

**OCLC WorldCat Local
Chat Widget
December, 2009**

WorldCat Local Chat:

OCLC is pleased to announce that Chat functionality will be implemented in the December install; available to institutions with Full WorldCat Local subscriptions. Institutions that have a Questionpoint Qwidget or other chat clients will now be able to provide their users the opportunity to chat directly with a librarian from within WorldCat Local.

Chat Clients:

This solution has been designed to work with any chat client by inserting the code snippet via configuration in the WorldCat Service Configuration User Interface module. The following is a summary of the chat clients OCLC tested with during the implementation of this project.

QuestionPoint:

The chat integration into WorldCat Local has been tested successfully using the QuestionPoint Qwidget with no issues identified.

Libraryh3lp:

The chat integration into WorldCat Local has been tested successfully using the Libraryh3lp Chat widget with no issues identified.

Configuring a Chat Widget in WorldCat Service Configuration:

The steps below document the configuration process from within an institution's Service Configuration account and depict how the chat client will work in the WorldCat Local user interface.

1) Chat settings are in the User Interface Module of Service Configuration.

The screenshot shows the OCLC Service Configuration interface. At the top, there is a search bar for 'OCLC, Online Computer Library Center: OCLC' with a 'Go' button. Below the search bar is a 'Search by:' dropdown menu set to 'Registry ID, Institution Symbol' and a 'Search' button. On the left side, there is a 'My WorldCat.org' menu with several options: 'User Interface Options' (highlighted with a red box), 'Search Results', 'OpenURL Resolvers', 'Place Hold/Request Buttons', 'OPAC Statuses, Locations and Circulation Policies', 'Holding Codes Translation Table', 'Licensed Content and Databases', and 'ILS Support and Maintenance'. Below the menu is a 'WorldCat.org (Staff)' section with a link to 'Find support documentation for products and services' and a 'Select a service' dropdown. The main content area is titled 'User Interface Options' and includes a note: 'Required fields are marked with an asterisk (*)'. Under the heading 'Choose your WorldCat.org URL', there is a field for '* WorldCat.org URL:' with the value 'http://worldcatcons[...].worldcat.org' and a link to 'check availability to see if this URL is already taken.'. Below this is a section for 'WorldCat Local Redirect' with an information icon and a message: 'WorldCat Local Redirect is not selected. You must check this option to automatically take users to your WorldCat Local when they go to a record on www.worldcat.org.'. There is also a checkbox for 'Redirect users who are IP authenticated to my institution to this URL when they go to a record display on www.worldcat.org'.

2) Chat configurations are only available in the Custom Links section on **Custom Link 1**. When the user selects a link type of 'Library Contact Info' the Chat questions will display.

The screenshot shows the 'Custom Link(s)' configuration page. At the top, it says 'Choose up to 7 custom links to appear in the banner.' with an information icon. Below this is a section for 'Custom link 1:'. It contains a 'Link type:' dropdown menu set to 'library contact info'. Below that is a 'Display Chat Widget:' section with two radio buttons: 'Yes' and 'No', with 'No' selected. There is an empty 'URL:' text input field. At the bottom, there is a 'Display text:' text input field containing 'Your Library Account', with a note '25 character limit.' and a link to 'test URL'.

3) If the user has a Questionpoint Qwidget they can insert the institution ID. Upon saving their settings the ID will be validated and the widget will then be automatically placed within their WorldCat Local.

Display Chat Widget: Yes No

The chat widget will open in a new window when the link or chat area is clicked. If you are a QuestionPoint customer, your Qwidget can be generated by supplying your QuestionPoint User ID. If you wish to display a different chat widget in WorldCat Local, you can past HTML to embed in a chat window that is accessible directly from WorldCat Local. The recommended size for the widget is 186px (w) by 276px (h).

Do you have a QuestionPoint account? Yes No

QuestionPoint Institution ID:

Always display chat window:

Display text:
25 character limit. [test URL](#)

4) If the user does not have a Questionpoint ID, but uses another chat widget they can insert the chat code snippet into this box to incorporate it within WorldCat Local.

Note: When copying and pasting code snippet, please ensure that it is copied directly from the source. When the code is copied from an email or text document carriage returns can sometimes be entered which will cause the code to fail.

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Do you have a QuestionPoint account? Yes No

Chat code:
<div id="qpchatwidget">
></div>

Always display chat window:

Display text:
25 character limit. [test URL](#)

5) If the user wishes the chat widget to always display to their patrons they can select the 'Always display chat window' box.

Do you have a QuestionPoint account? Yes No

Chat code: `<div id="qpchatwidget"></div>`

Always display chat window:

6) If the user does not select the 'Always display chat window' box, the chat widget will be launched when the user selects the 'Library Contact Info' link, identified by the 'Display Text'.

Do you have a QuestionPoint account? Yes No

Chat code: `<div id="qpchatwidget"></div>`

Always display chat window:

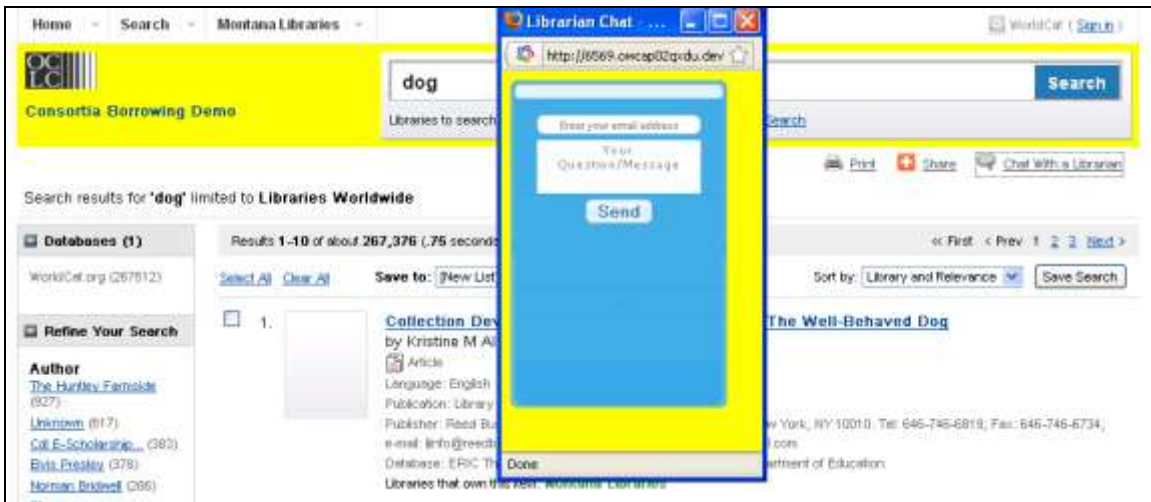
Display text:
25 character limit. [test URL](#)

Chat display in the WorldCat Local:

1) If Chat is not configured to always display the widget will be launched when the user selects the Library Contact link in either the toolbar or the Library Links dropdown.



2) The Chat widget then launches in a separate window so it may persist as the user navigates throughout the site.



3) If Chat is configured to always display to the user, the chat box will show below the search box and toolbar.



4) When the user clicks in the Chat box, the chat widget is launched in a separate window so that it can be maintained while the user navigates throughout the site.



5) If the library has a second 'Library Contact Info' link configured and has set Chat to 'Always Display', the secondary contact link will display in the toolbar as well.

