

# QUESTION POINT INSTITUTION ADMINISTRATOR INSTRUCTIONS

“The To Do List ASAP”

## Part I Create Librarian Accounts

1. Go to <http://www.questionpoint.org/crs/servlet/org.oclc.home.BuildPage?show=authorize&language=1> Enter your ID and Password sent to you by Tom Miller

If this is the first time you are **logging into QuestionPoint**, you will be prompted to change your password. Follow instructions on the screen

2. Locate the drop down menu in the upper right corner that says “select service”  
(You will also see a link for **Accounts under Admin along the** left-hand nav bar.)
3. Select “Administration”
4. Create New Librarian Account will be displayed – see image below

**NOTE:** Please, **first**, create a librarian account for yourself. So you will have two IDs, one for Administrator login and one for librarian login.

The screenshot shows the QuestionPoint Administration web interface. At the top, there is a navigation bar with 'Home', 'Reset Clock', 'Exit', and a 'Select Service' dropdown menu. Below this is a red navigation bar with links for 'Institution', 'Accounts', 'Passwords', 'Settings', 'Forms', 'Permissions', 'Surveys', 'Reports', and 'Login Announcement'. The main heading is 'Create New Librarian Account'. Below this, there is a 'Submit' button and a form with the following fields and options:

- Librarian's Name: (First Last) [Text Input]
- Librarian's E-mail Address: [Text Input]
- Screen Name: [Text Input]
- Services: [Section Header]
- Institution Report:  None  View
- Profile:  None  View Profile  Edit Profile
- Ask A Librarian:  None  Ask Librarian  Ask Administrator
- Knowledge Base (DAKLAND COMMUN CDL):  View KB
- Knowledge Base (QP Global Reference Network):  View KB  Add/Submit  Edit KB  Edit/Delete KB
- Type: Local [Dropdown Menu]

At the bottom of the form, there is a 'Current Access' section with 'Michigan Academic Group - MCCVLC' and 'All Categories' with 'Gov Info ++ GOVINFO' and 'SPANISH ++ SPANISH'. The footer indicates 'Your QuestionPoint session will end in 28:23 minutes' and 'Internet'.

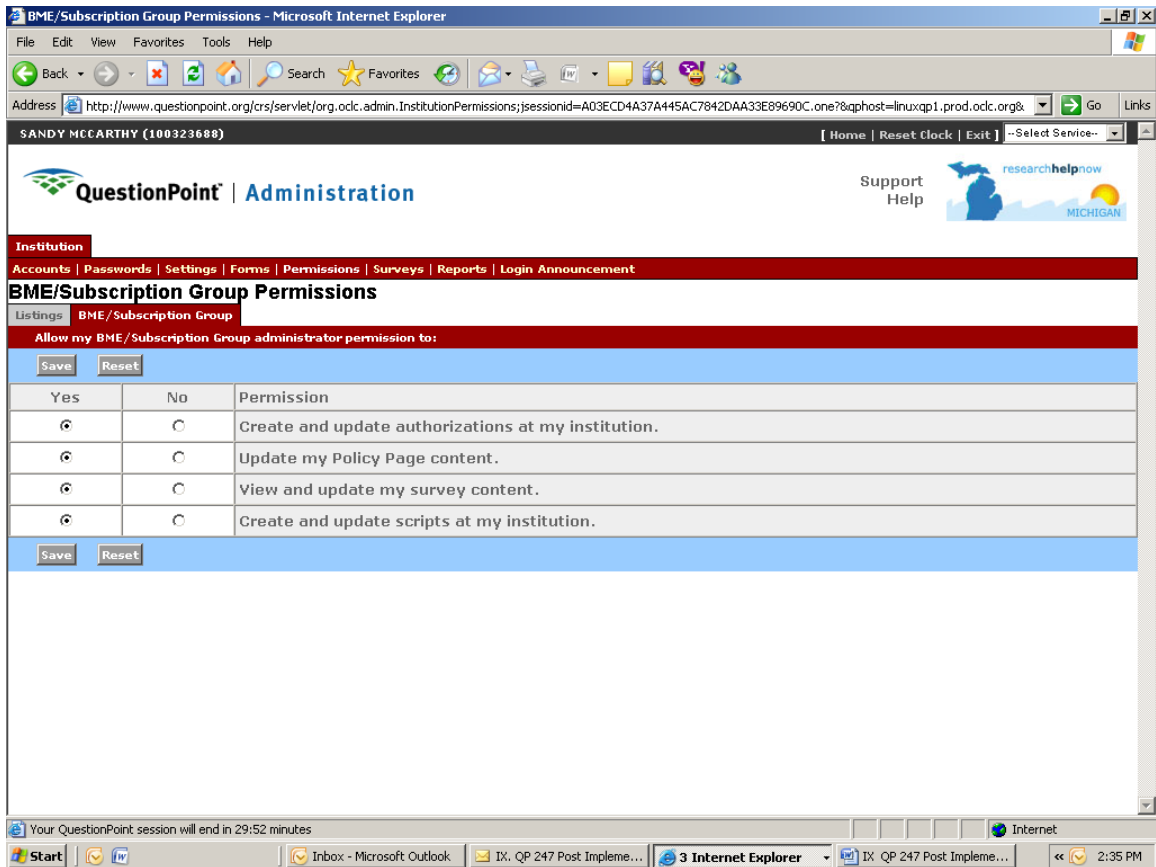
- a. Enter librarian's **first and last names**

- b. Enter librarian's email address -- confirmation with ID and password will be sent to the **librarian** once you click the submit button.
- c. Enter screen name -- we decided that it would be firstname/college or univ. for example my screen name is SandyWashtenaw You may use an alias as the first name, but please include the correct college or univ.
- d. Under institution report, select "view" -- this will allow your librarians to view the institution reports when they login. Only Ann and Sandy will be able to view and create collaborative reports
- e. Under Profile, select "view profile" for your librarians.
  - **NOTE:** As the administrator, when you create your librarian account, select "Edit Profile" because you are the contact person for your institution to update the profile.
- f. Under Ask a Librarian select "Ask Librarian" for your librarians. This allows your librarians to track, manage chat transcripts, **assign questions to other librarians, run Ask reports, and see Policy Pages during chat sessions.**
  - **NOTE:** As the administrator, when you create your **own** librarian account, select "Ask Administrator."
- g. Under Knowledge Base **for the local network**, select "view KB" (We have yet to create a **local** KB.)
- h. Under Knowledge Base **for the global network**, select "add/submit" for your librarians.
  - **NOTE:** As the administrator, when you create your **own** librarian account, select "Edit/Delete KB"
- i. Under Type, select "local" for everyone
- j. Under Current Access, make sure Michigan Academic Group is listed. If you find that the queue is under All Categories, simply select it, and click the arrow to send it to the left side.
  - **NOTE:** For Library of Michigan librarians, **you should** see Library of Michigan as your queue in the **Current Access** box.
- k. Review the Information you entered
- l. Click the **Submit** button
- m. Start entering the next librarian on your list

**NOTE:** Once you have created the librarian accounts, they will be sent an email with their ID and password. Librarians can now start to access the Practice queue. Once all institutions have set-up their library, the Michigan Academic and Library of Michigan groups will be ready.

## PART II Give Permission to BME (Ann/Sandy)

1. Logon
2. Click Administration (from drop down menu)
3. Click Permissions Tab
4. Click BME/Subscription Group Permissions
5. Click yes for all radio buttons
6. Click Save

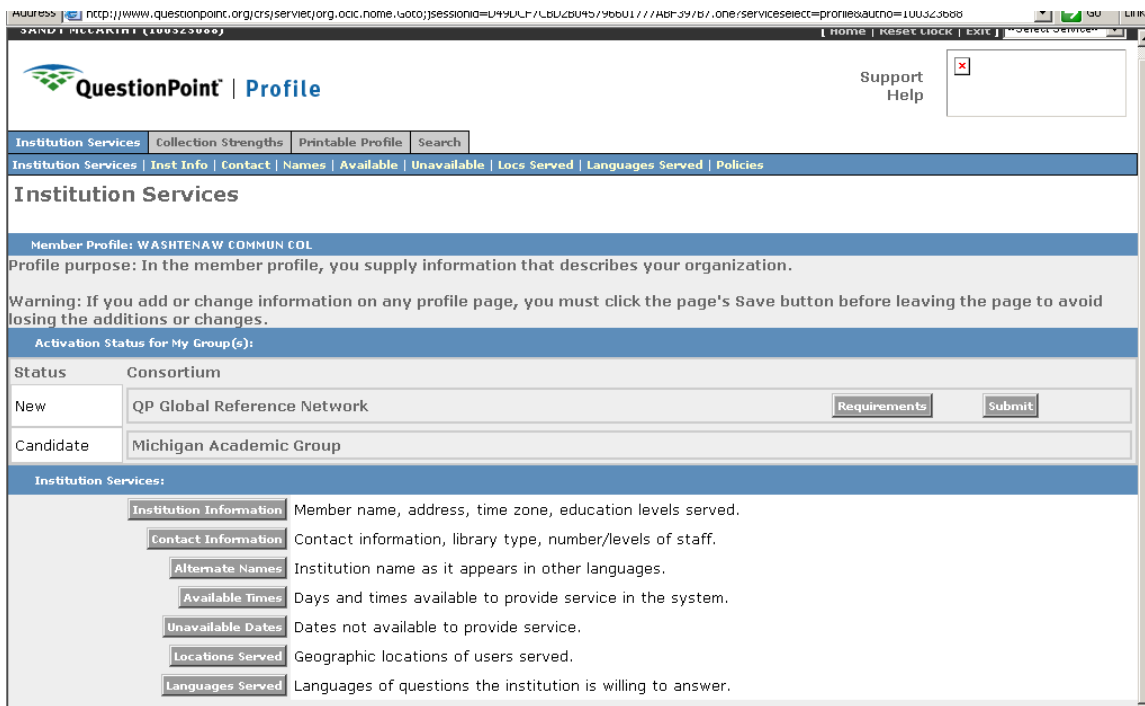


## PART III Creating Your Institution Profile (Policy Page)

1. Go to <http://www.questionpoint.org/crs/servlet/org.oclc.home.BuildPage?show=authorize&language=1> Enter your ID and Password sent to you by Tom Miller

If this is the first time you are **logging into QuestionPoint**, you will be prompted to change your password. Follow instructions on the screen

2. Locate the drop down menu in the upper right corner that says "select service"
3. Select "Profile." (See image below.)



4. Under Institution Services area
  - Review and make corrections if necessary to the information under Institution Services. Click on each gray link and review the content. Make changes if necessary.
5. Under Status area.
  - a. It will say “NEW” next to **Michigan Academic Group** since we are part of one group. Go to the right side and “click” the “Submit” button.
    - b. Once you click “submit” your status will change to “Active” (There is a “bug” in the system. The status may change to “candidate.” Ann will follow up by changing this to “Active” in the BME account)**
6. Policies page – scroll back up and click on the “Policies” tab – see image below

The screenshot shows the QuestionPoint Profile page for WASHTENAW COMMUN COL. The page has a navigation bar with links like 'Institution Services', 'Collection Strengths', 'Printable Profile', and 'Search'. Below this, there are tabs for 'Institution Services', 'Inst Info', 'Contact', 'Names', 'Available', 'Unavailable', 'Locs Served', 'Languages Served', and 'Policies'. The main content area is titled 'Policies' and 'WASHTENAW COMMUN COL'. There are several fields for editing, each with an 'Edit' button. The 'Alert' field is highlighted with a red box. The 'Home Page URL' field contains the text 'http://www.wccnet.edu/resources/library'. The 'Web Catalog URL' field contains the text 'http://198.111.176.116/uh/bin/cgisirsi/909192mXI/0/149050006/60/502/X'. The 'Reference E-mail Contact' field is currently empty.

- a. Click the “change” button to change the Status to Viewable
- b. Start clicking on the Edit buttons and enter the information and URL links for you library. This is basically our former InfoSheet page.
  - i. Under PIN -- please enter the generic PIN for other librarians to use to access your research databases from off campus. You can also add in the link to the databases.
  - ii. MeL Databases – add a note under databases with the following message: MeL Databases are available to persons with a valid Michigan Driver’s License or Michigan ID Card. For more information about MeL see <http://www.mel.org/MeL--AboutMeL.php>
  - iii. There are extra options listed on this Policies page, you will probably leave some of them blank.
  - iv. Under Policy Page email contact – you as the manager for you institution will be listed with your email address. Add the info here.
  - v. MeLCat participation—If you are participating in MeLCat, please include information about the service under ILL and the Cooperative sections. If you are not part of MeLCat, please add “Not a participant in MeLCat” to the ILL and Cooperative sections.
  - vi. When you are finished take a look at the “view policy page” link. You can always come back later and add more information or updates to your policy page.
  - vii. Tom Miller informed us that you can use basic HTML tags to each field. For example I did use the bold tag <b> </b> to highlight some information and the line break <br> to separate text into paragraphs.
  - viii. THAT IS IT.

## PART IV TRANSCRIPT EMAILS

1. Upper right corner click on “Administration” link from drop down menu
  2. Click the “Settings” tab in the red nav bar
  3. Outgoing email address – in reference to Transcripts sent to patrons
- p. 10-11 in the Question Point Administrator Guide

The screenshot shows the QuestionPoint Administration interface. The browser address bar displays a URL starting with 'http://www.questionpoint.org/crs/servlet/org.odc.admin.InstitutionFromAddressForm;'. The user is logged in as SANDY MCCARTHY (100323688). The navigation bar includes links for Home, Reset Clock, Exit, and a dropdown menu for Select Service. The main content area is titled 'Outgoing E-mail Address' and contains several tabs: Outgoing Address, E-mail Notification, Web Form Assignment, and Custom Messages. The 'Outgoing Address' tab is active, showing 'Outgoing E-mail Address Settings'. There are 'Save' and 'Reset' buttons at the top and bottom of the settings area. The settings include: 'Reply-to Messages' with radio buttons for OFF (selected) and ON; 'Outgoing E-mail Address' with radio buttons for AskALibrarian@odc.org (selected) and Custom (specify below); and a text input field for 'Custom E-mail Address' with a note '(required if Custom selected above)'. There are also 'Save' and 'Reset' buttons at the bottom of the form.

- a. First tab: Outgoing Address
  - i. Under Reply-to-Messages click “on”
  - ii. Under outgoing E-mail address: click “custom”
  - iii. Under Custom E-Mail Address: enter your email as the manager of your institution. We may want to change this later. If a patron replies to the transcript message, it will go to the librarian who answered that VR question.
  - iv. Click “Save” button

**b. Second tab: E-Mail Notification – only applies to QP email reference service—(has to do with transcript sent to patrons in the “from” field)**

- i. Change this “on”
- ii. Enter manager’s email or librarian email group at your library

**\*\*This will notify the library that a new question has come in for follow-up**

- iii. Then click the Test button to send a test email to the email.

c. Third tab Web Form Assignment – questions that come in via a form directly sent to a specific librarian – **leave as is for now**

d. Fourth tab Custom Messages

For now, only enter information in the following **three** areas:

- i. Custom Reply Text (option)
  - a. Select Yes
  - b. In the text box for the time being enter the following message:

Thank you for using Research Help Now. Our hours of operation are Monday-Wednesday 10am-9pm, Thursday 10am-5pm, Friday 10am-4pm, Saturday Closed and Sunday 1pm-10pm

NOTE: Library of Michigan you can replace Research Help Now with Ask Us or anything you want. We can change this later

- c. Click Cancel to return to the list under Custom Messages
- ii. Answer (option)
  - a. Under Greeting area – click “Custom” circle option and in the box, and enter the following text:

Hello,

Your chat transcript with a librarian at *Washtenaw Community College* is listed below.

**NOTE:** We can change this later. Suggestions are welcomed. Just replace Washtenaw Community College **with the name of** your library.

- b. Under Additional Text -- I left this blank for now. We can come back to this later
  - c. Click the “Save” button
  - d. Click the “test” button to view it
  - e. . Click Cancel to return to the list under Custom Messages
- iii. Chat Transcripts

When you click here, the information you entered above appears. Again we can add something else later.

## **PART V Surveys (Post Session Survey to patron)**

1. Upper right corner click on “Administration” link from drop down menu

2. Click on “Surveys” tab
3. Click “Survey Form” tab
  - a. Patron Survey Form section
    - leave as “Link to the Internal survey defined below.”
  - b. Internal Survey:
    - Check the box for Chat Session and Ask Answers
  - c. Questions:
    - Scroll down the list and check both boxes for the following five questions only

Did you have any problems or difficulties using the service?

Are you satisfied with the hours of service?

Were you satisfied with the answer to your question?

The quality of the library staff service in answering this request was?

Will you use this service again?

4. Click “Save” button
5. Click the “view “ options to view the survey page

## PART VI Scripts/URLS

Note: there are three levels of scripts and URLs

1. individual – each librarian will enter their own personal message
2. institutional – managers enter the information
3. Group “share” level – Ann and I will enter this level

For Part V, I am only providing information for Institutional scripts and URLs

1. Upper right corner click on “Ask” link from drop down menu
2. Click on “Settings” tab. (See image below.)

The screenshot shows the 'QuestionPoint | Ask a Librarian' interface. At the top right, there are links for 'Support Help', 'LLC Reference Network', and 'LC'. Below the navigation bar, the 'Settings' tab is selected. The main content area is titled 'My Address Book' and contains two sections: 'Add New Address' and 'View/Update Address'. The 'Add New Address' section has input fields for 'Name' and 'E-mail address' and an 'Add' button. The 'View/Update Address' section has a table with columns for 'Name' and 'E-mail address'.



3. Click on “Institution’s Scripts” tab
  - a. In this section, **you decide what scripts to create and make available to your librarians**. Just remember, when another librarian picks up your patron, these institutional scripts go along **with** the patron. **Also, keep** in mind that these scripts might help another librarian.
  - b. Enter the name of script
  - c. Enter the script
  - d. Press Add

That’s it. Add as many as you want. Once the scripts have been added, they will be listed at the bottom of page. You have to option of removing them.

4. Click on “Institution’s URL Scripts” tab
  - a. Same info about Scripts here. I’m leaving it up to you to add institutional scripts.
  - b. Enter the name of script
  - c. Enter the URL
  - d. press add

That’s it. Add as many as you want. Once the scripts have been added, they will be listed at the bottom of page. You have to option of removing them.

**NOTE:** Notice that if you want to create your own personal script, you click the tab My Scripts and My URL Scripts. The librarians can come here to add a personal greeting message.

## **PART VII Viewport URL Display**

1. login into Question Point as Administrator
2. Select “Administration” from top right drop down list
3. Click on “Forms” in the red horizontal navigational bar
4. Question Form Location is displayed – stay within this tab “Question/Viewport”

5. For now, leave the Open WorldCat setting as “no”

6. For the “Question Form URL:” box enter leave blank [if we check yes to Open WorldCat, then we need to enter a URL in this box]

NOTE: we may at some point want to change this to yes.

7. For the “Viewpoint URL:” box enter the URL you want to point to when the patron selects your library affiliation

8. Click “Save” button