

Research Help Now
Managers Training – Question Point
December 10, 2007
Michigan State University

Internet Explorer set-up

If you've been having technical problems with QP, double check your computer settings. Directions are available at: http://www5.oclc.org/questionpoint/Chat_setup.pdf

Setting up your library profile for follow-up

Managers should make sure they have completed this task for the following reasons:

- It ensures that the manager is notified when a new question or chat transcript needing follow-up arrives in your library's account.
- It allows the manager to add a second email address so backup is available if the manager is away.
- It permits QuestionPoint to add a patron's reply to the question history when a patron replies to a chat transcript, answer or clarification request.
- It allows the library to customize the email "From:" address that patrons see when they receive an email reply from QuestionPoint.

For more information, see "Set Up Your Library Profile for Follow-up," attached to the email.

Resolution codes and descriptive codes

Remember to assign a resolution code at the end of a session; if you don't, the session is assigned the default code of "Answered." This has happened with some of our sessions.

Assign the Resolution Code "Lost," only when the patron does not respond at all. If the patron added only one word to chat and provided an email address, assign the code "Follow Up by Patron Library." This ensures that the patron's request doesn't get lost.

Assign the resolution code "Follow Up by Me" only when you are the one who will be following up with a patron after a session has ended.

Managers who attended the workshop also agreed that managers should check the descriptive codes assigned to transcripts for sessions with their patrons. Add any additional descriptive codes you think are appropriate. Do **not** add descriptive codes to transcripts for the patrons of other libraries.

- **Managers**: On a weekly basis, please check descriptive codes and add additional descriptive codes to transcripts for sessions with your students.

For more information see:

- The handout "Resolution Codes and Descriptive Codes," attached to the email
- An updated version of "Handling QuestionPoint Transcripts: Routines for Managers" is attached to the email and includes directions for checking descriptive codes.

Follow-up procedures

Everyone:

It's easy to send a follow-up email within QuestionPoint. This also allows the patron's library to see your response and determine whether the library wants to do any additional follow-up.

Directions for sending an email follow-up in QP are available in QuestionPoint's "Chat followup and referral" document, attached to the email and also available at:

http://www.questionpoint.org/support/documentation/gettingstarted/qp_ref_followup.pdf

Important:

For now, whenever you send emails to patrons through QuestionPoint, please also email them directly and ask them to watch for an email response from QuestionPoint. The reason for this is to make sure that QuestionPoint email responses reach students in all cases.

Managers: Please check your library's list of "Answered" questions each day to see if any require more follow up.

Managers: Please check the list of questions in "New" and "Shared Followup" each day to see if any questions from your library's patrons have been referred to your library.

For more information:

The updated version of "Handling QuestionPoint Transcripts: Routines for Managers" attached to the email also includes directions for how to check your library's Answered, New, and Shared Followup lists.

Closing questions

Important: Managers, please close only questions with your library's patrons. If you close sessions with other institutions' patrons, those libraries will not be able to see the questions or follow up.

Important: Managers, please wait two weeks before closing questions. This waiting period gives patrons time to see the responses and request more help if needed. Patrons cannot see their questions and librarians' responses after the questions are closed.

Practice questions: Managers and librarians may close practice questions whenever they wish.