

Purpose of this guide

This guide helps you start to use QuestionPoint:

- It provides information about key concepts, features and tools.
- It describes how QuestionPoint enhances your library's reference service and helps you do your work.

Your library may use all the QuestionPoint tools or only those that support its current needs. You can implement other tools as new needs arise.

Figures included

The table of contents indicates the sections of this guide in which figures (screen shots) are included.

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Key QuestionPoint concepts

Reference Management Service

The Reference Management Service is one of the two elements of QuestionPoint.

It provides the tools for:

- Communicating with patrons in a virtual environment
- Managing your library's reference service

All libraries that participate in QuestionPoint use some or all of the tools in the Reference Management Service.

Interact with patrons at their point of need. Your library can:

- Receive questions through a web form on your web site and answer them through e-mail.
- Receive questions via an email address and answer them through e-mail.
- Receive and answer patrons' questions in real time through chat and the Qwidget (QuestionPoint widget).
- Receive questions sent through select SMS texting partners and answer them through e-mail.
- Record and follow up on questions received through telephone, fax, or at the reference desk.

Cooperate with colleagues locally, statewide, globally. You can collaborate with colleagues in:

- Your library and institution
- Local, statewide and regional groups of libraries

Build shared resources and experiences. Your library can share the results of its reference activities through:

- A local knowledge base
- The Global knowledge base

Manage, evaluate and improve reference service. Your library can manage its reference service through tools such as:

- Account management
- Analytic tools such as descriptive codes
- Statistical reports, quality control reports, and transcripts
- Patron surveys

24/7 Reference Cooperative

The 24/7 Reference Cooperative (the "Cooperative") provides your patrons with a live help chat service, available 24/7/365. The Cooperative is staffed by participating libraries that agree to answer questions for each other in real time, using the QuestionPoint software. Working together, the participants provide round-the-clock reference coverage for their patrons and bolster reference service when and where it is needed most. . Cooperating librarians are complemented by contracted back-up staff to guarantee failsafe coverage.

For more information about this add-on service, **view** the FAQ:

<http://wiki.questionpoint.org/w/page/13839418/24%207%20Coop%20FAQs>

Policy Pages

Policy Pages are another collaborative tool in the Reference Management Service. A Policy Page contains information that a library provides about itself and its policies. When chatting with a patron, any librarian can easily view the Policy Page of the patron's library to help answer the patron's questions.

Policy Pages are particularly important to the 24/7 Reference Cooperative. Each library that participates in the Cooperative must provide its Policy Page information and keep it up to date.

Base Management Environment (BME)

The Base Management Environment (BME) provides access to the entire suite of tools in the Reference Management Service, including chat forms, chat reference and followup, scripted messages, a local knowledge base, and access to the Global knowledge base.

Some libraries elect to have their own BME so they have sole use of the Reference Management Service tools and their own knowledge base.

Other libraries share a BME as part of a group. They share the tools and the fee for the tools. They work together in a shared chat queue to provide chat coverage. They can share followup duties, or each library can followup on its own patrons' questions. They collaborate on a shared local knowledge base. The group administrator uses reports and statistics of group activities to monitor and manage the group.

Service Unit Profile (SUP)

The Service Unit Profile (SUP) establishes the identification of a library or department as a discrete reference work unit. Each library or work unit that has an SUP has access to its own e-mail management, question forms, Qwidget (the QuestionPoint chat widget), walk-up /phone reference tracking and follow-up, questions, chat transcripts, reports and statistics, policy information, librarian accounts, scripted messages, e-mail messages, chat form look and feel, etc.

Each BME has one or more SUPs associated with it. If a library has its own BME, that BME has one SUP associated with it. If a group of libraries shares a BME, that BME has multiple SUPs associated with it.

Some individual libraries choose to have more than one SUP in order to access separate reports and statistics for areas such as branch libraries, teen websites, campus libraries, academic department libraries, languages served, etc.

For the 24/7 Reference Cooperative, each library that has its own catalog or website must have at least one SUP.

QuestionPoint system and websites

This section summarizes the components of the QuestionPoint system and related websites.

For librarians and administrators

QuestionPoint system

The QuestionPoint system contains the following components for librarians and administrators:

Component	Why use it?
My QuestionPoint page (in the Home module)	<ul style="list-style-type: none"> • Jump to frequently used places in the QuestionPoint system. • Launch the chat monitor. • Manage your personal account. • Read system-wide and local announcements. • Locate information and resources. • View statistical reports for yourself, your library, your group, all of QuestionPoint in the Reports tab.
Chat monitor	<ul style="list-style-type: none"> • Monitor chat requests. • Chat/ with patrons. • Indicate when followup is needed for a chat session.
Ask a Librarian module	<ul style="list-style-type: none"> • Access current email questions, text messages and chat transcripts. • Assign questions to librarians (administrators only). • Send answers -to questions received by your library. • Follow up on chat and Qwidget sessions. • Record/answer questions received via telephone, walk-up, e-mail, SMS or fax. • Refer questions and chat transcripts to subject-matter experts or other libraries. • Set up scripts and URLs for use when chatting or answering questions. • View patron survey responses. • Close questions and chat transcripts to indicate that work on them is complete. • Review transcripts and questions to provide quality control (administrators only). • View archived questions and chat transcripts in your library's Service History.
Knowledge Base (KB) module	<ul style="list-style-type: none"> • Search KBs for information to answer patrons' questions. • Add records to the Global KB or a local KB. • Edit and activate KB records to make them searchable.
Administration module (administrators only)	<ul style="list-style-type: none"> • Manage librarian accounts for your library or group. • Customize patron forms and communications with patrons. • Create patron surveys and view survey reports.
Profile module	<ul style="list-style-type: none"> • Provide or view library profile information. • Provide or view library Policy Pages. • Search for referral partners.

Websites

The following websites support your QuestionPoint activities:

Component	Why use it?
QuestionPoint support website at http://www.oclc.org/support/worldwide/en_us/services/questionpoint.html	<ul style="list-style-type: none"> • Access implementation materials, online help and documentation (Support page). • Use training materials and learn about training sessions (Training page). • Access the logon page for QuestionPoint (Librarian/Patron logon links).
QuestionPoint Wiki at http://wiki.questionpoint.org/	<ul style="list-style-type: none"> • Access reference policies, guidelines, and best practices. • Read and contribute information for the QuestionPoint community.

Component	Why use it?
OCLC website http://www.oclc.org/en-US/questionpoint.html	<ul style="list-style-type: none"> Access information for prospective QuestionPoint members (QuestionPoint page).
QuestionPoint blog at http://questionpoint.blogs.com/	<ul style="list-style-type: none"> Read and comment on news about the QuestionPoint service and community.

For patrons

If configured by the library, patrons receive a private free, QuestionPoint account in the QuestionPoint system if they submit a valid e-mail address when submitting a question.

QuestionPoint system

The QuestionPoint system contains the following components for patrons.

Component	Why patrons use it?
Chat request form	<ul style="list-style-type: none"> Start a chat session with a librarian
Chat window/Qwidget	<ul style="list-style-type: none"> Chat with a librarian
E-mail question form	<ul style="list-style-type: none"> Submit a question for a library to answer via e-mail
E-mail messages from QuestionPoint	<ul style="list-style-type: none"> Read answers or chat transcripts
Patron interface/account	<ul style="list-style-type: none"> Review their questions, answers and chat transcripts.
Public-access KB	<ul style="list-style-type: none"> Search Global KB records or local KB records marked for public access.

Notes:

- You need a QuestionPoint patron account to access its interface. If your library configures the feature, you receive information about your free QuestionPoint patron account by e-mail the first time you submit a question through a web form or chat with a librarian.)
- Click **Search KB** on the Patron Logon page to go to the Basic Search page for the public-access Global KB. Anyone can search it; no account is needed.
- Click **Terms of Service** on the Patron Logon page to see the terms and conditions governing use of QuestionPoint-facilitated communication with a library and possible disposition of the question and answer text.

Your library's website

Your library's website supports your reference service for patrons.

Component	Why patrons use it?
Reference service page	<ul style="list-style-type: none"> Learn about reference hours and methods. Chat with a librarian (if offered by your library). Submit a question through a web form (if offered by your library).

Notes:

See the [Best Practices in Link Placement guide](#) (provide citation) for ideas on where to place links to your reference service

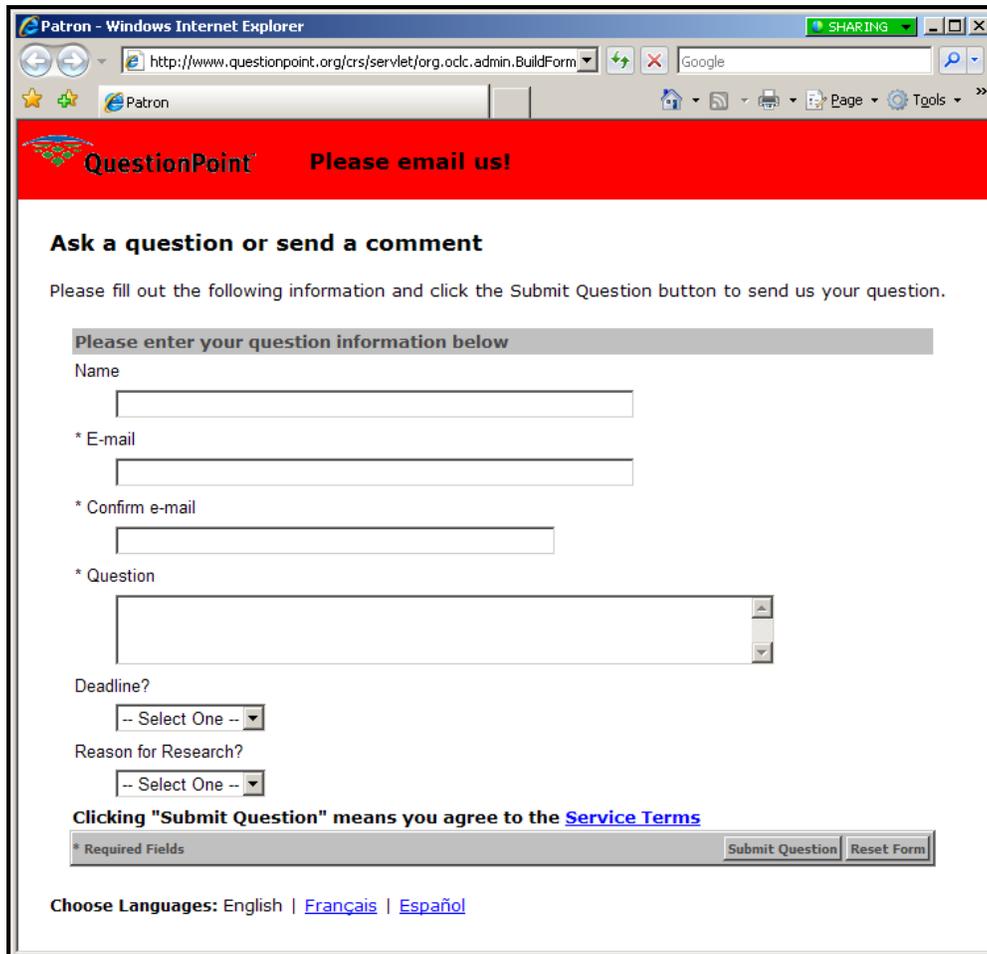
Question form for questions to be answered via e-mail (figures included)

Your library can place a question form on its website so patrons can submit questions at any time. You send answers to these questions via e-mail from QuestionPoint. QuestionPoint also provides tools that let your library cooperate with other libraries so others can answer your patrons' questions when your library is not available.

Patron submits question

A patron can submit a question on the question form, usually from a link on your website or other library interfaces. QuestionPoint acknowledges the question, adds it to your library's new questions in the Ask a Librarian (Ask) module, and sends an e-mail message to notify your library of the new question. A librarian can respond immediately if available when the question arrives. Otherwise, a librarian responds when available.

Here is a sample question form. Your library can customize the look of the form and the fields that it includes.



The screenshot shows a web browser window titled "Patron - Windows Internet Explorer" with the address bar displaying "http://www.questionpoint.org/crs/servlet/org.oclc.admin.BuildForm". The page features a red header with the QuestionPoint logo and the text "Please email us!". Below the header, the main content area is titled "Ask a question or send a comment" and includes the instruction: "Please fill out the following information and click the Submit Question button to send us your question." The form fields are as follows:

- Please enter your question information below** (grey header)
- Name:
- * E-mail:
- * Confirm e-mail:
- * Question:
- Deadline?:
- Reason for Research?:

Below the form fields, there is a note: "Clicking 'Submit Question' means you agree to the [Service Terms](#)". At the bottom of the form, there is a legend: "* Required Fields" and two buttons: "Submit Question" and "Reset Form". At the very bottom of the page, there is a language selection link: "Choose Languages: English | [Français](#) | [Español](#)".

Instructions for preparing and customizing your library's QuestionPoint forms are available in online Help at: http://www.questionpoint.org/crs/html/help/en/admin/ad_forms.html

Your library can also use an e-mail address and/or a Texting number* to have questions routed to QuestionPoint. This enables patrons to send questions without having to use your website as a starting point,

Note: QuestionPoint is not a direct provider of SMS services. A separate account via Text a Librarian or Upside Wireless is required for this feature.

Librarian sends answer

The figure below shows an answer that a librarian is preparing on the Answer Question page in the Ask a Librarian module. When the librarian clicks the **Send Answer** button, QuestionPoint sends the answer to the patron's e-mail address and records the answer in the Ask a Librarian module.

Answer Question

to: Elinor Dashwood <dashel@mymail.com>
Question: [1774737] What have been the greatest accomplishments of the G8? [\[Full Question View\]](#)

Answer:

I found several sources by searching on Google for G8 accomplishments.

- A July 8, 2005 fact sheet on the White House web site:
<http://www.whitehouse.gov/news/releases/2005/07/20050708-1.html>
- The Council on Foreign Relations site has several items:
<http://www.cfr.org/>
- The G8 Reseach Group at the University of Toronto and the University of Toronto Library have a G8 Information Centre web site:
<http://www.g8>

Scripts -- Select Personal Script -- -- Select Institution Script -- -- Select BME Script --

Attachment 1

Attachment 2

Chat (figures included)

Your library can place a form on its website so a patron can request a chat session with a librarian in order to receive assistance in real time. QuestionPoint provides tools that let your library cooperate with other libraries so others can chat with your patrons when your library is not available. In addition, your library can provide reference services around the clock by participating in the 24/7 Reference Cooperative.

How Chat works

- 1 A patron submits a request for a chat session.
- 2 The patron sees a message that indicates the patron is being connected to a librarian and invites the patron to provide more information about the question.
Note: If no librarian is monitoring requests, the patron sees a message that indicates chat is not currently available and refers the patron to other resources.
- 3 A librarian accepts the request and is connected to the patron. (If multiple librarians are monitoring the chat queue, the first one to accept the request is connected to the patron.)
- 4 The librarian and patron chat.
- 5 When the chat session ends:
 - The librarian selects a resolution code so the transcript receives appropriate followup in the Ask a Librarian module after the session.
 - QuestionPoint sends the chat transcript to the patron's e-mail address (if provided by the patron) and adds it to your library's current questions in the Ask a Librarian module.

QuestionPoint chat methods

Your library may use one or more of these methods:

- **Chat.** An ADA-compliant patron chat window lets librarians chat with patrons and send URLs that open in a separate browser window when patrons click on them.
- **Chat with Viewport and Cobrowse check.** The primary QuestionPoint chat method offers chat, lightweight co-browsing, page pushing, and librarian-to-librarian communication.
- **Qwidget (QuestionPoint widget).** A lightweight chat window that libraries can embed throughout their library Web pages and elsewhere.

More information about chat

- For policies, guidelines, and best practices, go to the QuestionPoint Wiki:
<http://wiki.questionpoint.org/>
- For documentation, go to the **Documentation** page:
http://www.oclc.org/support/worldwide/en_us/services/questionpoint/documentation.html
- For training resources, go to the **Training** page:
http://www.oclc.org/support/worldwide/en_us/services/questionpoint/training.html
- For instructions for preparing and customizing your library's forms, go to **online Help**:
http://www.questionpoint.org/crs/html/help/en/admin/ad_forms.html

Chat request

Here is a sample chat request form. If your library is part of a group, it works with its group/BME administrator to create its forms. The forms are hosted at OCLC. QuestionPoint provides URLs for the forms. Your library uses the URLs to link to the forms from its website.

QuestionPoint Chat with a Librarian

Welcome to Live Online Reference.

Please enter the information requested on the right hand side of your browser window.

- The 'Email Address' field is a recommended field. At the conclusion of the session, a complete transcript, including all chat and links to Web sites visited will be emailed to you. If you do not have an email address, or do not wish to have a transcript sent to you, you may leave that field blank.
- If you are using **Internet Explorer or Firefox**, and have "session cookies" enabled in your browser, the librarian should be able to take you to various Web sites to show you the answers. We will be able to "chat" with you in real time and send you Web pages via your browser during the session.
- **If you have a software firewall enabled**, such as Norton Internet Security, you may not be able to see chat from the librarian after you connect. If you experience such a problem, please exit the service, and, if you wish to reconnect, either disable the firewall before you return, or [check these instructions](#) on how to configure it to work with our service. Remember to re-enable the firewall after the session is over!
If you do not want to disable the firewall, you may be unable to see the librarian's chat and vice versa, so, please try to be as thorough as possible when asking your question, and be sure to include your email address, because the librarian will not be able to chat with you. You will receive an email response within 10 minutes of termination of the session containing either the answer, or a request for more information in order to answer the question.
- Opera, AOL's browser, and WebTV are not supported.
- If you use **Windows XP and have Service Pack 2 installed**, you must configure it to work with our software in order to chat with the librarian. [Please check these instructions.](#)
- If you are a MAC user we will be able to send you web pages, but you will not be able to take us to other websites during the session.

Please fill out the following information and click the Connect button to begin chatting.

Please enter your information below

Name

* E-mail

* Confirm e-mail

Status
-- Select One --

* Question

How did you Hear About Us?
-- Select One --

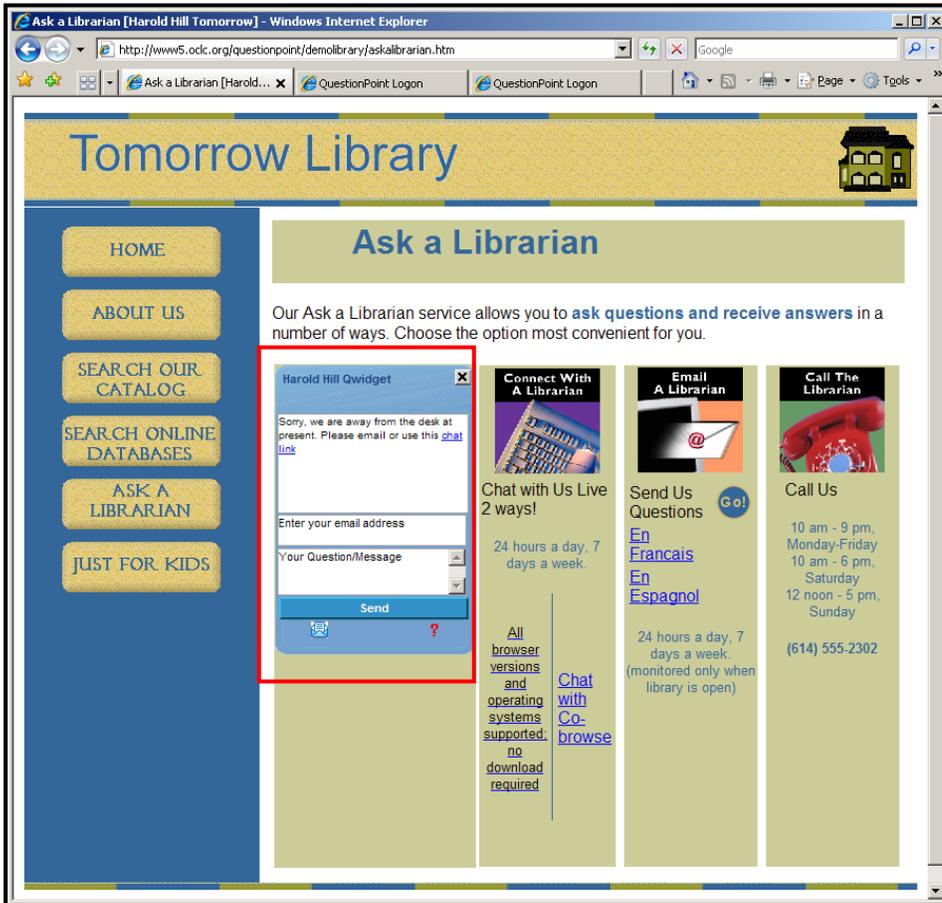
Thank you for using our service

Clicking "Connect" means you agree to the [Service Terms](#)

* Required Fields

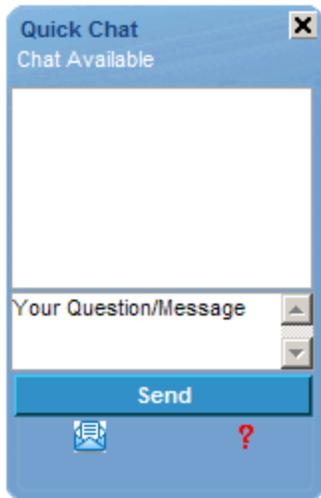
Qwidget request

Here is a Qwidget embedded on a library Web page.



The screenshot shows a web browser window titled "Ask a Librarian [Harold Hill Tomorrow] - Windows Internet Explorer". The address bar shows the URL "http://www5.oclc.org/questionpoint/demolibrary/askalibrarian.htm". The page content includes a navigation menu on the left with buttons for HOME, ABOUT US, SEARCH OUR CATALOG, SEARCH ONLINE DATABASES, ASK A LIBRARIAN, and JUST FOR KIDS. The main heading is "Tomorrow Library" with a house icon. Below this is the "Ask a Librarian" section, which contains a message: "Our Ask a Librarian service allows you to ask questions and receive answers in a number of ways. Choose the option most convenient for you." A red box highlights a "Harold Hill Qwidget" embedded in the page. The widget has a title bar "Harold Hill Qwidget" and a close button. The main content of the widget says "Sorry, we are away from the desk at present. Please email or use this [chat link](#)". Below this is a text input field labeled "Enter your email address", another text input field labeled "Your Question/Message", and a blue "Send" button. At the bottom of the widget are a chat icon and a red question mark icon. To the right of the widget are three columns of contact options: "Connect With A Librarian" (24 hours a day, 7 days a week, with a link to "Chat with Co-browse"), "Email A Librarian" (Send Us Questions with a "Go!" button and links for "En Francais", "En", and "Espagnol"), and "Call The Librarian" (Call Us with a phone icon, hours: 10 am - 9 pm Monday-Friday, 10 am - 6 pm Saturday, 12 noon - 5 pm Sunday, and phone number (614) 555-2302).

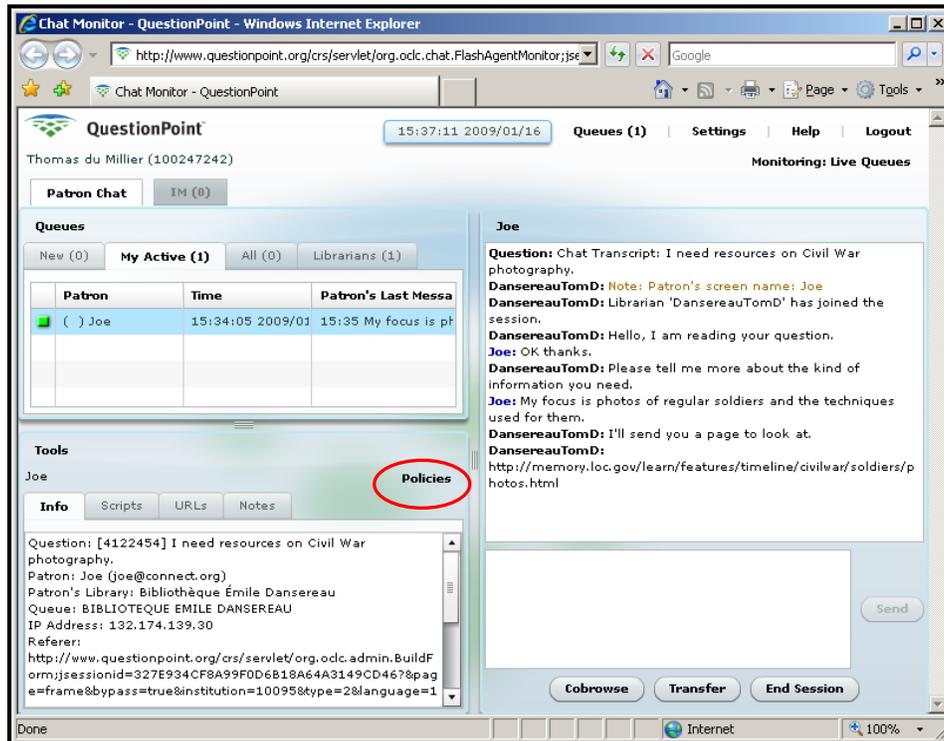
To start a chat session, a patron types a question in the box provided and clicks **Send**.



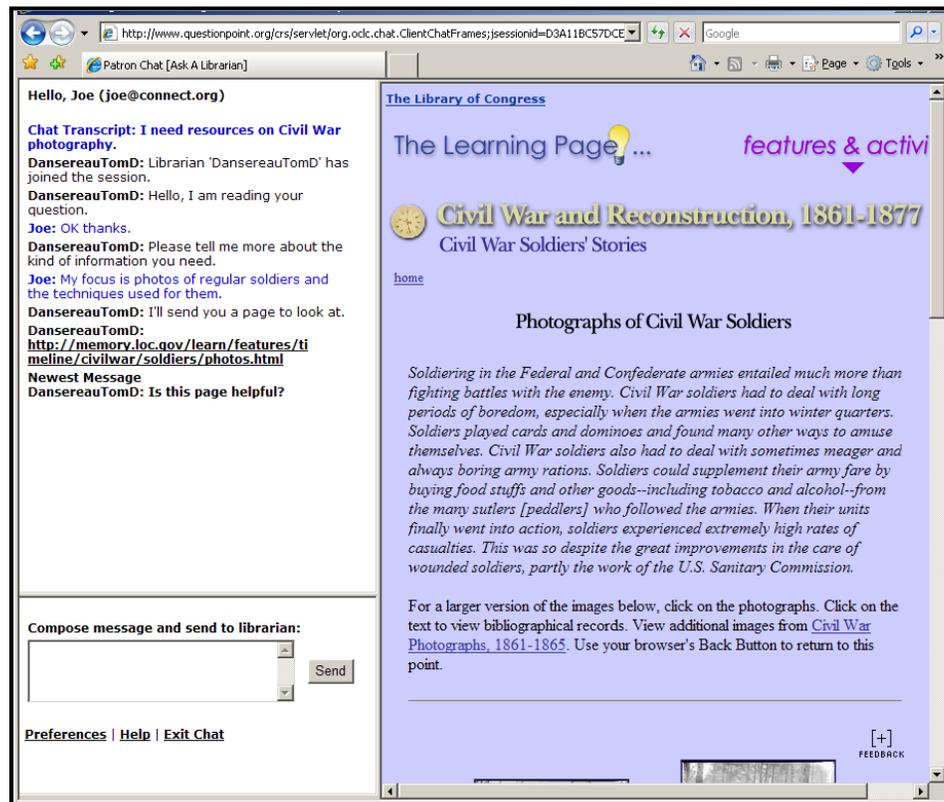
A close-up view of the "Quick Chat" widget. It has a title bar "Quick Chat" and a close button. Below the title bar is the text "Chat Available". The main area is a large empty text box. At the bottom, there is a text input field labeled "Your Question/Message", a blue "Send" button, a chat icon, and a red question mark icon.

Chat session in progress

The sample chat monitor below shows a chat session in progress from the librarian side. The librarian uses the chat monitor to respond whether the patron is using chat or the Qwidget. The librarian can click the **Policies** link to view the Policy Page for the patron's library.



Here is the patron side of the session with the patron using Chat with a Viewport.



Policy page

Here is the top of a Policy Page that provides information about a patron's library and its policies.

QuestionPoint | Profile

Phone	Hours	Location	Databases	Library Cards	Loan Periods
Loan Limits	Renewals	Holds	Late Fees	Interlibrary Loan	Course Reserves

Group Policy Page: Heartland Libraries

Group Member Policies: Heartland University Library

Heartland University Library

Alert: Closed Sundays

Home Page URL: <http://www.hul.edu>

Web Catalog URL: <http://www.hulcatalog.edu>

Reference E-mail Contact: wiljo@hul.edu
Policy Page E-mail Contact: wiljo@hul.edu
Library Card Number: 5555555555
Pin Number: 77777

Phone
(614) 555-5555

Hours
Monday, Tuesday, Thursday: 9 - 9
Wednesday: 9 - 6
Friday and Saturday: 9 - 5

Chat transcript status

At the end of a chat session, the librarian selects a **resolution code** so the transcript can receive appropriate followup in the Ask a Librarian module. At the bottom of the figure below, the librarian has selected "Followup By Me" so the chat transcript will be placed with the librarian's other questions and chat transcripts needing action and attention.

The librarian may also select up to 4 **descriptive codes** (Add Description) to categorize a session for statistical and planning purposes. A default list of over 50 codes is provided for convenience, and libraries can customize the list by changing or adding custom codes. Each library decides whether to use the codes and how to use them.

End Session

Joe
ivilwar/soldiers/photos.html
DansereauTomD: Is this page helpful?
Joe: Yes thanks!
DansereauTomD: May I send more like that you your email address later today?
Joe: Yes, please.
DansereauTomD: Thank you for using our reference services. Please take a few minutes and complete the survey for us. You should find a link at the top of your transcript.
DansereauTomD: Librarian ended chat session.

Info
Question: [4122454] I need resources on Civil War photography.
Patron: Joe (joe@connect.org)

Select Resolution

Select Resolution

Answered
Followup By Me
Followup By Patron's Library
Lost Call
Practice

Add Description

Send Librarian Note

Send Patron Note

Chat Session Ended

Question lists (figures included)

You can access your library's current questions and completed chat transcripts through the question lists in the Ask a Librarian (Ask) module.

Symbols in question lists and Full Questions

Symbols that show the status of questions and chat transcripts

The following symbols are used in question lists and Full Questions to show the status of questions and chat transcripts.

	New: Questions or chat transcripts that need action by you or your library
	Pending: Questions or chat transcripts that need action by any of the following: <ul style="list-style-type: none"> Patrons whom your library asked to clarify a question A library or subject-matter expert to whom your library referred a question or transcript
	Answered: Questions or chat transcripts for which an answer has been sent to the patron
	Closed: Questions or chat transcripts that a librarian or patron has closed because work on them is complete

Symbols that identify referred questions and chat transcripts

The following symbols are used in question lists and Full Questions to identify referred questions and chat transcripts. If a question or transcript has none of these symbols, your library served its own patron without assistance.

	Question or transcript referred by your library; or chat request for your library's patron picked up by another library
	Question or transcript referred to your library; or chat request for another library's patron picked up by your library
	Question or transcript referred by your library to an e-mail partner (an outside source who does not have a QuestionPoint account)
	Reply received from an e-mail partner

Question list tabs

The question lists are located under two tabs in the Ask a Librarian module: **Questions** and **My Questions**.



Tab	Description	To go to the lists
Questions	Your library's questions: <ul style="list-style-type: none"> All questions (including chat transcripts) that are assigned to you or other librarians at your library, or are unassigned. 	Click the Questions tab in the Ask a Librarian module. Or, click a Questions Lists link on the My QuestionPoint page.
My Questions	Your questions: <ul style="list-style-type: none"> All questions (including chat transcripts) that are assigned to you. 	Click the My Questions tab in the Ask a Librarian module. Or, click a My Questions link on the My QuestionPoint page.

Question list menu links

Each tab has menu links. Each link leads to a question list.

Questions tab	Questions My Questions Add Question Settings Reports Service History
	Active New Pending Referred Answered Closed All Shared Followup
My Questions tab	Questions My Questions Add Question Settings Reports Service History
	Active New Pending Referred Answered Closed All

Description of question lists

The following table describes the question lists:

Question list	Statuses included	Description of question list
Active	New  Pending  Answered 	A combined list of all the questions (including chat transcripts) in the New, Pending, and Answered question lists
New	New 	Questions that need action by you or your library, including: <ul style="list-style-type: none"> • Chat transcripts marked for followup • Questions submitted through your library's question form
Pending	Pending 	Questions (including chat transcripts) that need action by someone outside your library: <ul style="list-style-type: none"> • A patron whom your library asked to clarify a question, or • A library or expert to whom your library referred a question for an answer
Referred	New  Pending  Answered 	A combined list of those questions (including chat transcripts) in the New, Pending, and Answered question lists that were referred for an answer by your library or to your library
Answered	Answered 	Questions (including chat transcripts) for which an answer has been sent to the patron.
Closed	Closed 	Questions (including chat transcripts) that a librarian or patron has closed because work on them is complete.
All	New  Pending  Answered  Closed 	A combined list of all the questions (including chat transcripts) in the New, Pending, Answered, and Closed question lists
Shared Followup (Questions tab only)	New 	Chat transcripts or questions, for any library in your Base Management Environment (BME), that are waiting for any librarian in your BME to claim for followup; this list is available only if your BME administrator turns on Shared Followup

Sample question list

The sample Active Questions list below contains two web form questions and three chat transcripts.

- One question (1669955) needs action by the library and one (1669792) has been answered.
- Two transcripts have “Answered” status: 1669725 assisted another library’s patron; 1455476 is a practice session.
- One transcript (1622222) is for a session for which another library served the patron and is following up.

The screenshot shows the 'Active Questions' page in QuestionPoint. At the top, there are navigation tabs: Questions, My Questions, Add Question, Settings, Reports, and Service History. Below these are status filters: Active, New, Pending, Referred, Answered, Closed, and Shared Followup. The main heading is 'Active Questions' with a 'Find ID:' search box. A '[Refresh List]' button and 'Records 1 - 5 of 5' are visible. The table below lists five questions with their respective status icons (1-9) and assignment details.

Question ID	Status Icon	Question Title	Received/Updated	Assigned to / Patron
1669955	1 (New)	Where is Scugog Island, Canada?	Received: 2006/06/19	-- Unassigned -- Patron: Ed
1669792	2 (Answered)	Who invented vichyssoise soup?	Received: 2006/06/19 Updated: 2006/06/19	Assigned to: John Smith Patron: Maureen London
1669725	8 (Chat Transcript)	Chat Transcript: What is the park behind the New York Public Library?	Received: 2006/06/19 Updated: 2006/06/19	Assigned to: John Smith Patron: Ellie Heartland High School Library
1622222	3 (Pending)	Chat Transcript: I need information about simian virus spreading to humans	Received: 2006/05/26 Updated: 2006/06/19	-- Unassigned -- Patron: Ed
1455476	9 (Practice)	[Practice] Chat Transcript: What is California?	Received: 2006/03/23 Updated: 2006/03/23	Assigned to: John Smith Patron: Maureen London

Figure legend:

①	New: Needs action by you or your library	⑥	Question ID or number: Each question or chat transcript in QuestionPoint has a unique Question ID
②	Answered: Answer has been sent to the patron	⑦	Question submitted on a web form or added manually by a librarian (not preceded by “Chat Transcript”)
③	Pending: Needs action by someone outside your library	⑧	“Chat transcript:” appears if the patron used chat “Qwidget:” appears if the patron used the Qwidget
④	Referred in to your library by another library in your group.	⑨	Transcript of a practice chat session; patron used a practice chat form and librarian monitored his or her library’s practice queue
⑤	Referred out by your library to another library in your group or to a subject-matter expert who has a QuestionPoint account	⑩	Drop-down list that lets you limit the questions and transcripts listed to those that are unassigned or are assigned to a particular librarian

Full Question (figure included)

The Full Question (illustrated below) appears when you click a question or chat transcript in a question list. (The figure legend is located on the next page.)

Full Question << 4 of 5 >> | [Return to List](#)
[Print View](#)

Answer
Claim
Add Note
Add Descriptive Codes
Change Patron E-mail
-- Refer To --
-- Move To --

Question Detail

Patron: Ed <ferred1700@yahoo.com>	Status:
Assigned: Unassigned	Received: 09:54 2006/05/26
Wait Time: 35	Session Time: 1226

Referred to: Heartland High School Library	Assigned: Assigned
Recall	Send Message to Librarian

Question: [1622222] Chat Transcript: I need information about simian virus spreading to humans

Descriptive Codes: Reference

IP Address: 132.174.21.205

Referer: http://questionpoint.org/crs/servlet/org.oclc.ask.PatronChatForm

Browser/OS: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322; .NET CLR 2.0.50727)

Cobrowse: Yes

Campus: East

College: Business

Level: Junior

Question History

Patron:	Chat Transcript: I need information about simian virus spreading to humans
09:54 2006/05/26	
Librarian 1:	Note: Patron's screen name: Ed
09:54 2006/05/26	
Librarian 1:	Hello, I am reading your question now.
09:55 2006/05/26	
Patron:	Hi, John.
09:55 2006/05/26	
Librarian 1:	Can you tell me more about what you need to know about them.
09:57 2006/05/26	
Patron:	Yes, I need to find and describe a recent study.
10:13 2006/05/26	
Librarian 1:	OK. Can I do some checking and send you an e-mial message with some ideas?
10:13 2006/05/26	
Patron:	That's fine. Thanks.
10:14 2006/05/26	
Librarian 1:	Librarian ended chat session.
10:14 2006/05/26	
Librarian 1:	Note: Set Resolution: Followup By Patron's Library
10:15 2006/05/26	
Librarian 1:	Referred from: Chat Transcript to Shared Followup
10:15 2006/05/26	
Librarian 1:	Note: Set Description: Reference
10:15 2006/05/26	
Librarian 2:	Claimed by: Heartland High School Library(10180): Jane Kraft(100247433) From Shared Followup
11:03 2006/06/19	

Figure legend:

①	Buttons and drop-down lists for acting on a question or chat transcript: <ul style="list-style-type: none">● Answer: Go to the page for sending an e-mail message to the patron.● Claim/Reject Assignment: Assign the question to yourself (Claim) or unassign it (Reject Assignment).● Add Note: Go to the page for adding a note to the question history for you and other librarians.● Add Descriptive Codes: Go to the page for adding descriptive codes for statistical and planning purposes.● Change Patron E-mail: Go to the page for changing the patron's e-mail address.● Refer To: Go to the page for referring the question to a subject-matter expert, or another partner library● Move To: Close the question or add it to a KB.
②	Question/transcript header: patron's name and e-mail address, status of the question/transcript, librarian assigned, time/date received, and for a chat session the wait time and session time.
③	Referred to/by area: If question or transcript was referred to or by your library, this area identifies the other library involved and lets you recall or reject the referral or send a message to the librarian responsible for the question at the other library.
④	Question: Question ID and question.
⑤	Descriptive Codes: Codes assigned to the question/transcript by the librarian to categorize it for statistical and planning purposes. A librarian may select up to 4 codes for a question/transcript. Available codes include <i>circulation, homework, medical, research</i> , and others. Each library decides whether to use the codes and how to use them. If a library uses descriptive codes, it should use them only for its own patrons. Librarians answering questions for other libraries' patrons should not select descriptive codes because the codes may be used differently by each library.
⑥	Intake form data (system fields): Data collected when patron requested chat session, including patron's IP address, page from which patron requested session, patron's browser, patron's co-browse capability.
⑦	Intake form data (custom fields): Data collected by custom fields on chat/web form; varies by library or group.
⑧	Question history (librarian/patron interaction): Interactions or chat transcript of the librarian and patron.
⑨	Question history (actions taken): Librarian notes and notes about actions taken; not seen by patron.

More information:

- "Ask module" reference recordings and instructional materials are available on the Documentation and Training pages at http://www.oclc.org/support/worldwide/en_us/services/questionpoint.html

Service History (figure included)

The Service History is an archive of the questions and chat sessions that your library has processed through QuestionPoint. The Service History contains all available information about each question and chat session, except patron identifying information (the Name field and the part of the E-mail field before @), which is removed.

Your library can use the Service History to:

- Study its past service to patrons and plan future improvements
- Find additional questions and chat transcripts to add to a KB

To go to your library's Service History:

- Click **View Service History** in the Ask Quick Links on the My QuestionPoint page.
- Or, click the **Service History** tab in the Ask a Librarian module.

When is a question archived in the Service History?

90 days after the last action is taken on a question or chat transcript, QuestionPoint automatically archives it. QuestionPoint removes it from your library's question lists, regardless of its status, and adds it to the Service History.

Service History search results

The Service History Search illustrated below found the questions and chat sessions that the library received on between Jan 1 and June 30, 2010. Click a question or chat transcript in the search results to view a Full Question.

The screenshot shows the 'Service History' tab selected in a navigation menu. Below the menu is a search bar with a 'Search' button and a 'Search results displayed at bottom of page.' message. The search criteria are: 'By Assigned Librarian' (All), 'By Question Status' (All), 'Date Entered on or After' (01/01/2010), 'By Referral Type' (All), and 'Date Entered on or Before' (06/30/2010). The results table shows four records with their respective timestamps and assigned librarians.

Sort by:	ID	Received	Updated	Assigned to:
<input type="checkbox"/>	5191852	Chat Transcript: is pluto a planet?	Received: 12:26:40 2010/01/16 (GMT -0500) Updated: 12:26:40 2010/01/16 (GMT -0500)	
<input type="checkbox"/>	5628117	Chat Transcript: I need help on my research paper	Received: 08:07:22 2010/05/20 (GMT -0400) Updated: 08:43:58 2010/05/20 (GMT -0400)	Assigned to: CAROL BONNEFIL
<input type="checkbox"/>	5728119	where am I?	Received: 14:58:35 2010/06/27 (GMT -0400)	Assigned to:
<input type="checkbox"/>	5728122	Chat Transcript: how hot did it get yesterday?	Received: 15:03:01 2010/06/27 (GMT -0400) Updated: 15:03:26 2010/06/27 (GMT -0400)	Assigned to: Jan Ann Ewell

Knowledge bases (figures included)

What is a knowledge base (KB)?

A knowledge base (KB), as used in QuestionPoint, is a searchable database of selected, edited questions and answers and chat transcripts. A KB makes the answer prepared for one patron available for reuse to respond to other patrons. When you answer a question, you can easily search KBs and include the information that you find.

Records containing questions and answers and chat transcripts are added to one or more KBs. KB records are edited, activated, indexed, and made available for searching and viewing.

QuestionPoint KBs support all languages and alphabets.

QuestionPoint provides two types of KBs:

- The Global KB
- Local KBs

What is the Global KB?

The Global KB is shared by all libraries that participate in QuestionPoint. It is a cooperatively built resource for reference support and discovery work. All QuestionPoint libraries that have an active Global profile can contribute records to the Global KB. All QuestionPoint librarians can search it.

How does the Global KB grow?

- 1 Libraries submit their questions and answers and chat transcripts.
- 2 Editors of the Global KB review each record for relevance. Therefore, libraries do not need to decide if a record is relevant before they submit it.
- 3 Editors follow guidelines to remove personal information and to correct errors in grammar and spelling while preserving the integrity of the information.
- 4 Editors activate records to make them available for searching and viewing by all QuestionPoint librarians. Editors may also mark records for public access so patrons may view them.

What is a local KB?

The local KB is a database of questions and answers controlled by the library or libraries that share a Base Management Environment (BME). The libraries in each BME decide whether to contribute or use their BME's KB. Only the librarians in the BME can search a local KB or contribute records to it.

A local KB can:

- Grow into a valuable, time-saving reference resource
- Help librarians work more efficiently
- Help patrons receive faster and better reference service
- Help libraries analyze their questions and answers to improve their reference service
- Include records added from questions and answers and chat transcripts
- Include specialized local information added through an entry form

What is the Knowledge Base module?

The Knowledge Base module is the QuestionPoint system area where knowledge bases are searched, browsed, viewed, and edited.

To go to the Knowledge Base module:

- Select **Knowledge Base** in the Select Service drop-down list at the top of any QuestionPoint page.
Or, click a link or enter a search in the Knowledge Base Quick Links on the My QuestionPoint page.

What is public access to KBs?

Public access is the searching of a KB by patrons. Patrons can search and view only those active records that have been marked for public access. Some record fields that are displayed for librarians are not displayed for patrons.

Global KB

To search and view the public-access part of the Global KB, patrons can:

- Go to the Patron Logon page and click the **Search KB** link to view the Basic Search page.
- Use the KB search box or link on your library's web pages if you provide this access to your patrons.

Local KB

To search and view the public-access part of your local KB, patrons can:

- Use the KB search box or link on your library's web pages if you provide this access to your patrons.

More information

For information about how to provide access to your patrons, see "Let patrons search knowledge bases" available at http://www.oclc.org/support/worldwide/en_us/services/questionpoint/documentation/SearchKB.html

Sample KB module pages used by librarians

Knowledge Base basic search

The KB basic search illustrated below seeks information about a Smithsonian painting. The search looks in a local KB (Heartland Libraries) and the Global KB (QP Global Knowledge Base).

The screenshot displays the QuestionPoint Knowledge Base interface. At the top, there is a navigation bar with the QuestionPoint logo, the text "QuestionPoint | Knowledge Base", a "Support Help" link, and the OCLC logo. Below the navigation bar is a menu with "Search", "Browse", and "Add/Edit" options. The main content area is titled "Basic Search" and includes a sub-menu with "Basic", "Advanced", and "Question ID" options. The "Basic Search" section contains a search form with the following elements:

- A search input field labeled "*Search for: (keywords)" containing the text "smithsonian painting".
- A "Knowledge Base:" section with two checked checkboxes: "QP Global Reference Network" and "Heartland Mem. Library Sys.".
- "Search" and "Clear" buttons at the bottom right of the form.

Knowledge Base search results

The KB search results illustrated below contains the records found by the search.
Click a question in the list to view the record detail.

Knowledge Base Search Results		New Search
151 records found. View search criteria		
Records 1 - 10 of 151 ◀ 1 2 3 4 5 ... 16 ▶		
	Question	KB
1	36457: Looking for painting of 'Dorothy Lee' done in the mid 1900's by Villar. It was in the Smithsonian.	QP Global Reference Network
2	39820: There is a painting of [Ed: George] Washington in the National Portrait Gallery done by Peale's son. It is not very flattering of GW but is said to have been a very accurate depiction of the aging President. Is there an online picture available of this...	QP Global Reference Network
3	50654: I have been told that a painting is displayed at the Smithsonian, representing art from Tennessee. I don't know it's title, but it is of Lazarus's rise. [The artist's] name is Jerrie Barnes. Could you help me find this piece?	QP Global Reference Network
4	37101: I am trying to locate a painting by an Ash Can School artist. The painting I'm looking for has the title "_____ on the Steps of the Sub Treasury Building." Can you provide me with the full title for this particular painting and the name of the artist?	QP Global Reference Network
5	35345: I am looking for an oil painting of three American Indians on their horses on a small knoll. I saw the painting in Col. a few years ago while on vacation. I am looking to purchase such a painting. The paint is real life where the horses and Indians a...	QP Global Reference Network
6	433: I am seeking a good reference book or article on the impact the Hudson River School painters, particularly Frederic Church, had on the environmental movement in America and on the shaping of our national identity.	QP Global Reference Network

Knowledge Base record

The illustration below shows the Record Detail for one of the KB records found by the search.

Record Detail	
Record 2 of 151 Previous Next Return to Record List Print View	
Record ID: 39820 Submitted to Knowledge Base on: 01/08/2004 Last Update: 01/12/2004 Forwarded/Copied: 0	
Question	
Question:	There is a painting of [Ed: George] Washington in the National Portrait Gallery done by Peale's son. It is not very flattering of GW but is said to have been a very accurate depiction of the aging President. Is there an online picture available of this painting ?
*Education Level:	Undergraduate/VoTech
Keywords:	990929092745,George Washington portrait,George,Washington,portrait,Rembrandt Peale,Rembrandt,Peale
Subject:	Subject Broad Class: N8350-8356: Art as a Profession. Artists
Geographic Code:	n-us: United States
Reason:	None
Language of Question:	English
Sources Checked:	
Answer	
*Answer:	<p>The National Portrait Gallery, Smithsonian Institution has two paintings by Rembrandt Peale (one of Charles Wilson Peale's sons) of George Washington in its collection; one is dated circa 1818-1825 and the other is dated circa 1853. An image of the latter painting is available online (http://www.npg.si.edu/exh/hall2/index.htm [January 2004 Ed: click on "George Washington"]); however, I believe you may be referring to the other painting which is not currently loaded on NPG's Web site.</p> <p>The following collection catalogue contains an image of the painting; you can track it through your local public or university library via interlibrary loan:</p> <p>NATIONAL PORTRAIT GALLERY, SMITHSONIAN INSTITUTION, PERMANENT COLLECTION ILLUSTRATED CHECKLIST (Washington, DC: published by the National Portrait Gallery in association with the Smithsonian Institution Press, 1987)</p>

Assistance

This section describes how to get assistance when you are using the QuestionPoint system.

Online help

Click **Help** at the top of any QuestionPoint page to view online Help. Help appears in a separate window so you can view Help and QuestionPoint pages together. You can:

- Type a text string in the search box and click **Find** to find Help topics that contain the text string.
- Click **Contents** to view the table of contents of online Help.

Contact Support form

Note: If you submit a Contact Support form, you receive a response within 24 hours, Monday–Friday.

To request assistance or send a comment or suggestion:

- 1 Click **Support** at the top of any QuestionPoint system page to go to the Contact Support form.
- 2 Change or add information in the Name, Institution Name, Institution (OCLC) Symbol (if known), E-mail, and Phone fields to help support staff contact you.
- 3 Click the button that best describes the purpose of your message.
- 4 Type your question, request, or comment in the box. Provide as much information as you can to help support staff respond.
- 5 Click the **Submit** button.
QuestionPoint sends the form and displays the My QuestionPoint page.

Telephone and e-mail support

For telephone or e-mail support, contact your regional service provider, your first line of support.

Or contact OCLC support staff:

- Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
- E-mail: support@oclc.org
- Hours of OCLC telephone support: 7:00 am to 9:00 pm, U.S. Eastern time, Monday-Friday

Resources

- **Start Up Your QuestionPoint Account (a guide for new QuestionPoint users):**
http://www.oclc.org/resources/support/questionpoint/002_QuestionPoint_startup_account.pdf
- **Training resources:** http://www.oclc.org/support/worldwide/en_us/services/questionpoint/training.html
- **Documentation:** http://www.oclc.org/support/worldwide/en_us/services/questionpoint/documentation.html
- **Cooperative Policies:**
http://www.oclc.org/support/worldwide/en_us/services/questionpoint/24-7Cooperative.html

Comments, suggestions, feedback

Please send us your comments about this guide at

<https://www.oclc.org/forms/questionpoint/feedback.en.html>



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