

Research Help Now

QuestionPoint Routines for Librarians: Tasks before Launching Chat & Handling Transcripts

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TASKS BEFORE LAUNCHING CHAT

Please do each of these before you begin your shift:

- A. If you've had your popup blocker turned on, turn it off.
- B. Delete browsing history / offline content.

For IE 7.0:

1. Go to Tools > Internet Options.
2. Under the General tab, find Browsing History and click on Delete.
3. For Temporary Internet Files, click on Delete Files...
4. A Delete Files window opens. Click on Yes.
5. Click on Close.
6. Click on OK.

For IE 6.0:

1. Select Tools > Internet Options.
 2. Click on Delete Files. A Delete Files window opens.
 3. Click in checkbox next to "Delete all offline content."
 4. Click on OK.
- C. If you had a number of applications open during the day before logging in for your VR shift, close them and restart your computer.

HANDLING TRANSCRIPTS

After launching chat and logging on to your queue, check for sessions that may need attention.

Here is a way you can do this:

1. Return to the My QuestionPoint page.
2. Under **My Questions** (on left) click on:
 - **New**
3. Under **Question Lists** (also on left) click on:
 - **New**
 - **Unassigned**
 - **Shared Followup**

Definitions for each category appear in the box on the right.

NOTE: It is very important to claim and follow up on questions in Shared Followup in a timely manner. Claim questions referred to your library as soon as you see them. If a question for another library has not been claimed in 24 hours, please claim it.

The next page explains how to claim and respond to a question in these categories.

Categories

My Questions

New – Questions that have been referred to you.

Active – By default, all questions not closed and less than 90 days old are considered active by QP.

Question Lists

New – Any question assigned the “Followup by me” or “Followup by patron library” resolution code; also any questions that were not answered before patron closes session. Identified by a **?**.

Unassigned – New questions that have not yet been assigned to a librarian or questions which no librarian has claimed.

Active – Same as Active under My Questions

Shared Followup - Sessions marked as “Followup by patron library.” They can originate from any library in the queue. The contact person for the home library will receive an email alert; so presumably, they will have the opportunity to answer them first. Otherwise, all institutions have the opportunity to assign or claim them.

New (under My Questions)

1. Click on **New**.
2. Click on a question in the list.
3. Scroll to the bottom of the page and click on **Answer**.
4. Enter your response in the Answer text area.
5. Click on one of the following:
 - Send Answer** – to send an answer to the patron’s question
 - Request Clarification** – to request more information from the patron
 - Send Message** – to inform the patron about the status of work on the question

It’s easy to send a follow-up email within QuestionPoint. The advantage is that it allows the patron’s library to see your response and determine whether the library needs 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, available at:

http://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 your email response from QuestionPoint. The reason for this is to make sure that QuestionPoint email responses reach students in all cases.

New and Unassigned (under Question Lists)

Same as above.

Shared Followup (Question Lists)

1. Click on **Shared Followup**.
2. Click on a question in the list.
3. Click on **Claim**.
4. Scroll to the bottom of the page and click on **Answer**.
4. Enter your response in the Answer text area.
5. Click on one of the following:
 - Send Answer** – to send an answer to the patron’s question
 - Request Clarification** – to request more information from the patron
 - Send Message** – to inform the patron about the status of work on the question

Closing Questions—Important Information

1. Close only those questions that have come from your library’s patrons. Do not close a question from another library’s patron. If you do, the other library will not be able to see it.
2. Please wait two weeks before closing a question. If you close a question right after answering it, neither the patron nor the patron’s library will be able to view it.

FOR MORE INFORMATION

See “Chat Followup and Referral Guide,” available at http://www.questionpoint.org/support/documentation/gettingstarted/qp_ref_followup.pdf.

<h3>Assign Appropriate Resolution Codes</h3>

Remember to assign a resolution code at the end of a session; if you don’t, the session is assigned the default code “Answered,” regardless of the actual status of the question.

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 and you will be doing so right away.