



## Site Supervisor Manual For Ask Us 24/7

**Created by Jaclyn McKewan, 2009**  
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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.

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## Contacting the Ask Us 24/7 Project Manager

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# Part 1: Getting Set Up

So, your library has joined Ask Us 24/7! This part of the manual should guide you through “what happens next,” both with setup tasks that you need to complete, and what information you should expect to be receiving from the project manager, or from QuestionPoint.

Tasks that you need to complete are marked with a checkmark: ✓

Things to expect from the Ask Us 24/7 project manager or QuestionPoint are marked with a triangle: △

## Your Site Supervisor Account

To perform most of the setup tasks listed here, you will need to first login to QuestionPoint, using your 9-digit login number. (Go to <http://www.questionpoint.com>, and click on *Librarian Logon*.) From here, you will be taken to the “My QuestionPoint” page, which has a drop-down menu at the top right, to allow you to access the various modules.

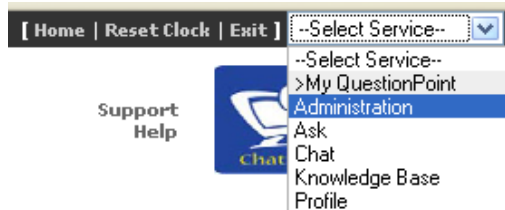
△ You will receive your username and password from the project manager. The first time you login, you will be prompted to change your password.

## Permission

The Ask Us 24/7 **Project Manager** at WNYLRC acts as the Subscription Group Administrator, and can perform administrative tasks for all libraries in the Ask Us 24/7 group. As **Site Supervisor** for your library (also called Institution Administrator) you can perform administrative tasks for your library only.

✓ Task: Please set your permissions to allow the Project Manager to access your account in the event that you need assistance with setup issues:

- In the drop-down menu on the top right, click on *Administration*



- Click on Permissions



- Click BME/Subscription group. Select “Yes” for each task and click Save.

### BME/Subscription Group Permissions

BME/Subscription Group

Allow my BME/Subscription Group administrator permission to:

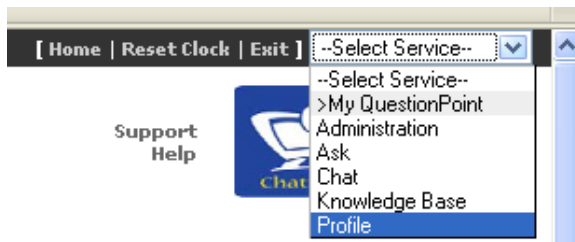
Save Reset

Yes	No	Permission
<input checked="" type="radio"/>	<input type="radio"/>	Create and update authorizations at my institution.
<input checked="" type="radio"/>	<input type="radio"/>	Update my Policy Page content.
<input checked="" type="radio"/>	<input type="radio"/>	View and update my survey content.
<input checked="" type="radio"/>	<input type="radio"/>	Create and update scripts at my institution.

Save Reset

## Profile

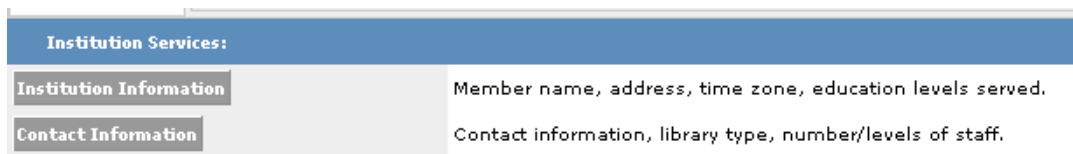
- ✓ Task: Verify your profile information
  - In the drop-down menu on the top right, click on *Profile*.



- Click on *Institution Services*.



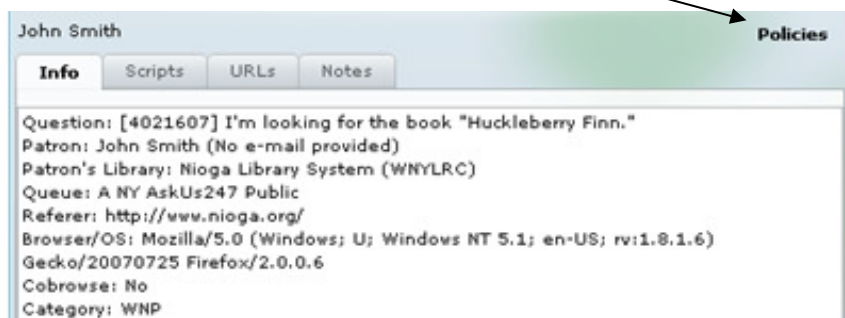
- Click the **Institution Information** button and enter the following information: Institution Name, Language, all of the Address fields, Country, Time Zone, and Daylight Saving.
- Click the **Contact Information** button and complete at least the first 7 fields (through phone/fax number).



## Policy Page

Policy pages for institutions participating in the 24/7 cooperative can be viewed on the My QuestionPoint page (the page that appears after you login). Click on the “search policy pages” link at the bottom left.

Policy pages are also viewable in chat. When you are chatting with a patron, you can click on the “policies” link to view the policies page for that patron’s library.



It is very important for your policy page to be kept up-to-date so that librarians at other institutions can help your patrons effectively. **Also, your library’s account will not be added to the global cooperative until your policy page has been completed, submitted, and approved.** This means that your librarians will not be able to chat with patrons outside of your institution, and your custom link to the chat will not work.

- ✓ Task: Create your policy page:

- In the drop-down menu on the top right, click on *Profile*.
- Click on *Policies*.

Institution Services	Collection Strengths	Printable Profile	Search	Administration				
Institution Services	Inst Info	Contact	Names	Available	Unavailable	Locs Served	Languages Served	Policies

- On this same page (below “change”) you can fill out whichever fields you want to provide information for. Include anything that may be helpful to librarians at other institutions who are helping your patrons. This information is only viewable to librarians participating in the chat reference cooperative, and cannot be seen by patrons.
- Patron questions about policies such as loan periods, item renewals, and library card replacements are common *in virtual* reference, so make sure to include this information.
- “Database Access for Coop Librarians” and “Guest Login/PIN for Coop Librarians” are optional fields. If you provide such numbers, they will allow the chatting librarians to access patron-only resources and better help your patrons navigate your website. These are used by the chatting librarian only and are not given to patrons.
- **Remember to click the “Submit” button** once you have finished the page. This indicates to QuestionPoint that your library is now ready to participate in the cooperative.
- **Notify the project manager that you have completed the policy page**, so that they can follow-up with QuestionPoint to make sure it gets approved.

To see examples of other policy pages, use the *Search Policy Pages* link on the “My QuestionPoint” page, on the bottom left of the screen.

Search Global KB: <input type="text"/>
<a href="#">Advanced Search</a>
<a href="#">Profile</a>
<a href="#">View</a>
<a href="#">24/7 Info Reports</a>
<a href="#">Search Policy Pages</a>
<a href="#">Admin</a>

From here, you can view all policy pages by clicking *Find Policy Pages*. Or you can search by name, or narrow down by library type or location. To search for other libraries in Ask Us 24/7, click the “BME” dropdown menu and select *Ask Us 24/7*.

Name:

BME:

Library Type:

State/Province:

Country:

For more information and guidance on policy pages, see this page:  
<http://wiki.questionpoint.org/Policy+Page+Guidelines>

Please be aware that unless you use HTML code, everything you type into these fields will appear as plain text. No matter how many times you hit return, it will not display any line breaks, and website addresses are not automatically converted into links. See the next section on HTML to learn some basic codes that will improve your policy page.

## 2 Policy Page Suggestions



NOVEL (New York Online Virtual Electronic Library) is a collection of databases available to all New York State residents. While your library's databases likely already include everything in that collection, we recommend you still include a separate mention of NOVEL as well. This is because NOVEL can be accessed by anyone with a driver's license, in addition to library cards. If a librarian at another institution is helping one of your patrons, and that patron does not have their library card handy, the librarian can still assist them with using NOVEL as long as they have a driver's license. Here is an example of how you could include this information in your policy page:

### Databases

Our databases are available at <http://www.acmelibrary.org/databases.html>

**Novel** - <http://www.novelnewyork.org>

The Novel databases are available to all New York State residents through the New York State Library. All you need to access these databases is a New York State Driver's License Number or State ID Card Number.

### Finding Full-text

A frequently-asked-question in our service is how to find the full-text of an article. This could be for several reasons:

- The patron found the citation while doing a search in a database, but full-text was not available there.
- The patron found the citation listed as a reference to another article.
- A professor/teacher recommended/assigned the article to the patron.

Whatever the reason, this comes up a lot. Many libraries have different procedures for finding full-text online:

- Serials Solutions, or similar software, which allows you to enter a journal name and produces a list of databases at the library that have it in full-text.
- Searching the library catalog, which can have separate listings (complete with links) for e-journals.
- Other specialized search forms/pages for finding a specific article.

Please consider adding this information to the "databases" section of your policy page. It can include steps for finding full-text online, finding the journal in print if it's not online, and placing an ILL request if it's not available in print. See this example from Cornell University:

#### One of our most frequently asked questions concerns **GETTING FULL TEXT ONLINE OF A SPECIFIC JOURNAL ARTICLE:**

1. The library catalog <http://www.catalog.library.cornell.edu> has the most accurate information on journal/newspaper/magazines. Use a basic search and journal title search.
2. If the catalog says we have full text for a particular year (sometimes through multiple databases), but the link(s) doesn't seem to be working, or asks for payment or a password (other than netid or CUWebLogin), or has a broken link, have patron report the problem: <http://www.library.cornell.edu/request/techprob>. Response is typically quick.
3. Often we have the print journal on the shelf at one of our 20 campus libraries.
4. If Cornell does not have the journal in any format, articles can be interlibrary loaned: <http://www.library.cornell.edu/svcs/borrow>

## HTML for Policy Pages

The fields in the policy page do not recognize the use of the “enter” key and no matter how many times you hit it, the text will run together without line breaks. To skip a line, enter the paragraph tag: `<p>`

To make text *italic*, surround it with the `<i>` and `</i>` tags. The example on the left will appear in the policy page as it does on the right:

For questions about fines, refer patrons to the `<i>Central Library</i>`, not their local branch.

For questions about fines, refer patrons to the *Central Library*, not their local branch.

To make text **bold**, surround it with the `<b>` and `</b>` tags. This may be useful when creating subheadings within a field.

To make text underlined, surround it with the `<u>` and `</u>` tags.

To create a bulleted list, start with the `<ul>` tag. Then surround each list item with `<li>` and `</li>`. End the whole list with `</ul>`. The example on the left will appear in the policy page as it does on the right:

The fines for the library are as follows:  
`<ul>`  
`<li>25 cents per day for books</li>`  
`<li>50 cents per day for CDs</li>`  
`<li>$1 per day for DVDs</li>`  
`</ul>`

The fines for the library are as follows:

- 25 cents per day for books
- 50 cents per day for CDs
- \$1 per day for DVDs

To create a clickable link, follow this formula: `<a href="http://the-address-of-the-website">the text of the link</a>`. See this example:

`<a href="http://www.askus247.org">Ask Us 24/7</a>`

[Ask Us 24/7](http://www.askus247.org)

## Your Library’s Custom Link

△ Once your policy page has been approved, you will receive an e-mail from either the project manager or QuestionPoint, giving you the custom link for your library.

The chat is actually hosted on QuestionPoint’s website, so no special software or settings are required for your library’s website. The link will look like this:

<http://www.questionpoint.org/crs/servlet/org.oclc.home.TFSRedirect?virtcategory=xxxx>

Instead of “xxxx,” your link will have a unique 5-digit code at the end. This will identify the chatters as patrons of your library. When the patrons click on this link, they will be taken to a new page where they can enter their question.

You can use this in the same way that you would use any other link, and place it anywhere on the library website where you think it would be useful to patrons. Possibilities include:

- a “contact us” page that lists all the ways to contact the library
- the library catalog (or just the results page)
- the library databases listing

- a sidebar navigation menu that appears on each page
- for academic libraries, consider placing the link on Blackboard or similar course websites

## Ask Us 24/7 Viewport

The viewport is the page that is displayed on the left side of the screen when the patron clicks on the chat link through your library's website. Please set this to <http://www.askus247.org/info/patron.html>

✓ Task: Set the correct viewport:

- In the drop-down menu on the top right, click on *Administration*.
- Click *Forms*.
- Enter one the above URL in the blank for the Viewport URL and click save.

### Viewport URL

Enter the URL that you want patrons to see in the left frame of the chat intake form, if you use chat with viewport and co-browse. If you leave this field blank, the Viewport chosen by the BME Administrator will appear for your institution.

## Creating Librarian Accounts

When you join Ask Us 24/7, QuestionPoint will set up your library's account and your site supervisor account with the 9-digit logon. It is then up to you to create accounts for the individual librarians in your institution.

✓ Task: Create an account for each librarian in your institution who staffs the virtual reference desk:

- In the drop-down menu on the top right, click on *Administration*.
- Click on *Accounts*.
- Enter first and last name
- Enter e-mail address
- Enter a screen name, following the QuestionPoint cooperative's naming convention:

The librarian's screen name identifies the librarian, thus communicating to the patron who they are talking to. 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 individual (a person and not an automated system). The screen name should also contain a fairly understandable affiliation so that the patron will be aware that the librarian is not their local librarian. Abbreviations in general should be avoided since they may be unintelligible to the patron and cause confusion.

Examples:

Jane at Acme College  
Acme College Librarian Jane

John in Buffalo, NY  
Buffalo, NY Librarian John

- Set Profile to "view profile"
- Set Ask a Librarian to "ask librarian." You may use "Ask Administrator" if you want the librarian to have administrative access to your institution's reports and other data.
- Set both Knowledge bases to "Add/Submit."

- Set Type to “Global.” This is very important, because it will allow the librarian to view questions from the patrons of other libraries in the 24/7 cooperative. If you leave it on “Local,” then they would only be able to see questions from your own institution.
- Click “Submit.”

Librarian's Name: (First Last)	Jane Doe
Librarian's E-mail Address:	doej@acme.edu
Screen Name:	Jane at Acme College
<b>Services</b> <span style="float: right;"><b>Account Privilege</b></span>	
Profile	<input type="radio"/> None <input checked="" type="radio"/> View Profile <input type="radio"/> Edit Profile
Ask A Librarian	<input type="radio"/> None <input checked="" type="radio"/> Ask Librarian <input type="radio"/> Ask Administrator
Knowledge Base (Ask Us 24/7)	<input type="radio"/> View KB <input checked="" type="radio"/> Add/Submit <input type="radio"/> Edit KB <input type="radio"/> Edit/Delete KB
Knowledge Base (QP Global Reference Network)	<input type="radio"/> View KB <input checked="" type="radio"/> Add/Submit
Type:	Global <input type="button" value="v"/>

## E-mail Notification

QuestionPoint can send you an e-mail message when a chat transcript needing follow-up arrives in your library’s account. You can also monitor incoming questions within the Ask module.

✓ Optional Task: If you want to receive e-mail notification:

- In the drop-down menu on the top right, click on *Administration*.
- Click on *Settings*.
- Click on *E-mail Notification*.
- Click Yes, then click *Save*.

### My QuestionPoint

Welcome, Jaclyn McKewan  
**Institution:** WNYLRC Public (10946)

My Questions
New: 0
Active: 52
Question Lists
New: 1
Unassigned: 1
Active: 158

Note. If you choose not to enable e-mail notification, you **must** login to your account several times a week to check for questions needing follow-up. You can find them by logging into QuestionPoint and checking for numbers next to the word “New” under “Question Lists.”

## Patron Replies to Transcripts

After a chat transaction, the patron receives a copy of the transcript in their e-mail. When you enable the “Reply-To” function, the patron can reply to the transcript by sending a reply to the e-mail. The e-mail address you use does not need to be an actual, valid address (since all replies are actually collected into your QuestionPoint account), but it should look like it came from your institution, to avoid confusing the patron.

✓Task: Enable patron replies and set the outgoing e-mail address:

- In the drop-down menu on the top right, click on *Administration*.
- Click on *Settings*.
- Click on *Outgoing Address*.
- For Reply-To Messages, click ON, which will allow patrons to reply to the chat transcript that is e-mailed to them after the transaction.
- For Outgoing E-mail Address, click Custom.

- For the Custom E-mail Address, enter the e-mail address that will send the transcript to your patrons. Choose a real e-mail address from your institution, so that if a patron replies to the transcript, you will be able to receive it.

Reply-to Messages:	<input type="radio"/> OFF <input checked="" type="radio"/> ON
Outgoing E-mail Address:	<input type="radio"/> AskALibrarian@oclc.org <input checked="" type="radio"/> Custom (specify below)
Custom E-mail Address:	<input type="text" value="askus247@wnylrc.org"/> (required if Custom selected above)

## Letter of Agreement

△ You will receive a letter of agreement from the project manager, which is an agreement between your library and the Western New York Library Resources Council. A generic copy of this letter is attached to the end of this manual for your reference.

✓ Task: Sign the letter, keep one copy for your records, and return the other copy to WNYLRC.

## E-mail Communication

✓ Task: Check with your IT department or systems librarian to have the following domains added to a “safe list” or “white list,” which will ensure that the e-mails do not get blocked:

- **wnylrc.org**
- **questionpoint.org**
- **oclc.org**

Some of our participants have found that these domains were being blocked, preventing them from receiving important messages. In some cases, the participants were initially able to receive the e-mails, but then they started getting blocked without warning.

## E-mail Discussion Group

✓ Task: Send the project manager the e-mail addresses of all the librarians at your institution that will be participating in Ask Us 24/7, so that they can be added to the e-mail list for participants.

## Scheduling

Once you are ready to start participating in Ask Us 24/7, you will need to set up a schedule.

✓ Task: Let the project manager know your latest student FTE figure (for academic libraries) or population served (for academic libraries). This will determine how many hours you will need to staff the service each week.

△ The project manager will let you know your hours requirement.

✓ Task: Select the hours you would like to staff from the shifts listed in red, yellow or blue on one of the following lists. Shifts on Saturday, Sunday, or any day after 6pm count as 2 shifts. E-mail the site supervisor with your chosen hours as well as the date you would like to start.

<http://wiki.questionpoint.org/PUBLIC%20247Ref%20Coop> (public libraries)

<http://wiki.questionpoint.org/ACADEMIC%20247Ref%20Coop> (academic libraries)

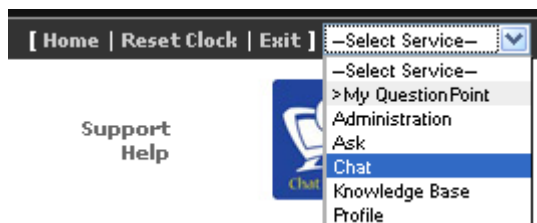
The list of available shifts changes from week to week, but once you pick a shift, it's yours to keep as long as you like. You can keep the same shifts indefinitely, or change at the start of every semester, or any time that your current shift becomes no longer convenient.

## Practice

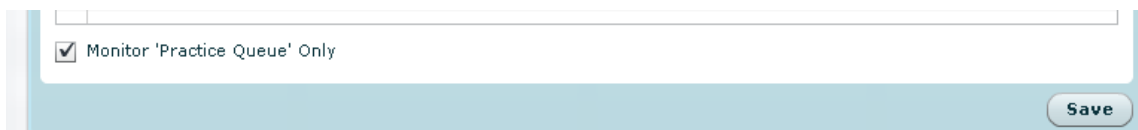
Many new participants in Ask Us 24/7 like to practice among themselves before officially going “live.” You can do this in pairs or in a small group, with some people acting as a librarian, and some people acting as a patron.

✓ Task: Practice chatting using the practice queue.

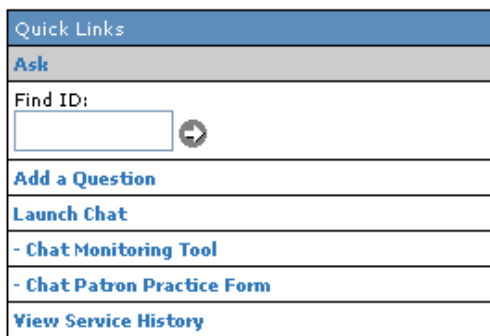
1. All participants login to QuestionPoint.
2. From the My QuestionPoint page, the “librarians” go the drop-down menu on the top right, and click on *Chat*.



3. When the screen to select a queue appears, the “librarians” select *Monitor Practice Queue Only*, then click *Save*.



4. From the My QuestionPoint page, the “patrons” click on *Chat Patron Practice Form* on the left side of the screen. This will put them into the practice queue as a patron.



Keep in mind that each institution has its own practice queue. So 2 people from 2 different libraries who entered the practice queue would not see each other – they would only see people from their own library. Practice accounts are available from the Project Manager if people from multiple libraries would like to practice with each other.

## AskUs247.org

The website for Ask Us 24/7 is located at <http://www.askus247.org>. It includes a dropdown list of participating libraries, allowing patrons to access the chat by selecting their library. (The patron is then sent to their library's custom link, the same one that each library uses on their own website.)

△ The project manager will add your library to the list once your library has become an active participant (ie, once you have started chatting).

## Promoting the Service

△ The project manager will give you bookmarks and pencils that can be used to promote Ask Us 24/7 to your patrons.

You can purchase additional pencils and bookmarks by contacting your library council, or the Ask Us 24/7 project manager. Other items available for purchase, as well as free downloadable materials, are available at the Ask Us 24/7 marketing toolkit at: <http://www.askus247.org/marketing/marketing.html>

## Before Chatting

- ✓ Task: Make sure that your computers and network are compatible with the chat:
  - Ensure that your computer and web browser settings are correct by using the "Software Requirements" page at the beginning of your training manual.
  - Verify that your library network settings allow the chat to work.

To co-browse, you must use a Windows computer with the Internet Explorer browser. If you wish to use a different operating system or browser, you can still chat, but you will not be able to use the co-browse function.

## Additional Information

Additional information for site administrators can be found at the Administrator Setup Guide at [http://www.questionpoint.org/support/documentation/gettingstarted/qp\\_ref\\_adminsetup.pdf](http://www.questionpoint.org/support/documentation/gettingstarted/qp_ref_adminsetup.pdf)

## Part 2: Optional Tasks

### Survey

You have the option of creating a survey which will pop-up on your patron's screen when the chat ends. This can be a great way to learn about your patrons thoughts and experiences with the service. Your library's survey is presented even if a librarian for another library chats with your library's patron.

✓ Optional task: Create a survey:

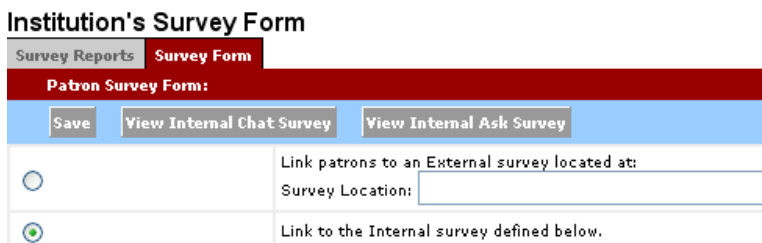
- In the drop-down menu on the top right, click on *Administration*.
- Click on Surveys.



- You will start out on the *Survey Report* screen, but if you haven't yet created the survey, there's nothing to report. Click on *Survey Form*.



- You have two options, creating an **external survey**, or using an **internal survey** created in QuestionPoint:
  - To use an **external survey**, you can create a survey on another site such as SurveyMonkey ([www.surveymonkey.com](http://www.surveymonkey.com)), and the link will appear to the patron at the end of the chat. This allows you complete flexibility in the way the questions are designed, but lacks some advantages of the internal survey. To use this option, create your survey, and then paste its address in the box next to *Survey Location*, and click *Save*.
  - If you choose to use an **internal survey** created in QuestionPoint, you cannot write your own questions, but you can choose pre-written questions from a list. One advantage is that each completed survey will be linked to its corresponding transcript. As soon as the survey is completed, the chatting librarian will receive a copy so that they can get immediate feedback on the transaction. Also, when reviewing transcripts, you can instantly see if the user filled out a survey. To use this option, see the following directions.

A screenshot of the 'Institution's Survey Form' interface. It has a dark red header with 'Institution's Survey Form' and a navigation bar with 'Survey Reports' and 'Survey Form'. Below the header, there are three buttons: 'Save', 'View Internal Chat Survey', and 'View Internal Ask Survey'. There are two radio buttons for selecting the survey type: 'Link patrons to an External survey located at:' and 'Link to the Internal survey defined below.'. The 'Survey Location:' field is visible next to the external survey option.

- If you use the internal survey, check the box next to *Chat Session*. (“Ask Answers” refers to transactions conducted via an e-mail form rather than chat. If you are interested in implementing an e-mail form in addition to chat, talk to the Ask Us 24/7 project manager.)

Internal Survey:		
<input checked="" type="checkbox"/> Chat Session	<input type="checkbox"/> Ask Answers	Enable patron survey for these parts of the system

- The screen includes a list of possible questions. For each question you want to include (up to 15 total) check the box under *Chat* for that question.

Questions:		
Chat	Ask	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>This was the first time I used this service:</b> Response: 1. Negative or No 2. Neutral or N/A 3. Positive or Yes
<input type="checkbox"/>	<input type="checkbox"/>	<b>I received a better answer from this resource than I would have found on my own:</b> Response: 1. Negative or No 2. Neutral or N/A 3. Positive or Yes

- At the bottom of the screen, click *Save*.

<b>Save</b>	<b>View Internal Chat Survey</b>	<b>View Internal Ask Survey</b>
-------------	----------------------------------	---------------------------------

- The next screen will confirm that the survey has been saved. To see how it will appear to the patron when it pops up after the chat, click on *View Internal Chat Survey*.

Important Note: Only a small percentage of patrons ever fill out these surveys. To increase the response rate, consider creating an Institutional Script that can be used at the conclusion of a chat, asking patrons to answer the survey. Example:

Thank you for using Ask Us 24/7! Please help us to improve our service by filling out the survey that will pop-up on your screen.

As long as you create this as an institutional script, librarians at other institutions will also be able to use it when chatting with your patrons. (For more information about scripts, see the Training Manual, as well as the next section of this manual.)

## Scripts

Scripted messages are designed to make communication easier during chat. Librarians can create personalized scripts for the messages they use most frequently. Scripts also help to promote consistency across the regional and national services. There are several types of scripts available for use with the QuestionPoint software:

- Personal scripts** (called "My Scripts" when you login to QuestionPoint) are made by you, and should include common messages used with patrons to make communication easier. These are available only on your own account.
- Institution scripts** are created by the site supervisor, and personalized to your local library's needs. These are available to all librarians at your institution.
- Shared scripts** are created by the Ask Us 24/7 project manager, and specific to our regional library service. These are available to all librarians participating in Ask Us 24/7.

Scripts can be used in different ways. Some libraries may just use them for often-used phrases. Examples:

### Anything else Enough to start

Can I help you with anything else today?

Do you think this is enough information for you to get started on your project?

**Not from your library** Hi, I'm not a librarian from your library but am at a college from Buffalo, New York. I'm reading your question now and will be with you in a moment.

You can also use scripts as a sort-of repository of frequently asked questions and answers. This could be especially useful when librarians from other institutions are chatting with your patrons. Examples:

**Book renewals** Sign into the catalog with your student ID number. Click on the Your Profile link in the top tool bar. Click on Loans. You will have the option to renew any titles that are not overdue.

**ILL** The ILL office is open Monday through Friday, 8 a.m. to 4 p.m. and can be reached by phone at 878-6310. More information is available at: <http://www.acmecollege.edu/library/ill.html>

**Loan Periods** The loan period for books is 28 days unless the book is recalled, in which case the due date is revised. Loan periods vary depending on material format and on your status as faculty, staff, or student.

✓ Optional task: Create institutional scripts:

- In the drop-down menu on the top right, click on Ask.



- Click on Settings, then Institution's Scripts.



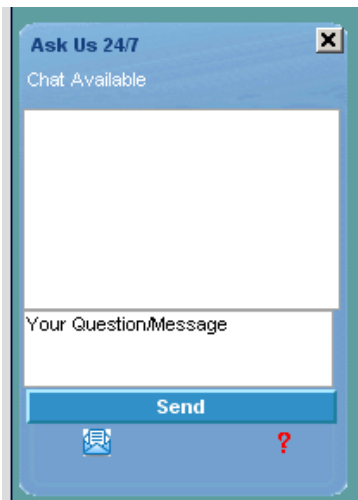
- For each script you want to create, supply a name for it (which will appear in your list of available scripts) and the text of the script itself. Then click Add.

✓ Optional task: Create personal scripts:

- In the drop-down menu on the top right, click on Ask.
- Click on Settings, then My Scripts.
- For each script you want to create, supply a name for it (which will appear in your list of available scripts) and the text of the script itself. Then click Add.

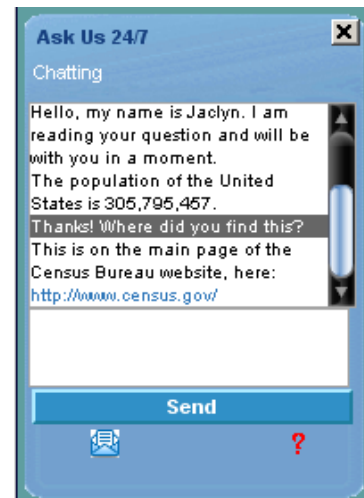
## Qwidget

“Qwidget” stands for “QuestionPoint Widget.” It is a box designed to look like Meebo or other instant-messaging programs.



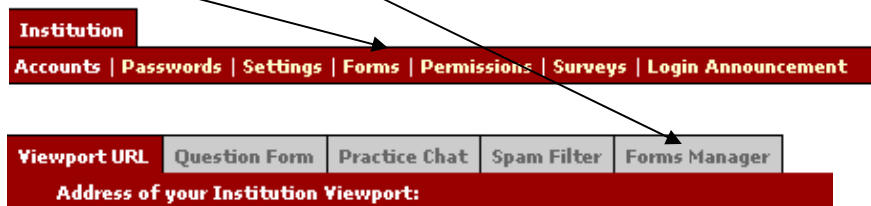
The Qwidget can be used instead of the standard chat link. Unlike the standard link, it does not take the patron to a new window. Instead the entire chat occurs within the Qwidget box. Any links sent to the patron will appear as a clickable link within the box – clicking on the link will then open the page a separate window.

This can have some advantages, because it is more recognizable to patrons as a chat box, and may be more attention-grabbing than the standard link.



✓ Optional task: Create a Qwidget:

- In the drop-down menu on the top right, click on *Administration*.
- Click on *Forms*, then *Forms Manager*.



- Click on *Create Qwidget (Preview)*.
- In the *Select Language* drop-down menu, either select English, or do not select anything and it will just default to English. Click *Submit*.
- On the Qwidget Configuration page, you can customize the Qwidget name, offline message, and appearance. Make sure to click *Submit* to save your information.
- Copy the *Qwidget Code* into any place on your library’s website where you would like the Qwidget to appear.

Optional features:

- Collapsible Qwidget: <http://wiki.questionpoint.org/Qwidget+Tips>
- Qwidget embedded into Ebsco databases: <http://distlib.blogs.com/distlib/2010/02/embedding-chat-widgets-within-ebSCO-databases.html> and: <http://support.epnet.com/eds/widgets.html>
- Smartphone Qwidget: Available for iPhone, Palm, and Android. You do not need to do anything special to enable this. If someone from one of those devices is looking at your website, in place of the Qwidget they will see an arrow with the words "click here to launch our mobile chat widget." Clicking there will start the app.

## Part 3: Day-to-Day Tasks

### Question Follow-Up

When a question from one of your patrons is coded as “Follow-up by Patron Library,” it is categorized as a new and unassigned question. As site supervisor, you will also receive an e-mail letting you know that a question requires follow-up, if you have enabled e-mail notification as described on page 7 of this manual.

My Questions
New: 0
Active: 52
Question Lists
New: 1
Unassigned: 1
Active: 158

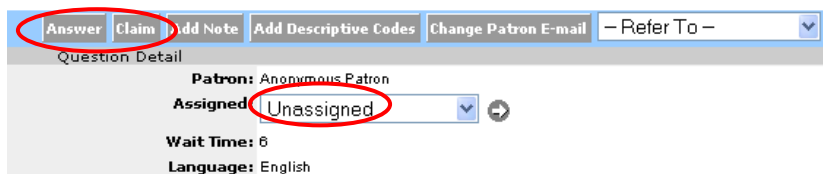
In this example, the library has one question in the *New* list, meaning it needs to be followed-up on. It is also *Unassigned*, which means it has not been assigned to a particular librarian.

For more information about the *New* list and other question lists, see “Question Lists” in the training manual.

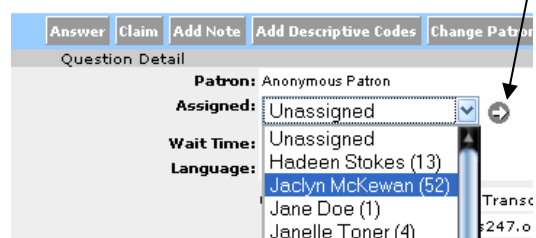
There are different ways that your library can handle question follow-up, depending on what you and the others at your library decide. Here are some possibilities:

1. One option is that the site supervisor, and only the site supervisor, answers all questions in the library’s *New* folder (which will have all the same questions as the *Unassigned* folder). The rest of the librarians are asked not to use this folder.
2. Another option is that all librarians can answer all questions requiring follow-up. It’s just a matter of who happens to login first and see the question. A librarian looking at new questions can choose to either answer the question immediately, or claim it for later (or do nothing and leave it for someone else). As site supervisor, make sure to check the *New* folder periodically to make sure that there are no questions being left unanswered.

Click on the question to view the transcript. To answer the question immediately, click *Answer*, and follow the steps for follow-up described in the Training Manual. To claim a question for later, click *Claim*. In both cases make sure it is listed as unassigned first. (The easiest way to do this is to just look for questions in the *Unassigned* folder, rather than the *New* folder.)



3. Another option is that the site supervisor is the only one to view questions in the *New* folder, but he/she can delegate questions to the other librarians by assigning the question to them. Do this by selecting a librarian name from the drop-down list, then clicking the arrow button. The librarian will not receive notification that a question has been assigned to them, so you need to either let them know when you are assigning a question, or ask all librarians to check their own *New* folders whenever they login.



**Claiming or assigning a question** assigns it to that librarian, removing it from the library's *Unassigned* folder and moving it to the individual librarian's *New* folder. However, a copy still remains in the library's *New* folder. (Also, when viewing the transcript, the assigned librarian's name will be listed at the top). For this reason, if you choose option 2, librarians should be asked to check the *Unassigned* folder directly (rather than the *New* folder), or to make sure that a question they want to answer does not have a librarian's name assigned to it:

My Questions	
New:	0
Active:	52
Question Lists	
New:	1
Unassigned:	1
Active:	158

In this example, my library has one question that requires follow-up. It is listed in both the *New* and *Unassigned* folders for the library. I've decided that I will claim this question so I can answer it later.

My Questions	
New:	1
Active:	53
Question Lists	
New:	1
Unassigned:	0
Active:	158

Now that I have claimed the question, it has moved from the *Unassigned* folder, to my own *New* folder. However, it is also still located in my library's *New* folder. Also, when looking at the question, my name is listed under "assigned":

Answer Reject Assignment Add Note Add Descriptive Codes Change Patron E-mail - Refer To -

Question Detail

Patron: Anonymous Patron

Assigned: **Jaclyn McKewan (53)**

Wait Time: 6

Language: English

It is preferable to conduct follow-up through QuestionPoint as indicated above and in the Training Manual. However, if you instead send a patron reply directly to their e-mail address, you should include a note in the transcript to indicate that you have done so. Find the question in the appropriate question list and click on it. Then click on *Add Note* near the top.

Answer Reject Assignment **Add Note** Change Patron E-mail - Refer To - - Move To -

On the next page, enter the note (for example: "I responded to this patron directly via e-mail."). Then click *Add Note* again. On the next page, you will see a message saying that the note has been saved. You should then close the question, to remove it from the New folder.

The note has been saved.

Full Question << 19 of 25 >> | [Return to List](#) [Print View](#)

Answer Reject Assignment Add Note Change Patron E-mail - Refer To - - Move To -

Question Detail

Patron: Anonymous Patron

Assigned: Jaclyn McKewan (42)

Wait Time: 5

Language: English

Status:

Received: 15:25:37 2009/03/06 (GMT-5)

Session Time: 868

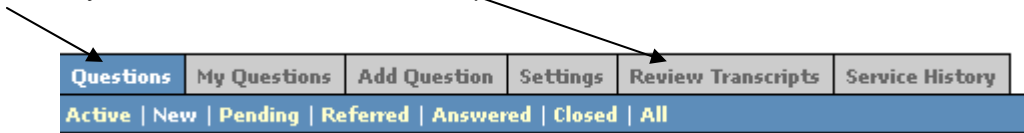
- Move To -  
- Move To -  
Closed  
Knowledge Base

## Reviewing Transcripts

In order to maintain the highest standards, each participating library is tasked with reviewing both the session transcripts and the survey responses **from their library's patrons** on a regular basis, at least once a week if not more frequently. (You do not have to review transcripts in which your librarians are chatting with other libraries' patrons, but you certainly can if you would like to get a better idea of how well your librarians are doing with the service.)

There are 2 ways for you to review transcripts. One is from your library's **Question Lists**. (See the section of the training manual titled "Question Lists" for more information on the different types of lists.) The other way is from the **Review Transcripts** screen.

Both screens can be accessed by clicking on *Ask* in the drop-down menu on the top right. The default screen is *Questions*, or you can click on *Review Transcripts*.



Both screens include all transcripts involving your patrons or your librarians from the last 90 days, but there are a few differences:

Question Lists	Review Transcripts
Available to all librarians at your library.	Available only to the site supervisor.
You can close questions from this screen.	You cannot close questions from this screen.
25 results per page are listed.	You can choose to view 25 or 100 results per page.
*You can choose to <b>exclude</b> transcripts with other libraries' patrons from this page.	By choosing an item in the "Session Type" dropdown menu, you can view only questions by your own patrons, only questions from Ask Us 24/7, only questions that your librarians answered, etc.
You can view questions according to what lists they are in. (See the section of the training manual titled "Question Lists.")	You can view all questions, or use drop-down menus to limit questions by: Assigned Librarian, Session Type, Survey Status**, Session Resolution, or Current Status.
Results cannot be sorted.	You can sort results by: ID, Patron, Date Received, Wait Time, Session Time, or Resolution.
Transcripts sent to quality control are not included.	All transcripts are included.
Date range cannot be customized.	You can choose a custom date range from within the last 90 days.

Site supervisors are encouraged to explore both screens to determine which works best for you. But keep in mind that in order to close transcripts (see next section) you will need to be in *Question Lists*.

\*To enable the exclude feature, go to Administration > Institution > Settings > Chat Transcripts. From here, select *Exclude from our question lists the transcripts of future chat sessions that we handle for other libraries, unless coded for Followup by Me* Please note:

- The setting is not retroactive – it will only apply to new chats from this point onward. Older chats from other libraries will still appear in your Question Lists until they are closed.
- This will affect all librarians at your institution, meaning they will not be able to see transcripts they have done with other library's patrons. As site supervisor, you can still see all these questions from the *Review Transcripts* page.

\*\*Limiting by “survey status” could be helpful because it allows you to view only transcripts where the patron filled out a survey. This is useful when compiling statistics.

## Closing Transcripts

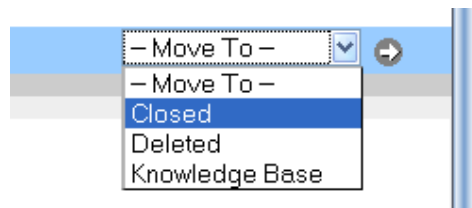
Participating libraries are asked to close transcripts **from their own patrons** if they determine that the patron’s question has been answered and no further help is needed. This can be done by the site supervisor during the course of reviewing transcripts, or it can also be delegated to other librarians at the library. Closing a question removes it from the list of “Active” questions of both the patron’s library and the chatting librarian’s library, and moves it to the “Closed” list.

Transcripts should be closed if:

- The patron is from your library.
- The patron’s question was completely answered during the chat, OR, the patron’s question required follow-up or referral, but has since been answered. (Wait a few days after the follow-up or referral before closing, in case the patron responds with an additional question.)

Do not close transcripts that involve patrons from other libraries. If you notice a question from another library’s patron that has been in your active list for over a week, e-mail the Ask Us 24/7 project manager, who will inform OCLC. They will then work with the other library to ensure they understand the policy on closing questions.

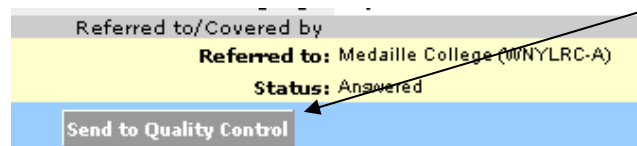
To close a transcript, from *Question Lists*, open the full view of the transcript. On the “Move to” box at the top right of the transcript, click “Closed,” then click the arrow key to the right



## Referring Transcripts to Quality Control

If a transcript demonstrates that QuestionPoint’s Policies (<http://wiki.questionpoint.org/247-Policies>) have not been followed, or if there is any other issue with the transcript, then you should refer it to Quality Control, in one of the following ways. In both cases, you should include a note explaining why you are sending it to Quality Control:

- From *Review Transcripts*, view the transcript, then click on the button "Send To Quality Control."



- From *Question Lists*, open the full view of the transcript. Using the "Refer To" box at the top of the transcript, select *Subject Matter Expert* from the pulldown list, then click the arrow key to the right. A list of Subject Matter Experts will appear, select *Quality*. You will then see a text box to enter your reasons for referral. When you are done, click on the Refer button at the bottom left.



You may also want to consider sending an e-mail to the patron (if they provided contact information) to ask if they still want more help. In some cases it may be too late, but at least the patron will know that someone at the library is trying to help them.

Quality control can also be used to send compliments to librarians. If you feel a librarian did an especially great job with one of your patrons, this is a great way to give them feedback. Just follow the steps for submitting to quality control, and in the comments box, you can enter your compliment.

## Statistics

Many different statistical reports are available to the librarians participating in Ask Us 24/7, and some are available only to the site supervisor. Detailed information on reports can be found at the following links:

Reports Quick Reference: [http://www.questionpoint.org/support/documentation/gettingstarted/qp\\_reports\\_ref.pdf](http://www.questionpoint.org/support/documentation/gettingstarted/qp_reports_ref.pdf)

Glossary: QuestionPoint statistical reports:

[http://www.questionpoint.org/crs/html/help/en/admin/ad\\_reports\\_glossary.html](http://www.questionpoint.org/crs/html/help/en/admin/ad_reports_glossary.html)

### Reports of Sessions

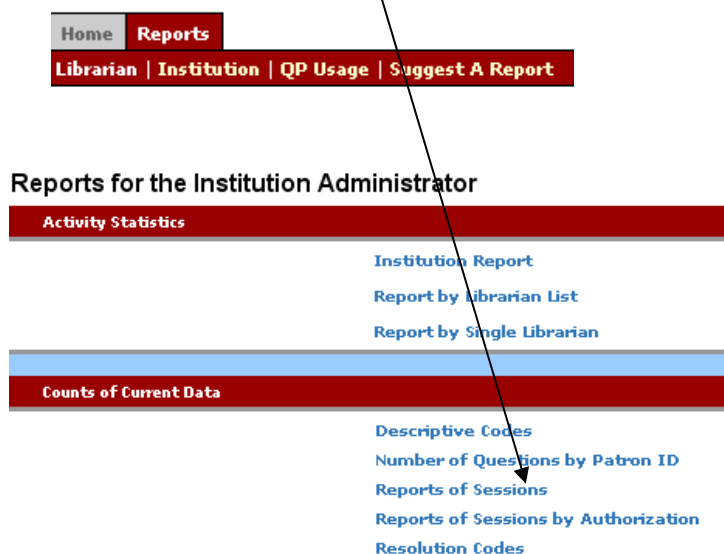
This report lists all the libraries in Ask Us 24/7, along with the number of patrons from each library, and the number of chats with librarians from each library. This is only available to site supervisors, and only has data for the last 90 days.

To view Reports of Sessions:

- Starting on My QuestionPoint, click on *Reports* tab on the top left



- Then click on *Institution*, then *Reports of Sessions*



Here's how to read the reports of sessions, using **Buffalo State College** as an example. These stats are for the last 90 days:

Institution Name	Sessions with Our Patrons				Our Sessions with Others' Patrons*			Total Chats	E-mailed Webform			Grand Total
	Library	BME	Outside BME	Total	BME's	Outside BME	Total		Library	Outside Library	Total	
Buffalo & Erie County Historical Society (WNYLRC)	2	3	25	30	0	0	0	30	0	0	0	30
<b>Buffalo State College (WNYLRC-A)</b>	<b>3</b>	<b>17</b>	<b>46</b>	<b>66</b>	<b>10</b>	<b>33</b>	<b>43</b>	<b>109</b>	0	0	0	<b>109</b>
Canisius College (WNYLRC-A)	7	16	25	48	10	36	46	94	0	0	0	94
Cazenovia College Library (WNYLRC-A)	0	1	6	7	2	1	3	10	0	0	0	10

Sessions with our patrons = **patrons from Buffalo State**

- 66 total patrons from Buffalo State used the service
- 46 of those patrons chatted with a librarian "Outside BME," meaning, outside of Ask Us 24/7
- 17 of those patrons chatted with a librarian in the BME, meaning, a librarian at an Ask Us 24/7 library, but not from Buffalo State College
- 3 of those patrons chatted with someone from their own library

Our sessions with others' patrons = **librarians from Buffalo State**

- 43 total chats conducted by Buffalo State Librarians
- 33 of those chats were with patrons outside of Ask Us 24/7
- 10 of those chats were with patrons from an Ask Us 24/7 library, but not their own library.

The numbers for your institution are hyperlinked, so you can click on any of the numbers to see all the transcripts that fit in that category. You can also enter in a custom date for the statistics, but information older than 90 days is not available.

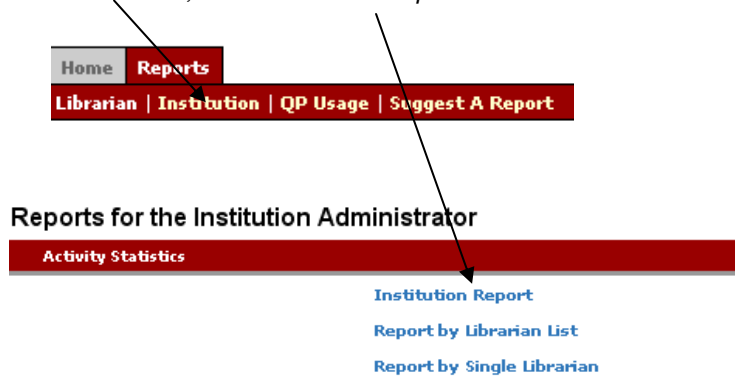
**Institution Report.**

This has all the data going back to when your library first joined. To view the Institution Report:

- Starting on My QuestionPoint, click on *Reports* tab on the top left



- Then click on *Institution*, then *Institution Report*



From here, you can choose a monthly or daily report. A monthly report will show data for one year (in this example, 2008) broken down by month. A daily report will show data for one month (in this example, January 2008) broken down by date.

Review Type  Monthly Report  
 Daily Report

Year 2008 ▼

Month (required for Daily Report) 1 ▼

Generate Report for All Services ▼

The easiest way to collect statistics this way is to choose monthly report. In the resulting report, scroll down toward the middle until you get to “Daily/Monthly Breakdown Stats.” Look for the *Total* column (the last column) to get data for the full year.

Daily/Monthly Breakdown Stats:													
All statistics here are reported in Eastern Time (-5 GMT)													
Time Period	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Avg. Concurrent Session Requests (All Inst.)	19	29	26	24	28	15	12	12	29	34	36	28	
Most Concurrent Session Requests (All Inst.)	30	51	48	49	40	28	26	19	46	68	63	65	68
Avg. Concurrent Session Requests (Your Inst.)	1	1	1	1	1	1	1	1	1	1	1	1	
Most Concurrent Session Requests (Your Inst.)	1	2	1	1	1	1	1	2	2	2	6	2	6
Co-Browsing Feature Used	0	0	0	0	0	0	0	0	1	1	0	0	2
Number of Chat Sessions Requested	5	27	11	16	10	6	6	6	22	23	35	25	192
Number of Chat Sessions Requested (After Hours)	0	0	0	0	1	0	0	0	0	0	0	0	1
Number(Total) of Chat Sessions Accepted	18	20	21	22	23	11	18	24	17	43	24	12	253

The field names here are different than the previous report:

Number of Chat Sessions Requested = patrons from your library

- In this example, the library had 192 chats conducted with their patrons during the year

Number(Total) of Chat Sessions Accepted = chats conducted by your librarians

- In this example, the library had 253 chats conducted with their librarians during the year

For a full explanation of the fields in these reports, see the “Glossary: QuestionPoint statistical reports” link posted at the beginning of this manual’s “Statistics” section.

[Date]

This is an agreement between the Participating Library and the Western New York Library Resources Council (WNYLRC) for active participation in the virtual reference services project known as Ask Us 24/7. An active participant in Ask Us 24/7 will serve on the virtual reference desk, utilizing its library staff as outlined below. The Participating Library will be hereon known as the “participating library.”

A. A participating library or library system must comply with the following:

- Commit staff member(s) to participate on the Virtual Reference Advisory Task Group if requested.
- Commit staff to attend periodic virtual reference training offered by WNYLRC or another regional library council.
- Agree to adhere to policies and procedures approved by WNYLRC’s Virtual Reference Advisory Task Group (subcommittee of the Regional Automation Committee), including changes in staffing requirements or participation fees, operational procedures, and training needs as related to the project.
- Commit staff member(s) to provide the required number hours per week on the virtual reference desk during the scheduled hours. Schedules are determined by both the participating library and the Ask Us 24/7 Project Manager, and as needed, by the QuestionPoint 24/7 Reference Cooperative.
  - All libraries in Ask Us 24/7 are members of the 24/7 Reference Cooperative, and are required to provide virtual reference services to Ask Us 24/7 participating libraries, and to **[public or academic libraries]** in the 24/7 Reference Cooperative.
- Commit physical space at the participating library for staff member(s) conducting virtual reference sessions.
- Unless otherwise provided by WNYLRC, the agreeing library must provide or install the needed equipment: a 15” or 17” monitor (17” preferred); a CPU; a keyboard; and a mouse. Preferred specifications for the CPU are: Pentium 4, 512 MB RAM or higher (laptops with these specifications are also acceptable).
- Provide access to the Internet (preferably via a T1 or better connection) to conduct virtual reference sessions.
- Complete all forms to assist in profiling your library in the QuestionPoint 24/7 Reference software.
- Promote the Ask Us 24/7 service in a positive manner to the public and to other libraries by using the Ask Us 24/7 name brand (and logo, whenever possible) and other promotional materials provided by WNYLRC.

B. The participating library or library system agrees in good faith to continue its alliance in the project through a pre-determined participation fee and a donation of staff time, as well as abiding by the conditions set forth above.

C. Therefore, by signing this letter of agreement, the participating library agrees to the conditions set forth in this letter. It is understood that any fees paid during the calendar year are non-refundable if the participating library decides to end its participation in the Ask Us 24/7 service.

Date: \_\_\_\_\_

Ask Us 24/7 Project Manager \_\_\_\_\_

Date: \_\_\_\_\_

Participating Library  
/Library System Representative \_\_\_\_\_