Ask Us 24/7 Administrator Manual

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Contacting the Ask Us 24/7 Project Manager

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Table of Contents:

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 from QuestionPoint are market with a triangle: △

Your Admin 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 Login.*) From here, you will be taken to the "My QuestionPoint" page, which has a drop-down menu at the top left, 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 administrator for your library, 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 left, click on *Administration*
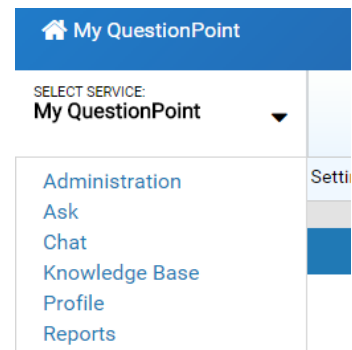
- Click on Permissions

- Click BME/Subscription group. Select "Yes" for each task and click *Save.*

Profile

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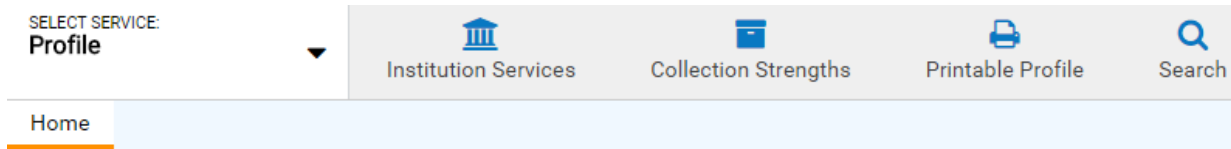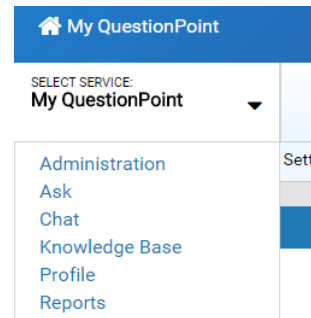
- Click on *Institution Services*.

- 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). It is also recommended that you select a "Library Type" to aid in categorizing your policy page.
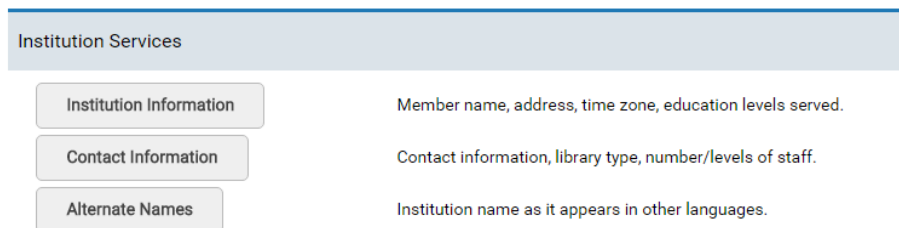
Policy Page

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.
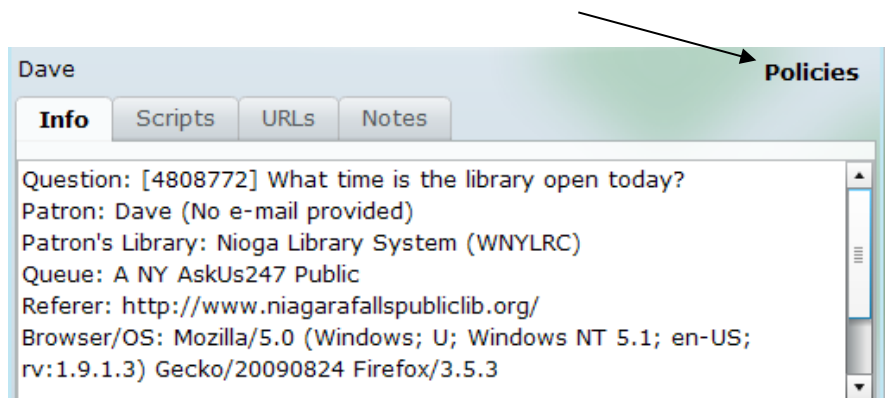
It is very important for your policy page to be kept up-to-date so that librarians at other institutions can help your patrons effectively. **Also, your library's account will not be added to the global cooperative until your policy page has been completed, submitted, and approved.** This means that 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 left, click on *Profile*.
- Click on *Institution Services,* then *Policies*.
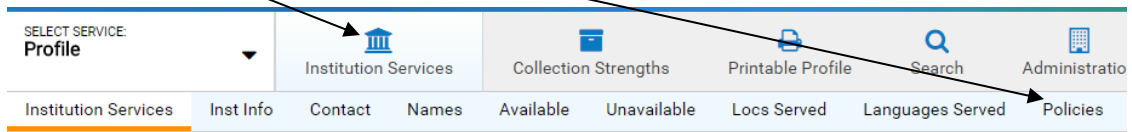
- On this page you can fill out whichever fields you want to provide information for. Include anything that may be helpful to librarians at other institutions who are helping your patrons. This information is only viewable to librarians participating in the chat reference cooperative, and cannot be seen 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.
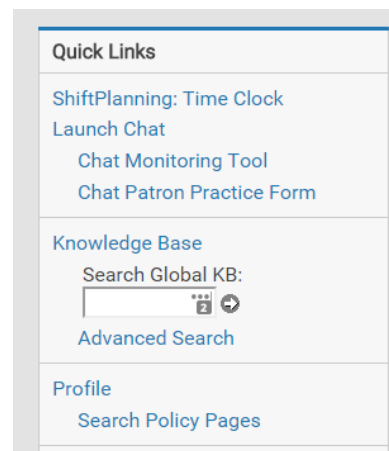
From here, you can view all policy pages by clicking *Find Policy Pages*. Or you can search by name, or narrow down by library type or location. To search for other libraries in Ask Us 24/7, click the "BME" dropdown menu and select *Ask Us 24/7*.

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:

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:

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 and tags. This may be useful when creating subheadings within a field.

To make text <u>underlined</u>, 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 . End the whole list with . 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: 25 cents per day for books 50 cents per day for CDs $1 per day for DVDs 	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: the text of the link. See this example:

Ask Us 24/7	Ask Us 24/7

Your Library's Custom Link

△ Once your policy page has been approved, you will receive an email 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.admin.BuildForm?&page=frame&institution=xxxxx&type=2&language=1

Instead of "xxxxx," 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

Adding to Ask Us 24/7 Group

✓ Task: Once your policy page is approved, add your library to the Ask Us 24/7 group.

- In the drop-down menu on the top left, click on *Profile*
- Click on *Institution Services*
- Under "Activation Status for My Group(s)" click *Submit* next to Ask Us 24/7

Activation Status for My Group(s)			
Status	**Consortium**		
New	QP Global Reference Network	Requirements	Submit
New	Ask Us 24/7	Requirements	Submit

- Your status will then be listed as "Active"

Activation Status for My Group(s)			
Status	**Consortium**		
New	QP Global Reference Network	Requirements	Submit
Active	Ask Us 24/7		

Creating Librarian Accounts

When you join Ask Us 24/7, QuestionPoint will set up your library's account and your admin 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 left, click on *Administration*.
- Click on *Accounts*.
- Enter first and last name – this will only be seen by librarians in chat at the same time, or librarians viewing the transcript, so this should be the person's real name.
- Enter email address
- Enter a screen name, which is the only name the patron will see, following the QuestionPoint cooperative's naming convention:

   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
John in Buffalo, NY

- 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."

Email Notification

QuestionPoint can send you an email 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 email notification:

- In the drop-down menu on the top left, click on *Administration*.
- Click on *Settings*.
- Click on *Email Notification*.
- Click *Yes*, then click *Save*.

Note. If you choose not to enable email 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."

Outgoing Email Address and Patron Replies to Transcripts

After a chat transaction, the patron receives a copy of the transcript in their email. In this section you will choose the "from" address for these email messages. You have the option to use the default, which is AskALibrarian@oclc.org, or a custom email address. The custom email address you use does not need to be an actual, valid address (since all replies are actually collected into your QuestionPoint account.

Be aware that if you choose to use a custom email address, there is a risk that the transcript emails may be classified as spam by certain spam filters, due to the fact that the "from" address used is different from where the email is actually coming from. If you are concerned about this happening, choose the default address.

When you enable the "Reply-To" function, the patron can reply to the transcript by sending a reply to the email. This reply is appended to the transcript on QuestionPoint, and you will receive notification.

✓Task: Decide whether or not to enable patron replies, and set the outgoing email address:

- In the drop-down menu on the top left, click on *Administratio*n.
- Click on *Settings*.
- Click on *Outgoing Address*.
- For Reply-To Messages, choose OFF or ON.
- For Outgoing Email Address, click AskALibrarian@oclc.org or Custom.
- For the Custom Email Address, enter the email address that will send the transcript to your patrons.

Outgoing E-mail Address Settings:	
Reply-to Messages:	○ OFF ⦿ ON
Outgoing E-mail Address:	○ AskALibrarian@oclc.org ⦿ Custom (specify below)
Custom E-mail Address:	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.

Email 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 emails 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 emails, but then they started getting blocked without warning.

Email Discussion Group

✓ Task: Send the project manager the email 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 email 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. Email the project manager with your chosen hours as well as the date you would like to start.

> http://wiki.questionpoint.org/w/page/13839485/PUBLIC%20247Ref%20Coop (public libraries)
> http://wiki.questionpoint.org/w/page/13839423/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 left, and click on *Chat*.
3. When the screen to select a queue appears, the "librarians" select *Monitor Practice Queue Only*, then click *Save*.
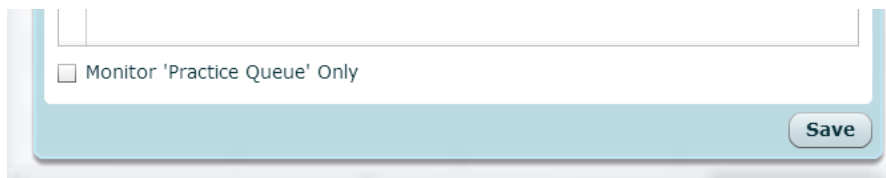
4. From the My QuestionPoint page, the "patrons" click on *Chat Patron Practice Form* on the left side of the screen. This will put them into the practice queue as a patron.
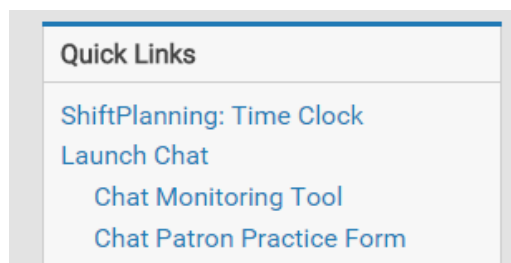
Keep in mind that each institution has its own practice queue. So 2 people from 2 different libraries who entered the practice queue would not see each other – they would only see people from their own library. Practice accounts are available from the Project Manager if people from multiple libraries 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 request 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.

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 left, click on *Administration.*
- Click on Surveys.
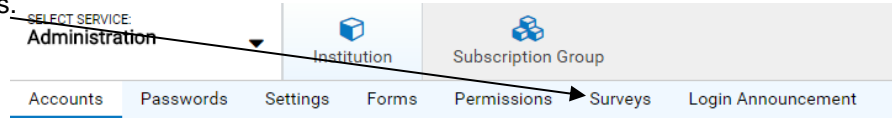
- You will start out seeing the *Survey Report* screen, but if you haven't yet created the survey, there's nothing to report. Click on *Survey Form.*
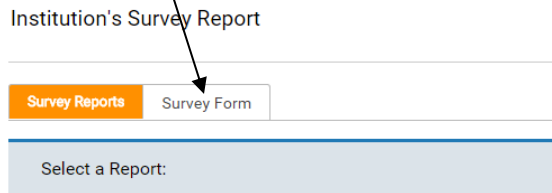
- You have two options, creating an **external survey**, or using an **internal survey** created in QuestionPoint:
  - To use an **external survey**, you can create a survey on another site such as SurveyMonkey (www.surveymonkey.com), and the link will appear to the patron at the end of the chat. This 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.

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

- 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.

Chat	Ask	Question
☐	☐	This was the first time I used this service: Response: 1. Negative or No 2. Neutral or N/A 3. Positive or Yes
☑	☐	I received a better answer from this resource than I would have found on my own: Response: 1. Negative or No ~~2. Neutral or N/A~~

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

Save	View Internal Chat Survey	View Internal Ask Survey

- 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 library's administrator, 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	Can I help you with anything else today?
Enough to start	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 left, click on Ask.

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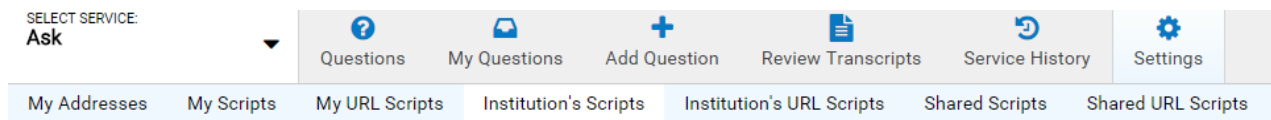
- For each script you want to create, supply a name for it (which will appear in your list of available scripts) and the text of the script itself. Then click Add.

✓ Optional task: Create personal scripts:

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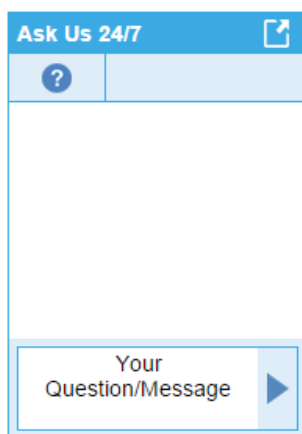- Click on Settings, then My Scripts.
- For each script you want to create, supply a name for it (which will appear in your list of available scripts) and the text of the script itself. Then click Add.

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.

15
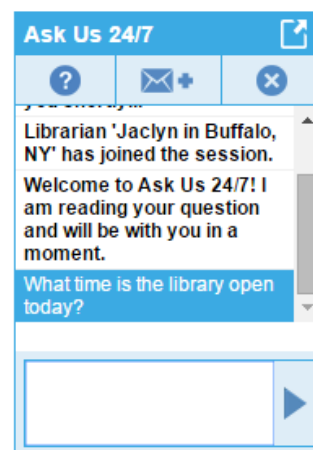
✓ Optional task: Create a Qwidget:

- In the drop-down menu on the top left, click on *Administration*.
- Click on *Forms* in the top menu, then *Forms* again in the next menu.
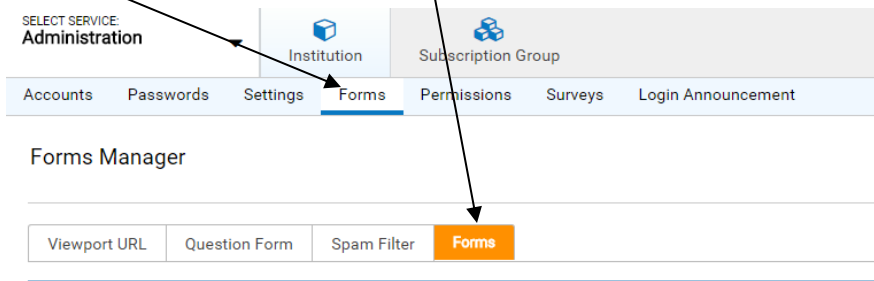
- Click on *Create Qwidget*
- In the *Select Language* drop-down menu, either select English, or do not select anything and it will just default to English. Click *Submit*.
- On the Qwidget Configuration page, you can customize the Qwidget name and appearance. Make sure to click *Submit* to save your information.
- Copy the *Qwidget Code* into any place on your library's website where you would like the Qwidget to appear.
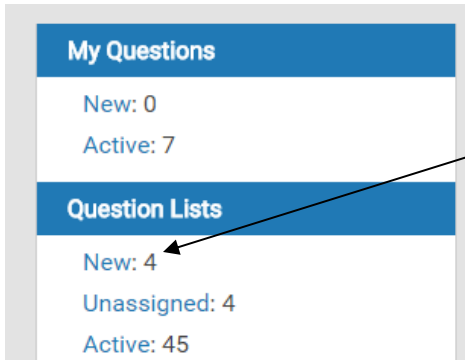
Optional features:

- 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 administrator, you will also receive an email letting you know that a question requires follow-up, if you have enabled email notification as described on page 7 of this manual.
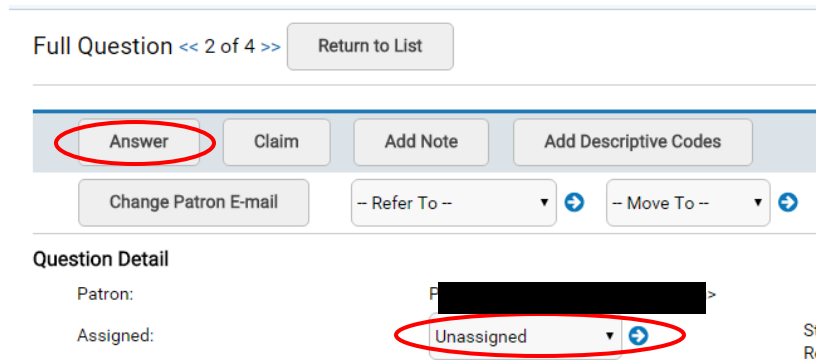

In this example, the library has four questions in the *New* list, meaning they need to be followed-up on. They are also *Unassigned*, which means they have not been assigned to a particular librarian. For more information about the *New* list and other question lists, see "Question Lists" in the training 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 administrator, and only the administrator, 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 administrator, 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 administrator 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 should receive a notification that the question has been assigned to them.

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:

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.

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":

18

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 email 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.

On the next page, enter the note (for example: "I responded to this patron directly via email."). 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.
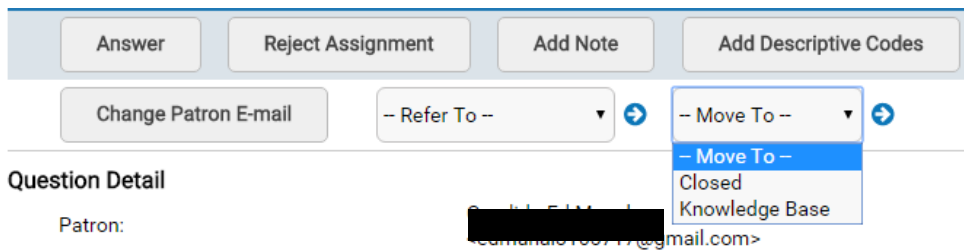
Reviewing Transcripts

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 left. The default screen is *Questions*, or you can click on *Review Transcripts.*

19
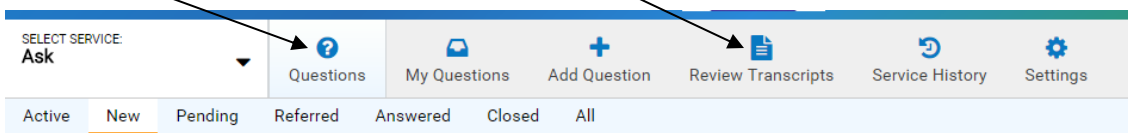
Both screens include all transcripts involving your patrons or your librarians from the last 90 days, but there are a few differences:

Question Lists	Review Transcripts
Available to all librarians at your library.	Available only to the administrator.
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 **exclude** 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.

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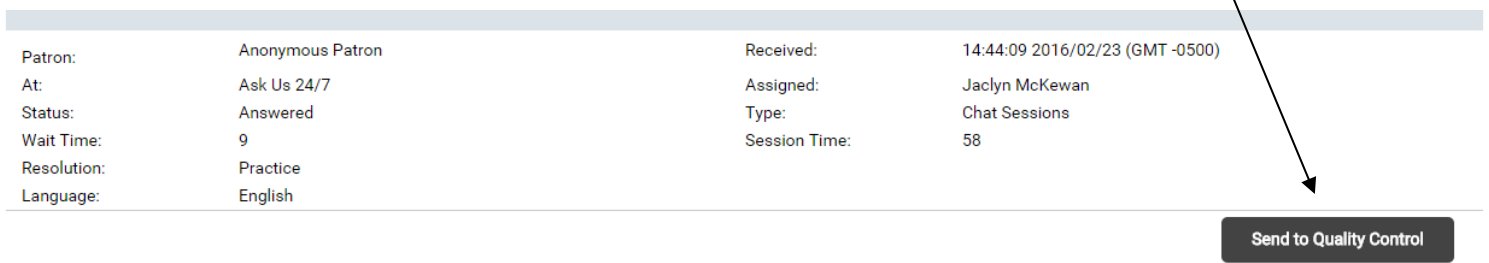
To close a transcript, from *Question Lists*, open the full view of the transcript. On the "Move to" box at the top right of the transcript, click "Closed," then click the arrow key to the right
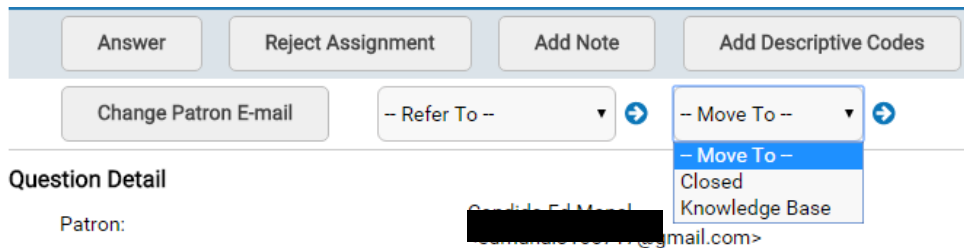

Referring Transcripts to Quality Control

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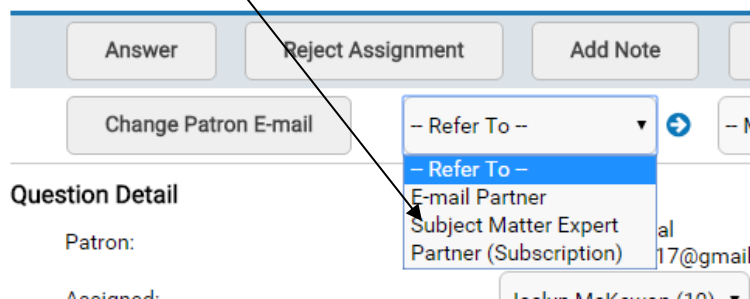
You may also want to consider sending an email to the patron (if they provided contact information) to ask if they still want more help. In some cases it may be too late, but at least the patron will know that someone at the library is trying to help them.

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 administrator. 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
Glossary: QuestionPoint statistical reports:
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 administrators, and only has data for the last 90 days.

- Click *Reports* from the dropdown menu at the top left.

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

Here's how to read the reports of sessions, using **Finger Lakes Library System (FLLS)** 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	
Finger Lakes Library System (NY)	3	20	153	176	17	198	215	391	0	0	0	391
Fort Ann School District (NY)	0	0	0	0	0	0	0	0	0	0	0	0

Sessions with our patrons = **patrons from FLLS**
- 176 total patrons from FLLS used the service
- 153 of those patrons chatted with a librarian "Outside BME," meaning, outside of Ask Us 24/7
- 20 of those patrons chatted with a librarian in the BME, meaning, a librarian at an Ask Us 24/7 library, but not from FLLS
- 3 of those patrons chatted with someone from their own library

Our sessions with others' patrons = **librarians from FLLS chatting with people not from their library**
- 215 total chats conducted by FLLS Librarians with other patrons
- 198 of those chats were with patrons outside of Ask Us 24/7
- 17 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.

- Click *Reports* from the dropdown menu at the top left.

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

SELECT SERVICE:
My QuestionPoint

Home   Reports

Librarian   Institution   Group   QP Usage   Suggest A Report

Reports for the Institution Administrator

Activity Statistics

Institution Report
Report by Librarian List
Report by Single Librarian

Counts of Current Data

Descriptive Codes
Number of Questions by Patron ID
Number of Text Messages by TXT Patron ID
Reports of Sessions
Reports of Sessions by Authorization
Resolution Codes

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.

Institution Report:

Submit

Report Type	● Monthly Report
	○ Daily Report
Year	2008 ▾
Month (required for Daily Report)	1 ▾
Generate Report for	All Services ▾

Submit

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.)	22	30	29	26	21	22	0	15	21	26	16	20	
Most Concurrent Session Requests (All Inst.)	44	51	52	46	32	39	0	20	36	45	28	40	52
Avg. Concurrent Session Requests (Your Inst.)	1	1	1	1	1	1	0	1	1	1	1	1	
Most Concurrent Session Requests (Your Inst.)	4	3	6	2	2	2	0	1	4	6	2	1	6
Number(Total) of Chat Sessions Requested	54	16	61	20	10	10	0	3	15	23	2	4	218
Number of Chat Sessions Requested (After Hours)	2	1	7	2	0	0	0	0	1	0	0	0	13
Number(Total) of Chat Sessions Accepted	0	0	0	0	0	3	0	6	11	5	1	0	26
Number of Chat Sessions Requested via Qwidget	0	0	0	0	0	2	0	1	2	2	0	0	7
Number of Chat Sessions Accepted via Qwidget	0	0	0	0	0	2	0	1	2	2	1	0	8

The field names here are different than the previous report:

Number (Total) of Chat Sessions Requested = patrons from your library
  • In this example, the library had 218 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 26 chats conducted with their librarians during the year

"After Hours" sessions refers to chats from your patrons that were picked up by the QuestionPoint backup librarians (sometimes referred to as "After Hours" staff). This can be an indication of how long your patrons were waiting, as the backup librarians do not see any questions until they have been waiting in the queue for 120 seconds.

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.

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[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 Ask Us 24/7 Advisory Board 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 _____
                                        Representative