Create your group's chat forms

Overview

In the Subscription Group tab in the Administration module, you (as a Group/BME administrator) can set up your group's patron chat forms using the Chat Forms Manager. You specify the content of the form for each Queue that your BME controls. QuestionPoint hosts the forms and provides the URLs for linking to the forms. This help topic describes the Group/BME administrator's tasks for creating the chat forms.

Institution's administrator's role

Institution administrators customize the look and feel of the chat form banner and the content of the chat-closed message for their libraries in Forms Manager under the Institution tab in the Administration module. They also get the URLs for linking to their libraries' chat forms. For information about the Institution administrator's tasks, see Set up your library's chat form.

Other uses of Forms Manager for Institution administrators:

- To set up the Qwidget for your library, see Create your Qwidget (QuestionPoint widget).
- To set up the e-mail question form for your library, see Create your library's email question form.

Benefits of this method for managing your group's chat forms

This method for managing your group's chat forms:

- Is easy to use and reduces the need for IT staff involvement.
- Lets you customize your forms.
- Can provide chat forms in multiple languages.
- Supports improved access to data about reference transactions.
- Provides improved protection against spam.

Configure chat messages that patrons see while waiting for a librarian

For each of your supported languages, you (as a Group/BME administrator) can select and customize up to five messages that the patron sees while waiting for a librarian to join the session. See Options for Patron Waiting Messages below for more information about the messages.
If you have already created your group's chat forms and now want only to select and customize the patron waiting messages, do steps 2, 3, and 12 for each of your Queues.

**Setup steps**

1. Decide what you want your form to contain. For more information, see [Options](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
2. Log on to QuestionPoint and go to Chat Forms Manager at Administration > Subscription Group > Chat Manager.
3. On the Chat Queues List, click the Chat Form for the queue whose chat form you wish to configure. The system displays the Chat Forms Manager page for the queue.
4. Click View Institutions to see a list of all institutions assigned to that queue.
5. Click Choose Languages. Here you select the languages in which you want the forms to be available. For more information, see [Options for Choose Languages](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
6. Click Define Chat Look and Feel. Here you define the banner for the top of your form. For more information, see [Options for Define Chat Look and Feel](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
7. Click Choose Form Fields. Here you select and configure fields for the form. For more information, see [Options for Choose Form Fields](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
8. Click Put Chat Fields in Order. Here you arrange the fields in the order in which you want them to appear on the form.
9. Click Review Chat Form Elements. Here you see a basic view of the form and can decide if changes or additions are needed.
   
   Note: Some form elements, such as the banner, are not included in this view.
10. Click Choose Form Availability. Here you choose the types of chat forms that you want to provide: Chat and/or Chat with Viewport. For more information, see [Options for Choose Form Availability](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
11. Click Publish Chat Form when you are ready to test the chat forms. This step makes the forms available on the web and provides URLs and View links for testing the forms. After you test the forms, repeat steps 5–10 as needed to make changes. Then repeat step 11.
   
   Note: Libraries should not use the URLs provided in this step to create the chat form links for their websites. See step 15.
12. Click Click Patron Waiting Messages. Here you can select and customize up to five messages that the patron sees while waiting for a librarian to join the session. For more information, see [Options for Patron Waiting Messages](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
13. Click Chat Closed Page. Here you specify the message that patrons see when chat is not available due to hours of coverage or technical difficulties. For more information, see [Options for Chat Closed Page](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).
14. Repeat steps 2-13 for each of your Queues.
15. Ask the libraries in your Group/BME to go to Administration > Institution > Forms Manager > Chat Settings and URLs to get the URLs for linking to the chat form that you created. Each library can also view the form and customize the form banner (define chat look and feel) and the chat closed message. If a library customizes the banner, it must also publish the chat form look and feel to add its banner to the published form. For more information about what each library does, see [Set up your library's chat form](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Chat_forms_and_queue_m...).

**Options**
Options for Choose Languages

Here you select:

- Languages in which you want the chat forms to be available.
- Default language, the primary language for listing fields when you work with your forms in the Administration module.

Note: Currently 24/7 Reference Cooperative participants can create only English language chat forms for queues that participate in the Cooperative.

You can customize the text of the forms in each language that you select. Full translations of default text are available for French, Spanish, Russian, Chinese (simplified and traditional), Italian, Catalan, Slovenian, Dutch, Korean, and German. For other listed languages, you must enter all text. If you want to provide forms in any of the other available languages, contact your OCLC regional service provider to ask for more information.

When you publish a form, you receive a form link for each language.

Options for Define Chat Look and Feel

Here you define the following elements of the banner for the top of your form:

- URL of the image file for the logo or image that appears on the left in the form banner. Recommended height of the image is 40 pixels.
- URL of the web page to which the patron goes if the image is clicked.
- Alternate (alt) text for the image.
- Banner text that appears next to your logo (40 character limit).
- Color (hexadecimal color code) of the background of the banner.
- Color (hexadecimal color code) of the banner text.
- URL and link text for up to two links that will appear in the banner.

If you have forms in two or more languages, you may either define a default banner that applies to all languages or customize the banner for each language.

Options for Choose Form Fields

Here you select and customize the fields to be included on your chat forms.

Fields

The following fields are available in Choose Form Fields:

- **Question Field.** The Question Field is included on every chat form. It appears in the Selected Fields area in Choose Form Fields. You indicate in Settings whether the field is required or optional for the patron to complete.
- **Form Element Fields.** Form Element Fields are standard, but optional, fields: Name Field, E-mail Field, Chat Form
Introductory Text, Chat Form Instruction, Chat Trailer or Footer, and Anonymous Chat Check Box. You select the ones that you want to appear on your chat forms.

- **Available Fields and Custom Fields.** Several Available Fields are provided by QuestionPoint and are semi-standardized and translated. Custom Fields are created, configured, and, if necessary, translated entirely by you. You may select up to 10 Available Fields or Custom Fields to include on your chat forms.
  
  Note: If there is an Available Field for a question that you want to ask patrons but you want to use different words to ask it, you should select and customize the Available Field rather than create a Custom Field. When you use Available Fields, you simplify form creation and QuestionPoint can provide more uniformity of reference-transaction data.

### Field types

The following types of Available Fields and Custom Fields are provided:

- **Select list** - A drop-down list of up to 30 answers from which the patron can select one. If the available Select lists do not meet your needs, you can create a Custom Field that is a Select list. There are three types of Select lists:
  
  ◦ Pre-populated value (you select up to 30 answers for your forms from a list of answers that QuestionPoint provides)
  
  ◦ Customizable entry (you create up to 30 answers)
  
  ◦ Fixed value (all answers are pre-selected by QuestionPoint)

- **Radio list** - A radio list of up to 5 answers from which the patron can select one.

- **Text area** - A text box with multiple entry lines (255 character limit).

- **Text box** - A text box with a single entry line (255 character limit).

### If you select an Available Field, you can:

- Customize the text of its label or question for each of your supported languages. 
  
  Note:
  
  ◦ Click **Restore** if you wish to return to the QuestionPoint default label after you customize it.

  ◦ If you have forms in multiple languages, you do not have to customize every language; you may choose a combination of custom and default labels for each field.

  ◦ When you customize text, QuestionPoint-supplied labels and questions appear as entities (for example, `&Form.MailAddr;`) that begin with `&` (ampersand) and end with `;` (semicolon). You remove the QuestionPoint entity in the text box and replace it with the text that you want to use. You do not need to provide an entity.

- Provide the text of the answers, for each of your supported languages, in a select list that provides customizable entry.

- Add or delete answers from a radio list or a select list that provides customizable entry or pre-populated values.

- Designate a default answer for a select list or radio list.

- Add a header instruction such as "Select one" to a select list.

- Order the answers, if there are multiple answer options.

- Indicate, in Settings, whether the field is required or optional for the patron to complete. Note: The E-mail field also has validation settings, which should be carefully considered. In addition to making the field required or optional, you decide whether or not to validate the patron’s e-mail address using predefined rules and whether or not to require the patron to enter the e-mail address twice to check for typographical errors. If you choose to validate the address using predefined rules, QuestionPoint accepts an e-mail address if it has a local-part and a domain
separated by @ (at). The local-part may contain any of the following characters: a-z, A-Z, 0-9, - (hyphen), or _ (underscore). Also, . (period) may appear between characters in the local-part. The domain may contain any of the following characters: a-z, A-Z, 0-9, - (hyphen), or _ (underscore). Also, the domain may contain subdomains separated by . (periods). Each subdomain may contain up to 66 characters, except the last subdomain, which must contain 2-6 characters, a-z only. For example, QuestionPoint accepts this e-mail address: x-y.zZZz_u12u@aaaa.bbbb-bbBBbb_bb34b.ccccccc.dddd

If you add (create) a custom field, you:

- Select a field type.
- Provide the text of its label or question for each of your supported languages.
- Provide the text of the answers in a select list or radio list for each of your supported languages.
- Designate a default answer for a select list or radio list.
  
  Note: If you do not want to designate a default answer for a select list, add a list header and provide text for the list heading, such as "Select one." The list heading is visible in the list before it is pulled down.

Options for Choose Form Availability

Here you decide which type of chat form you want to permit your institutions to offer. Choose one or both of the following:

- **Chat**: The chat form consists of the elements of the form only. There is no Viewport frame. During the chat session, only the chat transcript is displayed. Any links sent by the librarian appear in the transcript. If a patron clicks a link, the link opens in a separate browser window. This type of chat was formerly known in QuestionPoint as Chat 2 (Preview) or ADA-compliant Chat.

- **Chat with Viewport**: The chat form consists of the Viewport in the left frame and the form elements in the right frame. When a chat session starts, the frames switch: the chat box and chat history are on the left and the Viewport is on the right. This type of chat lets librarians push web pages to the patron's browser. For more information about the Viewport, see Specify the initial Web page for the Viewport.

Options for Patron Waiting Messages

Here you can select and customize up to five messages that the patron sees while waiting for a librarian to join the session.

- Each of your supported languages is listed on the Patron Waiting Messages page. To hide or unhide the messages for a language, click on the language. There is a Save button for each language. You must click the Save button for each language for which you make changes.

- The five available messages for each language are: Initial Message; First Message; Second Message; Third Message; Fourth Message.

- The Initial Message always appears when the patron connects to chat. You can use the default text or provide custom text. To use the default text for the Initial Message, check the Use Default box. To use custom text, uncheck the Use Default box and type the custom text in the text box.

- The other four messages are optional. You can use none, one, two, three, or four of them.

- If you use the First Message, it appears when the patron has been waiting for 50 seconds.

- If you use the Second Message, it appears when the patron has been waiting for 80 seconds.
• If you use the Third Message, it appears when the patron has been waiting for 120 seconds.
• If you use the Fourth Message, it appears when the patron has been waiting for 190 seconds.
• You are not required to use the messages in order. For example, you could use the Second and Fourth Messages and exclude the First and Third.
• You are not required to use the same messages for every language. For example, you could use the Second and Fourth Messages for one language and the First and Third Messages for another language.
• To use a message, check the Include box. To exclude a message, uncheck the Include box.
• To use the default text for a message, check the Use Default box. To use custom text, uncheck the Use Default box and type the custom text in the text box.
• If there is custom text in the text box for a message when you check the Use Default box, the custom text is removed. If you had previously saved the custom text, you can restore it by leaving the page without saving the changes for the language. When you return to the page, the custom text will be restored.

Options for Chat Closed Page

Here you can change the message that patrons see when your chat service is not available. You can change the message text, include HTML codes to format the message, and include HTML links to other resources, such as your e-mail reference service.

Examples:

• Enter HTML codes in the Text box to format the content. If you do not enter HTML codes, the content appears as a single paragraph. For example, enter <br><br> before each additional paragraph to separate it from the previous paragraph. Or, enter <br> to simply start a new line. The default message is enclosed in <h2></h2> codes to format the message as a heading.
• Enter HTML links in the Text box to include links in the message. For example, enter <a href="http://www.google.com">Google</a> to include a link to Google.

Click Restore and then Save if you want to return to the default message after you make changes.

Important reminders

URLs for testing only

The chat URLs provided when you publish the chat form for the group are for testing only. They must not be used by you or your libraries to link patrons to the form.

What your libraries do

After you complete and publish your group’s chat form, ask your libraries to go to Administration > Institution > Forms Manager > Chat Settings and URLs to get the URLs for linking to the chat form. Each library can also view the form and customize the form banner (define chat look and feel) and the chat closed message. If a library customizes the banner, it must also publish the chat form look and feel to add its banner to the form. For more information about what each library does, see Set up your library’s chat form.
If you delete published forms

If you delete published forms, be sure to notify your libraries to remove any links to their chat form on their web sites. If a patron clicks a link to a deleted form, an error page instructs the patron to contact their library for other options.

To delete published forms:

1. Go to Chat Forms Manager in QuestionPoint at Administration > Subscription Group > Chat Forms Manager.
2. Under the Chat Form tab, click the Queue whose chat forms you wish to delete.
3. Click Delete Published Forms.

If you add a language

If you add a language, be sure to check each field that you selected for your forms to add any needed labels, questions, or answers for the new language. Then publish the chat form again.