Ask Us 24/7 Software Pilot Final Report  
March 3, 2016  
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Introduction

When Ask Us 24/7, New York State’s cooperative chat reference service, began in 2003 it used a software platform called 24/7 Reference. The following year, the platform was acquired by OCLC and combined with their QuestionPoint software. Ask Us 24/7 has continued to use the same software since then. Chat software options for libraries have changed much in the intervening years, with some being discontinued and new ones being developed.

During 2015-2016, a group of librarians who participate in Ask Us 24/7 volunteered to test out two alternative platforms, LibraryH3lp, and Springshare’s LibChat. The purpose of this testing was threefold:

1. To be aware of other software platforms available.
2. To consider whether we want to leave QuestionPoint and move to another platform.
3. To consider whether we want to stay with QuestionPoint but keep another platform in mind as a backup, in case QuestionPoint should no longer be available.

Thank you to the following volunteers who tested the platforms:

Jessie Blum, Canisius College  
Jenny Burnett, Finger Lakes Community College  
Timothy Galvin, Buffalo & Erie County Public Library  
Sarah Morehouse, Empire State College  
April Steenburgh, Finger Lakes Community College  
Cindy Yochym, State University of New York at Fredonia

And thank you to the following software representatives for allowing me to set up these pilots, and for their responsiveness to questions:

Pam Sessoms, LibraryH3lp  
Phil Blank, LibraryH3lp/Chatstaff  
Bill Kessler, Springshare  
Sarah Pawlek, Springshare
Project Timeline

**June 5th, 2015**
I sent an email to our Ask Us 24/7 Advisory Board, soliciting volunteers to help test.

**June 7th, 2015**
I sent an email to all of our participants via our listserv, soliciting volunteers to help test.

These emails resulted in 6 volunteers, 5 from academic libraries and 1 from a public library. An additional announcement seeking more public librarian testers did not produce any results.

**July 28th, 2015**
Doodle poll sent out to determine a day/time for a phone meeting. No consensus was reached.

**August 4th, 2015**
A second Doodle poll was sent, resulting in a meeting date of August 25th.

**August 13th, 2015**
I emailed LibraryH3lp and LibChat to request test accounts for a pilot.

**August 25th, 2015**
A meeting was held by conference call to discuss how the pilots would be constructed. It was decided that practice sessions would be held among the participants, and later, that volunteers could act as patrons for “real-world” testing. This would be easier and cause less confusion than asking real library patrons to temporarily use a different chat service. The participants requested waiting until late October or November to begin testing, due to the start of the fall semester.

**October 2015**
Starting with LibraryH3lp, I reviewed the available documentation and practiced using the software, so that I could teach the volunteer testers. I created a PDF document, “LibraryH3lp basics for Pilot” (Appendix A) which I sent to the volunteers. I asked them to create some scripts (canned messages) and fill out their library’s profile prior to us meeting for testing.

**November 2nd, 2015 & November 5th, 2015**
Two LibraryH3lp practice meetings were held among the participants. While talking on the phone, we all signed into LibraryH3lp and used various functions: picking up a chat, viewing a library’s profile, sending a canned message, transferring a patron, and sending an instant message to another librarian.

**November 10th, 2015**
I sent an email to the Ask Us 24/7 listserv soliciting volunteers to act as patrons for a “live” practice session.
November 19th, 2015
I sent an email to the NY 3Rs (now known as ESLN) staff listserv soliciting volunteers to act as patrons for a “live” practice session.

November 23, 2015
Live test with LibraryH3lp conducted. Volunteer patrons came into the chat at various times during the one-hour test, while the librarians treated them as if they were real questions. Comments were later solicited from both the librarians and the patrons. (Appendix C)

November-December 2015
In preparation for LibChat testing, I reviewed the available documentation and practiced using the software, so that I could teach the volunteer testers. I created a PDF document, “LibChat basics for Pilot” (Appendix B) which I sent to the volunteers. I asked them to create some scripts (canned messages) and fill out some FAQ entries prior to us meeting for testing.

December 17th, 2015
A LibChat practice meeting was held among the participants. While talking on the phone, we all signed into LibChat and used various functions: picking up a chat, viewing a library’s FAQ entries, sending a canned message, transferring a patron, and sending an instant message to another librarian.

January 7th, 2015
I sent emails to the Ask Us 24/7 listserv and the NY 3Rs (now known as ESLN) staff listserv soliciting volunteers to act as patrons for a “live” practice session.

Live tests with LibChat conducted. Volunteer patrons came into the chat at various times during the one-hour tests, while the librarians treated them as if they were real questions. Comments were later solicited from both the librarians and the patrons. (Appendix C)

January 22, 2015
SurveyMonkey survey sent to volunteer librarians, which was completed by me and 5 of the volunteers. (Results are Appendix D)

February 1st, 2016 & February 4th, 2016
Phone discussions held among all volunteer librarians to discuss impressions of the three platforms and whether we want to consider leaving QuestionPoint.
Results – Chat Platform Comparison

Spreadsheet

I created a spreadsheet (Appendix E) comparing the three platforms across various aspects:

- **Policy Pages / Profiles** – an informational document, created by each participating library, that the chatting librarian can use to assist patrons.
- **Roll up** – the process where patron chats may be visible/available only to certain librarians based on where the patron is from and what librarians are currently online. This is to give librarians the best chance at picking up their own patrons.
- **Private Queues** – a way for librarians to choose to sign into the chat and only see chats from their own patrons, rather than other patrons in the cooperative. Any time a library spends monitoring their private queue would be up to them, and it would be in addition to the required time spent monitoring for chats from the whole cooperative.
- **Texting** - Whether questions can be asked/answered via text messaging.
- **Scripts / Canned Messages** – A way for librarians to create pre-written messages that can be sent to the patron during the chat, in order to save time. Librarians may also choose to use another library’s scripts, when chatting with a patron from that library.
- **Instant Messaging** – The ability for one librarian to send an instant message to another librarian who is online in the chat.
- **Follow Up** – The procedure for librarians submitting follow-up information via email, such as with chats that were handled by a librarian from another institution.
- **Mobile Chat** – Whether the patrons can access the chat from mobile devices.
- **Other Features** – Any other features that the specific platform has.

Survey

Based on the survey results (Appendix D), and the phone discussions in February, when asked about the two tested platforms, the majority of volunteers preferred LibChat to LibraryH3lp. Overall some also preferred LibChat overall among all three platforms, although some preferred QuestionPoint. The survey was based on features of the software only, rather than on pricing or availability of backup staffing.

Some survey answers on specific software features had a clear consensus:

*Policy Pages.* QuestionPoint and LibraryH3lp each had a system of libraries filling out a single-page document. When a library’s patron is chatting, the profile for their specific library is easily accessible to the chatting librarian. LibChat instead worked with a system of FAQ (frequently-asked-question) entries. When chatting, the librarian would need to access the FAQ page in a separate window, then filter the entries to only those from the patron’s library. Most testers preferred QuestionPoint’s setup.
Chat roll-up. Each system was different in this regard. QuestionPoint has a timed system, where the patron becomes visible to successive groups of librarians if they are not picked up by more local librarians after a certain period of time. With LibraryH3lp, there is no roll-up, as patrons become visible to their own librarians and not to anyone else. They would only be visible to other librarians (immediately) if their librarians were not online or were designated as “busy.” (The librarian could choose to be automatically labeled busy after chatting with a certain number of patrons.) With LibChat, patrons again are only visible to their own librarians, and would only be visible to other librarians (immediately) if their librarians were not online. A librarian who was faced with more patrons than they could handle would be able to transfer that patron back to the group queue, making them visible to everyone. Most testers preferred LibChat’s setup.

Instant Messaging. Both LibraryH3lp and LibChat had a one-click method of sending an instant message, which involved clicking on the name of the librarian. The IM would appear in a small box within the chat interface. QuestionPoint requires the librarian to click through a few different screens to either initiate or answer an IM, and they cannot view the IM at the same time as the patron chat. Most testers preferred LibChat’s setup.

Scripts. With QuestionPoint, a chatting librarian has access to scripts for their own library as well as the patron’s library, which they can select from scroll boxes. With LibraryH3lp, the scripts would appear as the librarian started typing words from the script. (For example, when the librarian typed “Hello” they would see all scripts beginning with the word Hello and could select them from a pop-up.) With LibChat, a button within the chat box would let the librarian select from various scripts. However, with both LibraryH3lp and LibChat, the librarian had access to all scripts in the cooperative, rather than just their scripts and the patron’s scripts. For this reason, most testers preferred QuestionPoint’s setup.

24-hour Staffing

One benefit of QuestionPoint was its “24/7 Reference Cooperative,” made of library users throughout the United States, as well as some in the United Kingdom. Combined with the “Backup Librarians” who work under contract for OCLC, this allowed our chat service to be available 24 hours a day, 7 days a week. Neither of the other 2 software platforms had this exact model.

LibraryH3lp works with Chatstaff, an organization providing staffing to online library reference services, which would be available to staff Ask Us 24/7 when we did not have any librarians online. However, we would not have access to a cooperative of other LibraryH3lp users.

LibChat does not at this time offer backup staffing, although it is possible that it would be offered in the future. This is a major point, as the 24-hour service has been a big draw for many of our participating libraries.
Group Admin Thoughts

As admin, one of my responsibilities is training new libraries in the QuestionPoint software, a process that currently takes about 4 hours. I believe that were we to move to LibChat, the training process could probably be reduced. This is due to QuestionPoint having some features that are not intuitive, or have a potential to be confusing. By moving to LibChat, I would eliminate or reduce the time spent training on these aspects:

- Use of resolution codes, where the labels are not accurate and are frequently used incorrectly by chat participants.
- Sending an instant message to another librarian.
- The various screens where one can find chat transcripts (“Review Transcripts” and “Question Lists”) and the various categories of questions (Pending, Referred, Active, Closed)
- There is no easy way for library admins to review only transcripts involving only their own patrons. Removing other patrons’ chats from view affects all librarians in the institution, meaning they cannot view transcripts of their own chats.

From an admin perspective, I did find LibChat to be a bit complex in the setup, due to the fact that it is a component in a larger SpringShare program called LibAnswers. Aside from the LibChat part, LibAnswers provides a FAQ (frequently-asked-question) setup for libraries, a method for answering questions via email, and a ticketing system for email or chat questions needing follow-up. The software is highly customizable to allow collaboration between librarians of different departments, locations, or branches. In order to allow our librarians from various institutions to work with each other’s patrons, but to still have first chance at picking up their own patrons, I needed to set up departments, groups and queues – one for each of the participating libraries, and one for Ask Us 24/7 as a whole. This was a bit confusing and time-consuming at first, but I was told by SpringShare that this could be automated, with librarian accounts created in bulk, if we were to join LibChat.

Another opportunity for customizing LibChat was with the chat forms. A single library could create multiple forms, with different names or visibility to different librarian groups. This could benefit public library systems by being able to create a differently-named form for each branch. With QuestionPoint, each public library system has one chat form, and there is no automated way to determine which location/branch a patron is from.

My personal preference would be to switch to LibChat, if/when backup staffing was to become available, but I do recognize our participants’ concerns (below) that the switch would be a large undertaking, and that we’d be operating without the benefit of a large organization managing the chat cooperative.
Conclusion

Based on phone conversations with our testers, the majority opinion was that we should not change platforms at this time. It would be a large undertaking to retrain all participants in a new software platform, and it would take time for everyone to get used to it. As one volunteer stated, we should stay with QuestionPoint, “unless there is a compelling reason” to switch.

I sought price quotes for both LibChat and LibraryH3lp, to see the difference in cost, as a significant savings could perhaps offer a compelling reason. With LibraryH3lp, this did not turn out to be the case. With LibChat, I was not able to do a direct comparison as the cost would be for the software only (no backup staffing). If/when backup staffing should become available, I will possibly revisit the cost issue.

Another consideration is that by leaving QuestionPoint, some features that are handled by OCLC would need to be handled by me, such as quality control, cooperative chat policies, and scheduling of the backup staff, which would add to my own workload.

So, at this time, Ask Us 24/7 will continue to use OCLC’s QuestionPoint. If QuestionPoint should be unavailable at some time in the future, LibChat would most likely be our platform of choice.
Appendix A

LibraryH3lp basics for Pilot

Login at https://libraryh3lp.com/webchat/

Choose new web client

Queues

Select just your library to see only your patrons. Select your library and askus-consortium to see all our patrons.

Patrons do not roll up - must select "busy" when chatting for any new patrons to move to consortium queue

You can set your status to go busy automatically anytime you have one chat - set **Auto-busy limit** in Settings
Appendix A

You can chat with more than one patron
  - split screen appears so you can see both at once

**Status options**
  - available
  - busy (continue current chat, no new chats) - select if ending shift shortly
  - away (end current chat, no new chats)

**Instant Messaging**
  - when other people are online, you will see them in your buddies list on the left
  - click on name to send IM

**Chat alert when new patron comes in**
  - visual alert
  - sound alert until patron is picked up - select your alert sound on Settings page
  - can get desktop alerts when patron types something and you are on another screen - select in Settings

**Chat features**
  - when patron comes in, you can see referring page, library they are from (click to see profile), and IP address
    - click library name or patron avatar to see profile
    - buttons at bottom: transfer, attach file, email transcript, tag for follow-up, block
    - **block** - blocks their IP address for 24 hours
    - **transfer** – can transfer patron to a specific librarian, or back to the queue to get picked up by someone else
    - these buttons are also available when viewing transcripts
tabs at top of screen
- chats - chatting
- activity - reviewing transcripts
- 3mail – optional feature, we are not using this
- profiles - library profiles within your service
- messages - scripts - personal or system-wide
- settings - options & password

scripts
- called canned messages
- created by group admin for everyone, or for individuals to use themselves
- during chat, start typing and the text will fill in
- or go to the “messages” tab and copy-paste from there
- no institution-level scripts, they are either system-wide or for individual librarians

resolution codes
- none, but there is an option to tag chat for follow-up

Survey
- option to add link to survey in chat box - http://docs.libraryh3lp.com/widget-clickable-title.html
- you would create your own survey in SurveyMonkey or similar

profile (policy page)
- login at http://chatstaff.org/clients/profiles/ProfileEditor.php
- use your email address
- use chatstaff as password

review transcripts
- from admin screen, click on chat history
- from regular chat screen, click on activity

Mobile
- software auto-detects for mobile devices and displays mobile-optimized widget for both iOS and Android

Proactive chat
- You can add proactive chat invitations to any existing chat snippet. Proactive will include an invitation to chat in addition to your existing in-page option, leaving the in-page option unchanged.
- LibraryH3lp admin dashboard --> chat snippets
- Select your queue, click the Edit button and scroll down to the section labeled "Routing for incoming chats." Click the Proactive options tab
LibChat basics for Pilot

Go to http://libapps.wnylrc.org and select the LibAnswers dashboard. Be aware that the main product we are using is LibAnswers, with LibChat being one component of that product.

Create chat form:
Click “LibChat” at the top and select “Chat Widgets.”

Fill out the form on the next page, and add the code to your webpage.

For custom fields, you probably want to add “email address” and “question” to the first two fields. There is automatically a field for Name so you do not need to add it.
Click “Department/Operator selection”. From there, select your library only from the dropdown list.

Click “Add Another Fallback.” From there, select “Ask Us 24/7” group only from the dropdown list. Then click “Set.”

If you want certain widgets to not roll-up to the cooperative, do not select a Fallback. Then the questions will only go to your library, and the widget will be offline if no one from your library is on.

Click “Save” and then copy the code for the widget, to place on your website.
Appendix B

Enter chat:
Click “LibChat” at the top and select “Connect.”

Scripts:

Personal Scripts:
Click “LibChat” at the top and select “Canned Messages.” From here you can add your own personal messages, which will only be visible to your account.

Institution-Level Scripts:
As admin for your library, you can create these. Click “Admin” at the top and select “LibChat Set-Up.” Then select the “System Canned Messages” tab and the “Add Canned Message” button. So these are a type of “System Canned Message” (see next entry) but tied to a particular library. Since there is no way to limit which canned messages show up in chat, please put your library name in the script, such as “Canisius Hello.”

System-Level Scripts:
The Ask Us 24/7 group administrator can create canned messages for everyone to use.

Using Scripts:

While chatting, click “canned messages” to see your personal canned messages as well as system messages – this includes “system canned messages” for individual libraries as well as all of Ask Us 24/7.

Personal Script (“My Messages”)
Institution-Level Scripts (“System Messages”)
Ask Us 24/7 Scripts (“System Messages”)
Appendix B

Accounts

As admin, you can add users by going to Admin → Queues

From here, you will see a pencil under “Actions” for your queue. Click this to edit the queue.

Click the “User Access” tab, and from this page you can add users.
FAQs (instead of Policy Pages)

Creating your library’s FAQ:

Click on “Answers” at the top and select “Create FAQ Entry.”

The “Group” will be your library, so leave that as it is.

For “Question” enter a brief synopsis of the question there.

For “Details” enter more explanatory information about the Question, NOT the answer. (That’s on the next page.)

Click “Save Question and Continue.”

Enter the answer in the box. You can add hyperlinks, text formatting, and images.

Click “Save answer Text.”

The Status starts out as “Unpublished Draft.”
Click “Change Status” and select “Hidden.”
Then click “Save.”
Appendix B

Accessing another library’s FAQ while in chat:

Right now, there is not a direct way to access another library’s FAQ while in chat with their patron. Instead, from another window, click on “Answers” and select “FAQ Entries.”

On the next page, for “Group” select the library you are chatting with.

Transferring patrons:

While in chat, click on the people icon.

To transfer to a specific librarian, select their Name under “Staff.” To transfer back to the queue For everyone, select “Ask Us 24/7 Group” from the Departments list.

Once you see that someone else has picked up The patron, close the chat window.
Appendix B

**IM With Another Librarian**

Under “Staff Online” you will see your name and anyone else from our group who is online. Click on their name to start instant messaging them.
Appendix C

LibraryH3lp

Feedback from Librarians, emailed to me after group testing but before the Live Practice Session:

Librarian 1: “How does the patron end the chat? I couldn't find a clear way to end the connection/conversation.”

Response from LibraryH3lp:
*This is by design and based on what we know about how patrons use widget-style chat boxes. We find that patrons often use the chat box several times during their research process, with various amounts of time away from the chat while they do their work. The widget provides a handy way for them to have an ongoing conversation, always inviting them to return, and preserving their prior chat history so they can easily refer back to what was said previously, right there in the chat box.*

The librarian is provided with feedback when the guest navigates off of the chat. The librarian can still send a message, and when/if the patron returns, the patron will see that librarian message. This gets us closer to modern messaging behavior that patrons use in other, more informal settings, rather than an older-style formal "phone call" style of chat conversation that has a very clear beginning and hang up.

There is a "clear chat history" button that the patron can use if they want to wipe out what has been said. This is handy on shared computers. The chat history also goes away on browser cache clearing.

Librarian 1: “From the librarian's end, the red X in the top right corner didn't really seem to end the connection/conversation. Even after X'ing-out, I could keep the exchange going. I wasn't able to find a clear indicator that anything was ended unless I closed the tab in the browser (same for the patron side).”

Response from LibraryH3lp:
*The red X ends the conversation from the librarian's perspective. It also places an end timestamp on the chat and ends it from the system router's perspective. When the librarian closes the chat box, it severs their exclusive connection to the guest. If the guest sends a new message, it will go out to ALL available operators on the queue, not just the one that previously answered.*

The guest is deliberately not notified of the librarian closing the chat window. Again, we want the chat box to be inviting to the patron to use, and we don't want them to feel like they have been "cut off" prematurely. The librarian might need to leave suddenly for any number of reasons, but if there are still librarians available on the queue, the patron can still send a message.

Librarian 1: “I don't care for the way the "Messages" come up. In a way, it can be convenient that they materialize after one starts to type, but to me, they clutter up the screen when they appear. That's
especially distracting when I have no intention of using a message in that moment and the system gets to assuming too much.”

Response from LibraryH3lp:
Thanks for the feedback! We're building in an alternative mechanism for the canned messages so that librarians who prefer to browse them can do that instead of using the type-ahead messages. (Currently, the canned messages can be disabled by the operator if desired; they could still view them and copy/paste them from the Messages area, although that would be slow.)

We went with the type-ahead messages because once they're familiar, they're extremely efficient since the operator does not need to spend time reaching for the mouse. Unwanted messages can be quickly dismissed by entering a couple of space characters, since that means there will be no matching messages, or the Escape key can be pressed. But again, we have heard from others, too, that they'd prefer a browsing mechanism instead of the type-ahead, and we'll be adding that.

Feedback from Patrons, emailed to me after the Live Practice Session:

Patron 1: “I mentioned this to the librarian I chatted with today, but the sound it made when the librarian responded was kind of weird-- like a submarine sonar blip. I don’t know if there’s a way to change this-- we use LibraryH3lp for our local chat but I’m not even sure how to adjust whether the widget defaults to having the sound on or off (ours is off, apparently).”

Response from LibraryH3lp:
Currently, this cannot be customized other than to be disabled entirely. We’ll probably add more sound options in a next-generation guest-side chat widget. The current one has the advantage of being relatively unique, so that the patron can easily associated it with the library chat box once they’ve heard it. This way they can do their research with other windows on top and hear the sonar ping when there is a new librarian message.

Patron 2: “It worked pretty well yesterday! One thing that was confusing to me was that sometimes the chat box said “away” and then a librarian answered immediately, and one time it said “available,” but I didn't get a response for a full 5 minutes. I liked the fact that as long as I wasn't in incognito mode, the chat history was saved when I closed windows.”

Patron 3: “I just wanted to tell you that I thought the chat test went great from my end...I never really used that feature before and I was amazed at how quick the librarians responded and how easy it was. I thought it worked great! Hope it helps, have a good day!!”

Patron 4: “The only issue I had was that while I was waiting for quite some time (ca. 8 minutes according to the chat box clock), there was no message telling me someone would be with me soon or that a librarian was helping others. There WAS an “available” box on the screen, but a patron might think that
the program just got left on by accident. The chat box was very easy to on the Fredonia site, where I spent most of my time, was very easy to use.”

**LibChat**

**Feedback from Chatting Librarians, sent to me in Instant Messages during the Live Practice Session:**

Librarian 1: “So we had technical difficulties and the chat dropped. The patron said they had wifi issues. After they dropped, I could not finish typing to send them a message.”

Librarian 1: “I also do not like that it doesn’t start our chat with their question in our chat box. You have to mouse over the entry to see that.”

*Response from LibChat:*

*For the first point you brought up - that the chat box doesn’t begin with the patron’s initial question - yes, there is a setting that could help with this. In the widget builder, under "Widget Options", there are actually 2 types of initial questions. The first one - labeled “Initial Question” actually does display directly in the chat panel. The other questions are treated a bit more freeform, and (at least currently) they only display on hover. I'll include a screenshot so you can see what I mean; I'll also chat with our developer here to see if that's something that could be changed down the road.*

Librarian 2: “It does have a smoother UI, at least apart from the FAQs. then again, I often find the policy pages a bit unwieldy at times. I did not care much for LibraryH3lp.”

Librarian 2: “I think I am now fond of the FAQs. Filtering works nicely to break down the mess of entries. Was just playing around in there, as that is where I have the least experience. It will definitely take librarian monitoring/curating, but it works once you are used to it 😊”

Librarian 3: “I honestly don’t think it’s as good a fit for Ask Us 24/7 as Questionpoint, even though it’s a very nice set-up and the support is great.”

**Feedback from Patrons given to librarian during Live Practice Session:**

Patron 1: “This is a nice chat interface...it's clean and quick.”

**Feedback from Patrons entered in the comment form when the Live Practice Session ended:**

Patron 2: “Apparently the librarian wasn't able to immediately see my initial question on her screen.”

Patron 3: “I think Cindy was from SUNY Fredonia, but the form i used said it was for Finger Lakes Community College.”
Appendix C

Patron 4: “The main issue I see with this system is that how to log off isn't obvious to me - the X. Maybe it is just my age. Once a patron closes, can the system be set up to give an automatic response? Also, I think it would take a bit (for me) to get used to clicking "view/email transcript" and THEN emailing to self. I think I prefer automatic emailing.”

Response from LibChat:
This isn't an option currently, though it's certainly an interesting idea! The issue on our end is that we don't currently have a login field explicitly dedicated to collecting email addresses - essentially we'd need to have a dedicated field just for that purpose, which we'd then rely on for pulling that address information. However, this is actually something we've talked about adding in the past (specifically for sites who'd like to integrate LDAP/Shibboleth/SIP2 authentication prior to initiating a chat, which would prompt patrons to enter their library credentials prior to initiating a chat). So while not currently available, we can definitely consider this for a future release.

Patron 4 again: “I also wonder if the rate this chat survey can be modified - different questions? More questions? Maybe it is the librarian in me that wants more detail and options, as with questionpoint. otoh, maybe more people would respond w/ a simple rating option like this”

Response from LibChat:
It's possible to customize all of the text within the comments pane itself, but it's not possible to add additional questions or ratings, if that makes sense. As you're customizing the widget, when you hover your mouse over different sections of content, you should be able to click on various areas to customize the text that appears. I'll include a screenshot so you can see what that looks like. Anecdotally, we've definitely found that people are more likely to fill out the rating & comments when the collection form is simple, if that makes sense.

Patron 5: “I would suggest being able to screen print/ paste into the box. When a screen is playing up, it helps. “

Feedback from Patrons, emailed to me after the Live Practice Session:

Patron 6: “Had one hiccup where I lost connection, but I think that was on my end as we were having some WiFi issues. My only comment (I think I left specific details in the comment section on the form as well) was that one time I clicked into an institutional form and got someone from a different institution responding. Was that intentional for the testing?”

Response from me:
Yes, we were deliberately testing in a cooperative setting.
Q2 Interface/Method For Reviewing Transcripts.

LibraryH3lp: Login to Webchat, then click "Activity" LibChat: Login to LibApps, select "Ask Us 24/7 LibAnswers", then click LibChat --> Transcripts

Answered: 6  Skipped: 0

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
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<td>QuestionPoint</td>
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</tr>
<tr>
<td>LibraryH3lp</td>
<td>16.67%</td>
</tr>
<tr>
<td>LibChat</td>
<td>33.33%</td>
</tr>
<tr>
<td>Total</td>
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<th>Any comments?</th>
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<tbody>
<tr>
<td>1</td>
<td>From an admin perspective, QP can be confusing with the two different pages for reviewing transcripts: &quot;Question Lists&quot; and &quot;Review Transcripts.&quot;</td>
<td>2/8/2016 9:39 AM</td>
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<tr>
<td>2</td>
<td>I didn't see a way in the others to sort by school. I don't need or want to see everyone's chats</td>
<td>2/4/2016 10:28 AM</td>
</tr>
<tr>
<td>3</td>
<td>Loved the interface.</td>
<td>2/1/2016 11:32 AM</td>
</tr>
<tr>
<td>4</td>
<td>I find QP's easiest to read, while it still provides detailed, relevant information.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
</tbody>
</table>
# Q3 Ease of Seeing / Picking Up Patrons

Answered: 6  Skipped: 0

## Answer Choices

<table>
<thead>
<tr>
<th>Choice</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuestonPoint</td>
<td>50.00%</td>
</tr>
<tr>
<td>LibraryH3lp</td>
<td>0.00%</td>
</tr>
<tr>
<td>LibChat</td>
<td>50.00%</td>
</tr>
</tbody>
</table>

## Total Responses: 6

## Any comments?

<table>
<thead>
<tr>
<th>#</th>
<th>Any comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>With LibChat, it's not as easy to see which library the patron is from, and need to hover over the initial chat alert to see the question, even after picking up the patron.</td>
<td>2/8/2016 9:39 AM</td>
</tr>
<tr>
<td>2</td>
<td>Easier</td>
<td>2/4/2016 10:28 AM</td>
</tr>
<tr>
<td>3</td>
<td>I liked LibChat the least as far as the initial moment when the question comes in. It was frustrating that I didn't see the question immediately. I would have to move the green “chatting box” to see that initial inquiry from the patron. Again, to me, it's just clearer and more direct in QP.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
<tr>
<td>4</td>
<td>Very much enjoyed the UI. Simple, easy to navigate</td>
<td>1/22/2016 2:54 PM</td>
</tr>
</tbody>
</table>
### Q4 Policy Pages

**Answered:** 6  **Skipped:** 0

**Answer Choices**

<table>
<thead>
<tr>
<th>Service</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuestionPoint (Policy Pages)</td>
<td>66.67%</td>
</tr>
<tr>
<td>LibraryH3lp (Profiles)</td>
<td>0.00%</td>
</tr>
<tr>
<td>LibChat (FAQs)</td>
<td>33.33%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#</th>
<th>Any comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I may be more used to QuestionPoint, but I had a hard time with the FAQs. I like the automated nature of the policy page appearing for the patron's library, and having all the info on one page, rather than having to go to a separate FAQ page and limit all entries to the particular library I need.</td>
<td>2/8/2016 9:39 AM</td>
</tr>
<tr>
<td>2</td>
<td>I like being able to see the policies that go along with the institution of the patron not ALL the policies</td>
<td>2/4/2016 10:28 AM</td>
</tr>
<tr>
<td>3</td>
<td>LibChat was quite awkward.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
<tr>
<td>4</td>
<td>Filtering FAQs to find information was much quicker and easier than scanning through policy pages. I did not enjoy the Profiles on LibraryH3lp.</td>
<td>1/22/2016 2:54 PM</td>
</tr>
</tbody>
</table>
### Q5 Chat Roll-Up

Answered: 5  Skipped: 1

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuestonPoint (based on who's online and length of time)</td>
<td>40.00%</td>
</tr>
<tr>
<td>LibraryH3lp (based on who's online and whether you are set to &quot;busy&quot;)</td>
<td>0.00%</td>
</tr>
<tr>
<td>LibChat (based on who's online - must transfer additional patrons back to the queue)</td>
<td>60.00%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#</th>
<th>Any comments?</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>QP is transparent, automatic.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
<tr>
<td>2</td>
<td>Transfer was very very easy.</td>
<td>1/22/2016 2:54 PM</td>
</tr>
</tbody>
</table>
Q6 Sending Instant Message (IM) to another librarian

Answered: 5  Skipped: 1

Answer Choices

<table>
<thead>
<tr>
<th>Response</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuestonPoint (click &quot;IM&quot; tab, then select librarian from list - cannot view IM same time as patron chat)</td>
<td>0.00% 0</td>
</tr>
<tr>
<td>LibraryH3lp (click on librarian name - can view on same screen as chat)</td>
<td>20.00% 1</td>
</tr>
<tr>
<td>LibChat (click on librarian name - can view on same screen as chat)</td>
<td>80.00% 4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>5</td>
</tr>
</tbody>
</table>

Any comments?

<table>
<thead>
<tr>
<th>#</th>
<th>Any comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Much better than QP’s method of having a separate IM screen, which you can’t view the same time as patron chat.</td>
<td>2/8/2016 9:39 AM</td>
</tr>
<tr>
<td>2</td>
<td>I do not have a preference.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
<tr>
<td>3</td>
<td>interface was sleep and non-intrusive while still being easy to reach</td>
<td>1/22/2016 2:54 PM</td>
</tr>
</tbody>
</table>
## Q7 Scripts

Answered: 6  Skipped: 0

### Answer Choices

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuestonPoint (Scripts - access from menu in chat. Only see scripts from your library &amp; patron library)</td>
<td>66.67% 4</td>
</tr>
<tr>
<td>LibraryH3lp (Canned Messages - start typing and they appear, or access from &quot;Messages&quot; menu link. You see all libraries' canned messages)</td>
<td>0.00% 0</td>
</tr>
<tr>
<td>LibChat (Canned Messages - click button in chat. You see all libraries' canned messages)</td>
<td>33.33% 2</td>
</tr>
</tbody>
</table>

### Total

<table>
<thead>
<tr>
<th>#</th>
<th>Any comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I like being able to only see scripts for only my library and the patron's library rather than all libraries.</td>
<td>2/8/2016 9:39 AM</td>
</tr>
<tr>
<td>2</td>
<td>I just want to see the scripts from my library and the patron's library. Otherwise, too much clutter. I did not like LibraryH3lp's way that when one begins to type, the scripts come up on the screen.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
</tbody>
</table>
Q8 Follow-up

Answered: 6  Skipped: 0

Answer Choices

<table>
<thead>
<tr>
<th>QuestonPoint (get email notification, reply through interface)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>50.00%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LibraryH3lp (get email notification, reply directly to patron's listed email address)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16.67%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LibChat (get email notification, reply through interface)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>33.33%</td>
</tr>
</tbody>
</table>

Total | 6

# | Any comments?                                                                 | Date          |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In QP, the reply gets added to the transcript, but this doesn't seem to be the case with LibChat.</td>
<td>2/8/2016 9:39 AM</td>
</tr>
<tr>
<td>2</td>
<td>QP is clear, direct, easy to designate how a follow-up question is dispatched.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
</tbody>
</table>
**Q9** Overall, if you had to pick one software platform (if money was no object, and they all provided equal 24-hour backup) which one would be your preference?

Answered: 6  Skipped: 0

---

### Answer Choices

<table>
<thead>
<tr>
<th>Software</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuestonPoint</td>
<td>50.00%</td>
</tr>
<tr>
<td>LibraryH3lp</td>
<td>0.00%</td>
</tr>
<tr>
<td>LibChat</td>
<td>50.00%</td>
</tr>
</tbody>
</table>

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### Any comments?

<table>
<thead>
<tr>
<th>#</th>
<th>Any comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Questionpoint is a bit clunkier in the interface but works far better for what we do with it. LibChat is a second best - and I think that if we committed to it, Springshare would make some adjustments for us. It might take time, but they always come through. I don't really like LibraryH3lp. My vote is to stay with Questionpoint, no regrets.</td>
<td>2/8/2016 10:19 AM</td>
</tr>
<tr>
<td>2</td>
<td>Less complex overall than Questionpoint.</td>
<td>2/8/2016 9:39 AM</td>
</tr>
<tr>
<td>3</td>
<td>I could use any of these products, however, from my perspective as one who answers virtual reference questions and does the follows-up for our library, I prefer QP across the board. I realize that is what I'm used to, but compared to other products, I find it clearer, more direct, efficient, &quot;sharper,&quot; and just easier. I can't speak for the patron, but from the limited roles we played as patrons, of the other two products, I prefer LibraryH3lp over LibChat. I've sent a few comments to Jaclyn near the times of the tests we made, which can give more of my opinions.</td>
<td>1/29/2016 5:26 PM</td>
</tr>
<tr>
<td>4</td>
<td>Overall very impressed with the interface and functionality</td>
<td>1/22/2016 2:54 PM</td>
</tr>
<tr>
<td>Policy Pages</td>
<td>OCLC QuestionPoint</td>
<td>LibraryH3lp</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Roll up</td>
<td>Each library has a policy page, and a link to it automatically appears while you are chatting.</td>
<td>Patrons from your library are automatically visible to only you. When your status is set to &quot;busy&quot; or you are not online, your library's patrons automatically go to the cooperative. Otherwise, if you are online and not &quot;busy,&quot; your library's patrons will <strong>not</strong> roll up, regardless of the time passing.</td>
</tr>
<tr>
<td>Private Queues</td>
<td>Available by request. Can be confusing to access.</td>
<td>Automatic. You can choose to login to only your library’s queue.</td>
</tr>
<tr>
<td>Texting</td>
<td>No. Libraries that already have an account with Mosio’s Text-a-Librarian can have their Mosio account accessible through the QP interface.</td>
<td>Yes - Option for libraries to answer their own texts or have them sent to the cooperative. $24 per year per library.</td>
</tr>
<tr>
<td>Scripts</td>
<td>Yes, scripts for the patron’s library (only visible when chatting with that library), scripts for your own library, personal scripts, and scripts for Ask Us 24/7 as a whole.</td>
<td>Yes, called canned messages. All canned messages within Ask Us 24/7 are visible to all librarians. Start typing a few words in chat to make them appear, or view all canned messages from the &quot;Messages&quot; menu at the top. Individual librarians can also have their own canned messages.</td>
</tr>
<tr>
<td>Instant Messaging</td>
<td>Must click &quot;IM&quot; tab, then librarian name. IM cannot be visible same time as chat.</td>
<td>Yes, click on librarian name. Can be visible on same screen as chat.</td>
</tr>
<tr>
<td>Follow Up</td>
<td>Can code for follow-up. Library admin will get an email of the transcript, and can use that to reply through the QP interface.</td>
<td>Can flag for follow-up. Library admin will get an email of the transcript, and can use that to reply directly to the patron via their email. Or can choose to set up 3mail option to allow replies within the interface.</td>
</tr>
<tr>
<td>Mobile Chat</td>
<td>Yes, with Qwidget only.</td>
<td>Yes</td>
</tr>
<tr>
<td>Other Features</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24-hour backup</td>
<td>Yes, with the 24/7 Reference Cooperative</td>
<td>Yes</td>
</tr>
</tbody>
</table>