

Enquire Librarian Training Manual

© OCLC Ltd 2015

Unless otherwise stated, *OCLC* owns the copyright in this document including the content, page layout, graphical images, logos, photographs and trademarks. With the exception of permitted fair dealing under the Copyright, Designs and Patents Act 1988 no part of this document may be reproduced or transmitted in any form or by any means or stored in any electronic retrieval system without prior written permission of *OCLC*. All moral rights in the contents of this document are hereby asserted.

Course Objectives

This course is designed for library staff that will be taking part in Enquire or staffing a local authority local service.

Please note that the OCLC Support desk will not assist with queries arising from this training manual unless the caller has attended the training course.

By the end of the course you should be able to

- Chat with patrons, through picking up a question, answering and closing it.
- Follow-up outside of the chat session.
- Perform review and admin functions within your user id.

Software Version:	QuestionPoint.	Release November 2015
Author:	Joanne John	
Reviewers:	Ruth Abbey	

OCLC believe the information presented in this document is accurate at the time of production. However the information is subject to change and OCLC cannot accept responsibility for any errors that may appear in the document.

QuestionPoint™ OCLC Ltd City Gate 8 St Marys Gate Sheffield S1 4LW Phone – +44 (0)114 267 7502 / 0845 267 7502 (local rate) Web – www.oclc.org

Contents

1. INTRODUCTION	4
1.1 What is Enquire	4
2. THE BASICS: QUALITY, CUSTOMER SERVICE AND PROCEDURE	5
 2.1 Etiquette 2.2 Customer Service 2.3 What to check before starting your shift	5 6 7 7
3. QUESTIONPOINT SOFTWARE	9
 3.1 Logging into QuestionPoint	
4. LET'S GET CHATTING	
 4.1 Patron/Customer Access:	$ \begin{array}{cccccccccccccccccccccccccccccccccccc$
5. ANSWERING QUESTIONS OFFLINE	
5.1 Answering questions / Follow up chat sessions5.2 Replying to anonymous sessions5.3 Example of a question answered offline	
6. SOCIAL NETWORKING	
6.1 Yahoo!Answers	

1. Introduction

1.1 What is Enquire

Enquire is a subscription service and formerly one of a trio of People's Network services originally commissioned by the Museums Libraries and Archives Council (MLA¹) in 2003. It provides a high quality public library reference service, 24 hours a day, 365 days a year, using OCLC's QuestionPoint² software.

This service is achieved through joint service delivery across participating libraries in England and Scotland combined with participation in OCLC's 24/7 Reference Cooperative that secures coverage from US partners.

As the service is supported by 1,400 libraries worldwide, there is always someone on hand to answer your users' questions in the hours when your library staff or UK staff are not available.

Enquire is staffed by subscribing libraries in the UK Monday to Friday between 9am and 5pm, and on Saturday mornings. After these times the service is staffed by our cooperative colleagues predominantly in the US (these are both cooperative libraries and also OCLC employed Back-up staff who assist at peak times). Enquire is staffed all day every day, including all major holidays where we still receive questions.

Through innovative uses of the software, additional added value local services can also be created. Communications directors are taking opportunities to answer internal staff queries and concerns. Chief Executives from Luton and Somerset have taken part in one or more chat sessions with their citizens. A Bristol Councillor has conducted a chat session during Local Democracy week. Somerset, as well as engaging with Councillors, have also held chat sessions with an Environmental expert for schools to attend about recycling. Other possibilities include homework help services, opportunities to chat with an author or sessions that engage with specific interest communities such as those researching their family history.

All training course manuals are made available on the 'Enquire for Staff' website³ and may be viewed online or downloaded by customers wishing to have current manuals for modules they use. Additional short information guides can be found on the Enquire for staff website

¹ <u>http://www.mla.gov.uk</u> & <u>http://www.peoplesnetwork.gov.uk</u>

² <u>http://www.questionpoint.org</u>

³ http://www.oclc.org/support/services/enquire.en.html

2. The Basics: Quality, customer service and procedure

2.1 Etiquette

Before delving too much into the product, some time should be spent looking at the etiquette of chat. It isn't any different in terms of customer service, but there are some methods that can be used to help you have a more confident session:

- Chat in short sentences.
- If the question is a tough one, explain to the patron that it might take a while to answer, and offer to get back to them later via email if that is easier for them.
- Set users at ease with phrases like 'that's an interesting question', although over doing this can appear insincere; also try to work the customer's name into the conversation to make the service more personal.
- Ask for the client's approval if appropriate 'I'd like to look at this further and get back to you via email. Is that OK with you?'
- Keep users interested by offering relevant websites to look at whilst you do further research.
- Another method of keeping the user engaged is to tell them what sources you are searching and why.
- If you have had technical problems or require more time to find the answer tell the user politely and send a follow up email as soon as possible with the answer.
- Before closing, ask the patron if the question has been answered ("Does this completely answer your question?")
- Close each session politely and definitively e.g. Thank you for using the service...'

For further reference: 24/7 Policies, section 4.1, General Chat Guidelines: http://wiki.guestionpoint.org/247-Policies#41GeneralChatGuidelines

2.2 Customer Service

Good service in, Good Service Out:

The importance of the reference interview cannot be stressed enough. This is especially true if the question will be coded for follow up, a good reference interview is really essential, and it helps establish communication with the patron. We have some good reference interview guidelines in the Policies (<u>http://wiki.questionpoint.org/247-Policies#42ReferenceInterview</u>) and Best Practices (<u>http://wiki.questionpoint.org/247-Best-Practices#ReferenceInterview/ResourceSelection</u>).

Examples of quality and customer service are

Matching

Take the tone of your interaction from the tone of the patron, i.e. level of formality or personalisation, or if you are not sure be slightly more formal. Take charge, but only within the bounds of your confidence, Enquire is <u>not</u> advocating the use of emoticons and text-speak.

Depth of Response

How much of a 'reference interview' is to be conducted; will they want short or long answers; how much help to be given when questions are received outside the scope? The reference interview will assist you in getting these answers. The reference interview will also help identify the timescales you have to respond.

How much time should be given to a transaction?

There is no predetermined length for a chat session. The average session time is 16 minutes, although it can be much less, and if you are very engaged with the question or patron it can take significantly more. Use your own judgement as to when you think the question can be wound down. Use closed questions that require a yes or no "Does this answer your question?"

Local questions

Many patrons use Enquire to get local answers. This is acceptable and if the patron's local library authority participates in Enquire there is no reason why they cannot be helped. Through use of the policy pages (see Section 4.2) you should be able to assist them. It is also useful to remember that when you are not on duty, other libraries in both the UK and US will be answering your patron's questions.

Signposting

As professionals you may not always be able to provide the answer, although you will be able to signpost them, that is provide them with details of where they can find the answer. For instance: financial assistance can be found though the Citizens Advice Bureau; and health assistance can be found through the provide the provide

Customers are the arbiter of quality, you need to keep them not lose them to ensure you establish credibility not just for Enquire, but for our local authorities and public libraries.

2.3 What to check before starting your shift

Look to see who your shift partners are – they are the only ones that count. Also, you should check your pc browser settings before each shift.

2.3.1 Checking your shift partners

There is a rota detailing all participants and their shift times. This can be found at: <u>http://www.oclc.org/support/services/enquire.en.html</u>



For the purpose of finding out who your shift partners are, click on **Staff Rota**. You'll see the page below, where you can click on the Staff Rota link from the menu bar, an Excel spreadsheet will download showing which other authorities will be staffing Enquire with you during the shift.

Below is a copy of the staff rota.

4	A B	C	D		E	F		G	Н			
4	The 24/7 rota tab has been removed as all Enquire libraries (not necessarily each staff member)											
5	Shinte be schifting this queue for an of your designated single											
6	*HIN1* - Io find your authority, use 'find' on the menu bar, or Ctri++ and type in part of your authority name											
-	******	hifte and Ones Areas	- C	the data de	05 140 120	1			www.askalibrariari.org.uk			
0	**DM cl	hifts are 9am - 1pm hifts are 1pm - 5pm		updated:	06/10/20	20						
9	F IVI 3	nints are tpin - 5pin		une.	10	.50						
	~,	ALL AUTHORITITIES NOW 24/	7 FOR EACH SHIFT - A	T LEAST ONE PER	RSON SHOULD BE MO	NITORING THE 24/7 R	EFERENCE C	UEUE AND PICKING UP QUE	STIONS FOR EACH SHIFT ~			
			Training	material can be	found here: http://e	nguire-uk.oclc.org/con	ntent/view/	115/113/				
10			-									
47	Sunday	Monday	Tuesday	Wed	nesday	Thursday		Friday	Saturday			
48	05-Oct	06-Oct	07-Oct	08-00	t	09-Oct		10-Oct	11-Oct			
49		AM	AM	AM		AM		AM				
50		Croydon	Brighton & Hove	Kirkle	ees	Cornwall	2	outhwark	Newcastle 9.45-12.15 (24/7)			
51		Cheshire	Norfolk	Lanca	ashire	Surrey		indsor & Maidenhead				
52						Essex						
53												
54	PM PM PM PM PM PM											
55		Hull	Manchester	Leed	5	Kensington & Che	lsea	Westminster				
56		Staffordshire	Newcastle (1 - 4)	North	Yorkshire	Derbyshire		Worcestershire				
57			Kent					Kent				
58						Nottingham City (24	4/7) (eve)					

1. Shows date and time the rota was last updated.

2. Shows which authorities are also monitoring the 24/7 Reference Cooperative. The blank line between authorities denotes the two daily sessions: am (09:00-13:00) and pm (13:00-17:00).

2.3.2 Checking your pc settings

Next check your pc settings. This is important as it is the settings that enable the automatic refresh of the chat between yourself and the patron. If these settings are not changed responses will not come through from the patron. If you forget to do this before launching chat, don't worry you can do this when you are in chat.

On your browser menu bar (not the software) click:

- Tools
- Internet Options
- In the Temporary files areas:
 - Delete your cached pages
 - Click on 'Settings' and change the radio button from the default of 'automatically' to the option 'every visit to the page'
- Click Okay and continue logging into QuestionPoint

See below for an example of what to do.



Once all this is checked, you are ready to log into QuestionPoint.

3. QuestionPoint software

3.1 Logging into QuestionPoint

To log on to the librarian side of the software, go to: <u>http://www.questionpoint.org</u> At the top of the screen, select the option: 'Librarian Logon'.



To log in you will need the 6-digit User ID and password provided. This 6 digit User ID is emailed when a new account is set up. Local Administrators will have a 9 digit User ID for setting new accounts and running reports, this will start 100XXXXXX.

Authorization:			
Library patrons c	lick here to log in		
Language:	Select Language	▼ <	
User ID:	123891		
Password:	•••••		
Forgot your pass	word? Click Here		
Logon			
Logon			

If you cannot remember your password, use the "Forgot your password? Click Here" option under the Password cell, your login details will be emailed to you. If you still have problems, contact Support⁴

The password will initially be the first 20 characters (including full stops and the '@') of your email address. When entering your password, you can either cut and paste your email address as detailed in the User ID email, or just keep typing until the cursor stops; there is no need to count the characters. The password is however case sensitive.

The first time you login, you will then be prompted to re-type the password and select your own unique password.

3.2 Change the session timeout

😭 My	QuestionPoint					QuestionPoint
SELECT SERVICE: My QuestionPoint		•		A Home	Reports	
Home	My Password	Му	Settings	My Library's W	/ebform Coverage	

From your 'My QuestionPoint' home page click on "Settings", this is the 3rd option on the red menu bar.

SELECT My C	service: QuestionPoint	• н	À Iome	Suppor Hel Reports Reset Cloc	rt p :k
Home	My Password	My Settings	My Library's W	Webform Coverage	
Vie	ew/Change My S	Settings			
	Account Privilege	s:			
	Account Type		Lib	brarian	
	Institution Repo	ort	No	one	
	Profile		Арј	pprove Profile	
	Ask A Librarian		Asl	sk Administrator	
	Knowledge Bas	e	Edi Edi	lit/Delete KB - Enquire staff pages KB lit/Delete KB - QP Global Reference Network KB	
	Current Settings				
	Name:		Jo	0	
	E-mail address:		jo.j	.john@oclc.org	
	Truncate quest	ions in <mark>l</mark> ists:	0	Yes No	
	Truncate after:		0	(0-999) Characters	
	Session time-ou	it period:	03	30 minutes 💿 1 hour 💿 2 hours 💿 4 hours	
				Save	

Check your name and email details are correct. The change you need to make is to the timeout period, this should be changed to 2 hours. Once done, click on **Save**

This should not require changing again.

3.3 Homepage: Overview



The Home page screen is split into 3 areas:

1-Offline and Chat area

The left hand column is your main working column. It is where you launch chat from, pick up offline questions, edit your own settings, and access the knowledge base.

2-News / Announcements area

QuestionPoint post details of upcoming upgrades/installs and any other news relating the service, including a link to the Enquire Staff website. This information is detailed in the middle area of the screen

[This is also accessible by clicking on the Enquire logo at the top right – more information on this is detailed in section 3.3.1]

3-Information, Resources and Training area

The right hand column is the QuestionPoint Training area – you can view the standard QuestionPoint training materials here however, 'quick guides' and a manual specific to the Enquire service can be found at: <u>http://www.oclc.org/support/services/enquire.en.html</u>. The OCLC training

materials are comprehensive and are both text based PDF guides and walk through animated guides (viewlets) which are thorough and well worth a look.

Documentation includes PDF guides and viewlets to take you through the various aspects of QuestionPoint, including Flash chat and the chat and referral processes

There are also links to:

- <u>QuestionPoint Policies</u> (see Section 2.2)
- <u>QuestionPoint Best Practices</u> (see Section 2.2)

3.3.1 Enquire for staff website:

<u>http://www.oclc.org/support/services/enquire.en.html</u> - is the main page for a raft of Enquire service information. It includes this manual and other training material. It is accessible from the The QuestionPoint logo at the top of the screen:

OCLC [•] Support	& Training			Search Sup	port & Training	Q		
			Contact OCLC	Support S	ystem Alerts	X Librarian's Toolbox		
Product Support Train	ing Software & Reports	Ordering & Billing						
Support & Training home > Enquire								
Support & Training home	Enquire Support							
Enquire								
Need assistance for Enquire?	Enquire is a collaborative, real time, 24/7 digital reference subscription service. It delivers an enhanced information service to the public by providing unfettered 24/7 access to library and information professionals through chat and email technology.							
Contact OCLC Support Your local service desk »	<i>Enquire</i> is socially inclusive; availa in Enquire.	Internet ac	cess and who	ose library participates				
Enquire Rota Click Here »	Enquire is an accessible chat based service that is staffed globally, managed nationally and delivered locally and epitomises public library collaborative/shared service delivery.							
Main OCLC Site	Enquire offers you the ability to cre	ate locally tailored services	s that all come into one piece of software.					
News, events, member info »	Interesting Questions / S	urvey Comments						

The website has links to the most recent training recordings and static PowerPoint presentations as well as the Enquire User Manual.

The Subscription form in 'Subscribers' Corner' and a button to contact UK Support.

3.4 The 'offline' area



3.4.1 Questions Lists / Ask Module

You are able to review your questions and those of your authority colleagues from the Question Lists / Ask Module. Referred service questions or questions taken offline are also listed here.

My questions – questions only you have answered.

Question Lists – all authority questions.

New questions – questions that have just come in and are currently being dealt with in chat, or that are referred, either via referral from the service, or where a patron has replied to an answer/further clarification request.

Unassigned – questions that may have been disconnected in the process of being picked up by your authority. If any questions appear here, you should check to see what action needs to be taken.

Active questions –questions that have not been 'closed'.

SELECT S Ask	SERVICE:	•	(?) Questions	And A Constructions	+ Add Question	Review Transcripts	Service History	\$ Settings			F	Support Help Reset Clock
Active	Ne	w Pending	Referred Ar	nswered Closed	I All							
Acti	Active Questions So									Search:	by Keywor Q Advanced Sec	d(s) 🔹 오 arch
Ref	resh L : by: IC	ist D Received Updat	ed							Records 1 - 25	of 238 《 1 2 3 4 5 Limit to: All	10» • 🕤
	8	10817377: Chat Received: 23:44:5	Transcript: Is the 3 2015/10/11 (0	re any material that GMT +0100) Update	would show a map d: 09:08:05 2015/1	or description of the g	allowgate or mercha	nt city in Glasgow betwee nth	ne years 1614-1615	Unassigned Patron:		
		10816954: Chat 7 Received: 19:48:1	Transcript 6 2015/10/11 (G	GMT +0100) Update	d: 20:03:33 2015/1	0/11 (GMT +0100)				Assigned to: Patron: Anonymous Patron		
	8	10816306: Chat Received: 09:49:4	Franscript: Your o 0 2015/10/11 (G	description of the til GMT +0100) Update	le of the Harry Turt d: 09:09:05 2015/1	ledove novel is incorrec 0/12 (GMT +0100)	. Instead of "In the p	resence of Nine Enemies it sh	ould read Mine Enemies.	Unassigned Patron:		
	10815653: Chat Transcript: My account says that it is linked to 'Hack David Lovatt'. Who is he and whatdoes that meme an? Received: 21:37:49 2015/10/10 (GMT +0100) Updated: 10:40:13 2015/10/12 (GMT +0100)								Assigned to: Patron:			
		10814758: Chat know the full nam	Transcript: Are yo ne of the author, I 7 2015/10/10 (G	ou able to locate o c but the surname is l	opy of Counselling De Board (I think!) 7 d: 10:13:53 2015/1	for Toads? I have been Thank you in advance 0/12 (GMT +0100)	recommended to rea	d it, but I haven't been able to	find it on the search facility. I don't	Assigned to: Patron:		
		10814730: Chat 7 Received: 13:08:1	Franscript 9 2015/10/10 (G	SMT +0100) Update	d: 13:17:24 2015/1	0/10 (GMT +0100)				Assigned to: Patron: Anonymous Patron		
	Image: Contraction of the co								Assigned to: Patron: Anonymous Patron			

You can also access the Question Lists via the **Ask** module heading in the drop down menu.



3.4.2 Question Lists

Click on "New" under the "Question List" heading; this takes you into another screen listing all the questions that have been asked by patrons and picked up or assigned to your authority.



Here you see a list of all the questions by category:

Active – questions for follow up / awaiting further information.

New – new questions just come in.

Pending – questions requiring action (referred questions will show here as well as in New). **Answered** – if you have completed the question you can automatically set the question status to 'Answered'.

Closed – when no further action needs to be taken.

There are also symbols to the left of the transcripts showing the status of the question:

3	10817377: Chat Transcript: Is there any materi
	Received: 23:44:53 2015/10/11 (GMT +0100) l
\square	10816954: Chat Transcript
	Received: 19:48:16 2015/10/11 (GMT +0100) l
3	10816306: Chat Transcript: Your description of
	Received: 09:49:40 2015/10/11 (GMT +0100) l
?	10815653: Chat Transcript: My account says t
	Received: 21:37:49 2015/10/10 (GMT +0
	10814758: Chat Transcript: Are you able to loc: know the full name of the author, but the surna
	Received: 13:19:37 2015/10/10 (GMT +0100) l
	10814730: Chat Transcript
	Received: 13:08:19 2015/10/10 (GMT +0100) l
	10814660: Chat Transcript: title
	Received: 12:01:16 2015/10/10 (GMT +0100) l
	10814605: Chat Transcript: HiI have asked fo
	Received: 10:50:50 2015/10/10 (GMT +0100) [

These symbols are explained below:

Question list	Statuses included	Description of list			
New	New ?	Questions that need action by you or your library			
Pending	Pending ∲	 Questions that need action by someone outside your library: A patron whom your library asked to clarify a question, or A library or expert to whom your library referred a question for an answer 			
Answered Answered		Questions for which an answer has been sent to the patron.			
Closed	Closed 🗀	Questions that a librarian or patron has closed			
Active	New Pending Answered	A combined list of all the questions in the New, Pending, and Answered question lists			
Referred	New Pending Answered	A combined list of those questions in the New, Pending, and Answered question lists that were referred for an answer by your library or to your library			
	(Referred questions only)	 The list includes questions referred: By your library to another library in your group, to the Global Network, or to a subject-matter expert To your library by another library in your group or by the Global Network 			

3.4.2.1 New Questions area

You will need to open a question from the 'New' questions area if one of the following has happened:

- You are on shift and a general question that was referred back to Enquire overnight by the US for additional answering.
- You are not on shift, you may have a new question referred as it is very local and requires specialist knowledge.

- You have completed a chat session and need to undertake further research and get • back to the patron.
- The patron has asked for a response via email. •

For points 1 & 2, your authority will receive a daily email containing all referred questions information from OCLC Support:

Example of the emails that are sent daily to the Enquire list for libraries to action as appropriate:



Good morning,

There are no referred questions this morning from Enquire to your libraries, but please continue to check your local 'New' Question Lists for any that have come back to you directly as these are your citizens wanting assistance:



he rota for the rest of this week and next week are shown below. If you have any queries, please contact Support

Thursday	Friday	Saturday
08-0.ct	09-0.ct	10-Oct
AM	AM	
Comwall	Staffordshire	Newcastle 9.45-12.15 (24/7)
Surrey	Westminster	
PM	PM	
Essex	Bradford	
Kensington & Chebea	Nottinghamshire	

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12-Oct	13-Oct	14-0ct	15-Oct	16-Oct	17-0ct
AM	AM	AM	AM	AM	
Kent	Essex	Norfolk	Cornwall	Windsor & Maidenhead	Newcastle 9.45-12.15 (24/7)
Lancashire	Sandwell 9:30-1:30	Kent	Surrey	Nottinghamshire	
		Nottingham City			
PM	PM	PM	PM	PM	
Bolton	Newcastle	Hertfordshire	Bromley	Southwark	
Oxfordshire	Norfolk	Leeds	Halton	Nottinehamshire	

Best wishes, to

Enquire Customer feedback 2015:

- ** live this concept (ive never heard of it before indep) (ive talked in two librarians today and they were both great and a lot of help! It's great to exchange thoughts, opinions, questions and answers!...* ** ready sand/answcke at 22.08 brs...*

Jo John City Gate - 8 St. Mary's Gate - Sheffield S1 4UW - United Kingdom T 0114 267 7502 -

C OCLC

OCLC org - Eacebook - Twitter - YouTube - Encuire ORAC BEN "CREDeser" Addition Addition Section 2010 OCIC (INC) UN Registered in England and Willes Company No. 480:73 Registered Address: City Gate, S.S. Mary's Gate, Sheffield, St. 4,W

Clicking on a question in the 'New' questions list will open up a question. This will be displayed as below and shows all the details of the transcript.





Change Patron E-mail

Question Detail



This shows details **about** the question:

Patron - Contact details – such as name and email where given. Section 5 details how to deal with anonymous patrons.⁵

⁵ For this manual an OCLC alias account has been used. No data protection rights have been violated.OCLC LtdVersion 5. November 2015Page 17 of 49

Wait Time – How long did a patron wait before being picked up (in this case 60 seconds). **Session Time** – Shows how long the chat session was in progress (in this case 2940 seconds / 49 minutes).

Referred to: Shows which library authority picked up the question.

Question – the full initial question.

Referer: Shows the URL the patron accessed the service through.

Zip code – the first 3 digits of a postcode. This information is kept for library reporting purposes. It also provides a useful tool to see where a customer's local library authority is. In this instance, the customer is in CB3 which is in Cambridge.

Section 5 will cover how to answer a question 'offline' in more detail.

To show briefly, click on 'Answer'

Answer Question

Cancel Ser	d Answer Request Clarification Send Message Save Draft	Q Search KB
Question: to:	[10824225] Chet Transcript: Do you hold old school Photographs for St Saviours Primary from 1958 to 1965 and also Sir Robert Bellarmine from 1965 to 1969. Can I view these at the Mitchell. [Pull Question View]	
	Eot + Format + Vev + Inset + h ← B / U E E II II E II II A + B + ® © d ⁰ Formats + Fort Family + Fort Sizes +	O Quark Tip Please note: When adding scripted messages that will be used prmarky in that sessions, large fonts and/or colors are not recommended, as pation interface display may be affected.
		O Quick Tip Default line spacing for this editor is enter key-a paragraph break (double spaced). Using enter key will end any title formatting.
		To create a single spaced break use Shift+enter keys. This will continue any title formatting on the previous line.
	p Words: D d	
	Show/Hide Tooltip	
Senpts	- Select Personal Script - Select Institution Script - Select BVIE Script - O	
	File size limit is 5 MB. Total attachment size cannot exceed 12 MB.	
Attachment 1	Browse No file solected.	
Attachment 2	Browse No file selected.	
Attachment 3	Browse No file selected.	

There are several ways to send an answer, for Enquire we use:

Send Answer – this sends the answer to the patron and sets the question status to 'answered'. You can add two attachments to the reply.

Request Clarification – this sends your message asking for more information to the patron and sets the question status to 'pending'.

Save Draft – this allows you to start an answer, but you will need to complete it for it to be sent to the patron.

Attachments can also be sent with any response.

3.5 Scripts

Scripts can be a very useful part of the chat session, allowing you to use time saving predetermined scripts to save you typing, these can be a welcome or a session ending, they can be standard ways to ask for additional information or clarification, or to set users at ease. Scripts can be added, edited and deleted

From the QuestionPoint homepage select 'Ask', from the drop down menu.

SELECT SERVICE My QuestionPoint	-	# Home
Administration	Settings	My Library's W
Ask		
Chat Knowledge Base		
Profile		
Reports		

Select settings

🕋 My QuestionPoint		The American Point'	Institution: Enquire (10836) UK Support Exit
Ask	Image: Constraint of the second sec	ipts Service History Settings	Support Help Reset Clock
My Addresses My Scripts	My URL Scripts Institution's Scripts Institution's URL Scripts	Shared Scripts Shared URL Scripts	
Institution's Scripts	3		
Add New Script			
Script Name:			
Script Text:	Edit • Format • View • Insert • • • • B I U E E III III Font Family • Font Sizes •	E I A · A · O O Formats ·	O Quick Tip Please note: When adding scripted messages that will be used primarily in chart sessions, large fonts and/or colors are not recommended, as patron interface display may be affected. O Quick Tip Default line spacing for this editor is enter key=a paragraph break (double spaced). Using enter key will end any title formatting. To create a single spaced break use Shift+enter keys. This will
	p Show/Hide Tooltip	Words: 0_d	Add
view/opdate scripts	Name	Text	
Remove	Edit Enquire referred questions - non subscriber	I'm sorry, but your library no longer participates in the Enquire service. Please o Enquire but this was no longer possible.	an you contact them directly advising you tried to have the query answered via
Remove	Edit Offensive / Abusive	The question you have asked has been deemed inappropriate or abusive and t	nerefore cannot be answered.
Remove	Edit PC Problems	I am having intermittent problems with my pc, can we take this offline to email contact via email. This will help me answer your question without losing you.	? If this is okay with you, please type your email address and I will re-establish
Remove	Edit Test script	To check the status of your account and view books on loan, due dates and to your ID number: http://193.1.100.111/TalisPrism/accessAccount.dojsessioni fine please call 061 202166 to discuss payment or alternatively drop in to the l	see If any money is owed on your account log in to your library account using d=1B50CDE31BFAC9D905B14A7E46183E61.worker1? If you need to pay a brary and speak to a staff member at the information desk.
Remove	Edit What r u looking for?	If you could please give me an idea of what the information is for, I can better $\boldsymbol{\sigma}$	etermine the resources to use to answer your question more quickly.
Remove	Edit Where have you looked?	Could you please let me know where you have looked for this information so fa	r? This will help me not to duplicate what you have already found.
			Return to Top

There are two types of script: **Institution Scripts** and **My Scripts**, the procedure for editing etc is the same for both.

Institution Scripts – should be set by the authority administrator and should reflect how you wish to say standard phrases.

My Scripts – you can add your own to help you when you are on duty.

To add a script, select either Institution Scripts or My Scripts

Give the script a short name in **Script Name**, then add the full text in the **Script Text** box. When you are happy with the wording, click on Add. It will show in the **My Scripts** column when in a chat session.

Add New Script																			
Script Name:	Where have	you look	ed?																
	Edit - Format - View - Insert -																		
	•	В.	Į⊻	EE	Ξ			1)=	<u>A</u> •	A		٢	Formats -	Font Family	•	Font Sizes	•	
	Could you pl	lease let	me know v	where you h	nave look	ked for this	inform	ation so	far?	This will	help m	e not to	duplica	te what you hav	ve already found.				
Script Text:																			
	р																		Words: 27
	Show/Hi	de Toolti	р																
																			Add

3.6 Policy Pages

Policy pages for your library can be created and edited to help other libraries in the Enquire service, or the 24/7 Reference Cooperative, assist your users when you are not online. For instance, if you staff one day per month, that is 6 days per year, so other libraries could be helping your library users for 359 days per year. Policy pages make the patron experience as seamless as we can make it, and provide the information we need to deep link into library information.

Policy Pages can be edited with your Standard User login, or an Authority Administrator login. From the QuestionPoint user homepage, select "**Profile**"

s	ELECT SE	RVICE: estionPoint	•	A Home
ŀ	Home	My Password	My Settings	My Library's We
	My Ne Ac	Questions ew: 1 tive: 19		
3	Que Ne	estion Lists	يو معر	ana jer
	Ci. Know Si Ad	אמו הצבער הדמכנה vledge Base earch Global KB: vanced Search	0	
[Profil Se	e arch Policy Page	28	

In the next screen select "Policies"

A My QuestionPo	pint			QuestionPoint								
SELECT SERVICE: Profile	-	Institution	2 Services	Collection	- Strengths	Printable Profile	Q Search	Administration				
Institution Services	Inst Info	Contact	Names	Available	Unavailable	Locs Served	Languages Served	Policies	3 ties			

Edit the form with as much information as you can, as this will not only assist your UK colleagues when dealing with local questions, it is absolutely vital to enquiries picked up by the out of hours US partners (24/7 Reference Cooperative and Backup Staff).

My QuestionPol	int					1	P QuestionPoint				Institution: The Answers People (108 Annexissie Ward
cr service file	•	Institution	Services	Collector	strengths	Printable Profi	Q Search	Administrati	21		Supp
tution Services	inst info	Contact	Names	Available	Unovailable	Loos Served	Languages Served	Policies	Specialties		Press Co
olicy Edit Pag	e										
 Add angle To see inst To see how To see whit When you 	brackets to a ructions/rec v the policy p ch WorldCet have comple	any URL to co commendation age will oppe Institution Re ted this page	invert to a hy no on how to er to libraria igistry recorr use the 'Sul	perlink, excep complete this ns, click the "k d your institut benit" button t	ct where noted to a Policy Page, pli New Policy Page ton to linked to, o to alert the Coop	i specific field inst eace use these Pc 7 button at any til dick the "View Wor Manager that you	ructions. Icy Page Guidelines le during the edit pro IdCat Registry' butto ar institution is ready	oess. n. If your institu to participate in	tion should be links the 24/7 Reference	ed to a different record, please click h a Cooperative. Use this only upon pc	wre: Correction Poern Acy page completion.
							The A	nzwerz Peo	ple		
View Polis	ry Page	View W	VorldCat Re	gistry	Sabmit						
Edit	Alerts										
						84	ndey, 11th October th	rough Thersda	y, 22nd Oetober:		
	Due to	maintenance,	thelibrary o	atalogue will	be unavailable. I	t will not be possi	tie for customers or li	brary staff to a	earch the catalogue	e, place reservations or manage acco	sunts including renewing books online.
	Customer	ra can renew l	books during	this period by	y calling 0845 60	037628, visiting at	y Essen library or by	you marking an	y chat for follow up	p. PLEASE ASK CUSTOWER FOR THE	ER LIBRARY GARD NUMBER AND NAME.
		New users (will not be ab	ile to use the I	Ibrary computer	s or wr-fi, eBeek a	nd eAudio customers	will be able to	eccess OverDrive bu	ut BarrowBox oustomers will only ha	we access if they use the app.
						Libraries	all be open and ousto	mers can borro	w and return resou	Inces.	
Origoing: Sor	ne customer	ts have report	ed problems Search cat	accessing Es alogue' in the	sex Libraries' or yellow tab. If th	ine catalogue. Pi ey are still unable:	st, oustomers should to access the online o	not use saved atalogue pleas	inks but should typ e forward the enqui	se the following URL into their brows iny to us so we can follow up with cu	ar http://www.essec.gov.uk/libraties and click on the link r technical team.
Edit	Library Ho	me Page URL	(Do not mek	ude homi in the	io field)						
http://www.ep	uaex.gov.uk/	Voraries									
Edit	Home Pag	elastructions									
The Answers	People is the	central enqui	iry service fo	r Essex Ubrar	ND.						
EssexLibrarie	s Business I	rformation S	ervice previd	es business ir	formation reso	cross to support p	roposed, new and es	ablished busin	esses in the county.	1	
Edit	Parent Inst	titution									
Eda	Catalog UR	8L (Do not inc	lucle html in t	this field)							
http://essedib	mariles lessen	ee.gov.uk/va	/Vubis.csp								
Edit	Catalog In	structions									
Essex Librarie	e share the c	online-catalog	ue with Sout	thend Librarie	s and Thurrock	Libraries.					
eBooks and e	Audio: We su	bacribe to tw	p sBook and	audio aBook	suppliers: OverE	irive, OneClickdigi	tal and BorrowBox (%	rmerly Bolinda) and accessing the	ese holdings from the website and no	of the catalogue is preferable.
The catalogue for borrowing	also include sets. There i	is the holding	p of the Peri nembership	orming Arts s fee and a cha	ervice: playsets, rge for supplying	orchestral sets an performance set	d choral sets. Interes 8.	ted organisatio	ns should phone P	Netforming Arts directly on 0338 0138	8949 Monday to Friday between 9am and 5pm to amange
ICE (Inclusive Essex Librarie	Communical s. Search the	tion Essex) pr e library catal	rovides com logue using 1	nunication tri he search terr	sining and resou in 'inclusive com	ross to families ar munication resou	nd to carera of childre loes'.	n and adults w	th learning disabilit	ties. Resources, including inclusive co	semunication equipment, are available to borrow from

You can add text, or URLs, whichever you feel will require the least amount of updating.

On the following page are a few examples of Library Policy Pages: When updating your own policy pages you can view others by selecting the 'Search Policy Pages' option from the homepage:

select si My Qu	ervice: estionPoint	-	Ame Ame					
Home	My Password	My Settings	My Library's Wel					
Му	Questions							
Ne Ac	ew: 1 otive: 19							
Qu	estion Lists							
Ne	ew: 1		anna frai					
Ci	at Paul Practy							
Knov	vledge Base							
S	earch Global KB:	Ð						
Ad	dvanced Search							
Profi	le							
Se	earch Policy Page	es						

Search for "Bolton"

	Policy Page Ernal Contact	Phone	Hours	Location	Available Technology and Equipment	WS Access?	_					
QuestionPoint Profile	Detabeses	e Books	Library Card Policies	Loss Periods/Returns	Renevals	Late Pees	1					
	Interlibrary Loan	Library programs, events, services	Meeting Rooms				-					
Search Policies												
Group Policy Page		Enquire staff pages										
Group Member Polizies		Balton Libraries (Eng-UK	5		interest and a second sec							
Bohon L Bravius (Eng-UK) 2												
Alarstandia and a second and a se												
Library Home Page URL: http://www.boltoniama.co	ukr											
Catalog URL: https://bahos.spydus.co.uk												
Policy Page Email Contact:	стон сохик 3											
Batabase Access for Coop Librarians (library on The last 8 characters on the card ignore letters BTP at t	nd etc.): NOTE: These URLs, o he beginning. The final chracter	ermanes, and/or passwords must may be an it; the rest are numbers.	not be shared with part	uns jase Gatabases field	or student/faculty/staff access infu):							
Phone: 01204 222523 for AskBoltani, disartes Engary Serves.		4										
Hours: See this link for details of all branches and their opening between 0815 and 0900 on weekslays (scorpt Wednesd	times. The Central Library's hos 496).	ro are: Menday 0816 - 1500 Tuesda	ry 0815 - 1930 Wednesd	ay 9988 - 1780 Thursday	0816 - 1990 Priday 0818 - 1738 Satarda	ry 0900 - 1790 8	landay 1000 - 1600 Alimited service, with no reference function, is availab					
Location: See link above for locations of all branches. The Central	Librey is in Bolton town centre.	near the Town Hall. He address is G	entral Library, Le Mone G	Sescent, Bolton, BL1158								
Available Technology and Equipment: People's Network Computers with Internet access. Libra	ry catalogues. Printing, acannin	ng and Pax facilities.										

- 1. Shows the Policy Page sections that have been completed, these are also hotlinks to the section.
- 2. Shows who to contact to alert them there are policy page issues.
- 3. Shows the Policy Page contact if different from Alerts
- 4. Shows a completed section with text and hyperlinks.

Any problems with policy pages can also be reported to <u>support-uk@oclc.org</u> where we will work with the library to amend them.

Search for "Norfolk"

	Poley Page Ernal Contact	Phone Hoge	Locatio	Whi Access 7	Cotabooes.	
QuestionPoint Profile	e-Baoka	Library Card Policies Log Perce	ds/Returns Reneval	in Holds	Late Feet	
						1
Search Policies						
Broup Policy Page		Enquire staff parties				
Group Member Policies		Norfolk Liby ry & Info S	rvice (Eng-UK)		• Subm	et
					_	
			Norfolk Library	& Info Service (Er	q-UK)	2
			Alex to Concer fields	one of The Inform	Cine Team	
Library Home Data HDI - http://www.ooffile.org	in a second second second second	nder bre		·····		<u>.</u>
http://www.confedit.com/actions.and.com/actions/althout	arian linder htm					
Paralas IIDI - breachadde and a souther the	and a subtraction of the subtraction					
Policy Page Email Contact	3					
Database Arrens for Contributions Observe	and start NUTP These LPLs or	an a	not be shared with na	troop (see Databas	es fachi far an	edent/family-stall arrays white
Phone						
http://www.norfolk.gov.uk/Leisure.and.culture/Libn	arias/Yout.local.library/index.htm					
Hours: Each of any Manyas have different spectre burst for	rate one he found have	4				
http://www.norfolk.govuk/Leisure_and_culture/Libr	ares/Yout Jocal Jibrary/Index.htm	4				
Location:						
We have 46 statio library points - details of location fo	reach can be found at the follows	g URL http://www.norfalk.gov.sk/	essee, and outpare/b	branes/Year_local	Marany/Index	have
With Access?: We new have free public With access at all of our libra acceptance of the Norfolk County Council Terms and	ries. The network will show on you Conditions.	lat of available networks as NCC.	Library,JWń, When you	a have linked to the	network, you	will need to log on using your library membership number and PIN in order to browse the Internet. Logging on implies
Dutabases: See list of databases here: http://www.norfolk.gov.de	/ibrariesfindit					
e Books: http://www.noriolic.gov.uk/Letsure_and_outure1.im tai media/visioolis_eAudio_and_eMacazines/indech	ares/Dig					

Lancashire

	Policy Page Email	Contact	Phone	Hours	Location	Available Technology and Equipment	Wifi Access?
	Databases		e-Books	Tech Assistance	Library Card Policies	Loan Periods/Returns	Loan Limits
• QuestionPoint Profile	Renewals		Holds	Late Fees	Interlibrary Loan	Library programs, events, services	Meeting Rooms
	Summer Reading I	Programs/Lists	Other Policies				
Search Policies							
Group Policy Page		Enquiro eta	ff.pager				
Gloup Folicy Fage		Linquire ata	ii pages				
Group Member Policies		Lancashi	re Libraries			Submit	
				Lancashir	e Libraries		
Alerts:Lancashire libraries general email is library@	ancashire.gov.uk The pho	one number is 0	3001236703 Ple	ase ask enquirers t	o aive their 14 diait libra	ry card number if they have problems w	ith accounts. reserv
	start 20118. Seve	eral other library	services in the L	ancashire area hav	e different numbers whi	ch can't be used to access our online se	vices.
Library Home Page URL: http://www.lancashire.g	ov.uk/libraries						
Parent Institution:							
http://www.lancashire.gov.uk							
Catalog URL: http://							
http://capitadiscovery.co.uk/lancashire/searchhelp.http://capitadiscovery.co	ttp://www.slideshare.net	t/LCLIS/lancash	ire-library-catalo	ogue			
Policy Page Email Contact:							
Quest Login / DIN for Coon Librariana:							

Bolton Header - all these headings relate to completed sections and they are also hotlinks

Policy Page Email Contact	Phone	Hours	Location	Available Technology and Equipment	Wifi Access?
Databases	e-Books	Library Card Policies	Loan Periods/Returns	Renewals	Late Fees
Interlibrary Loan	Library programs, events, services	Meeting Rooms			

Norfolk Header - all these headings relate to completed sections and they are also hotlinks

Policy Page Email Contact	Phone	Hours	Location	Wifi Access?	Databases
e-Books	Library Card Policies	Loan Periods/Returns	Renewals	Holds	Late Fees

Lancashire Header – all these headings relate to completed sections and they are also hotlinks

Policy Page Email Contact	Phone	Hours	Location	Available Technology and Equipment	Wifi Access?
Databases	e-Books	Tech Assistance	Library Card Policies	Loan Periods/Returns	Loan Limits
Renewals	Holds	Late Fees	Interlibrary Loan	Library programs, events, services	Meeting Rooms
Summer Reading Programs/Lists	Other Policies				

3.7 Support and help

There are online resources that can help you during your session:

- There is the Staff website http://enquire-uk.oclc.org containing help guides, hints and tips
- The Enquire mailing list (if you are subscribed to it) can be used to broadcast a tricky question. This can be used not just for Enquire, but any question you may have received on the reference desk. Why not pool the resources of the Enquire staff to get a rounded answer. If you are not on the listserv, let Support know and you can be added. The email address to send questions to is pn-enquire-l@oclc.org

If you are unable to find the answer online, or need immediate assistance then please contact Support:

- <u>support-uk@oclc.org</u>
- Tel: +44 (0)114 267 7502 / 0845 267 7502

4. Let's get chatting

In this section we'll look at how the patron/customer accesses the service and what their view will be. We'll then concentrate on the librarian functions.

Here's a quick checklist of things to remember when conducting a chat session:

- Never forget the reference interview the same principles that apply to physical, email or telephone reference still apply here. Always try to ascertain the level of response, where they have been before and what they want it for.
- Be confident to multitask you'll need to be able to cope with opening multiple internet sessions to find information.
- Have a positive service attitude and willingness to help.
- Be mindful of colleagues that may want to contact you during a session (Instant Message).
- If you want time to think about a response, then take it offline.
- Use the Policy Pages.
- Stay calm and have fun!

4.1 Patron/Customer Access:

To get a better feel for how you can help the customer, be a patron:

- Know your way around the patron's form.
- Know how pages are displayed.
- Look at the difference 'preferences' that are available in a session for different formatting.

The service can be accessed by your own specific Enquire URL, or Bookmark Your Library, for Bookmark Your Library the patron will need to validate their postcode.

Chat with a librarian - live. 24x7 The Ask a Librarian service is powered by Engure - a collaboration of libraries in the UK and US. You can chat with a librarian in real time or can email your questions and simply wait for the answer. In order to use the ask a librarian service, you need to enter your postcode below. SUMME Ask a Librarian Your Question/Message

4.1.1 Patron/Customer preference options

In the chat form the patron is able to change their viewing preferences.

@ QuestionPoint Chat	[Skip Navigation]	Escale's Parter	ork Home About us Centact us Sitema		
Hella, Jo John (jahnj@ack.org)	People's Network				
Thank you for your question. There may be a brief datas while we connect you to a librarian.	The are large Tablet's Mitchell Long + Topper Large - Alexit Tablet				
While you wait, can you provide any more information about your question Chet Transcript: TRAINING - do not pick up	Enquire Mont Equire Access using a some mader Top on using Enquire Accesstable use policy	Encode Mout Excute Mout Excute Mout Excute Access using 5 Service in reader Access using Encure Access using Encure			
Profes He and The Co	entes select your preferences within 2 mod button will simply return you	or 3 minutes and return to that is order to prevent a title-out of your chart session to that without saving tothings.	a, however, the query may be		
Pierce II Tic lief Name II	terrage Chine 196 know when new messages h terrage Chine: ¹⁰⁸	erst, you can fil in details at the			
Displa These Fort S	y Settlings proference options allow you to r ing: 17 💌	important we have your email. Dack to you.			
Four F Calor Compose message and send to librarian:	ece, Vintina 💌 Schwarz (Backbia or shite (Sela re Settings -) (Cancel)	A 🖻	ice. If you enter your postcode, a service your question can be derectly, we can do that for you contact details.		
Sed	1	Session Feedback	and the second state of the		
Preferences Help Exit Chat		service better, we welcome all in, as this is extremely helpful.			
		Thank you for using our online live reference service!			
		Enquire is a Yahoo! Answers UK Snowledge Partner			

4.2 Librarian access

Log into your QuestionPoint account as we described in Section 3.

inter server. My QuestionPoint 🚽	# Hone	Beparts	Support Help Reset (Sock
forme My Password My Satt	nga My Library)	Webform Coverage	
My Questions		QuestionPaint Announcements	English • O
New: 1 Active: 19		Last Updated: 4/28/2015	Blog WM
Question Lists Next 1 Unaccigned: 0 Active: 237 Find D: Add a Question		Scheduled Maintenance Complete for August 28 The August 28 maintenance period has completed as planned. If you experience any leaves please clear yist cache. Thusk you for using QuantionPoint. -The QuestionPoint new Virtual User Group Meeting Available On Thursday June 18, 2015 OCLC hosted a virtual user group meeting. We talked about the future of QuestionPoint release followed by a group question and answer pession. Check out the recording and let us know if you have any questions.	Bocumentation Training Feedback Framebusters 24/7 Hertomece Cooperative Membership Lists
Quick Links		View the WebExcesording [46 minutes]	
ShiftPlanning Time Clock Learner Chat Chat Manifoling Tear Chat Patron Practice Form		Subscription Group Announcements Kart Updated: May 2015	

From the Offline area, click Launch Chat.

4.2.1 Selecting queues

Select the queues you will be monitoring:

For standard Enquire chat- **all boxes should be checked**. It is a requirement to participate in the 24/7 Reference Cooperative.

For local services – your local service will be your Primary Queue. When monitoring local chat only the Primary Queue should be selected.

Sel wit Pri	ect queues to monitor and click "Save". To monitor your Primary Queue h no potential rollup delay in your chat monitor, you must check your mary Queue box even if it is also part of another line item.
	Select All
	Queue
✓	Primary Queue: A Enquire UK
✓	BME Queues: A Barnsley UK, A ENQ Bookmark, A ENQ Cornwall UK, A ENQ Donc
✓	Cooperative Queues: Enquire, A ENQ Doncaster UK, AQ Essex UK, A ENQ Halton
✓	24/7 Reference: Public Cooperative
_	Monitor 'Practice Queue' Only

4.2.2 Checking who is monitoring the shift

Once monitoring the live queues, you can click on the **Librarians tab** to see who else is monitoring the shift with you. This will list who is from a UK Enquire library and who is from the US 24/7 Reference Cooperative libraries and also OCLC Backup staff, and how you can also see whether your fellow Enquire librarians are in session with you, or just monitoring a local service.

John (123891) Patron Chat IM (0)				Monitoring: Live Queue:
Jueues				
New (0) My Active (0) All	(0) Librarians (10)			
ibrarian	Queues	Queue (Library)	Active	Time
lo John (123891)	9	A Enquire UK (OCLC (UK) Ltd (Er	0	12:11:14
Mark Lenihan (126185)	9	A Enquire UK (London Borough c	0	12:04:00
vicola Hamil-Stewart (12485) 1	A ENQ Cambridgeshire UK (Camb	0	10:18:07
Pat Birch (113912)	1	A ENQ Cambridgeshire UK (Camb	0	10:06:58
Veil McClean (124835)	1	A ENQ Kent UK (Kent Cnty Coun	0	09:07:47
ori Kuban (P) (117586)	84	After Hours Coverage (QP Backu	1	11:54:42
Raul Cervantes (S) (114545)	85	After Hours Coverage (QP Backu	0	10:57:18
Philippa Taylor (122061)	40	A Enquire UK (Somerset Cultural	0	12:01:06
Sarah Carrington (122263)	9	A Enquire UK (Bournemouth Libra	0	09:03:11
Peter Kazmierczak (122254)	9	A Enquire UK (Bournemouth Libre	0	08:35:14

What do all of the Queue numbers mean:

- 1 or 2 queues means that the staff are monitoring only their local service and will not see Enquire questions.
- >2 <40 queues mean that the staff are monitoring the Enquire service, it is very important to select both queues as shown in Section 4.2.1.
- **40+ queues** means these staff are not only monitoring Enquire, but also the **24/7 Reference Cooperative** on their shift, as per our obligation for 24/7 provision for Enquire.
- **80+ queues** these are the OCLC Backup staff, who monitor all 24/7 Reference Cooperative queues. The Backup staff are Enquire's last resort to pick up a question and should not be relied on to pick up the Enquire questions, they are our responsibility in the first instance.

4.2.3 How a new session arrives

When a new chat session comes in a pop up alert is displayed on your screen. This will happen even if you are currently in a chat session. This is so that you are aware another session has come in. For the first 40 seconds, only Enquire librarians will see the new Enquire patrons. These patrons should be picked up right away otherwise the question is opened up to the wider 24/7 Cooperative. The Cooperative and Back-up staff have been asked to wait over 60 seconds before picking up a question.

Coestion Horne coests Nation that	aPaint (1000000)		(112) o	n (1) Sattaga Bala Lagost Hantaring: Practice Queen	
Quantum					
5mm (1) 10.0					
Pabos.	See	(prove	Question		Many a start of a transfer base surfaced
larry loves	45	Wy Seattlaken	(Nadas) Landain		New patron char session has arrived?
			The patter that second his article?		New Chat Patron - Patron: Jenny Jones
toik :		-			OK

<u>HINT</u>: When you log into chat, if you are unable to pick up a question and the pop up box does not go away, check your pc settings. This is often an indication that the Internet Tools Setting has not been set to 'every visit to the page'.

4.2.4 Changing your alert and screen preferences

Change the way you are alerted to a new session. You can change your settings to remove a pop up alert and just have an audible alert. This may mean you are able to select a question more quickly.

• QuestionPol	nt			12:16:42 2009/04/24 0888	Queues (2)	Settings	Help Logout
o John (123891)						Monito	ing: Live Queues
Patron Chat	IM (0)						
Queues							
New (0) My A	ctive (0) All (1)	Librarians (9)					
Patron	Queue	Question	Librarian			1	
Bruce Kent	A Enquire U		1 -1 -1 1	1			Manager 1 and
		Settings					
		My Flash Chat Se Change font size: New Patron Noti Plash based popup Browser based ale Sound alert when Sound alert repeat Sound alert repeat Show network use	sttings releft : rts (popup and system s "New" patron anives; tody while "New" patron h tody while "New" patron h sign meter;	ound): in queue: as responded;		_	8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8
Tools Info Scrots	Liffica Neitz					G	moel Save

Moving the screen boxes around to suit your working style:

At Legent 1000 Beach 1000 Peter Chi (a) (a) (a) (b) (b) (b) (b) (b) (b) (b) (b) (b) (b	• •			That the poly of t
Pineto Dil Billion Namio Namio Namio Nami	K Support (100284857)			Monitoring: Live Queues
Space Under yr Marie 10 Carefield (Maria Marie 10) Carefield (Maria Maria Mari	Petron Chat IH (0)			
Ne Mill Mill Andre 13 Mill Uberken 13 Mill Uberken 13 Mill Uberken 13 Mill Uberken 14 Aussen 14 Kannen 14	Queues			Librory Potron:
Prior Part Parton's Last Resurge () Subcry Resmin (1) 2012 2012 2012 2012 2012 2012 2012 20	New (0) Ny Active (1) Al	II (0) Librarians (18)		Question: Quidget: test question: for an anonymous transcript to (training/admin): tests: Estronic screen name: Library Estron
I Jacowy Reven I Jacowy Reven I Jacowy Reven I Jacowy Reven I Jacowy Reven I Jacowy Reven Teach Protect Protect I Jacowy Reven Protect Protect Teach Protect Protect Main Protect Protect Protect </th <th>Patron</th> <th>Time</th> <th>Petron's Last Nessegn</th> <th>Jo (training/admin): Librarian to (training/admin) has joined the session.</th>	Patron	Time	Petron's Last Nessegn	Jo (training/admin): Librarian to (training/admin) has joined the session.
Tests Pecks Tray Torus Pecks Description Pecks	()Library Patron	11:30:45 2015/09/28 (SMT+0100)		
Set Reduct Test Reduct Test proton Reduct Test				
Test Periors Description				
Tests Protects Tests Protects Tests Protects Tests Protects Tests Protects Tests Tests				
Tests Participa Tests Tests Tests Te				
Tests				
Test Pelos Star J show Pelos Star J show<				
Tesh Pelos time in the intervence interve				
Test Package first prime				
Teste Pelcies Avge provide (10773081) Consider (164: au and menore Durande (154: au and me		-		
Tests				<u> </u>
Tech Padics And Contain Unit Description Site and increments 00 50 moles. And Contain Site and increments 00 services. Setting Description Site and increments 00 services. And Contain Site and increments 00 services. Without: Description Site and increments 00 services. Increments 00 services. Without: Description Site and increments 00 services. Increments 00 services. Without: Description Site and increments. Increments. Without: Description Site		(-)		
Brand Packing Into Specific (1077301] Gwidget test question for an anonymous transport stron: User: The	Tools		-	
Into Status Heres Decision (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget test gasetion for an anomenous transport Work (10773501) Gwidget (107060) Work (10773501) Gwidget (107060) Work (10707600) Wo	brary Patron	1	Pall	3
bedder (1077303) Gwidget Itet gaddien for an anonymous transite. down: sharp Patien 105 e easi provided down: Sharp Patien 105 e easi provided a sharp Patien Patient 105 e easi provided a sharp Patient Patient 105 e easi provided a sharp Patient (1) Sharp Patient 11 e easi provided a sharp Patient (1) Sharp Patient 11 e easient (1) Sharp Patient (1) Sharp Patient 11 e eas	twio Scripts LIRLs Note	. 🔶		
Patron Trans Patron's Lost Messon () Library Patron 11:33:45 2015/09/28 (petr =0100) Trans	rowner/95: Mozilla/S.D.(Windows Jary 537.3 abrowce: No	NT 6.1; WOW64) AppleWebkig537.26 (KHTM)	like Gesko) Chrone(45.0.3454.101	
Constitution Point Constitution Point Constitution Constation Constati				Transfor End Sension
Patron Tes Patron's Loss (0,07,08 (0,017 + 0.100)) Question (0,017 + 0.100) Question (4) Settings Help Log Voided IM (0) Voided Voi				
Partner Times Patron's Last Message () Library Patron Library Library Library Library Library Library Library Library Library	and the second			
Patree (L0020+327) MailWorking: L0020+327) Patree (Sat IN (0) Decession Image: Control (Control (Contro) (Control (Control (Control (Control (Control (Control (C	-o- QuestionPoint			11:22:02 2015/09/28 (2MT+0100) Queues (4) Settings Help Logos
Patree Cat	k Support (100284857)			Masitoring: Live Quese
Decent Utravises (1) All (0) Ubravises (12) Utravises (12) Utravises (12) Decent (12) Operations: for an instrumental transcript to (pravises/pdetinist): here: Patron's screen names, Library Patron to (travising/admin): here: Patron's screen names, Library Patron to (travising/admin): Librarian 'to (travising/admin)' has joined the session.	Patree Chat IN (0)			
Percent Times Petron's Lent Menage Classified and product the section. () Jubrary Patron 11:30:45 2015(09(30 (SHT+0100)) Petron's Lent Menage Description	pueses	a design and the second s		Ubrary Patroni Counting Contracts but exercises for an exercise insertion
Patron Time Patron's Lost Message Do (training/admin): Librarian 'to (training/admin)' has joined the session. a (Jubrary Patron 11:30:45 2015(03/38 (GHT +0100) b b Do (training/admin): Librarian 'to (training/admin)' has joined the session.	My Active (1) Al	too coranans (17)		Jo (training/admin): Note: Patron's screen name: Library Patron
()Library Patron [11:30:45 2015(09)28 (GHT+0100)	Petron	Time	Petron's Last Nessep	Jo (training/admin): Librarian 'Jo (training/admin)' has joined the session.
	 ()Library Patron 	11:30:45 2015/09/28 (GHT	+0100)	

Tools			
Jbrary Patron			Policies
Info Scripts URLs Notes			
(20) Petron Library		(33) My Library	
24/7 Welcome		1. Enquire welcome	
Anonymous patron - get details		GN: Which Library do you use	
Books or articles or online		30: come back with guestion	
Deadline?		30) somy been so long	1
Enquire Welcome	:	dick here script	
Have you looked already?		118118 / AQA	-
Library doesn't participate in Enquire		Birmingham Libraries script	
Mare specific		Enguire referred questions - non subscriber	
PC problems		Good Question	
Shall I do more research?		Just a moment	
Stage 1 process for rude or abusive patrons		More detail	
Stage 2 process for rude or abusive patrons		More specific	
Welcome and busy		Non-subscribing	
what is the info for?		Offensive / Abusive	

4.3 The librarian chat screen – Patron Chat tab

An overview of all the areas of the chat screen is detailed in this section and the processes associated with them. Click on the Patron Chat tab.

4.3.1 The New tab

This is where new chat sessions will come in.

Patron Chat	154 (0)	aves nat supply identify information	<u>n.</u>]	10:41:34 2009/04/27 0000	Queues (2) Settings Help Monitoring: Live New Chat Petron - Queue: A E	Logout Queues
Queues						
New (1) My	Active (0) All (3	2) Librarians (12)				
Patron	Time	Queue	Question			
Joanne John	0	A Financie I & C Guardiana Jako Patron Jacob Resoluti Olariano Mari Resoluti Olariano Mari Resoluti Olariano Mari Resoluti Olariano Mari Resoluti Olariano Mari Resoluti Olariano Mari Resoluti Nacilia Mariana (S. Marilia Mariana (S. Marilia Mariana) Patrona Maria Patrona Maria Patro	Percel DO NOT PICK (P - (Do NOT PICK (P - subset) by ohtelike the coll (set of the set of the set of the set of the set of the set of the set of the set of the (set of the set of the set of the set of the (set of the set of the set of the set of the (set of the set of the set of the set of the (set of the set of the set of the set of the (set of the set of the set of the set of the (set of the set of the set of the set of the set of the (set of the set of the (set of the set of			
Info Scripts	UPLS Notes		Policies			
Info Scrptz	URLS Notes		Polices			Send

Once a new chat session arrives.

At the top right of the screen you will see a short pop up display showing the Queue the patron is coming in from. This could be Enquire, it could be a local queue where the staff are not logged in and it rolls up to Enquire, or it could detail one of the thousands of 24/7 Cooperative libraries (if you are monitoring the 24/7 Cooperative).

When a question comes in, the details appear:

Patron - this will show the patron name if provided; or say anonymous if a name has not been provided.

Time - this is the time elapsed, the total time (in seconds) that the patron has been waiting. **Queue** - advises which queue the patron is coming in from.

Question - this will show the full details of the question.to see the whole question hover over it with the mouse **do not click unless you are picking it up**.

NOTE: Hitting the Enter key will send information to the customer. As discussed in the etiquette section, chat in short sentences, and use ellipses (...) to advise more information is coming...

4.3.2 Picking up a question – Chat Tools including anonymous patrons.

The rest of the screen becomes visible, once a question is picked up. Now you can access all of the tools to make the chat session a success. You will also notice that your session has moved from the **New** tab to the **My Active** tab, where more of the screen is available to you, as shown in the information below.

4.3.2.1 The Info tab

QuestionPoint Jo John (123891) Patron Chat IM (0			10:41:44 2009/04/27 00000 Queues (2) Settings Help Logo Monitoring: Live Queue				
Queues			Joanne John				
New (0) My Active (1) All (2) Librarians (12)	Question: Chat Transcript: DO NOT PICK UP - training				
Patron	Patron Time Patron's Last Mess		Bo: Note: Patron's screen name: Joanne John Jo: Librarian 'Jo' has joined the session.				
() Joanne John	10:41:33 2009/04/27						
Tools Joanne John Info Scripts URLs Questum (14/54405) (10/	Notes	Policies					
Queue: A Enquire UK [P Address: 192.87.44.12 Refere: http://www.aska Browser/OS: Mozilla/4.0 (1.1.4322; .NET CLR 2.0.5 Cobrowse: Yes Cobrowse; Yes Cotogory: ENQUIRE_UK zip code: PE15	(competition) Setwork: Online Enquiry Ser Setwork: Ministration or Sector Setwork: MSIE 6.0; Win 20727; MS-RTC LM 8)	vice (Enq-UK) dows NT 5.1; SV1; .NET CLR	Ser				
Transfereten data from unos e anti-	ist and		Cobrowse Transfer End Session				

This tab provides you with information about the customer:

It provides **Patron** information, their name and email address if provided (for anonymous patrons see 4.3.2.2 Anonymous patrons – how do they get the transcript?).

The **Queue** details of how they have accessed the service.

The **Referer** shows the path they took to access Enquire – it could be the People's Network url, the Ask A Librarian url, or a local url; all are clues to where the question comes in from and if clarification is required.

The **zip code** shows the patrons location. In Section 3 we covered the importance of the postcode and how it helps with not only library statistics, but gives a clue as to the customer's whereabouts should they require local information.

4.3.2.2 Anonymous patrons – how do they get the transcript?

Anonymous Patrons can still receive an email of their transcript, however you must advise them of this.

In the chat "Info" tab, you will see that (No e-mail provided) this is an anonymous patron.



You can create a new script for this as some libraries have already. See 3.5 Scripts on how to create a new script. An example of a script is shown below.

Tools	
Library Patron	Policies
Info Scripts URLs Notes	
(20) Patron Library	(23) My Library
Welcome and busy	1. Enquire welcome
What is the info for?	2. Where have you looked
Yahoo! Answers closing signature	3. 118118 / AQA
1. Hello	4. Still searching, OK to hold?
2. Which library authority do you belong to?	5. Still searching - no email provided
3. Signposting for non-subscribing library	6. Anonymous ending
4. signposting for subscribing library	Weather (test #2)
5. Goodbye	Weather (test)
Thank you for using Enquire. You'll be able to email yourself a copy of an email address. We don't keep this information. We would also be grateful if you can complete the short online survey t	the transcript at the end of this session as you didn't enter that pops up when the session ends.

When the patron clicks on the Qwidget "Email session transcript" they can enter their email in a box. For the full form when the session ends an email box is on the page the patron sees.

n order to use the ask a lib	The page at ww	w.questionpoint.org sa ^{dress}	iys: ×
Ask a Librarian			
Your session has ended. select from the option(s)		ОК	Cancel
Email session transcript			
ок			

4.3.2.3 The Scripts tab

QuestionPoint Jo John (123891) Patron Chat IM (0)			10:42:34 2009/04/27 MODE Queues (2) Settings Help Logo Monitoring: Live Queue
Queues			Joanne John
New (0) My Active (1)	Al (2) Librarians (1	2)	Question: Chat Transcript: DO NOT PICK UP - training
Patron	Time	Patron's Last Message	Jos Librarian 'Jo' has joined the session.
Tools Joanne John	10:41:33 2009/04/27	Policies	
thro Scripts UKLS (Notes	USECTO: I	
(22) Patron Library	(26) My L	ibrary	
Books or articles or online Deadline? Enquire Welcome Have you looked already? More specific Offensive or abusive	Clarification Good Ques Hold I'm about i Just a mon More detail	noon no send you a webpage nent	Please can you explain
Wating for www.questionport.org.			Cobrowse (Transfer End Session

The scripts tab allows you to access pre-configured scripts that can make sending quick statements to the customer easier. Scripts can be edited which will allow you to personalise them to fit the situation.

Scroll down the list of scripts and when you find one you wish to use click on it:

The script will populate in the box below – see in the example above the 'Clarification' example, when clicked on, the text "Please you you explain...." becomes available. This also includes a typing error to be corrected, but you can edit it to say "Please can you explain a little more..." etc and then click on the >> to send it over to the typing area.

4.3.2.4 The Notes tab

QuestionPoint Jo John (123891) Patron Chat	0)		10:42:54 2009/04/27 WWWW Queues (2) Settings Help Logout Monitoring: Live Queues
Queues	(1) Al (2) Librarians (1	21	Joanne John Question: Chat Transcript: DO NOT PICK UP - tranno
Patron () Joanne John	Time 10:41:33 2009/04/27	Patron's Last Message	Jot Note: Patron's screen name: Joanne John Jo: Ubrarian 'Jo' has joined the session. Jot Note: this is a training question only Jo: Please can you explain
Tools Joanne John Info Scripts URLs Add a "librarian only no	Notes	Policies	
		Seod	Sind.

You can use the notes tab to write any information about the transcript in progress. These notes are librarian only notes and are not visible to the patron. Here you can add information as follows:

- If you are taking the question 'offline' you may want to make a note of due date, or any reference material you immediately thought of may be useful.
- If the session is a rude or inappropriate question, as well as ending the session promptly you may also want to add a note.

4.3.2.5 Policies

Using the Policy Pages in chat

QuestionPoint Jo John (123891) Patron Chat IM (0)			10:43:04:2009/04/27 IIIIIII Queues (2) Settings Help Logout Monitoring: Live Queues
Queues			Joanne John
New (0) My Active (1)	Al (1) Librarians (3	12)	Question: Chat Transcript: DO NOT PICK UP - traning
Patron () Joanne John	Time 10:41:33 2009/04/27	Patron's Last Message	Jo: Librarian 'Jo' has joined the session. Joi Note: this is a training question only
Teols Joanne John Info Scripts URLs Add a 'librarian only note'	Notes	Policies	

You will find using the Policy pages for local information useful when in chat, as it allows you to deep link directly into local information. Policy pages are available only for subscribing libraries⁶ Clicking on the word **Policies** opens a new browser window outside of the chat session:

Chat Manitar - QuestionP	* *				6.895	2000
Summing and any and any inclusion of the particular	white,) and an a state (1990) at 2	009020394000005544439964qdadoqqay0qaalaataaq	* C 0, heat	+ 1	h (9. =
QuestionPoint' Profile	Clatentide of Stand Ca	alay Policy Page Errol Contest - IP Askinas Range - Location -				
iearch Policies						
Group Policy Page	10	trepare and W progen				
Group Member Policies		Bookmark Your L Snery Barnoley Central L Brary (Enq-UK) Boton L Braries (Enq-UK) Bradford L Bra & Info Service (Enq-UK) Bradford L Bra & Info Service (Enq-UK) Bradford L Bra & Info Service (Enq-UK)	Submit			
P Erray 2.1fthe	Herrathy 1. Use the stop-do 2. If they are not on the ' roucking access to Find a Book not contain all resources available conformer wants to kave feedba	Brighton & How Liberates (Enq.UK) Sonales, London Borough of (Enq.UK) Cheshire West & Chester Council and Cheshire East Council Commut Library Service (Enq.UK) Denotestic Central Library (Enq.UK) Denotestic Central Library (Enq.UK) Datalay Libraries Enquire Enquire: Enquire: Enquire: Yahoo Answers Profile Glappov Libraries Enquire: Kahoo Answers Profile Glappov Libraries Helfordshire Libraries Information Service (Enq.UK) Kensington & Chelseo Libraries (Enq.UK) Kenstordshire Libraries (Enq.UK)	them which library they use! sky page for the patron's PUBLIC library. and here: All UP public libraries click here for link de libraries, as well as allow to the runtional chart service via Queldget to access the local catalogue if you can't find it easily in "AB" in the Centaet Up form on the Bookmark site: Cantaet Up land			
4. Turnaround time for email ro 5. TRANSFERRING & QUESTION /	exponents: referred questions w AND INFing Only attempt an IM	Bibe sent for offline response the sent working day, so a response can or a barrafer to Rearians monitoring 2 or more queues, any less and t	take anywhere from 1 day to be responded to Monday to Priday and longer over a weeken wy we not on Engoine ainty and will not be expected to pick up, they are only monitoring loc	aby		
Jarary Home Page URL: http://www.bookmark	yourlife any organi				_	
CLC						
atalog URL http://www.workkat.org/labiltrara						

From the drop down menu, select the participating library authority you are looking for and click on **Submit**.

The authority's details will appear as below, enabling you to review information and deep link as necessary.

	Statewide or Shared Catalog	Policy Page Email Contact	Phone	Hours	Location	Available Technology and Equipment
QuestionPoint Profile	Wifi Access?	Databases	e-Books	Tutoring/Homework Assistance	Library Card Policies	Access Policies and Reciprocal Arrangements
Question one Tronte	Loan Periods/Returns	Loan Limits	Renewals	Holds	Late Fees	Interlibrary Loan
	Obituaries/Local History	Community referral Information	Library programs, events, services	Meeting Rooms	Summer Reading Programs/Lists	
Search Policies						
Group Policy Page	Enc	uire staff pages				
Group Member Policies	No	ottingham City Libraries (Enq	ŀUK)	• Submit		
Library Home Page URL: http://www.notlinghamcity.g The library service in the City of Notlingham is provided by PLEASE NOTE that NOTTINGHAM CITY C differing policies Parent Institution: Notlingham City Library & Information Service is	ov.uk/article/22851/Librarier Nottingham City Council OUNCIL and NOTTI	Notting	ham City Libraries (Enq-UK)	arate library authorities	s with a shared catalog	gue and membership but
Nothingham City Eibrary & monitation Service is	s provided by Nottingin	an ony council http://ww	w.nottingnameity.gov.ux/inde	x.aspx:articleiu=1		
Catalog URL: https://emlib.ent.sirsidynix.net.uk/client/e Statewide or Shared Catalog: The library catalog is a joint catalog for Nottingha	n_GB/nottcity/? m City Libraries and Not!	inghamshire County Librari	es; items appearing on the ca	talog are available to membe	rs of either library service.	
Policy Page Email Contact: nicola.holmes@nottinghar	ncity.gov.uk					
Database Access for Coop Librarians (library card Example number = D20123456 ; all library member	etc.): NOTE: These URL: ship numbers start with 1	s, usernames, and/or passw he letter D followed by 8 nu	ords must not be shared with merical digits. The first numer	patrons (see Databases field ical digit will be either 0, 2 or	l for student/faculty/staff ac 3.	cess info):
Guest Login/PIN for Coop Librarians: PIN not required for online database access; librar	y system PIN chosen by l	ibrary user at registration.				

4.3.2.6 Ending a session

QuestionPoint Jo. John (123891) Patron Chat IM (0)		10:45:24 2009/04/22 WUUU Queues (2) Settings Help Logout Monitoring: Live Queues
Queues			Joanne John
New (0) My Active	(1) Al (1) Librarians (1	2)	Question: Chat Transcript: DO NOT PICK UP - training
Patron	Time 10:41:33 2009/04/27	Patron's Last Message	Jo: Note: Patters screen name: Joanne John Jo: Note: this is a training question only Jo: now to end the session
Tools Joanne John	Notor	Policies	-1
Add a 'librarian only no	te':		
		Send	Send

When you have come to the end of your chat session, click on the **End Session** button. Here you must select a closing **resolution** for the chat session.

End Session			×
Joseph John		Select Resolution	
Ouestion: Chat Transcript: DO NOT PICK UP - traning		Select Resolution	
Jo: Note: Patron's screen name: Joanne John		Answered	
Jo: Ubrarian 'Jo' has joined the session. Jo: Note: this is a training question role.		Followup By Me	
Jo: now to end the session		Followup By Patron's Library	
Jos Librarian ended chat session.		Lost Cal	
		Practice	Add
			_
Info			
Question: (4454403) DO NOT PICK UP - training Patron: Joanne John (jo.john@odc.org) Patron's Library: Peoples Network Online Briquity Cervice (Brig-UK) Quese: A Enquire UK	•		
IP Address: 192.87.44.122 Defects http://www.edualheading.com/d	П	Add Description	
Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1;		Send Libratian Note	
		Tanad Parlanan Notar	_
Chat Session Ended			Close

Resolution codes quantify how the question was left:

Answered – The question was answered in full with no follow up required at the moment, although the patron can come back to you later. Once a resolution has been added it is shown in the transcript:

Librarian 1: 08:43:52 2015/11/11 (GMT +0000) Note: Set Resolution: Answered

Follow up by me – you have agreed to take this offline and get back with an email response later.

Follow up by Patron's Library – sends the question back to OCLC Support to forward on to the patrons library. If you are participating in the 24/7 Reference Co-op, it will go back to the relevant institution for local follow up.

Practice – use this code for any test or demonstration question. These are not then recorded in the statistics.

End Session		×
Joanne John	Select Resolution Add Description	
Question: Chat Transcript: DO NOT PICK UP - training	Select Description (up to 4)	Added (1)
Jo: Librarian 'Jo' has joined the session.	Access	* Test
Jor Note: this is a training question only	Authentication	2
Jo: Librarian ended chat session.	Book Order	
Jo: Note: Set Description: Test	Catalog	
	Circulation	
	Citetion	
Into		
Question: [4454403] DO NOT PICK UP - training Patron: Joanne John (jo.john@odc.org) Patron's Lorary: Peoples Network Online Enquiry Service (Enq-UK) Queue: A Enquire UK IP Address: 192.87.44.122 Referer: http://www.askalbrarian.org.uk Browser/DS: Mozila/4.0 (compatible; MSBE 6.0; Windows NT 5.1;	Send Librarian Nate	
	Send Patron Note	
Chat Session Ended		Close

Once a resolution code has been accepted you are able to select descriptive codes to identify what the question was about (up to 4 can be selected).

NOTE: Descriptive codes should not be added for sessions originating from the 24/7 Reference Cooperative <u>http://wiki.questionpoint.org/w/page/13839422/247-</u> Policies#443DescriptiveCodes

Once added the session will include the descriptive codes:

Patron: 10:45:53 2015/10/03 (GMT +0100)	Patron ended chat session.
Librarian 1: 10:46:03 2015/10/03 (GMT +0100)	Note: Set Resolution: Answered
Librarian 1: 10:46:09 2015/10/03 (GMT +0100)	Note: Set Description: Research

You can also add an additional **librarian note** at this time. This note is only visible to library staff and not to the patron, so if a session has abruptly ended you may want to add a note to this effect.



As well as a librarian note, this is your final chance to provide information to the patron. You can add a message to be sent to the patron in the '**Send Patron** Note' box.

	End Session	×
	Joanne John	Telect Tessistion
1	Question: Chat Transcript: DD NOT PICK UP - training	Add Description
	Jo: Note: Patron's screen name: Joanne John	Send Datron Note
	Jos Uperandin Jo nas joineo tite session. Jos Note: Itsis a tradining question only Jos now to end the session Jos Librarian ended chart session. Jos Note: Set Description: Test	Add a 'message for the patron':
	Into Question: [4454403] DO NOT PICK UP - training Patron: Joanne John (jo.johnBodo.org) Patron's Library: Peoples Network Online Enguiny Service (Eng-UK) Queue: A Engure UK P Address: 192-87.44.122 Refere: http://www.akabarano.org.uk	
	Drowser/DS: Mozila/4.0 (compatible; MSE 6.0, Windows NT 5.1;	Close

Once you have completed these steps (although you are only required to add a resolution code), click on **Close** to end the chat session. As soon as you click on **Close** the information in the chat transcript and any message you add here is emailed to the patron. You will then return to the '**New**' patron area to await another question.

QuestionPoint Jo John (123891) Patron Chat IM (0)				10:49:34 2009/04/27 0000	Queues (2)	Settings H Monitoring	elp Logout I: Live Queues
Queues							
New (0)	ty Active (0) All (1) Utranans (12)					
Patron	Time	Queue	Question				
- 1576				-1			
Tools							
	Little Notes						
Add a 'Ibraria	n only note's						
							(-Send)
				Colimana	(translar.)	(fintfression)	

4.4 The librarian chat screen – IM tab

This tab allows you to contact colleagues through **Instant Messaging.** This can be used for a variety of reasons:

- You may need to log off.
- You may wish to transfer a question to someone.
- You may wish to say 'hello, that should have been my question'.

4.4.1 Sending an IM to a colleague

To send an instant message, click on the **IM** tab, then select the librarian you want to IM by clicking on their name. As with chat, type your message in the box and send.

Gampart 13000040571					1314128 201910/14 1081 42100	Ansaies (51	sectings.	allerine: 1 in	Logoet
Petron That III ((1)							entropy unit	e dentes
	47			IN					
ibrarian	Queses	Queue (Library) . Active	Time						
inda Denney (8.P) (114	265	A Alber Hours Coverage 1 3	12:59:34 (0HT +0100)						
Rephanie Coates (1109	1	A Brighton-Hove (Brights 0	13:11:53 (GMT +0100)						
ducard DeButts (50.196)	47	A C. Rappahannock VA (* 1	12:57:27 (GHT +0100)						
toge Lone Pamela (348)	1	A ENQ Comwall UK (Care d	10:56:25 (0HT+0100)						
eslay Tamimon (14536	1	A ENQ Doncaster UK (Do: 0	13:09:17 (GHT +0100)						
forgaret Brockman (129	54	A ENQ Kent UK (Kent Orl 4	00:44:16 (GMT +01000						
sell HcClean (124825)	1	A ENQ Kent UK (Kent Cril 0	13:19:55 (GMT +0100)						
athanine (129773)	1	A ENQ Norfalk UK (Norfol G	09307115 00MT +01000						
Garrie Lane (133705)	1	A ENQ Nottinghamiltine 1 0	09:20:46 (0HT =0100)						
Usine Allen (133705)	1	A ENQ Nottinghamphine I 0	09:03:17 (GMT +0100)						
K Support (100294957	22	à Enquire UK (Enquire) 1	13:39:34 (GMT +0100)						
eather Meness (13484	52	A Enquire UK (Hertfordst 1	13:10:21 (0HT =0100)						
arry Heath (139676)	45	A Enquire UK (Staffordah 0	09:08:11 (0MT+0100)						
Dher Grazier (119616)	40	A MD PUBLIC (WORCEST @	13:00:30 (GMT +0100)						
Hy Active IM Seastorn									
ibrarian		De							
				-				_	-

4.4.2 Receiving and ending an IM from a colleague

An alert pops up when you receive and IM and you are unable to do anything in the chat window until you click on **close**.

Click on the IM tab which now reads IM (1). Click on the name of the person who has sent you the instant message. Type your reply in the box and send.

To end an IM session, click on **End IM Session** and return to the Chat tab to wait for a new question.



4.5 Closing your chat screen and QuestionPoint

The way in which you end your time on shift is important. If you log out incorrectly you will still show as logged in and the 24/7 Cooperative may assume you are still staffing and will not pick up questions that come via Enquire swiftly enough.

Ending the chat session:

- At the top right of the chat screen, click on the **Logout** button.
- The screen will close and another will replace it. This screen advises you that your chat session is now logged off and the **close window** button should be clicked.
- You will be back at the QuestionPoint homepage to continue with offline work.

00 00 3036	Queues (1) Settings Help Logout Homitoring: Practice Queue	
	\mathbf{X}	
	λ	
	1	
	QuestionPoint Chat	
	Goodbye, Thomas du Niller (100247242). Ask a Librarian Chat is now logged off.	

To log out of QuestionPoint completely at the top right of the homepage, click on **Exit**. This will log you out of QuestionPoint.

5. Answering Questions Offline

Offline questions are questions that are no longer in the chat session, but require further contact with the patron:

These can be chat sessions you have set for further follow up via **Follow up by me**; or referred shift; or local questions as part of Enquire follow up

5.1 Answering questions / Follow up chat sessions

From your **Homepage**, click on **New** under **Question Lists**. The list of questions question to be answered will be displayed:



Clicking on the question opens the detailed transcript:

SELECT SERVICE: Ask • • • • • • • • • • • • • • • • • • •	🔅 y Settings		Support Help Reset Clock			
Active New Pending Referred Answered Closed All						
Patron email is blank						
Full Question Return to List						
Answer Reject Assignment Add Note Add Descriptive Codes						
Change Patron E-mail - Refer To - 🔹 🕤 - Move To - 💌 📀						
Question Detail						
Patron: Walk Up						
Assigned: UK Support (20) 🔽 📀	Status: Received:	? 14:22:28 2015/10/07 (GMT +0100)				
Language: English						
Question: [10804689] test for descriptive codes and header training information	[10804689] test for descriptive codes and header training information					
Patron Institution: Enquire	Enquire					
Question History						
Patron: test for descriptive codes and header training information 14:22:28 2015/10/07 (GMT+0100)						
Librarian 1: Note:						
Please can you leave this question for PPT screenshot pu	08:20:22 2015/10/08 (GMT +0100) Please can you leave this question for PPT screenshot purposes.					
Librarian 1: Referred from: Enquire(10836) by: UK Support(100284857) to institution: 12:18:37 2015/10/08 (GMT +0100) Reason: As a test	Enquire: Yahoo Answers	s Profile(13215)				
Librarian 2: Rejected by institution:13215. 12:25:34 2015/10/08 (GMT +0100)						

Select a question and click on 'Answer'. The Answer Question screen opens:

SELECT SERVICE		Support	
Ask 👻	Questions My Question Add Question Review Transcripts Service History Settings	Help Reset Clock	
Active New Pending Re	erred Answered Closed All		
Patron email is blank			
Answer Question			
Cancel Save Ar	swer Save Draft	Q Search KS	
Question	[10604639] test for descriptive codes and header training information [Full Question View]		
to:	Walk Up		
Answer:	Edl v Formal v Vev v Insert v	O Quick Tip Please note: When adding scripted messages that will be used priminity in that sessens, large forts and/or colors are not recommended, as patron interface display may be affected.	
	A B I U E E E E E E E E E E E A A · E · ♥ Q P Fornats ·		
		O Queck Top Default from spacing for this editor is enter key-a paragraph break (double spaced). Using enter key will end any the formating. To create a single spaced break use Shift-enter keys. This will continue any title formatting on the previous kee.	
	p Words:		
	Skew/Hde Tooltp	_	
Seripts	- Select BME Sorpt O		
	File size limit is 5 MB. Total attachment size cannot exceed 12 MB.		
Attachment 1	Browse No file selected.		
Attachment 2	Browse No file selected.		
Attachment 3	Browse., No file selected.		
Attachment 4	Browe No the selected.		
Cancel Save Ar	swer Save Draft	Q. Search KB	

Compose the answer to the question in the Answer Box. Next you can do several things:

- Send Answer this sends the answer to the customer and sets the question status to 'answered'. Scripts can be used if you want to. Attachments can also be added to the reply.
- **Request Clarification** this sends a message asking for more information to the customer. The question status is set to 'pending'.
- Send Message do not use this.
- Save Draft saves your reply as a draft for editing and completion later.

A patron will receive your answer as an email. They can respond to the email they receive (which is from a generic QuestionPoint email address). The reply will arrive via the software in the **Questions List** area. As the question has been assigned to you (as you answered it), you will also receive an email notification.

5.2 Replying to anonymous sessions

When an anonymous chat session is picked up, you see at the bottom left of the chat screen that no details have been provided: **Patron: anonymous (No e-mail provided)**



This will remind you during the session to ask for contact details if you reach agreement to take the question offline and answer the question later.

When accessing the question from the Question List, you are immediately alerted by the additional

header message:

In the example below the patron has provided their email address within the chat transcript. To add the email to the question detail;

· highlight and copy the email from the transcript

Patron email is blank

then

• click on the button Change Patron E-mail.

Patron email is blank							
Full Question Return to List							
Answer Reject Assignment Add Note Add Descriptive Codes							
Change Patron E-mail	- Refer To 🔹 📀 - Move To 🔹 📀						
Question Detail							
Patron:	Walk Up						
Assigned:	UK Support (20) 🔻 📀	Status: Received:	? 14:22:28 2015/10/07 (GMT +0100)				
Language:	English						
Question:	[10804689] test for descriptive codes and header training information						
Patron Institution:	Enquire						
Question History							
Patron: 14:22:28 2015/10/07 (GMT +0100)	test for descriptive codes and header training information						
Librarian 1:	Note:						
06.20.22 2013/10/08 (GMI +0100)	Please can you leave this question for PPT screenshot purposes.						
Librarian 1: 12:18:37 2015/10/08 (GMT +0100)	Referred from: Enquire(10836) by: UK Support(100284857) to institution: Enquire: Yahoo Answers Profile(13215) Reason: As a test						
Librarian 2: 12:25:34 2015/10/08 (GMT +0100)	Rejected by institution:13215.						
Answer Reject Assignment Add Note Add Descriptive Codes							
Change Patron E-mail							
_							

A new screen will appear, where you can paste the new email address into **New Email Address** and then reconfirm it in **Re-enter New Email Address**.

In the Old Question area, leave the radio button as 'Leave unchanged' which is the default

				Canool	Change Patron E-mail
Question:	[10804689] test for desc	niptive codes and header training information [Full Question View]			
Use this page to change the patron e-mail address	for this question. This pay	ge creates a copy of the question with a new patron e-mail address ar	d Question ID. Be sure that	the new address is the correct one for the patron	who asked the question.
Old Patron Information:		Walk Up			
New E-mail Address:		enter the email address from your transcript here			
Re-enter New E-mail Addreas:		repeat above			
New Patron Name: (Optional, used for new accounts)					
Old Question:		Leave unchanged O Delete O Gose Question			
Reason for change: (optional):		Use the 'Leave unchanged' option			
				Canoe	Change Patron E-mail

Adding a reason for changing the email address is optional.

Once all the changes have been made click on the **Change Patron Email** button. The screen will then return to the question showing the overwritten detail.

If the patron wishes to remaining anonymous this isn't a problem (unless they need an offline response) the patron can email themselves the transcript at the end of the chat session (see below). This additional email information is not stored in QuestionPoint. You might want to advise an anonymous customer that they can email the transcript to themselves after the session has ended.



5.3 Example of a question answered offline

This is a polite, good quality offline reply.

Question History:

Patron: Chat Transcript: Hi,

Realise you probably get annoying questions like this all time but I am trying to track down a book I read when I was younger (maybe about 10-11). I think it was called "she was a witch" or something similar. I can't remember the author and Google isn't throwing anything up for the title. I borrowed the book from a Glasgow City Library (Rutherglen) which is now under South Lanarkshire Authority but cannot find anything in their catalogues.

The book was set in the late eighteenth century and was told from the perspective of a young girl whose mother was accused of being a witch because she wanted to learn medicine and had progressive views of politics (I remember her mother amending the title of rights of man to 'and women' as a scene in the novel.)Bizarrely, I remember the epigraph was "of shade and sunshine for each hour see the measure made and wonder not if life consists of sunshine and of shade-inscription on sundial of (mother's name) herb garden".

I am beginning to think I've made it up so I would be really grateful if anyone has ever heard of it? Thanks, Mxxxxx

Librarian : Librarian '24/7 Cooperative librarian' has joined the session.

Librarian : Hi! I am a librarian in the State of Tennessee and I will be assisting you today. Your librarians have asked our librarians to staff this 24-hour service when they are unavailable. I am reading your question right now to see how I can help you.

Librarian : I would be happy to forward your request on to a librarian from your library. They will get back with you via e-mail. Will that work?

Patron: Well, I'm in Edinburgh now so it would probably be best if it was a librarian at Rutherglen library in Glasgow as that's where I got the book?

Librarian : I understand. They will contact that library if they need to. I'm not sure what their policies are on book searches, but I'm sure they would be glad to take a look.

Patron: That would be great thanks!

Librarian : You're welcome! If you need further assistance, please feel free to contact us again. Thank you for using Ask A Librarian. Goodbye!

Librarian : Librarian ended chat session.

Librarian : Hi Mxxx,

My name is Bxxx and I am a librarian in the Mitchell Library. Your enquiry has been referred to us.

The book you describe is by Roger J Green and the title is indeed "She was a Witch". I have searched Glasgow Libraries' catalogue and this book is not in stock. I have also searched Edinburgh Libraries catalogue and they do not hold any copies either. I can also confirm it is no longer available in any of South Lanarkshire libraries.

I suspect it is now out of print as there is no link to purchase it from the author's website http://www.rogerjgreen.net/books.htm#she. However there are used copies for sale here http://www.amazon.co.uk/She-Was-Witch-Roger-

Green/dp/0192716603/ref=sr_1_14?ie=UTF8&s=books&qid=1270803757&sr=1-14. The listing for the new copy appears to be an error as the book it was published in 1992 - just a description of the condition of the book.

I know how frustrating it is to be unable to find a book you remember from childhood, but you haven't made it up!

I hope this information is helpful to you. Kind regards, Bxxx

6. Social Networking

As well as accessible via the Enquire services link, Enquire is also present in the social networking and community sites. This is to gain both visibility and to actively demonstrate libraries are a valuable repository of information to those disengaged and lapsed users.

6.1 Yahoo!Answers

Enquire service has become a Knowledge Partner in Yahoo! Answers. In doing so, it brings the service to a point of need, and demonstrates the value of libraries to a web audience.

