MANUAL FOR NEW LIBRARIES

Created in 2014 by Nono Burling

Thanks to Jaclyn McKewan of Ask Us NY for her excellent and inspirational example.

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Setting up your Account

Set up your Profile http://bit.ly/1ye8Gkx (links to a video demo)

From the drop down menu in the upper left select *Profile*
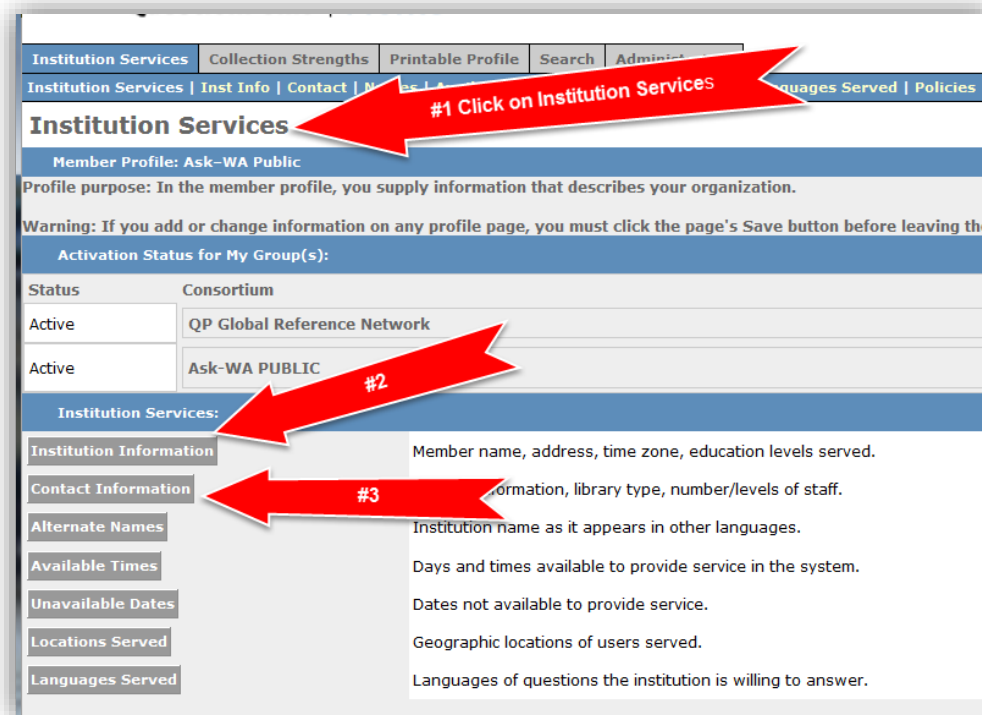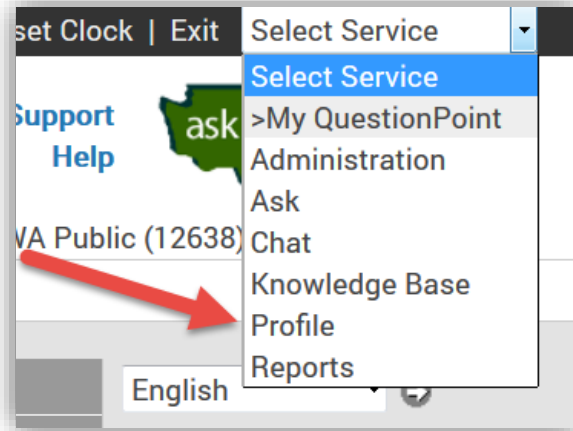
#1 Click on the *Institution Services* Tab

#2 Click the *Institution Information* button and enter the following information: Institution Name, Language, all of the Address fields, County, Time Zone and Daylight Saving. Click on *Save*

#3 Click the *Contact Information* button and complete at least the first 7 fields (through phone/fax) Click on *Save*

Policy Pages

Your policy page is the most important part of your set up. It is the primary tool for Cooperative librarians to provide good service to patrons from across the Cooperative. The policy page is automatically linked to the website the patron uses to ask the question. Thus, if a patron enters through Library ABC's site, then the policy page for Library ABC will be linked in the chat monitor. Policy pages are password-protected and can only be accessed once a librarian logs into QuestionPoint. This is the information which allows librarians at other institutions to help your patrons.

While you may not have something to put in every field be as complete as possible and be sure to keep this page updated. Checking in regularly to be sure all links work and any changes that may have occurred in your library is essential to providing good service. Only the 9 digit Administrator Account can edit the policy page.

Before creating your own, it is a good idea to look at policy pages already done by other libraries. From the **Home** screen on the lower left scroll down the page to the bottom and click Search Policy Pages
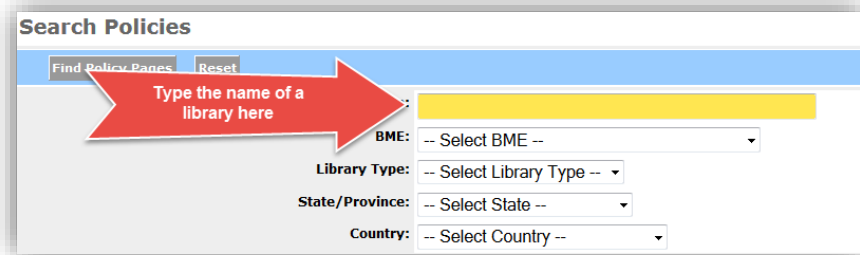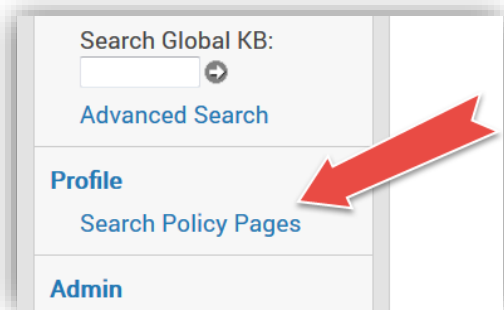
For Public Libraries a good example might be Seattle Public Library

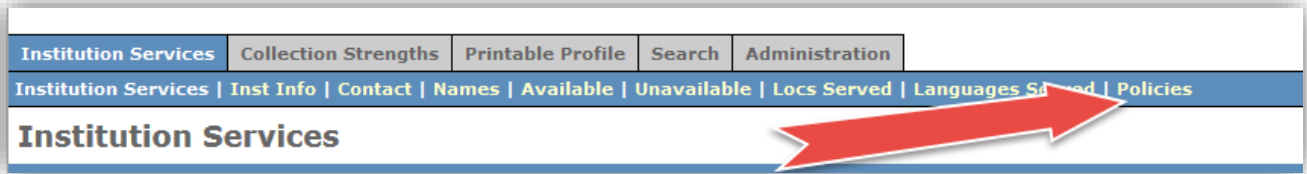For Academics take a look at Highline Community College.

The key is to make it clear and easy to navigate quickly. Link where ever possible and/or provide blocks of text that can be copy and pasted for example:

Fill out the policy page for your library. http://bit.ly/1r7ugol (links to a video demo)

Go to *Profile -- Institution Services -- Policies.*

Follow the guidelines listed on the QuestionPoint wiki. http://bit.ly/1unVlJk

Remember every field does not need to be filled in. Also please be aware that unless you use HTML code, everything you type into these fields will appear as plain text. See the section on HTML to learn the basics to improve your policy page.

Change the status (at top) to VISIBLE and then hit SUBMIT.

You will receive an email from OCLC staff once your policy page has been approved, or if any changes are necessary.

Your library's account will not be added to the global cooperative until your policy page has been completed, submitted and approved.

HTML for Policy Pages

The fields in the policy page do not recognize the use of the "enter" key. No matter how many hit it the text will run together without line breaks.

Here is a chart of some basic HTML tags to help you format your text.

Format	Code	How it looks
Italics	<i>text to be italic<u/>	*text to be italic*
Bold	text to be bold	**text to be bold**
Underline	<u> text to be underlined </u>	<u>text to be underlined</u>
Line break	 	
Double line break (blank line)	 	
Hot link text to a URL	text to link	[Google]()
Hot link a URL	You can hot link a URL by enclosing it in angle brackets. *For example:* <http://www.google.com>.	http://www.google.com
Bulleted List	To create a bulleted list start with the <u> tag, Then surround each list item with <li and *For example:* 10am -8pm Mon-Thur 10am-6pm Fri - Sat 12pm-6pm Sun	• 10am -8pm Mon-Thur • 10am-6pm Fri - Sat • 12pm-6pm Sun

EXAMPLE WITHOUT HTML CODES

The field as it is entered:

Databases:

Memorial library has 25 online databases available through the Internet using your library card. http://www.yourlibrary.org/databases

The field as it appears in the policy page:

Databases:
Memorial library has 25 online databases available through the Internet using your library card. http://www.yourlibrary.org/databases

The field as it is entered:

Databases:

Memorial library has

25 online databases
available through the Internet
using your library card.

<http://www.yourlibrary.org/databases>

The field as it appears in the policy page:

Databases:
Memorial library has 25 online databases
available through the Internet
using your library card.

http://www.yourlibrary.org/databases

[Linking to the Chat Service](http://bit.ly/VdwWH5)   http://bit.ly/VdwWH5 (links to a video demo)

Once your policy page has been approved you will be able to access links to your library's portal.

The chat is hosted on the QuestionPoint website so all you have to do is provide the link on your library's page (see **Promoting the Service**)

There are three different possible ways to access your library's chat service.

1. Normal "Chat" which is ADA compliant
2. The Viewport chat which allows your patron to have a live webpage beside the chat window
3. The Qwidget, a small widget that can be placed at point of need anywhere you choose to place it.

The links are found from the Administration Module found on the drop down menu of the homepage
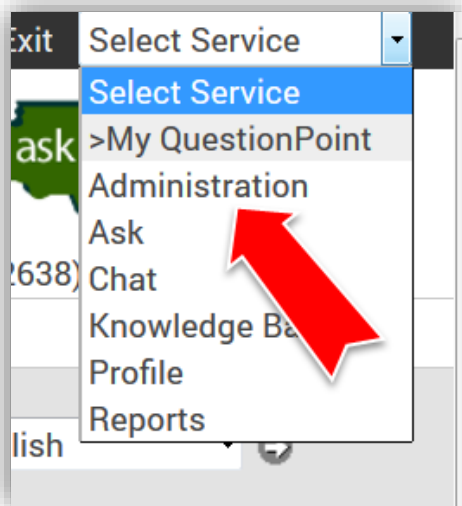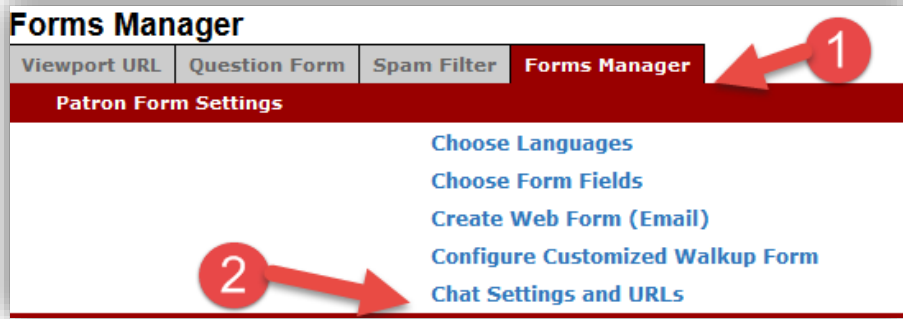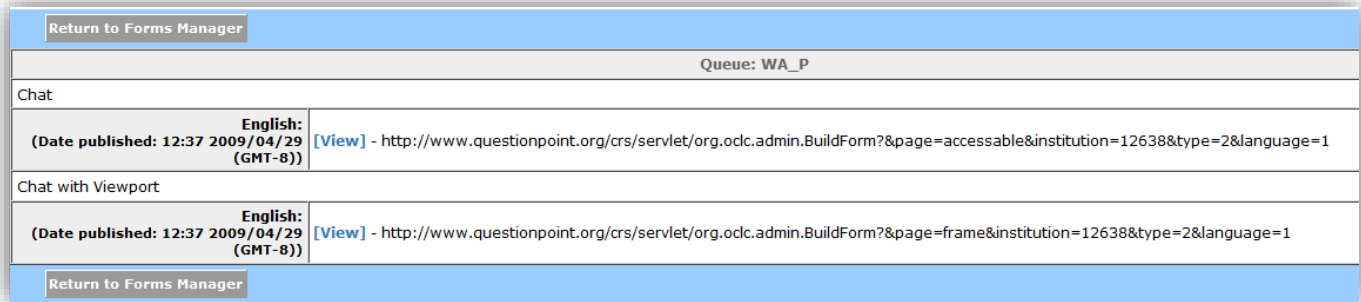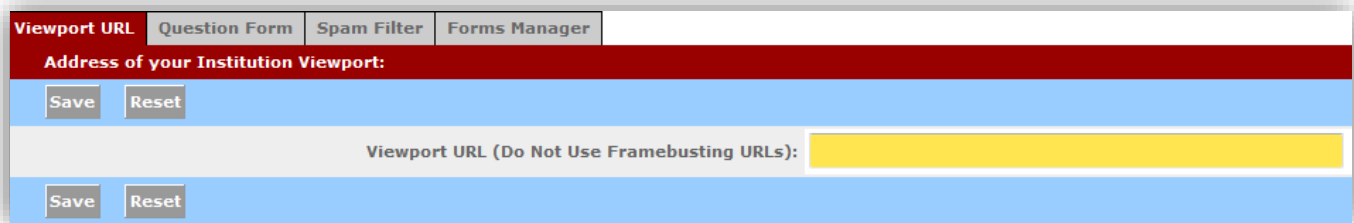

Click on Forms
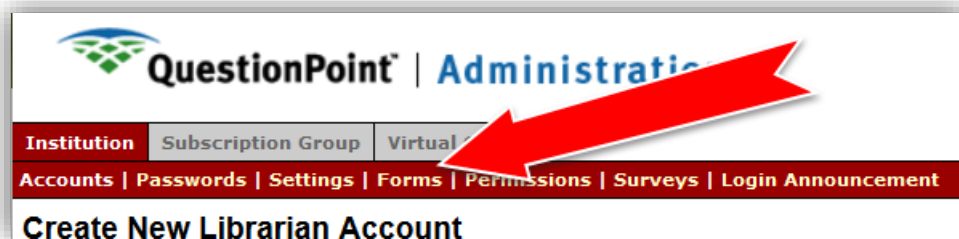
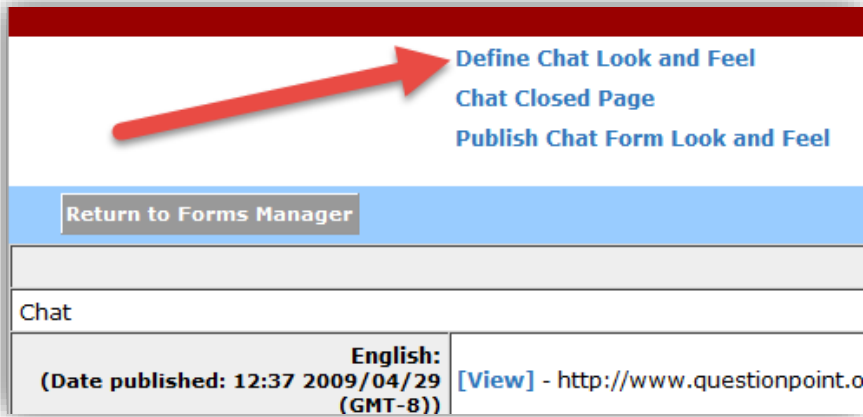Then *Forms Manager* and *Chat Settings and URLS*

The first URL is the ADA compliant form. The second is not ADA-compliant, but includes your viewport. If you click on *View* you can see what each page looks like.
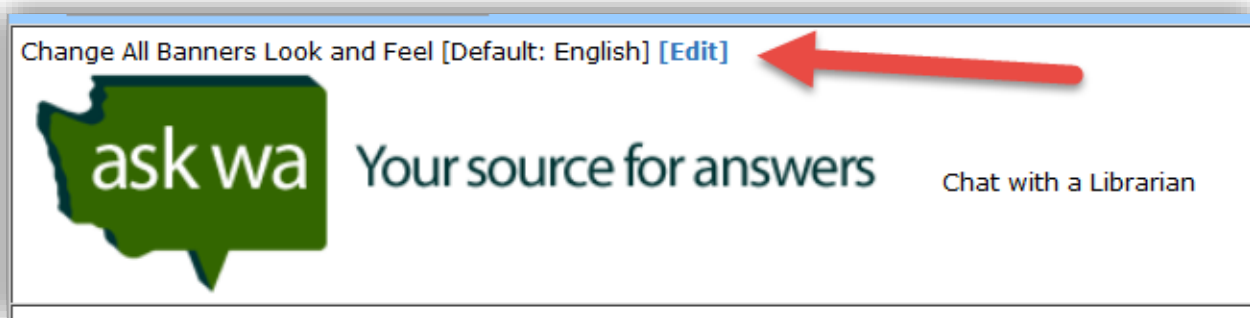

If you chose to use the viewport you can set the opening page to any website- many libraries choose to link to their own homepage. Return to the tab that says Viewport URL, paste in the URL you wish to show and click *Save*. When you return to the Chat with Viewport you will see how it will appear to your patrons.

Another way to customize your page is through *Define Chat Look and Feel* which allows you to select an image for your chat form. This is found on the same page as the URLs to the forms.

Define Chat Look and Feel
Chat Closed Page
Publish Chat Form Look and Feel

Return to Forms Manager

Chat

English:
(Date published: 12:37 2009/04/29
(GMT-8))
[View] - http://www.questionpoint.o

If you click on that link you will see that the standard Banner is shown. Click on *Edit*

Change All Banners Look and Feel [Default: English] [Edit]

ask wa Your source for answers   Chat with a Librarian

You can change the header to represent your library if you wish. (Often if you right click on your library's header or a libguide header you can get a URL that will work.) Fill out the form and click *Save*. You must return to the *Chat settings and URLs* page and click on *Publish Chat Form Look and Feel* or the changes will not be saved.

Define Chat Look and Feel
Chat Closed Page
Publish Chat Form Look and Feel

glish:
4/29 [View] - http://www.questionpoint.org/crs/s
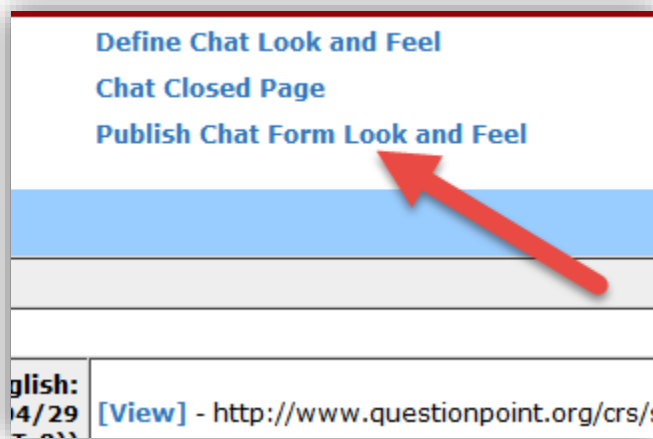
The third access point is the **Qwidget.** One of the benefits of the Qwidget is that the patron does not leave the page. Also you can embed it all over the place especially at point of need. For example Seattle Public library has it set so that if a catalog search returns no hits they patron sees a qwidget so has the opportunity to chat with a librarian to help them create a better search.

You begin the same way *Administration> Forms> Forms Manager*

But then click on *Create Qwidget>Submit.* At this point you have the opportunity to define how you want your qwidget to look. You can select colors, size, customize the messages you want your patrons to see and whether to require an email address for chat. I recommend at the *very least* that you opt to "Nudge patron to enter email address". If they don't leave an email address they will not receive the transcript and you will not be able to follow up with them with more information. But this is a library specific choice. Once you have made all your selections you click on *Submit* and then you copy the embed code from the box under the widget. You can then place the chat box anywhere you wish. Here is a video that will demonstrate the steps. http://bit.ly/1qT2FVZ
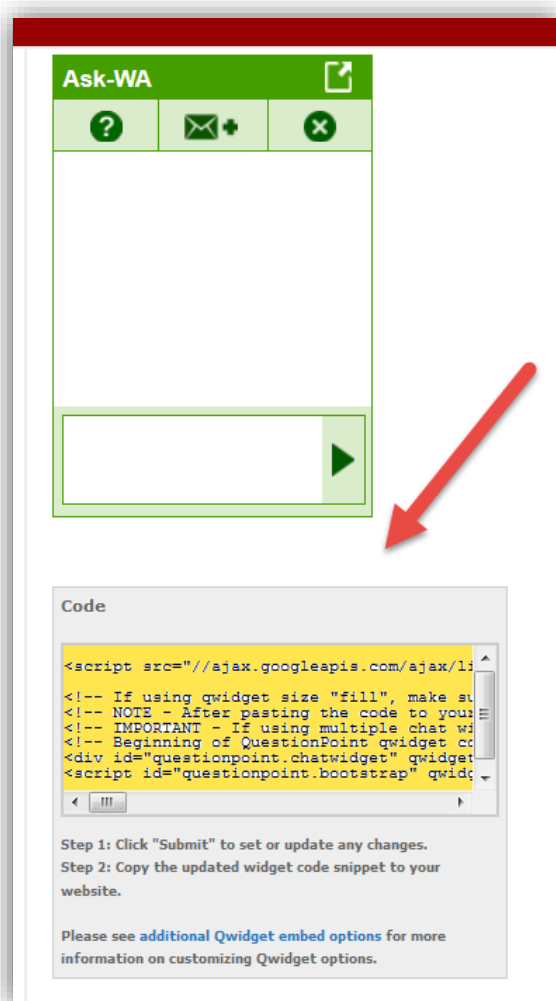
[Adding Librarian Accounts](http://bit.ly/1sRVCRy)   http://bit.ly/1sRVCRy (links to a video demo)

In QuestionPoint, go to **Administration** > **Institution** > **Accounts** > **Create Account**.

1. Enter the librarian's name as you want it to appear to librarians and administrators in the QuestionPoint interface
2. Enter the librarian's email address
3. Enter the screen name for the librarian as you want it to appear to patrons who chat with the librarian. Select account privileges. The screen name should contain a personal name (it does not have to be the librarian's actual name) so that the patron will know he is talking to an actual person)
4. I recommend making all the librarians "Ask Administrators". This does NOT give them the full permissions for things like editing the Policy Page, but it allows them to access statistical data, assign questions to others in your institution, and to review transcripts of chat sessions and answered questions.
5. Select type Global if the librarian will monitor QuestionPoint chat queues.
6. Click **Submit**. Repeat steps 1–6 for each librarian account that you want to create

Join the "Washington State QuestionPoint" Virtual Group

http://bit.ly/1nWXiDT (links to a video demo)

Before you can join the Washington coop group, you need to activate your profile in the QP Global Reference Network. You may do this in QuestionPoint under "Profile -- Institution Services." View the QuestionPoint help file to find out what information you need to provide to join the Global network.
http://www.questionpoint.org/crs/html/help/en/profile/pr_gen_taskneededinfo.html#BABIHJBH

Your profile will be reviewed and you will be notified when you are activated in the QP Global Reference Network group.

Once you are active in the Global network, you will see a new tab in the "Admin" module labelled *Virtual Groups* (#1) click on the tab, and select *Join a Group* (#2).

A search for "Washington" will display the "Washington State QuestionPoint" group on top of the list of results. Select the "Join this group" link to join the virtual group.

Once you are activated as a member of this group, you will see a new referral option for your questions, which will allow you to refer questions to (and have questions referred from) other libraries cooperating in Washington State.

[Setting Your Email Addresses](http://bit.ly/1vRSh9x) ………http://bit.ly/1vRSh9x (links to a video demo)

From the Administration Module click on *Settings*

1. The first highlighted box is the address for libraries that use QuestionPoint as their email program. This address is what that the patron will see as the sender of the email.

If the chatting librarian does not feel that they have been able to fully answer a question they have the option of marking it as "Follow up by Patron's library". This will instantly trigger an email informing the library that there is a question needing their assistance.

2. The second box is where this email will be sent. It is very important to set this email to a generic email address that many people can access. If it goes to a personal address and that person is say on vacation that question may not be intercepted for a long time.

Patron Replies to Transcript

3. After a chat if they provided an email address the patron will receive a copy of the transcript. When you enable the Reply-To Messages function (#3) the patron can reply via email.

4. Please choose yes, it will help later with statistics gathering.

Optional tasks

Survey:…………………………http://bit.ly/1t7DNhr   (links to a video demo)

You have the option to create a survey that will pop-up on your patrons screen. This is a good way to see how the service is working for your patrons. QuestionPoint makes it easy to create a survey. Again from the Administration Module select *Surveys>Survey Form*

Chat Session (#1) provides the survey option after every chat. Ask Answers (#2) is if you use QuestionPoint as your email provider. Be sure and choose *Internal Chat*. You can chose from a long list of questions. I recommend only choosing a few, no more than six, or people will be unlikely to fill them out.

Descriptive codes:………………http://bit.ly/1l9djfB   (links to a video demo)

If you would like to keep track of what kinds of questions are being asked you have the ability to add a descriptive code to every question when it is closed. From the Administration Module select *Settings>Descriptive Codes> Build Descriptive Codes List*
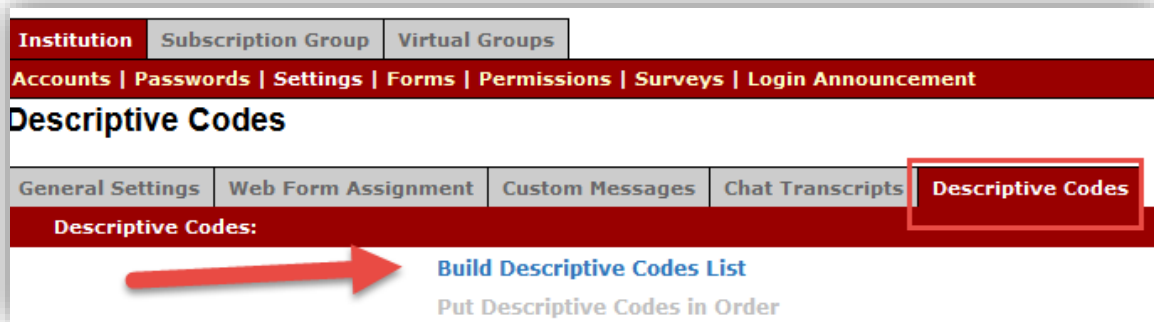
There is a fairly exhaustive list of descriptions. Click the ones you would like to track and then *Add*. You can also enter a custom descriptive code
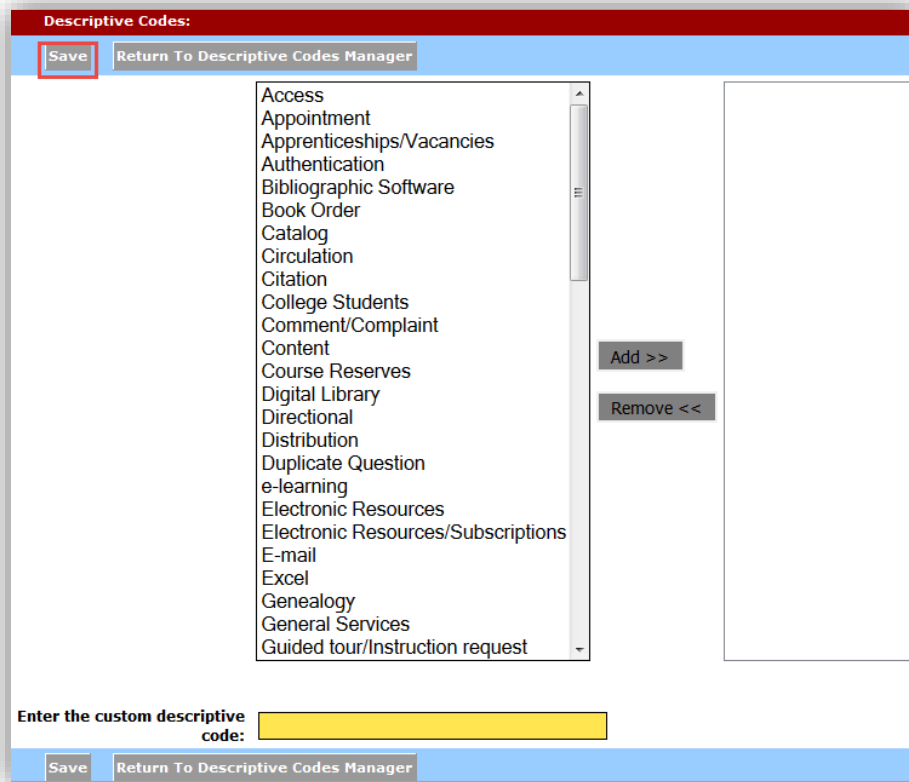
When you are finished click on the *Save* button and when you go to add descriptive codes you will only see your chosen items.

Personalizing your Profile

[Adding Scripts](http://bit.ly/1pJ2rVi)   **http://bit.ly/1pJ2rVi**   (links to a video demo)

Scripts are a quick easy way to save typing. Many of the questions that we ask are used in many chat interactions. To save time it is possible to create scripts. The QuestionPoint wiki has a collection of scripts (http://bit.ly/1vbwZmV) submitted by librarians which can give you an idea of how they might be used. Scripts are sorted alpha/numerically with numbers at the top so you might want to number your scripts as well as name them for easy retrieval. You should automatically have three scripts, Welcome, Still Looking and Goodbye (Ask WA) However if you want to create your own scripts here is how you would do it.

After logging in from the drop down menu in   the upper right click on *Ask*
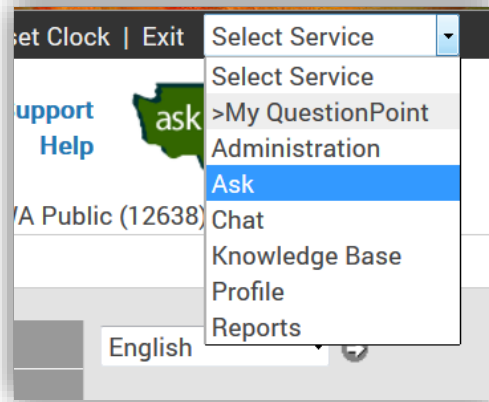
Then click on *Settings > My scripts*
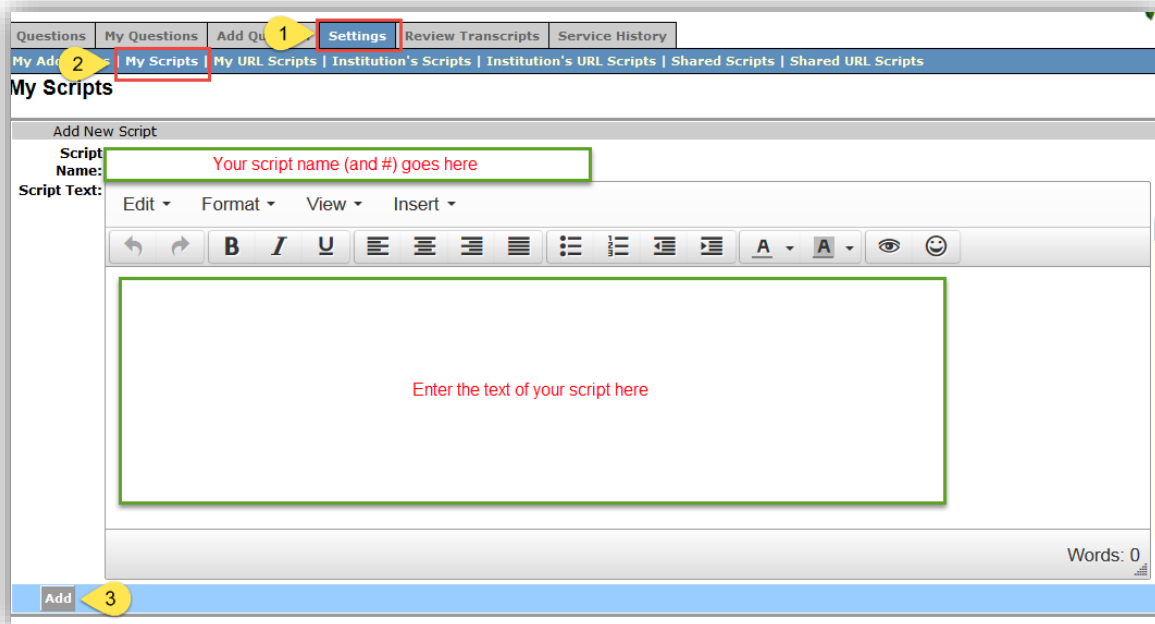
When you are done click on Add and it will turn up in your list of scripts the next time you chat. If you have frequently used URLs you can do the same with *My URL Scripts*. Institution Administrators can add scripts for all the librarians and individual librarians can add scripts only they will see.

Daily Maintenance Tasks

Following up questions

When a question from one of your patrons is coded as "Follow up by Patron's Library" it is categorized as a new question. If you set a follow up email you will also receive an email letting you know that a question needs attention.

The first person on in the morning should check messages that have come in overnight or on the weekend. Click on "Active" and then read through them, see if any need following up. Even if they are marked as "Answered" sometimes you, knowing your own resources may be able to add more to the answer.

New shows the questions that have come in that have not been looked at.

"My Questions" are questions unique to the librarian who is logged into the account. "Question Lists" are questions specifically associated with the library and all librarians at that library can access these questions.

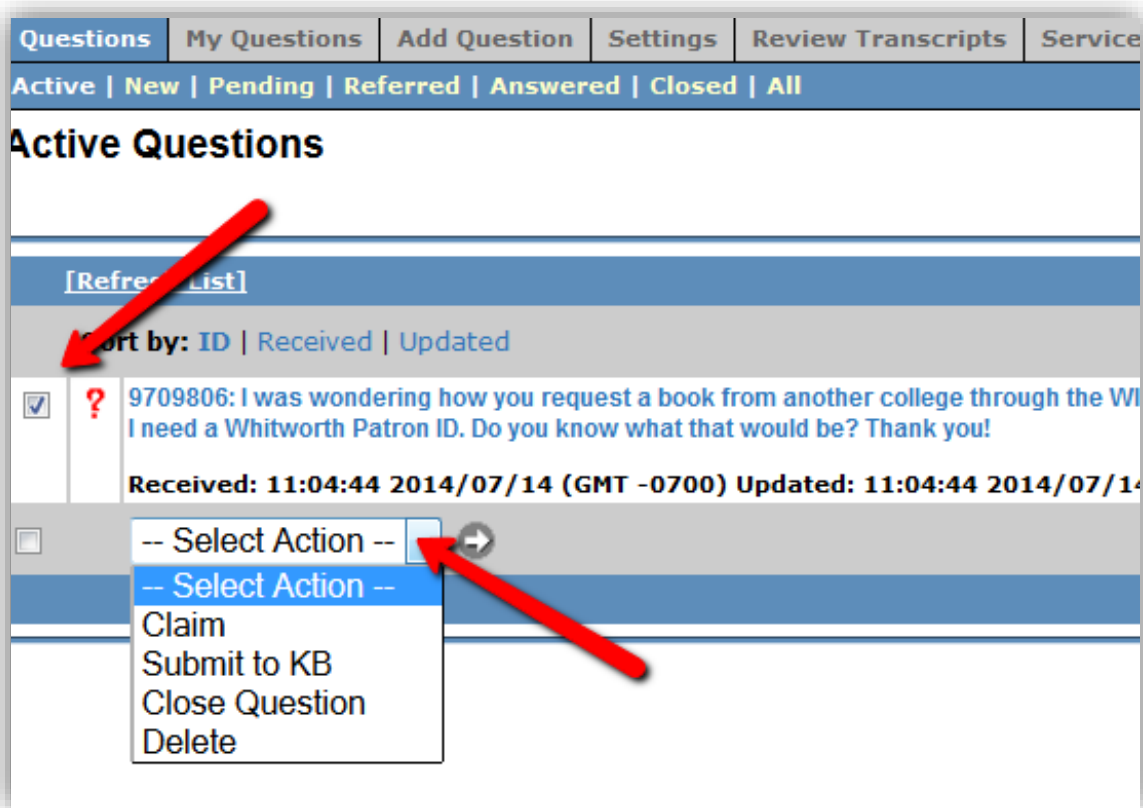If the patron provided an email address #1 you can follow up with more information.

Click on Answer #2 to respond. You can include up to four attachments in your response.

#3 allows you to add Descriptive Codes if you desire.

#4 is for adding a note. For example if you replied to the person via your desk email you can add a note here so that other librarians will know that the question has been completed.

Closing questions

After you have reviewed the questions and you feel it has been adequately answered you need to close the question. Be sure to check the box before selecting *Close Question* from the drop down menu. You can close multiple questions at once.

Quality Control- both good and bad

Have you encountered a transcript that you believe was handled really well and would like to send praise? Or maybe there is one that you believe could have been handles better, this is how you respond.

Once a question has been closed you have the opportunity to respond via Quality Control. From the Ask Module click on Review Transcripts and then select the session.

Once you open the question you will see a *Quality Control* button. By clicking there you have to opportunity to send your comments to OCLC. It is completely anonymous and diplomatically handled but your feedback will go to the chatting librarian's library.

Accessing Statistics

One of the great things about QuestionPoint is that there are many different kinds of statistical reports available to you. There is always quick easy access to the most recent 90 days of statistics. Logging in as the Administrator from the home screen click on *Reports>Institution.*

Each of these will give you a different interpretation of your statistics. I suggest once you've been using QP for a few months that you come in and play with it. Please ask if you have questions. The statistics can be a little exhaustive. The one link though that I want to point out is the Descriptive Codes. If you chose to assign these to your questions this is where you would come to find how many say, reference questions you have had. There is also a method for gathering historic statistics outside of the 90 days. Please ask if you would like instructions on how to do that.

Promoting the Service

Now that you have everything set up how are you going to get the word out so that your patrons find it? Promotion is key. Here are links to Logos if you choose to use them. http://1.usa.gov/1ol7zP8

 Download and adapt this press release template to share the story of Ask-WA with your local media outlets: Ask-WA Press Release Template (doc).   http://1.usa.gov/1AY8TfT

The libraries that have the highest usage link to Ask WA from virtually every page on their site. Some have an "Ask a Librarian" link embedded in their header so patrons always know where to find it. The more access points the higher the use.

For Academic Libraries, do you use Libguides? Using a Qwidget you can embed a chat box in every libguide. Some libraries such as Green River Community College have also embedded a link into the header of all their libguides. The students learn that the link is always in the same place and know how to get help
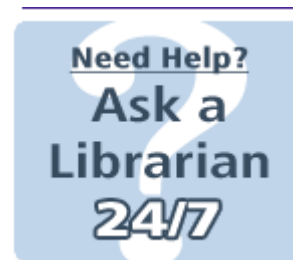

Many libraries have a logo that is distinct to them which is included on every page. Here are a few examples:
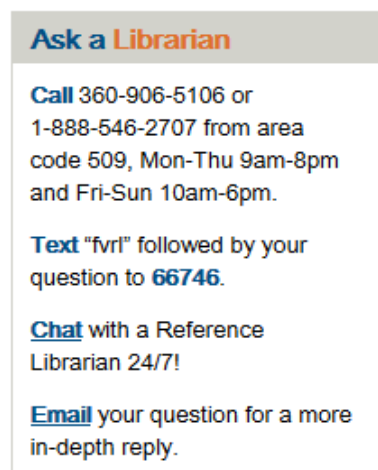
Eastern Washington University has a logo is branded into the header of every Library page.
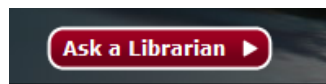
Seattle Public has this logo on many of its pages as well as qwidgets throughout their site.

Fort Vancouver has this image on most major pages. They also have a qwidget or entry point on Teen pages and on the Kids homework help as well as many of the subpages

Whatcom County Public Library has this image built in to almost all their pages – even database entry points

Important QuestionPoint Links

QuestionPoint has a rather exhaustive amount of documentation. But there are a few key pages that are important to know about:

24/7 Best Practices - http://bit.ly/1pbh1DN

24/7 Reference Cooperative Policies and Procedures - http://bit.ly/1nc3dJD

QuestionPoint ACADEMIC 247Ref Coop - hours that need more coverage

QuestionPoint PUBLIC 247Ref Coop - hours that need more coverage

Ask WA Scheduling Calendar (Google Calendar)

QuestionPoint: 24/7 reference services blog

Also remember in the header of every page are these links

Of course please contact me with any questions

Nono Burling
Phone: 360 570-5576
nono.burling@sos.wa.gov

OR if you can't get through to me try calling QuestionPoint directly

1-800-848-5878