen, so when Ann finds a question like this in the shared follow-up folder, she refers it via QuestionPoint's "Partner, Subscription" list, or for those libraries that are</p>
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	<p>not set up yet for that, via QuestionPoint's "refer via e-mail" capability.</p> <p>Example:</p> <p>Question: [1303771] Chat Transcript: I am trying to print an article from the blackboard as I am doing HSA 615 and I am not able to. Can you help. thanks ID: tfs683021 REFERRER: http://library.dyc.edu/databases.html BROWSER: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; CWPORTAL;.NET CLR 1.1.4322) IPADDRESS: 142.46.224.156 Other: INIT_AGENT = Faulkner Librarian Dena ZIPCODE = L6R-1K6 LIBRARY = D'Youville College USER = doreen Kerridge ATTENDEESTATUS = AUDIENCEMEMBER MAIL = kerridge_d@hotmail.com VIRTCATEGORY = DYOUVILLE CONFIRM_EMAIL = kerridge_d@hotmail.</p> <p>2. Questions that are referred to a library via Partner, Subscription show up in the library's question lists as a new question, so it is obvious that something new has come in. The library can then follow up on that question like they would any other question in their lists. If the question was referred to the library via e-mail, it would obviously come in their e-mail account--Ann sends these types of questions to the reference contact shown in the policy pages.</p> <p>3. If the question came in through the generic www.askus247.org (shows as Virtual Category - WNYLR), then Ann claims and answers those, unless it is a subject specialist question, and in those cases, Ann refers the questions via e-mail. For example, if it was a local history question, Ann would refer it via QuestionPoint e-mail to Laura at the Buffalo and Erie County Historical Society.</p>
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3. Quality of Service

<p>Policy # 3A Greeting the patron</p>	<p>The policy is:</p> <ul style="list-style-type: none"> • Use the welcome script to respond quickly and efficiently when a patron comes online. • Read the question carefully and indicate to the patron your interest in the patron's query. • Personalize the session by using the person's first name if indicated. • Read the patron information in the upper left of the librarian's screen. Notice what web page the patron came into the service from. Look at the patron's email address if given to indicate whether the patron is a college student.
<p>Policy # 3B Conducting the Reference Interview</p>	<p>The policy is:</p> <ul style="list-style-type: none"> • Rely on your finely honed reference skills that you use at the traditional reference desk. Clarify what the patron is requesting. Be succinct, but word friendly. • Use question negotiation to ensure you understand what type of information the patron needs. Use open-ended questions when appropriate.
<p>Policy # 3C Keeping the patron in the session</p>	<p>The policy is:</p> <ul style="list-style-type: none"> • Remember to inform the patron of your progress in the search for information to answer the patron's question. Use the scripted messages as needed – let the

	<p>patron know what you are doing: still searching, checking authority, escorting, sending a link, etc.</p> <ul style="list-style-type: none"> • If the question appears to be academic in nature, ask the patron if this is for a college or high school assignment. • Use the 60-second rule. This is the amount of time between your last and next response while conducting the search. • Refrain from using library jargon. Responses should be clear, easy to read, and free of personal opinion. • Ask the patron if there is a deadline for this information.
Policy # 3D Providing the information	<p>The policy is:</p> <ul style="list-style-type: none"> • Provide the answer/information first. Send the URL link where you located the information to answer the patron's question. Then ask if the patron wants to see how you located the information and answer of his/her question. • Use the Policy Pages in QuestionPoint to answer circulation questions. A policy page link should automatically appear when a patron comes in from a participating library's home page. Local libraries should have this type of information prepared in scripts for your use as well. • Give patron time to determine if the information found is satisfactory. • Cite the source of the information. • Ask the patron if they need more sources. • Recognize if the question needs more follow-up and should be referred to a subject specialist or another library. • Limit when and why you ask the patron to call his or her library. Instead, refer the patron for "Follow Up by Me" by selecting the appropriate Resolution code at the end of the session. You can follow-up later by calling the library in question and getting the information yourself to send the patron via email is preferable. The patron knows that you have taken his question seriously and is willing to go the extra step for them. • If you need to refer them to another library, provide them with phone numbers, addresses, hours, or contacts when available. Otherwise you are directing them to a phone book to do it on their own. Make it as easy for the patron as possible.
Policy # 3E Closing the session	<p>The policy is:</p> <ul style="list-style-type: none"> • Ask the patron if the information found answered his/her question to his satisfaction. Use the scripts if needed. Remember to personalize when appropriate. • Ask the patron if he/she has other questions they would like assistance with. • Using the closing library's script. Encourage the patron to use the service again and thank them for coming.

4. Responsibilities of Participating Libraries

Policy # 4A Notifying the group of scheduling conflicts	<p>The policy is:</p> <p>Advance notice is critical to the success of the project. As much advanced notice should be given in order to ensure a replacement. Each virtual librarian is responsible for covering his/her shifts. Work within your institution first, then request coverage through the local consortium (Ask Us 24/7) using the listserv (wnyvvp@wnylrc.org) and then out to the larger consortium through Victor at daloriv@oclc.org See section 1 A – 1E.</p>
Policy # 4B Scripted messages	<p>The policy is:</p> <ul style="list-style-type: none"> • Evaluate your library's global scripts on a regular basis. If other librarians are answering questions for your students, please make sure they are provided with accurate information to give to the patron. • Create your own scripted messages that meet your needs when working with patrons. Messages should keep in mind the quality statements listed above.
Policy # 4C Service to the nation-	<p>The policy is:</p>

wide consortium	<ul style="list-style-type: none"> As part of the nationwide consortium, it is imperative that Ask Us 24/7 be good neighbors by logging in on time or even a few minutes early to accommodate the inconsistencies in clocks and other time keepers. Keeping instant messaging on throughout the day may be a good thing when WNY is not monitoring our own categories (i.e. Friday) in case a librarian outside of WNY who is and needs to transfer a call due to the local nature of the inquiry.
Notification of policy or script changes	<p>The policy is: <i>(This policy is currently under revision)</i></p> <p>Each participating library is responsible for periodically checking the scripts and library policy as posted on the 24/7 Collaborative Library Policy page.</p> <ul style="list-style-type: none"> For changes to scripts: send an email indicating the change to Laura Osterhout at WNYLRC. An MS Word document is preferred. Laura will make the change to the global scripts. For changes to Library Policy Page: Access your QuestionPoint profile. Instructions for editing your profile can be found at: http://www.247ref.org/QP_Instructions_4_Institution_Admins_files/frame.htm

5. Privileges of Libraries Participating in the Service

Policy # 5A Linking to the service	<p>The policy is:</p> <p>Participating libraries donate a minimum of three hours on the virtual desk per week. Benefits of participation:</p> <ul style="list-style-type: none"> - Participating libraries can directly link to “Ask Us 24/7” from their institutions’ websites using the service logo and links provided by the cooperative. - Participating libraries receive free ongoing training and free promotional materials to publicize the service to their patrons. - Use of the Meeting Room feature for scheduled meetings, such as instruction to groups of students or patrons, or for meeting colleagues online in a group session. - The opportunity to work cooperatively with other librarians in the region to provide state-of-the-art virtual reference services to all patrons. <p>Non-participating libraries are not eligible to use the “Ask Us 24/7” service logo or name anywhere on their website. They may not link directly into the service. They may, however, direct their patrons to the service through the WNYLRC website, using the words, “WNYLRC’s <i>Virtual Reference Service</i>” and providing a link to the following page: http://www.wnylrc.org/vreferen/index.htm. Non-participating libraries that utilize the WNY 24/7 virtual reference service are encouraged to join the cooperative.</p>
Policy # 5B Publicity	Libraries are encouraged to promote the service through various channels available to them using guidelines established for logo placement and text. Sample copies of press releases will be given to participating libraries.
Policy # 5C Promotional materials	Participating libraries will receive promotional materials at no cost or at no additional cost. These materials may include but are not limited to: posters, bookmarks, table cards, pencils, and more.