Create or update your library's policy page

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Your library's policy page contains information about your library and its policies. If monitoring for a chat cooperative, librarians can view the page during chat sessions to help them answer your patrons' questions. Create or update your library's policy page in the QuestionPoint Profile module.

Submit your policy page if your library is a new member of the Cooperative

If your library is a new member of the 24/7 Reference Cooperative, you must submit your policy page when it is ready in order to begin your chat service and your participation in the Cooperative. Please review the 24/7 Reference Cooperative Policy Page Guidelines before you prepare your policy page.

After you submit your policy page, the QuestionPoint team reads it and contacts you if they have questions. After any needed additional information is added, the QuestionPoint team sets up your chat queues and notifies you. Then you can place links to your chat form on your library's web site.

To submit your policy page, click Submit located near the top of the Policy Edit Page (Profile > Institution Services > Policies). You only submit the policy page once. After that, you can update your policy page as needed. The button disappears upon first use.

The Submit button is included on the Policy Edit Page only if your library is a member of the 24/7 Reference Cooperative.

For more information, see Create or update your library's policy page.

Search policy pages

You can search all policy pages. You may find information in other libraries' policy pages that will suggest information to include in your own. You can search policy pages from the My QuestionPoint home page (lower left navigation pane) and in the Profile module: Profile > Search > Search Policies.

For more information, see Search all policy pages.

Required privileges

You must be your library's institution administrator or you must have Edit Profile privileges in order to create or update your library's policy page in the Profile module.

If you have View Profile privileges, you can view your library's policy page in the Profile module but you cannot create or update it.

https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Get_started/Create_or_upd…
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update it.

View your Policy Page

Click View Policy Page at the top of the Policy Edit Page to view your library's policy page as it will appear to librarians. The policy page opens in a separate window.

View your WorldCat Registry record

The WorldCat Registry is a central database of essential library information maintained by OCLC. Data in the Registry is increasingly used by other OCLC services to help libraries avoid the need to update information in many places. If a library keeps its main telephone number in the Registry, e.g., and that field is used by other services, the library does not need to worry about updating that number every place it displays should it change.

Click View WorldCat Registry at the top of the Policy Edit Page to view your library's WorldCat Registry record. The record opens in a separate window. If your library's Registry record does not appear or the wrong record appears, click the Correction Form link in the instructions at the top of the Policy Edit Page and then complete and submit the form so OCLC can link your Policy Page to the correct Registry record for your library.

For the fields highlighted in yellow on the Policy Edit Page, you can use data from your library's WorldCat Registry record. You can link to, copy, or disregard the data in the record for use with your policy page.

If you link to a field in your Registry record, the data from the record is displayed directly in your policy page. If your library's Registry administrator changes the data in the Registry, the data automatically changes in your policy page. You cannot edit the linked data for your policy page. However, you can unlink the data and then copy and edit it.

The advantage of linking to data from the WorldCat Registry is that information you want to enter into your policy page may be changeable. An example is the list of IP addresses: your library may be assigned new IP addresses over time; linking to the Registry maintained data will automatically always display the most recent information. Automatic updates, of course, are only as good as the source data and depends on the frequency with which your library updates the Registry.

If you copy the data from a field in your Registry record, you can then edit the data for use in your policy page. However, if your library's Registry administrator changes the data in your Registry record, the data will not automatically change in your policy page. You would need to copy the data again for use in your policy page.

If you disregard the field in your Registry record, you can complete or edit the field for your policy page as you wish, without reference to the data in the Registry.

Create or update your library's policy page

1. Navigate to Profile > Institution Services > Policies.
2. On the Policy Edit Page screen, click Edit or Unlink for a field that you want to add or change.
3. Add or change information in the field and click Save. For more information, see Edit a policy field and Format the
information using HTML codes or angle brackets.

4. Repeat steps 2-3 as needed.

5. Click View Policy Page.

6. Read and test the page.
   Note any needed additions or changes.
   Close the separate window.

7. If additions or changes are needed, repeat steps 2-6.

8. Submit your policy page if your library is a new member of the Cooperative.

Edit a policy field

To edit a policy field, click Edit or Unlink for the field on the Policy Edit Page.

The page for editing a field contains the following items:

- The name of the field.
- A text box that you can use to enter or edit data in the field.
- An arrow button that you can click to view data for the field from your library’s WorldCat Registry record. The button appears only if you can use data from the Registry record for the field.
- A Save button that you can click to save any changes that you make in the field.
- A Cancel button that you can click to return to the Policy Edit Page without making any changes.
- A Reset button that you can click to revert to the last saved version of the data in the field.

If you click the arrow button, the page contents change to show:

- The name of the field.
- Data from your library's WorldCat Registry record, or a note indicating that the field in the Registry record has not been completed or its data has been deleted.
- A Link to this Registry field button that you can click to link to the field in the Registry record. If you click this button, you return to the Policy Edit Page and an Unlink button appears with the field.
- If you are not satisfied with the results in your policy page when you link to a Registry field, you can ask your library’s WorldCat Registry administrator to change the data in the Registry record, or you can unlink the field and then copy the information from the Registry record and edit it as needed.
- A Copy this information button that you can click to copy the data from the Registry record. If you click this button, information from the Registry field is copied into the text box. You can edit the information as needed and then click the Save button.
- A Cancel button that you can click if you decide to disregard the data from the Registry record. If you click this button, the information in the text box does not change. You can edit the information as needed and then click the Save button.
- Descriptions of the three buttons and the result of using each of them.

For more information about using data from your library's WorldCat Registry record, see View your WorldCat Registry record.
Reminders/tips

- Review the 24/7 Reference Cooperative Policy Page Guidelines if your library is a member of the Cooperative.
- Provide appropriate information for each field, such as e-mail addresses, hours of service, or brief descriptions.
- Keep the information brief and suitable for cutting and pasting into a chat message.
- Include links to appropriate pages on your library’s web site so the librarian can direct the patron to a page or co-browse to it with the patron.
- Use angle brackets < > around a URL to hotlink it. You must be sure that 'http://' or 'www' (or both) is included.
- Use HTML codes if you want to put text in bold, italics, or color typeface.
- Let others suggest improvements for your policy page.

Library Home Page URL and Catalog URL fields

Note: In these two fields only, you should not use HTML codes. Include only the appropriate URL; the system automatically formats the URL text as a link.

You can use data from your library’s WorldCat Registry record in these fields. For more information, see Edit a policy field.

Library Home Page URL field. Provide the URL for your library's home page. Include "http:/' or "https://" at the beginning of the URL so the URL will be hot linked in the policy page.

Catalog URL field. Provide the URL for your library's catalog. Include "http://" or "https://" at the beginning of the URL so the URL will be hot linked in the policy page.

Map field

This field displays a map based on the data here. If you link to your library's Registry record for this field, the map will be based on the geographic coordinates stored there. Since these coordinates do not always represent the exact address of your library, the map may not pinpoint the exact location of your library. If you wish to link to the Registry data for this field, to take advantage of the benefits of linking to this central library data source, but the map does not seem accurate, ask your library's Registry administrator to adjust the geo information in the Registry. This has been made quite simple to do; instructions are available within that feature.

If you copy data from the Registry instead, your library's address is copied, and the map is based on the address rather than coordinates. This is usually more exact but will not be automatically updated should the library's address change in the future.

You can also enter your library's address instead of linking or copying. The map is then rendered based on the address you enter.
Let others suggest improvements for your policy page

In the Policy Page E-mail Contact field, provide the e-mail address or addresses (separated by commas) of the people responsible for your library's policy page. If you do, a librarian viewing your policy page can send a message to report a problem or suggest an improvement. The message goes to each e-mail address that you provide and contains the sender's e-mail address so you can reply.

Provide only e-mail addresses in the field. Librarians cannot send messages if you include other information in the field.

Format the information using HTML codes or angle brackets

Use HTML codes or angle brackets to format information in all fields except the Library Home Page URL field and Catalog URL field.

Frequently used HTML codes

The following HTML codes are frequently used to format information in policy pages.

<table>
<thead>
<tr>
<th>FORMAT</th>
<th>CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line break</td>
<td>&lt;br&gt;</td>
</tr>
<tr>
<td>Double line break (blank line)</td>
<td>&lt;br&gt;&lt;br&gt;</td>
</tr>
<tr>
<td>Bold</td>
<td>&lt;strong&gt;text to be bold&lt;/strong&gt;</td>
</tr>
<tr>
<td>Hot link text to a URL</td>
<td>&lt;a href=&quot;http://URL&quot;&gt;text to a link&lt;/a&gt;</td>
</tr>
<tr>
<td>Hot link a URL</td>
<td>You can hot link a URL by enclosing it in angle brackets. For example: <a href="http://www.google.com">http://www.google.com</a>.</td>
</tr>
</tbody>
</table>

Example without HTML codes

The field as it is entered:

Databases:

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

The field as it appears in the policy page:
Databases:
Memorial library has 25 online databases available through the Internet using your library card. http://www.yourlibrary.org/databases

Example with HTML codes

The field as it is entered:

```
Databases:
Memorial library has
<a href="http://www.yourlibrary.org/databases">25 online databases</a>
available through the Internet<br>
<strong>using your library card.</strong><br>
```

The field as it appears in the policy page:

```
Databases:
Memorial library has <a>25 online databases</a>
available through the Internet <strong>using your library card</strong>.

http://www.yourlibrary.org/databases
```