Chat and followup

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Overview

This overview of chat and followup provides context for setup activities and decisions.

Chat workflow

1. Librarian logs on to QuestionPoint, launches the chat monitor, selects queues.
2. Librarian accepts a chat request and chats/co-browses with a patron.
3. Librarian selects a resolution code at the end of the chat session.
4. QuestionPoint sends the transcript to the patron’s email address.
5. QuestionPoint creates a question (reference transaction) for the session and places it in the QuestionPoint system, including the chat transcript and other information about the session.
6. Based on the resolution code selected, QuestionPoint assigns a status to the question and adds it to a question list in the Ask module.
7. Librarian logs out of the chat monitor upon completion of his or her chat shift.

Resolution codes and their effect in QuestionPoint

- **Followup by patron’s library**: The status of the question is New for the patron’s library. The question is unassigned. If Shared Followup is turned on for the patron library’s group, the question is also included in the Shared Followup list. The question is not included in the question lists of the chatting librarian’s library.
- **Followup by me**: The question is assigned to the chatting librarian, whether or not he or she is from the patron’s library. The status of the question is New for the librarian’s library. The status is Pending for the patron’s library if it is not the librarian’s library. The question is not included in the Shared Followup list even if Shared Followup is turned on.
- **Answered**: The status of the question is Answered for the patron’s library. The status is Answered for the chatting librarian’s library also if it is not the patron’s library. The question is assigned to the chatting librarian.
- **Practice**: Same as Answered
- **Lost call**: The status of the question is Closed for the patron’s library. The status is Closed for the chatting librarian’s library also if it is not the patron’s library. The question is assigned to the chatting librarian.

The 24/7 Reference Cooperative’s best practices document contains guidelines for use of the Resolution codes by members of the cooperative. Libraries and groups should provide guidelines for use of the codes by their librarians when they are not participating in the cooperative.
Question status

• New (?): Needs follow-up by your library
• Pending ( ): Needs follow-up by another library, subject-matter expert, or patron
• Answered ( ): Answer sent to the patron during or after the chat session
• Closed ( ): Work on the question is considered to be complete (librarians can close questions in QuestionPoint)

Question lists

Under the Questions tab:

• Active Questions: Your library’s questions that have New, Pending, or Answered status.
• New Questions: Your library’s questions that have New status.
• Pending Questions: Your library’s questions that have Pending status.
• Referred Questions: Your library’s questions that involve another library or a subject-matter expert and have New, Pending, or Answered status. This list is used primarily by libraries that provide e-mail reference. They use it to monitor questions that they have referred to another library or a subject-matter expert.
• Answered Questions: Your library’s questions that have Answered status.
• Closed Questions: Your library’s questions that have Closed status.
• All Questions: Your library’s questions that have New, Pending, Answered, or Closed status.
• Shared Followup Questions: Questions, for any library in your group, that have New status and are waiting for any librarian in your group to claim for followup; list appears only if Subscription Group administrator turns on Shared Followup.

Under the My Questions tab:

• For each of your library’s librarian accounts, the question lists under this tab contain the subset of your library’s questions that are assigned to that librarian. (For example, in your account, the lists contain the questions assigned to you.)
• The following lists are provided: My Active Questions, My New Questions, My Pending Questions, My Referred Questions, My Answered Questions, My Closed Questions, All My Questions.

Service History

Inactive questions remain in question lists for 90 days. Then QuestionPoint moves them to the Service History (Ask > Service History).

Follow-up workflow

1. Librarian logs on to QuestionPoint; goes to a list of questions needing follow-up:
   - Shared Followup Questions (Question Lists > Shared Followup)
   - New Questions (Question Lists > New)
2. Librarian selects a question and sends an answer to the patron. Referral: Rather than send an answer, the librarian could refer a question to another library or a subject-matter expert. See Referral of questions and transcripts: overview.

3. QuestionPoint sends the answer to the patron’s e-mail address, changes the status of the record to Answered, and moves it to the Answered Questions list.

Setup

Do the setup tasks below to provide chat and follow-up to patrons. Some tasks are done by the Subscription Group administrator and some by the Institution administrators. The Subscription Group administrator also does the Institution administrator tasks for his or her own library.

Subscription Group administrator

Chat service and follow-up: If you are the Subscription Group administrator, review the current settings for each of these tasks and make changes as needed.
<table>
<thead>
<tr>
<th>TASK</th>
<th>FEATURE</th>
<th>LOCATION IN SYSTEM</th>
<th>WHAT TO DO</th>
<th>TIPS/RESOURCE LINKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turn on shared follow-up.</td>
<td>Shared follow-up</td>
<td>Administration &gt; Subscription Group &gt; Settings &gt; Shared Followup</td>
<td>Check or uncheck the box and click <strong>Save</strong> to turn shared follow-up on or off.</td>
<td>If turned on (checked), sessions marked for <strong>Followup by patron's library</strong> are listed for any group librarian to claim at Ask &gt; Questions &gt; Shared Followup. And the Shared Followup referral option becomes available. If turned off (unchecked), you have no Shared Followup question list. Each library does its own follow-up.</td>
</tr>
<tr>
<td>Create chat forms for your Queues</td>
<td>Chat Forms Manager</td>
<td>Administration &gt; Subscription Group &gt; Chat Forms Manager &gt; Chat Form</td>
<td>Choose and configure fields for inclusion on the chat form for each queue.</td>
<td><a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/%E2%80%A6">Create your group's chat forms</a>.</td>
</tr>
<tr>
<td>Create scripts for use by all libraries in your group.</td>
<td>Shared scripts; Shared URL Scripts</td>
<td>Administration &gt; Subscription Group &gt; Settings &gt; Shared Scripts; Shared URL Scripts</td>
<td>For each script, supply a name and text or a URL and click <strong>Add</strong>.</td>
<td><a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/%E2%80%A6">Add, change, or remove scripts</a>.</td>
</tr>
</tbody>
</table>

**Institution administrator**

**Chat service and follow-up:** If you are an Institution administrator, review the current settings for each of these tasks.

https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/…

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for your library and make changes as needed. If you are the Subscription Group administrator, review the current settings for each of these tasks for your own library and make changes as needed.
<table>
<thead>
<tr>
<th>TASK</th>
<th>FEATURE</th>
<th>LOCATION IN SYSTEM</th>
<th>WHAT TO DO</th>
<th>TIPS/RESOURCE LINKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create any needed library accounts</td>
<td>Librarian accounts</td>
<td>Administration &gt; Institution &gt; Accounts</td>
<td>Create any new librarian accounts that are needed.</td>
<td>You can create as many librarian accounts as you need to provide your library’s reference service, at no additional cost. We recommend that every librarian who uses chat have his or her own QuestionPoint account. Two people cannot use the same account at the same time to chat. See Create librarian accounts.</td>
</tr>
<tr>
<td>Confirm that librarians are trained and ready</td>
<td></td>
<td></td>
<td>Provide opportunities for training and practice with QuestionPoint.</td>
<td>• <a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/">QuestionPoint training</a> • <a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/">Chat quick reference</a> • <a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/">Follow-up guide</a></td>
</tr>
<tr>
<td>Confirm that librarians' workstations are set up</td>
<td></td>
<td></td>
<td>Ensure that the browser setup procedures have been followed.</td>
<td><a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/">QuestionPoint training</a></td>
</tr>
<tr>
<td>Verify that your library’s network does not conflict with chat</td>
<td></td>
<td></td>
<td>Ensure that your library’s network accesses the Internet without passing through a proxy server. Or, if it does pass through a proxy server, request that traffic to and from port 80 not be cached for questionpoint.org</td>
<td>These requirements are necessary because QuestionPoint chat refreshes every few seconds. Ask your network administrator to contact <a href="https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/">OCLC Support</a> with questions.</td>
</tr>
<tr>
<td>Action</td>
<td>Policy page</td>
<td>Profile &gt; Institution Services &gt; Policies</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
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<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Verify or edit your policy page and make it viewable.</td>
<td></td>
<td></td>
<td>If status is Hidden, click Change to change status to Viewable. Click Edit to edit a field. Click Save to save changes to a field. Click the View Policy Page to view the results of saved changes. Create or update your library's policy page.</td>
<td></td>
</tr>
<tr>
<td>Submit your policy page if you are a member of the Cooperative</td>
<td></td>
<td></td>
<td>Click Submit when your policy page is ready in order to begin your chat service and your participation in the Cooperative. After you submit the policy page, the QuestionPoint team sets up your primary chat queue and notifies you. Then you can place links to your chat form on your library's web site.</td>
<td></td>
</tr>
<tr>
<td>Create scripts for use by your library</td>
<td>Institution’s Scripts; Institution’s URL Scripts</td>
<td>Ask &gt; Settings &gt; Institution’s Scripts; Institution’s URL Scripts</td>
<td>For each script, supply a name and text or a URL and click Add. Add, change, or remove scripts.</td>
<td></td>
</tr>
<tr>
<td>Remind librarians to create scripts for their personal use</td>
<td>My Scripts; My URL Scripts</td>
<td>Ask &gt; Settings &gt; My Scripts; My URL Scripts</td>
<td>For each script, supply a name and text or a URL and click Add. Add, change, or remove scripts.</td>
<td></td>
</tr>
<tr>
<td>Verify or configure your library’s chat form</td>
<td>Administration &gt; Institution &gt; Forms &gt; Forms Manager &gt; Chat Settings and URLs</td>
<td></td>
<td>View the published chat forms, which are hosted by QuestionPoint, and get the URLs needed to create links to the forms. Customize the look and feel of the chat form banner, and Contact your Group/BME administrator to discuss any questions. See Set up your library's chat form.</td>
<td></td>
</tr>
<tr>
<td>Set your library’s Viewport URL</td>
<td>Viewport URL</td>
<td>Administration &gt; Institution &gt; Forms &gt; Viewport URL</td>
<td>Type the Viewport URL in its box and click Save.</td>
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</tr>
<tr>
<td>Verify important profile information</td>
<td>Institution Information</td>
<td>Administration &gt; Institution Services &gt; Inst Info; Contact</td>
<td>When a librarian accepts a chat request, the page for the URL appears in the left side of the patron’s chat window.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Institution Contact Information</td>
<td>Administration &gt; Subscription Group &gt; Settings &gt; Branding (Subscription Group administrator only)</td>
<td>Do not use a framebusting URL.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Group Branding</td>
<td></td>
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</tbody>
</table>

Provide your library’s information for the following fields:

- **Inst Info:** Inst (Institution) Name; State/Province; Country; Time Zone; Daylight savings
- **Contact:** Alert E-mail; Library Type(s)
- **Group Branding:** Short Name

You can change pre-existing information as needed. For example, change uppercase letters only to upper and lower case letters.

See [What profile information should every library provide?](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/…)

Click Save on each page.

Turn on email notices of new questions or follow-up

E-mail notification

Administration > Institution > Settings > E-mail Notification

Click Yes if you want to receive an email notice when a new question or chat

You can use a mailing list address.

Separate multiple
transcript needing follow-up arrives in your library’s account. Click No if you do not.

If you click Yes, type an email address or addresses in the box.

Click Save.

addresses with semicolons.

Click Test to send a test message to the address or addresses that you specified.

See Set the email notification address.

Administration > Institution > Settings > Custom Messages

Custom Messages:
Custom Reply Text appears at the bottom of all messages to patrons.

Click Change to exclude (off) or include (on) patron account information in messages to patrons.

Click Edit to edit a particular message.

To edit Custom Reply Text, click Yes, type the text, and click Save. It does not have a Test button. Custom Reply Text appears in the other patron messages when you test them.

To edit other messages, click Custom, type the text, and click Save. Click Test to view a mockup of a message as saved.

Click Cancel to return to the main Custom Messages page.

Customize system-generated email messages sent to patrons Custom Messages

Messages related to chat and/or followup:

• Answer
• Clarification Request
• New Account from Chat
• Chat Transcript

Messages related to e-mail (web form) reference:

• Answer
• Clarification Request
• New Accounts
• New Question
• Acknowledgement

See Custom messages

https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Administration_module/Administrator_setup_guide/…

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Turn on capture of patron replies to system email messages

Outgoing address

Click On, click Custom, type a custom email address, and click Save.

If you do this, QuestionPoint sends an e-mail notice to the librarian and adds the patron's reply to the question history when a patron replies to a chat transcript, answer or clarification request.

The custom e-mail address appears as the From address in system email messages to patrons. You may want to use an address that identifies your library. You can use a valid address or one that just looks valid because patron replies do not actually go to the custom address.

See Outgoing address.

Turn on patron survey form

Patron survey form

Administration > Institution > Surveys > Survey Form

1. Check the boxes for both survey forms (Chat Session and Ask Answers).

2. Check the box for each question (up to 15) that you want to include in each form. (You can choose the same or different questions for each form.)

3. Click Save.

Chat survey form: Patron can complete it when a chat session ends or the transcript email arrives.

Ask survey form: Patron can complete it when a follow-up answer arrives via email.

See Create/manage patron survey forms.

After you save, you can click each View button to test the results.
Display links in Worldcat.org to your library’s reference service.

(These links increase the visibility of your reference service.)

<table>
<thead>
<tr>
<th>Display links to your reference service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open WorldCat Setting: Question Form URL</td>
</tr>
<tr>
<td>Administration &gt; Institution &gt; Forms &gt; Question Form</td>
</tr>
</tbody>
</table>

If you want to include a link in WorldCat.org to your library’s reference service and your library makes its holdings available in WorldCat.org, click Yes and type the URL for your reference service in the Question Form URL.

Otherwise, click No.

<table>
<thead>
<tr>
<th>Exclude transcripts of chat sessions with other libraries’ patrons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat Transcripts</td>
</tr>
<tr>
<td>Administration &gt; Institution &gt; Settings &gt; Chat Transcripts</td>
</tr>
</tbody>
</table>

If you want to exclude transcripts of your library’s chat sessions with other libraries’ patrons from your library’s question lists, click the Exclude button and click Save.

If you do nothing, these transcripts will be included in question lists because that is the default option.

The Exclude setting applies to libraries that pick up chat sessions with other libraries’ patrons, whether or not they participate in the 24/7 Reference Cooperative. Excluding these transcripts simplifies workflow for some libraries.

See Include/exclude transcripts of our chat sessions with other libraries’ patrons.