

This guide describes how to follow up on new QuestionPoint chat sessions with patrons.
You can send a message to the patron or refer the followup to another library or a subject-matter expert.

Contents of this guide

Overview	2
Select a resolution code at the end of each chat session	2
Follow up a chat session in QuestionPoint or refer the followup to others.....	2
Log on to QuestionPoint	3
Go to questions (including chat sessions) that need followup	3
List of questions for you to follow up (My New Questions).....	3
List of questions for your library to follow up (New Questions).....	4
List of questions for libraries in your group to follow up (Shared Followup Questions).....	5
Send a message to the patron	7
Or, refer followup to another library or a subject-matter expert	10
Referral steps.....	10
Referral options.....	10
You cannot access an in-progress chat session in question lists	11
Troubleshooting	11
More information	11
Support.....	11
Comments, suggestions, feedback.....	11

Overview

Select a resolution code at the end of each chat session

1 When a chat session ends, the librarian selects one of the following resolution codes in the chat monitor:

- Answered
- Followup by me
- Followup by patron's library
- Lost Call
- Practice






The [24/7 Reference Cooperative's best practices document](#) contains guidelines for use of the Resolution codes by members of the cooperative. Libraries and groups should provide guidelines for use of the codes by their librarians when they are not participating in the cooperative.

2 QuestionPoint sends the session transcript to the patron's e-mail address (if provided by patron).

3 QuestionPoint creates a *question* (reference transaction) for the session and places it in the QuestionPoint system, including the chat transcript and other information about the session.


Note: A *question* can be added in QuestionPoint through a chat session, web form, telephone call, reference-desk visit, etc. Any expression of a patron's information need can be managed in QuestionPoint as a question.

4 Based on the resolution code selected, QuestionPoint assigns a status to the question and adds it to a question list:

Resolution code	Question status	Question list*
Answered	 Answered	Answered Questions
Followup by me	 New for the chatting librarian's library and for the chatting librarian	New Questions My New Questions
Followup by patron's library	 New for the patron's home library	New Questions
Lost Call	 Closed	Closed Questions
Practice	 Answered	Answered Questions

* Questions with New, Answered, or Pending status are also listed in the Active Questions list.

Questions with New, Answered, Pending, or Closed status are also listed in the All Questions list.

Questions with  Pending status are awaiting response by another library, a subject-matter expert, or a patron.

Questions with  Closed status are considered to be complete; they are listed in the Closed Questions list only.

Follow up a chat session in QuestionPoint or refer the followup to others

1 The librarian logs on to QuestionPoint.

2 The librarian goes to one of the lists of questions that need followup:
(Your library or group should provide guidance on which question list you will go to.)

- List of questions for you to follow up (My New Questions)
- List of questions for your library to follow up (New Questions)
- List of questions for libraries in your group to follow up (Shared Followup Questions)

3 The librarian selects a question in the list to follow up.

4 From the Full Question page for the selected question, the librarian:

- Sends a message to the patron, or
- Refers the question to another library or a subject-matter expert for followup.

Log on to QuestionPoint

Log on to QuestionPoint:

- 1 Go to <http://www.questionpoint.org/>
- 2 Click **Librarian Logon** (at top of page). The QuestionPoint Logon page appears.
Tip: Bookmark the Logon page as a shortcut for steps 1–2.
- 3 Type your **QuestionPoint authorization** (User ID).
- 4 Type your **QuestionPoint password**.
Tip: Case sensitive; be sure that Caps Lock is off.
- 5 Click the **Logon** button. The My QuestionPoint page appears.

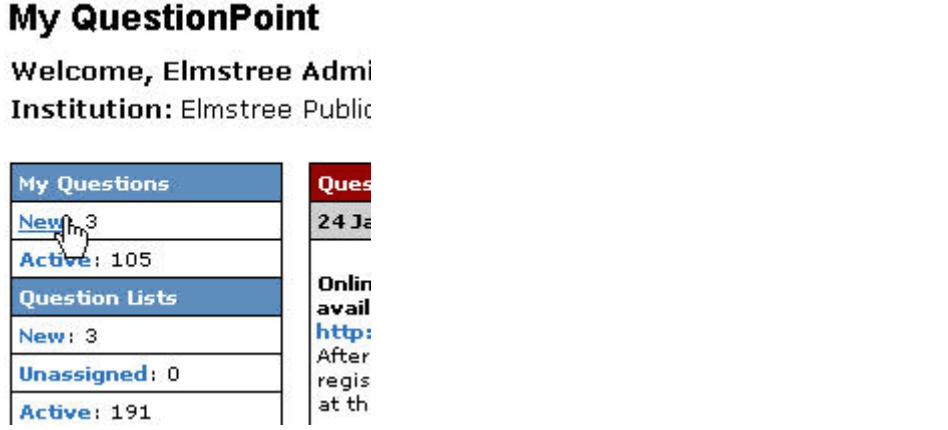

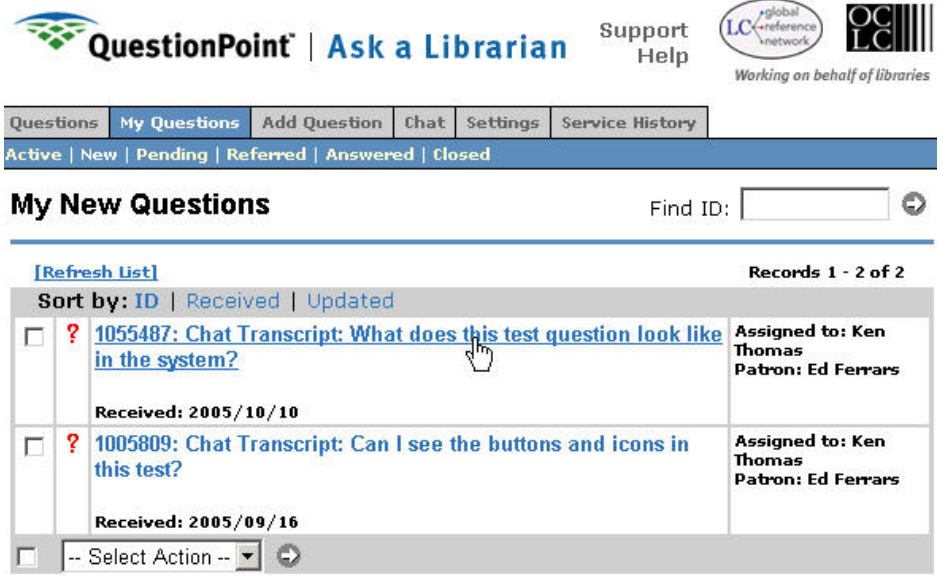








Go to questions (including chat sessions) that need followup

Your library or group should provide guidance on which question list you will use to select questions for followup:

- List of questions for you to follow up (My New Questions),
- List of questions for your library to follow up (New Questions), or
- List of questions for libraries in your group to follow up (Shared Followup Questions).

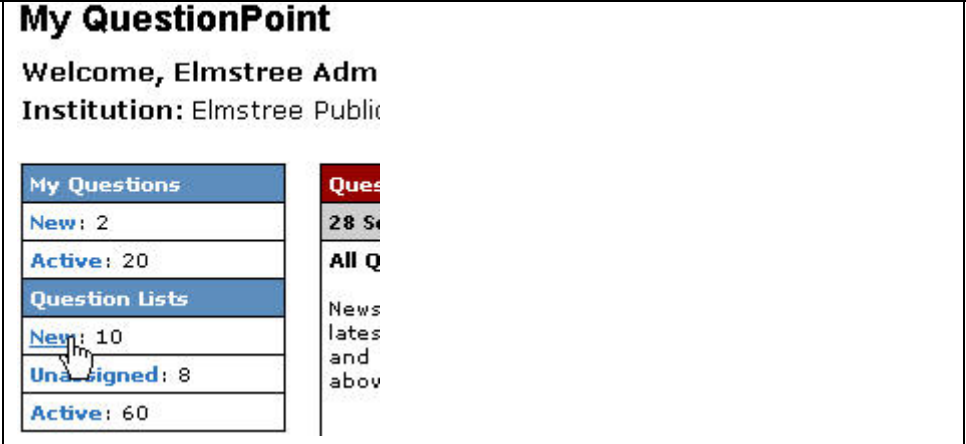

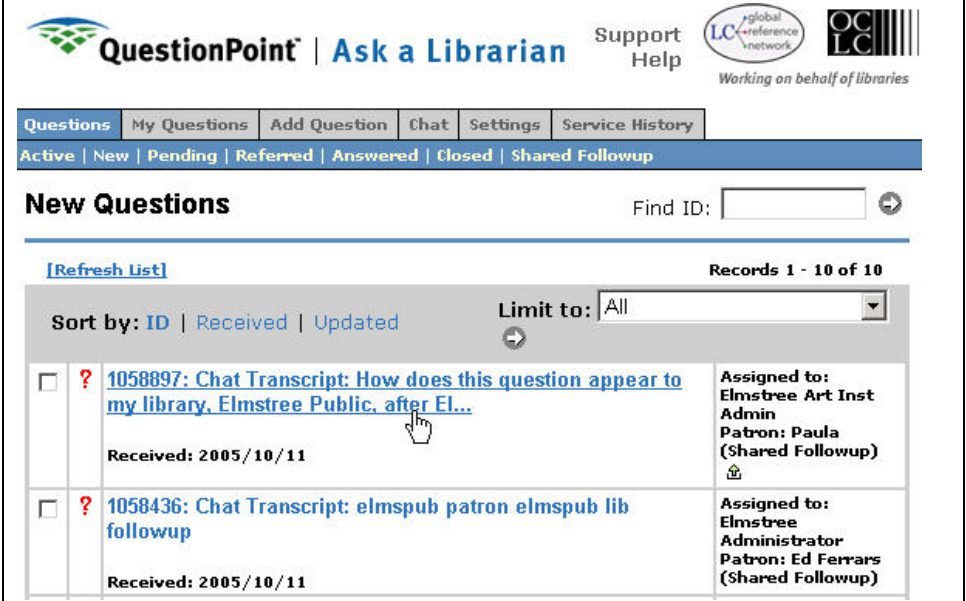








List of questions for you to follow up (My New Questions)

To go to the list of questions for you to follow up (questions assigned to you):

<p>1 Click the New link under My Questions on the My QuestionPoint page.</p>	 <p>My QuestionPoint Welcome, Elmstree Admin Institution: Elmstree Public</p> <p>My Questions New: 3 Active: 105</p> <p>Question Lists New: 3 Unassigned: 0 Active: 191</p>								
<p>QuestionPoint displays the My New Questions list. It is located under the My Questions tab in the Ask a Librarian module.</p> <p>Questions in this list need followup. They have the New status icon: </p> <p>2 Click a question in the list.</p> <p>QuestionPoint displays the Full Question page.</p> <p>See “Send a message to the patron” on page 7 for the next steps.</p>	 <p>QuestionPoint Ask a Librarian Support Help   Working on behalf of libraries</p> <p>Questions My Questions Add Question Chat Settings Service History</p> <p>Active New Pending Referred Answered Closed</p> <p>My New Questions Find ID: <input type="text"/></p> <p>[Refresh List] Records 1 - 2 of 2</p> <p>Sort by: ID Received Updated</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td></td> <td>1055487: Chat Transcript: What does this test question look like in the system?</td> <td>Assigned to: Ken Thomas Patron: Ed Ferrars</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>1005809: Chat Transcript: Can I see the buttons and icons in this test?</td> <td>Assigned to: Ken Thomas Patron: Ed Ferrars</td> </tr> </table> <p>-- Select Action --</p>	<input type="checkbox"/>		1055487: Chat Transcript: What does this test question look like in the system?	Assigned to: Ken Thomas Patron: Ed Ferrars	<input type="checkbox"/>		1005809: Chat Transcript: Can I see the buttons and icons in this test?	Assigned to: Ken Thomas Patron: Ed Ferrars
<input type="checkbox"/>		1055487: Chat Transcript: What does this test question look like in the system?	Assigned to: Ken Thomas Patron: Ed Ferrars						
<input type="checkbox"/>		1005809: Chat Transcript: Can I see the buttons and icons in this test?	Assigned to: Ken Thomas Patron: Ed Ferrars						

List of questions for your library to follow up (New Questions)

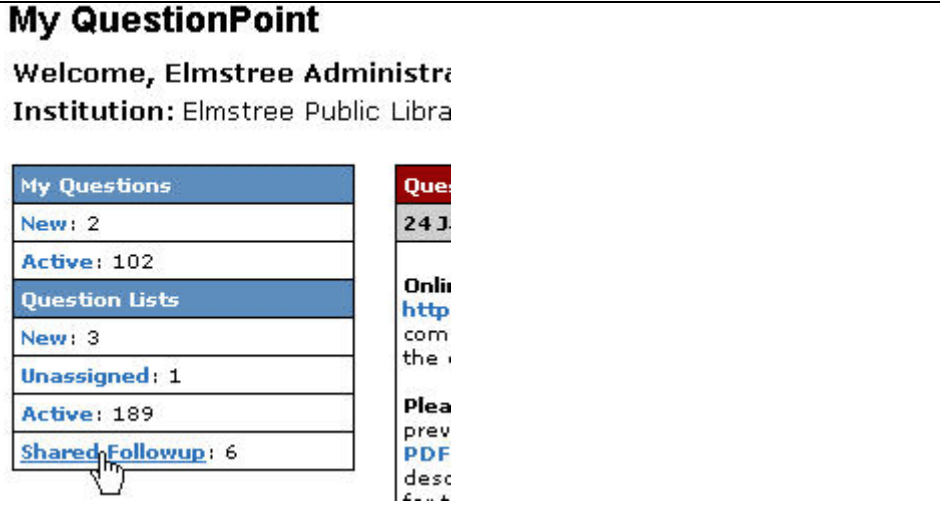

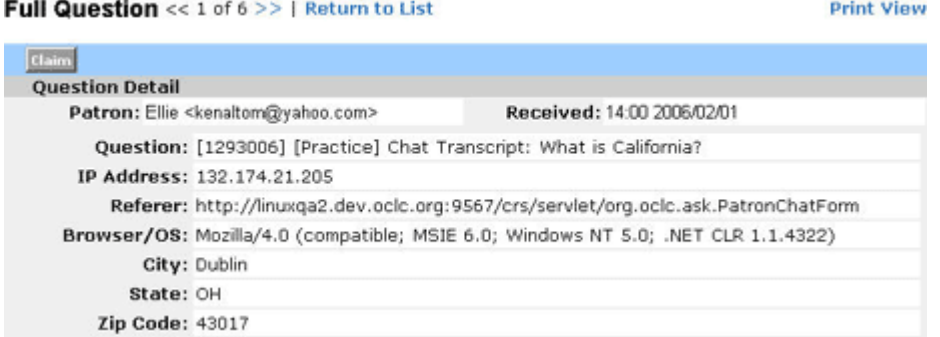
To go to the list of questions for librarians at your library to follow up:

<p>1 Click the New link under Question Lists on the My QuestionPoint page.</p>	 <p>My QuestionPoint Welcome, Elmstree Adm Institution: Elmstree Public</p> <table border="1"> <tr><th>My Questions</th></tr> <tr><td>New: 2</td></tr> <tr><td>Active: 20</td></tr> <tr><th>Question Lists</th></tr> <tr><td>New: 10</td></tr> <tr><td>Unsigned: 8</td></tr> <tr><td>Active: 60</td></tr> </table>	My Questions	New: 2	Active: 20	Question Lists	New: 10	Unsigned: 8	Active: 60
My Questions								
New: 2								
Active: 20								
Question Lists								
New: 10								
Unsigned: 8								
Active: 60								
<p>QuestionPoint displays the New Questions list. It is located under the Questions tab in the Ask a Librarian module.</p> <p>Questions in this list need followup. They have the New status icon: </p> <p>2 Click a question in the list.</p> <p>QuestionPoint displays the Full Question page.</p> <p>See "Send a message to the patron" on page 7 for the next steps.</p>	 <p>QuestionPoint Ask a Librarian Support Help   Working on behalf of libraries</p> <p>Questions My Questions Add Question Chat Settings Service History</p> <p>Active New Pending Referred Answered Closed Shared Followup</p> <p>New Questions Find ID: <input type="text"/></p> <p>[Refresh List] Records 1 - 10 of 10</p> <p>Sort by: ID Received Updated Limit to: All</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td> 1058897: Chat Transcript: How does this question appear to my library, Elmstree Public, after El...</td> <td>Assigned to: Elmstree Art Inst Admin Patron: Paula (Shared Followup)</td> </tr> <tr> <td><input type="checkbox"/></td> <td> 1058436: Chat Transcript: elmsspub patron elmsspub lib followup</td> <td>Assigned to: Elmstree Administrator Patron: Ed Ferrars (Shared Followup)</td> </tr> </table>	<input type="checkbox"/>	 1058897: Chat Transcript: How does this question appear to my library, Elmstree Public, after El...	Assigned to: Elmstree Art Inst Admin Patron: Paula (Shared Followup)	<input type="checkbox"/>	 1058436: Chat Transcript: elmsspub patron elmsspub lib followup	Assigned to: Elmstree Administrator Patron: Ed Ferrars (Shared Followup)	
<input type="checkbox"/>	 1058897: Chat Transcript: How does this question appear to my library, Elmstree Public, after El...	Assigned to: Elmstree Art Inst Admin Patron: Paula (Shared Followup)						
<input type="checkbox"/>	 1058436: Chat Transcript: elmsspub patron elmsspub lib followup	Assigned to: Elmstree Administrator Patron: Ed Ferrars (Shared Followup)						

List of questions for libraries in your group to follow up (Shared Followup Questions)

Your library may belong to a group that uses full chat (chat with co-browse) and shares responsibility for followup.

To go to the list of questions for librarians in your group to follow up:

<p>1 Click the Shared Followup link under Question Lists on the My QuestionPoint page.</p> <p>Note: If there is no link, the group administrator has not turned on shared followup.</p>	 <p>My QuestionPoint</p> <p>Welcome, Elmstree Administrator Institution: Elmstree Public Library</p> <table border="1"> <tr> <td>My Questions</td> <td>Question Lists</td> </tr> <tr> <td>New: 2</td> <td>New: 3</td> </tr> <tr> <td>Active: 102</td> <td>Unassigned: 1</td> </tr> <tr> <td>Active: 189</td> <td>Shared Followup: 6</td> </tr> </table>	My Questions	Question Lists	New: 2	New: 3	Active: 102	Unassigned: 1	Active: 189	Shared Followup: 6				
My Questions	Question Lists												
New: 2	New: 3												
Active: 102	Unassigned: 1												
Active: 189	Shared Followup: 6												
<p>QuestionPoint displays the Shared Followup Questions list. It is located under the Questions tab in the Ask a Librarian module.</p> <p>2 Click a question in the list.</p>	 <p>QuestionPoint Ask a Librarian</p> <p>Support Help</p> <p>Questions My Questions Add Question Settings Reports Service History</p> <p>Active New Pending Referred Answered Closed Shared Followup</p> <p>Shared Followup Questions Find ID: <input type="text"/></p> <p>[Refresh List] Records 1 - 6 of 6</p> <table border="1"> <thead> <tr> <th>Sort by: ID</th> <th>Received</th> <th>Updated</th> <th></th> </tr> </thead> <tbody> <tr> <td>1293006: [Practice] Chat Transcript: What is California?</td> <td>Received: 2006/02/01</td> <td>Updated: 2006/02/01</td> <td>Patron: Ellie Elmstree Public Library</td> </tr> <tr> <td>1291279: [Practice] Chat Transcript: fdffdfdd</td> <td>Received: 2006/01/25</td> <td>Updated: 2006/01/25</td> <td>Patron: Anonymous Patron Elmstree Public Library</td> </tr> </tbody> </table>	Sort by: ID	Received	Updated		1293006: [Practice] Chat Transcript: What is California?	Received: 2006/02/01	Updated: 2006/02/01	Patron: Ellie Elmstree Public Library	1291279: [Practice] Chat Transcript: fdffdfdd	Received: 2006/01/25	Updated: 2006/01/25	Patron: Anonymous Patron Elmstree Public Library
Sort by: ID	Received	Updated											
1293006: [Practice] Chat Transcript: What is California?	Received: 2006/02/01	Updated: 2006/02/01	Patron: Ellie Elmstree Public Library										
1291279: [Practice] Chat Transcript: fdffdfdd	Received: 2006/01/25	Updated: 2006/01/25	Patron: Anonymous Patron Elmstree Public Library										
<p>QuestionPoint displays the Full Question page for claiming the transcript. The page has two parts.</p> <p>The top part contains the question detail and a Claim button. The detail contains the patron information from the chat session.</p>	 <p>Full Question << 1 of 6 >> Return to List Print View</p> <p>Claim</p> <p>Question Detail</p> <p>Patron: Ellie <kenaltom@yahoo.com> Received: 14:00 2006/02/01</p> <p>Question: [1293006] [Practice] Chat Transcript: What is California?</p> <p>IP Address: 132.174.21.205</p> <p>Referer: http://linuxqa2.dev.oclc.org:9567/crs/servlet/org.oclc.ask.PatronChatForm</p> <p>Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)</p> <p>City: Dublin</p> <p>State: OH</p> <p>Zip Code: 43017</p>												

The bottom part contains the question history and a **Claim** button. The history contains the transcript of the chat session, librarian notes, and system notes about librarian or patron actions.

Question History	
Patron: 14:00 2006/02/01	[Practice] Chat Transcript: What is California?
Librarian 1: 14:01 2006/02/01	That's a very basic question. Please tell me more about what you need.
Patron: 14:04 2006/02/01	My son needs to write a general 500 word report with 2-5 pictures about California for his 4th grade class, emphasis on its history.
Librarian 1: 14:05 2006/02/01	Ahh, for Mr. LaRue?
Patron: 14:05 2006/02/01	That's him!
Librarian 1: 14:06 2006/02/01	Did your son bring home the study guide?
Patron: 14:06 2006/02/01	No!
Librarian 1: 14:06 2006/02/01	I'll send ti to you shortly by e-mail. OK?
Patron: 14:07 2006/02/01	Terrific! Thanks!
Patron: 14:07 2006/02/01	Patron ended chat session.
Librarian 1: 14:07 2006/02/01	Note: Set Resolution: Followup By Patron's Library
Librarian 1: 14:07 2006/02/01	Referred from: Chat Transcript to Shared Followup
Librarian 1: 14:07 2006/02/01	Note: Set Description: Homework
Librarian 1: 14:08 2006/02/01	Note: LaRue assignment folder

3 Click the **Claim** button.

QuestionPoint removes the question from the Shared Followup Questions list so no one else can claim it.

QuestionPoint displays the Full Question page for sending a message to the patron.

See "Send a message to the patron" on page 7 for the next steps.



Send a message to the patron

Send a message to the patron from the Full Question page.

The Full Question page has two parts. The top part contains the question detail with patron information from the chat request form. It also contains various action buttons, lists, and links. The patron field contains the patron's e-mail address as provided on the chat request form.

Tip: If the patron field does not contain the correct e-mail address, you cannot send a message to the patron. However, if you know the patron's correct e-mail address, you can change the address so you can send a message. Click the **Change Patron E-mail** button to change the address. When you change the address, QuestionPoint creates a copy of the Full Question, except the new Full Question has the new patron e-mail address, a new Question ID, and a note in the Question History describing the change. The new Full Question has the same status as the old one. You can then send a message to the patron from the new Full Question by clicking the **Answer** button. When you send the message, the transcript or Question History is included.

Full Question | [Return to List](#) [Print View](#)

-- Refer To --
-- Move To --

Question Detail

Patron: Ellie <kenaltom@yahoo.com>
 Status: ?

Assigned: Elmstree Administrator (103)
 Received: 14:00 2006/02/01

Wait Time: 13
 Session Time: 412

Question: [1293006] [Practice] Chat Transcript: What is California?

Descriptive Codes: Homework

IP Address: 132.174.21.205

Referer: http://linuxqa2.dev.oclc.org:9567/crs/servlet/org.oclc.ask.PatronChatForm

Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)

City: Dublin

State: OH

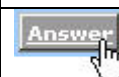
Zip Code: 43017

The bottom part of the page contains the question history and action buttons. The history contains the transcript of the chat session, librarian notes, and system notes about librarian or patron actions.

Question History

Patron:	[Practice] Chat Transcript: What is California?
14:00 2006/02/01	
Librarian 1:	That's a very basic question. Please tell me more about what you need.
14:01 2006/02/01	
Patron:	My son needs to write a general 500 word report with 2-5 pictures about California for his 4th grade class, emphasis on its history.
14:04 2006/02/01	
Librarian 1:	Ahh, for Mr. LaRue?
14:05 2006/02/01	
Patron:	That's him!
14:05 2006/02/01	
Librarian 1:	Did your son bring home the study guide?
14:06 2006/02/01	
Patron:	No!
14:06 2006/02/01	
Librarian 1:	I'll send ti to you shortly by e-mail. OK?
14:06 2006/02/01	
Patron:	Terrific! Thanks!
14:07 2006/02/01	
Patron:	Patron ended chat session.
14:07 2006/02/01	
Librarian 1:	Note: Set Resolution: Followup By Patron's Library
14:07 2006/02/01	
Librarian 1:	Referred from: Chat Transcript to Shared Followup
14:07 2006/02/01	
Librarian 1:	Note: Set Description: Homework
14:07 2006/02/01	
Librarian 1:	Note: LaRue assignment folder
14:08 2006/02/01	
Librarian 1:	Claimed by: Elmstree Public Library(10957): Elmstree Administrator(100292640) From Shared Followup
14:19 2006/02/01	

1 Click the **Answer** button (if the patron field contains the correct patron e-mail address.)



QuestionPoint displays the Answer Question page. The page has two parts.

The top part contains the work area with various boxes, buttons, and lists for preparing a message to the patron.

From this page, you can send three types of messages to a patron: answer, clarification request, status report.

Send an answer if you believe that you have the information that the patron needs.

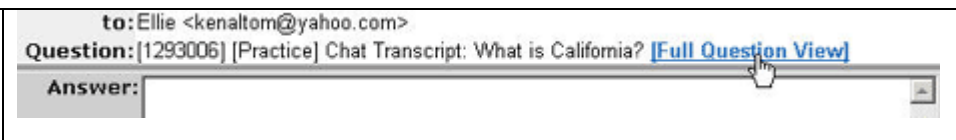
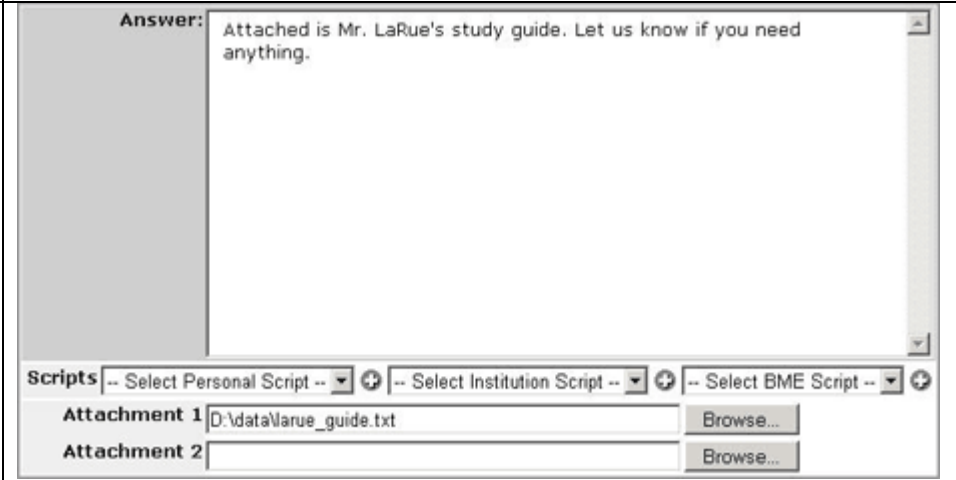





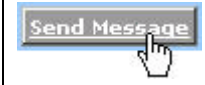
Request clarification if you need more information from the patron before you can prepare an answer.

Send a message if you want to inform the patron about the status of the work on the question.

Answer Question

The bottom part contains all the information from the Full Question page.

Question ID: 1293006	
Question:	[Practice] Chat Transcript: What is California?
Patron Name:	Elle E-mail: kenaltom@yahoo.com
Currently Assigned to:	Elmstree Administrator At Elmstree Public Library
Wait Time:	13
Session Time:	412
Status:	?
Descriptive Codes:	Homework
IP Address:	132.174.21.205
Referer:	http://linuxqa2.dev.oclc.org:9567/crs/servlet/org.oclc.ask.PatronChatForm
Browser/OS:	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)
City:	Dublin
State:	OH
Zip Code:	43017
Patron:	[Practice] Chat Transcript: What is California?
14:00 2006/02/01	
Librarian 1:	That's a very basic question. Please tell me more about what you need.
14:01 2006/02/01	
Patron:	My son needs to write a general 500 word report with 2-5 pictures about California for his 4th grade class, emphasis on its history.
14:04 2006/02/01	
Librarian 1:	Ahh, for Mr. LaRue?
14:05 2006/02/01	
Patron:	That's him!
14:05 2006/02/01	
Librarian 1:	Did your son bring home the study guide?
14:06 2006/02/01	
Patron:	No!
14:06 2006/02/01	
Librarian 1:	I'll send ti to you shortly by e-mail. OK?
14:06 2006/02/01	
Patron:	Terrific! Thanks!
14:07 2006/02/01	
Patron:	Patron ended chat session.
14:07 2006/02/01	
Librarian 1:	Note: Set Resolution: Followup By Patron's Library
14:07 2006/02/01	
Librarian 1:	Referred from: Chat Transcript to Shared Followup
14:07 2006/02/01	
Librarian 1:	Note: Set Description: Homework
14:07 2006/02/01	
Librarian 1:	Note: LaRue assignment folder
14:08 2006/02/01	
Librarian 1:	Claimed by: Elmstree Public Library(10957): Elmstree Administrator(100292840) From Shared Followup
14:19 2006/02/01	

<p>2 Click the Full Question View link if you want to view all the information in a separate window while you work.</p>	
<p>3 Prepare your message: include text and insert scripts or attach files as needed.</p>	
<p>4 Click the Send Answer button to send an answer. The message is sent, the question status changes to answered , and the question is moved to the Answered Questions list.</p> <p>Or</p> <p>Click the Request Clarification button to send a clarification request. The message is sent, the question status changes to pending , and the question is moved to the Pending Questions list.</p> <p>When the patron responds to the clarification request:</p> <ul style="list-style-type: none"> • You receive an e-mail notice, • The response is added to the question, • The question status changes to new , and • The question is moved to your library's New Questions list and your My New Questions list for followup. <p>Or</p> <p>Click the Send Message button to send a message about the status of the work on the question. The message is sent but the question status does not change and the question stays in the same question list.</p>	 <p>Or</p>  <p>Or</p> 

Or, refer followup to another library or a subject-matter expert

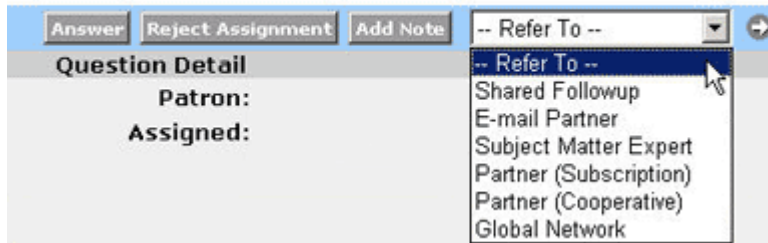
Referral steps

To refer followup to another library or a subject-matter expert:

- 1 Select a **referral option** in the Refer To drop-down list in the Full Question page and click the arrow.

Note: The figure below shows all referral options; some options may not be available to your library. Your library or group should provide guidance on which referral options you will use.

Full Question << 1 of 9 >> | [Return to List](#)



- 2 QuestionPoint displays the request form for the referral option selected.
- 3 Select a library or subject-matter expert to receive the request, provide any other needed information in the form, and send the request.
- 4 For your library, QuestionPoint changes the status of the question to Pending and moves it to the Pending Questions list and the Referred Questions list.

For the library or expert receiving the request, QuestionPoint changes the status of the question to New and places it in the New Questions list.

- 5 The library or expert receives the request and sends an answer to the patron.
- 6 QuestionPoint changes the status of the question to Answered and moves it to the Answered Questions list.



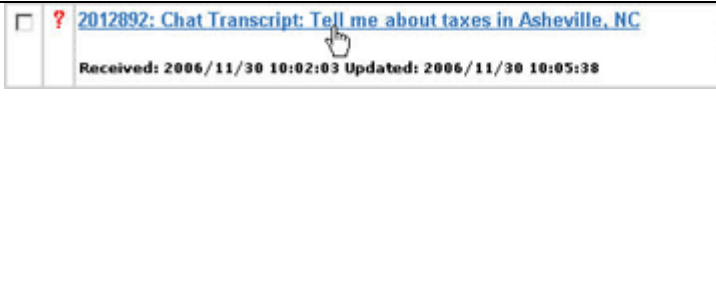
Referral options

The referral options shown in the Refer To drop-down list are described in the following table:

Option	Description	Availability
Shared Followup	Places the question in the Shared Followup Questions list for any library in your subscription group to claim	If your group uses full chat and the group administrator activates shared followup
E-mail Partner	Sends the request via e-mail to one of your personal subject-matter experts who does not have a QuestionPoint account	Yes, available to every library
Subject Matter Expert	Sends the request to one of the 24/7 Reference Cooperative's subject-matter experts.	If your library is a member of the 24/7 Reference Cooperative
Partner (Subscription)	Sends the request to a library or subject-matter expert in your subscription group.	If activated by administrators
Partner (Cooperative)	Sends the request to a library or subject-matter expert in your cooperative group.	If activated by administrators
Global Network	Sends the request to the Global Reference Network, which routes the request to a qualified library or organization.	If your library joined the Global Reference Network

You cannot access an in-progress chat session in question lists

The **[In Progress]** label in front of a chat transcript in a question list indicates that the chat session is in progress. You cannot access the Full Question containing the transcript. The list entry is not hot linked and it has no check box.

The list entry appears when a patron submits a chat request. The status is "New" until a librarian joins the session.		-- Unassigned -- Patron: Edward Ferrars
When a librarian joins the session, the status changes to "Answered."		Assigned to: John Smith Patron: Edward Ferrars
The librarian can change the status when he or she ends the session and selects a resolution code. In this example, the librarian selected "Followup by patron's library." When the session ends, the [In Progress] label is removed and you can access the Full Question containing the chat transcript.		-- Unassigned -- Patron: Edward Ferrars (Shared Followup)

Troubleshooting

- Document problems that you encounter so you can describe them when you request support.

More information

The following information is available on the QuestionPoint web site at <http://www.questionpoint.org/>

- **Policies** at <http://www.questionpoint.org/policies/index.html>
- **Training and videos** at <http://www.questionpoint.org/education/index.html>
- **Documentation** at <http://www.questionpoint.org/support/documentation/gettingstarted/index.html>

Support

- **OCLC support staff:**
E-mail: support@oclc.org
Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Comments, suggestions, feedback

We welcome your comments about this guide. Please use the form at <http://www.surveymonkey.com/s.asp?u=685031335509>



©2007 OCLC Online Computer Library Center, Inc.
ISO 9001 Certified
Product and service names are trademarks and service marks of their respective companies.

QuestionPoint users may reproduce this document for their internal use. You must include the OCLC copyright notice if you reproduce substantial portions.