

Purpose of this guide

This guide helps you start to use your QuestionPoint account:

- Log on to the QuestionPoint system
- Change your account password
- View and change your account settings
- Log off (exit) the QuestionPoint system

Figures included

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

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What you need to log on to the QuestionPoint system

In order to log on and use the QuestionPoint system, you need:

- A QuestionPoint authorization and password
- A workstation that meets certain requirements

QuestionPoint authorization

To log on, you need a QuestionPoint authorization (also called a user ID) and a password.

Administrator

If you are your library's QuestionPoint administrator, you receive your QuestionPoint 9-digit authorization and initial password from OCLC or your OCLC regional service provider.

Librarian

If you are a library staff member, your library's QuestionPoint administrator creates your QuestionPoint account (called a **librarian account**). The administrator specifies the name and e-mail address for your account.

You receive your QuestionPoint 6-digit authorization and initial password either in an e-mail message or from your administrator.

Contact your administrator if you do not have an authorization and password or you have questions about them.

Librarian workstation requirements

QuestionPoint system

To log on and use any aspect of the QuestionPoint system except Flash chat, you need:

- Access to an Internet connection
- A Windows or Macintosh web browser, such as Chrome 18.0 or higher or Internet Explorer 8.0 or higher

Flash chat

If your library uses Flash chat, the workstation requirements and setup instructions are provided in the *Guide to IE browser setup* available at http://www.oclc.org/resources/support/questionpoint/C_001_chatsetup.pdf

The French version is available at

http://www.oclc.org/resources/support/questionpoint/C_001fr_Configuration_Chat.pdf

Patron workstation requirements

Web form

If your library provides a Web form for submitting questions, patrons need:

- Access to an Internet connection
- A Windows or Macintosh web browser, such as 18.0 or higher or Internet Explorer 8.0 or higher, (no other software is required)

Flash chat

If your library uses Flash chat, the patron workstation requirements are provided in the *Guide to IE browser setup* available at http://www.oclc.org/resources/support/questionpoint/C_001_chatsetup.pdf

The French version is available at

http://www.oclc.org/resources/support/questionpoint/C_001fr_Configuration_Chat.pdf

Access the QuestionPoint web site (figure included)

The QuestionPoint website is the place to:

- Log on to the QuestionPoint system
- Learn about QuestionPoint
- Participate in the QuestionPoint community

The QuestionPoint website is available at <http://www.questionpoint.org/>



On the QuestionPoint website, you can:

- Click **Librarian Logon** to go to the Logon page for the QuestionPoint system.
- Search for information and materials available on the QuestionPoint web site and in online Help.
- Click **Support** to access documentation and implementation materials.
- Click **Community** to get involved in the QuestionPoint community. On the Community page, you can join the QuestionPoint e-mail list (listserv), share information about your QuestionPoint experiences, and participate in QuestionPoint user group meetings.
- Click **Training** to access training materials or register for training sessions.
- Click **Policies** to access policies, guidelines, and best practices.

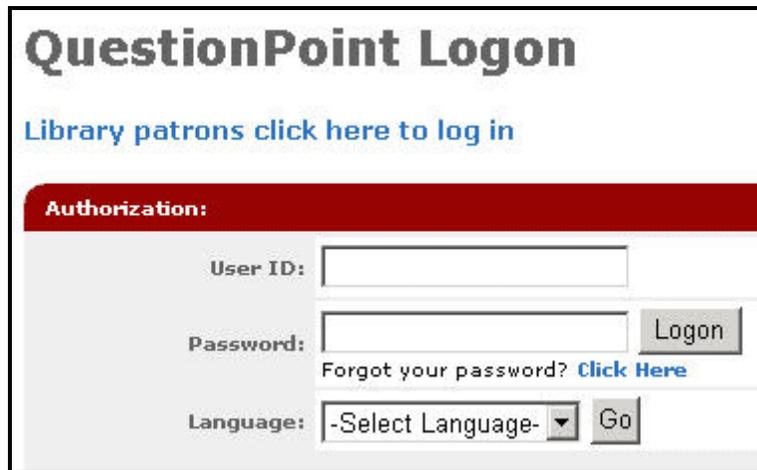
Log on and change your password (figures included)

This section describes how to log on to the QuestionPoint system and change your password.

Go to the QuestionPoint Logon page

If you are not already on the QuestionPoint Logon page:

- 1 Go to the QuestionPoint web site at <http://www.questionpoint.org/>
- 2 Click the **Librarian Logon** link at the top of the page.
The QuestionPoint Logon page appears in a separate window.
Tip: Bookmark this page as a shortcut for steps 1–2.



Log on to QuestionPoint

- 1 If you want to use QuestionPoint in English, go to step 2.
Otherwise, select a language in the drop-down list and click **Go**.
The QuestionPoint Logon page reappears in the language that you selected.
- 2 Type your QuestionPoint User ID (also called Authorization or Login ID) in the box provided.
- 3 Type your QuestionPoint password in the box provided.

Notes:

- Type lowercase letters in lowercase and uppercase letter in uppercase because the **password is case sensitive**. Be sure that you are not using **Caps Lock** on your keyboard.
 - Your initial password is the first 20 characters of your e-mail address. The first time you log on using your initial password you are required to change your password.
- 4 Click the **Logon** button.
If the My QuestionPoint page appears, you are logged on.
If the Change Password page appears, you must change your initial password. After you change it, the My QuestionPoint page appears.

Forgotten password

Assistance is available if you forget your QuestionPoint password but you know your authorization.

Click **Click Here** on the **QuestionPoint Logon** page, type your authorization in the box that appears, and click **Submit**. QuestionPoint sends a message containing the password to the e-mail address associated with your account.

Assistance from your library's QuestionPoint administrator

Contact your library's QuestionPoint administrator if you need additional assistance. The administrator can:

- Verify your authorization and e-mail address at Administration > Institution > Accounts > View/Update Accounts.
- E-mail your current password to you or reset your password at Administration > Institution > Passwords.

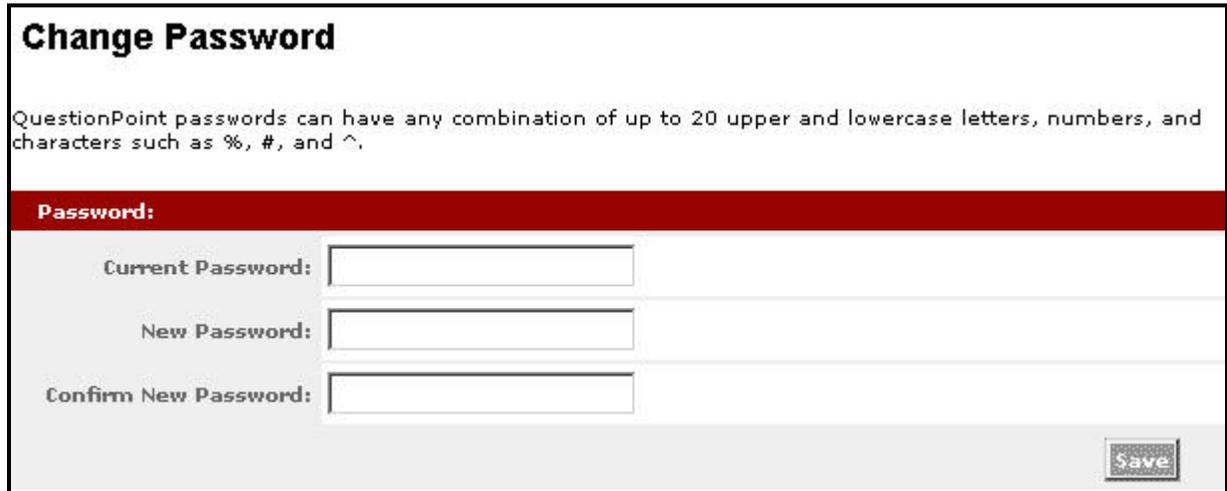
Change your password

Change your password on the Change Password page.

Go to the Change Password page

If you are not already on the Change Password page:

- 1 Click **Home** in the Service bar at the top of the screen.
The **My QuestionPoint** page appears.
- 2 Click the **Password** menu link.
QuestionPoint displays the **Change Password** page.



Change Password

QuestionPoint passwords can have any combination of up to 20 upper and lowercase letters, numbers, and characters such as %, #, and ^.

Password:

Current Password:

New Password:

Confirm New Password:

Save

On the Change Password page

- 1 In the **Current Password** box, type your current password.
Note: Type lowercase letters in lowercase and uppercase letters in uppercase because the password is case sensitive. Be sure that you are not using **Caps Lock** on your keyboard.
- 2 In the **New Password** box, type your new password.
Note: You can include up to 20 letters and numbers in your password. Type letters in lowercase unless you want to use uppercase.
- 3 In the **Confirm New Password** box, type your new password again.
- 4 Click the **Save** button.
QuestionPoint changes your password and displays the **My QuestionPoint** page. It also sends a confirmation message to your e-mail address. Use your new password the next time you log on to QuestionPoint.

Start your session on the My QuestionPoint page (figure included)

After you log on or change your password, the My QuestionPoint page appears. It is:

- The starting point for your QuestionPoint sessions
- The place for the latest QuestionPoint announcements, news and information
- Your access point to the QuestionPoint areas that you use most often

The screenshot shows the My QuestionPoint interface. At the top, a red navigation bar contains links: Home, Password, Settings, Coverage, Reports, Chat Monitoring Tool, and Terms and Conditions. Below this, the page title is 'My QuestionPoint' and the user is greeted with 'Welcome, John Middleton'. The institution is identified as 'Heartland University Library (10178)' and the OCLC Symbol is 'OCL'. A language selection dropdown is set to '-Select Language-'.

On the left side, there are several panels:

- My Questions:** Shows counts for New (0), Active (0), Question Lists (New: 0, Unassigned: 0, Active: 0, Shared Followup: 0).
- Quick Links:** Includes 'Ask' with a 'Find ID:' search box, 'Add a Question', 'Launch Chat', 'Chat Monitoring Tool', 'Chat Patron Practice Form', 'View Service History', 'Knowledge Base' with a 'Search Global KB:' box, 'Advanced Search', 'Profile', 'View', 'Search Policy Pages', and 'Admin'.

In the center, there are two announcement boxes:

- QuestionPoint Announcements (5 September 2006):** Announces recent enhancements and bug fixes, with a link to the 'QuestionPoint blog'.
- Institution Announcements (8 September 2006):** Reports that 'Larry is out sick today' and that 'dictionaries' have been moved.

On the right side, a 'Keep Up to Date' panel lists various resources and support links, including 'Look in the Blog', 'QuestionPoint, Global Reference Network', '24/7 Reference Cooperative' (Public and Academic), 'QuestionPoint Wiki', 'Resources', 'Documentation', 'RUSA Guidelines', 'RUSA Virtual Reference Guidelines', 'VM Version Test', 'List of known framebusting pages', 'Downloads', 'Sun Java Runtime Environment', 'Microsoft VM', 'Training and Support', 'Training Guides and Viewlets', 'Browser Setup for Chat', 'Support Form', 'Cobrowsing Issues', '24/7 Reference Cooperative', '24/7 Coop Policies', '24/7 Coop Best Practices', '24/7 Policy Page Guidelines', '24/7 Public Coop Schedule', '24/7 Academic Coop Schedule', 'Feedback', and 'Feedback Form'.

Figure legend:

①	Menu for accessing other parts of the My QuestionPoint/Home module.	⑤	Announcements from the QuestionPoint team at OCLC.
②	Links to frequently used lists of questions. The number of questions currently in a list appears next to each link. (For a description of question lists, see the <i>QuestionPoint Overview</i> .)	⑥	Announcements from your library's QuestionPoint administrator.
③	Links and search boxes for quick access to other frequently used areas of QuestionPoint. The links and boxes that you see are appropriate to your account privileges.	⑦	Select the language in which to use QuestionPoint and click the arrow.
④	Your account name, your library name and 5-digit institution ID number, and your library's OCLC symbol.	⑧	Links to news, resources, and support and feedback forms.

Notice the elements on every QuestionPoint page (figure included)

The elements on every QuestionPoint page help you move around in the system.

Sample page with elements labeled

The screenshot shows the 'Active Questions' page in the QuestionPoint system. The interface is divided into several sections:

- Service bar:** Displays the user's name 'John Smith (100247431)' and navigation links: [Home | Reset Clock | Exit] and a '--Select Service--' dropdown.
- Module title:** Features the QuestionPoint logo, the text 'Ask a Librarian', a 'Support Help' link, and logos for 'LC global reference network' and 'OCLC', with the tagline 'Working on behalf of libraries'.
- Module menu:** Contains tabs for 'Questions', 'My Questions', 'Add Question', 'Settings', 'Reports', and 'Service History'. Below these are sub-tabs for 'Active', 'New', 'Pending', 'Referred', 'Answered', 'Closed', and 'Shared Followup'.
- Page name:** The main heading is 'Active Questions', followed by a 'Find ID:' search box.
- Work area:** The main content area showing a list of questions. It includes a '[Refresh List]' link, 'Records 1 - 4 of 4', and sorting options: 'Sort by: ID | Received | Updated' and a 'Limit to: All' dropdown. The list contains four entries:
 - 1669955: Where is Scugog Island, Canada? (Received: 2006/06/19, Patron: Ed)
 - 1669792: Who invented vichyssoise soup? (Received: 2006/06/19, Updated: 2006/07/28, Assigned to: John Smith, Patron: Maureen London)
 - 1669725: 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: Chat Transcript: I need information about simian virus spreading to humans (Received: 2006/05/26, Updated: 2006/06/19, Patron: Ed)
- Status bar:** At the bottom, it shows 'Your QuestionPoint session will end in 116:57 minutes' and an 'Internet' icon.

Description of page elements

Element	Description
Service bar	<ul style="list-style-type: none"> Your account name Your authorization Home link takes you to the My QuestionPoint page in the My QuestionPoint/Home module Reset Clock link resets the session timeout timer Exit link logs you off the system Select Service drop-down menu lets you go to any of the following modules available to your account: My QuestionPoint; Administration; Ask (Ask a Librarian); Chat; Knowledge Base; Profile
Module title	<ul style="list-style-type: none"> Module name Support link takes you to a form that lets you request assistance or send a comment Help link opens a separate window that contains online Help
Module menu	<ul style="list-style-type: none"> Menu tabs take you to sections of the module Menu links take you to pages of a module section
Page name	<ul style="list-style-type: none"> The page name identifies the page.
Work area	<ul style="list-style-type: none"> The work area is where you perform tasks and view information.
Status bar	<ul style="list-style-type: none"> The status bar contains the session timeout timer.

Learn about your QuestionPoint account (figure included)

On the View/Change My Settings page, you can:

- View your account type and privileges
- View or change your account settings

Go to the View/Change My Settings page

If you are not already on the View/Change My Settings page:

- 1 Click **Home** in the service bar at the top of the screen.
The **My QuestionPoint** page appears.
- 2 Click the **Settings** menu link.
QuestionPoint displays the **View/Change My Settings** page.

The screenshot shows the 'View/Change My Settings' page. It is divided into two main sections: 'Account Privileges' and 'Current Settings'.

Account Privileges:

Account Type	Librarian
Institution Report	View
Profile	Edit Profile
Ask A Librarian	Ask Librarian
Knowledge Base	Edit KB - Heartland Libraries Today KB Add/Submit - QP Global Reference Network KB

Current Settings:

Name:

E-mail address:

Truncate questions in lists: Yes No

Truncate after: (0-999) Characters

Session time-out period: 30 minutes 1 hour 2 hours 4 hours

Buttons:

View account type, privileges and settings

On the View/Change My Settings page:

- View your account type and account privileges in the **Account Privileges** area.
- View or change your personal settings in the **Current Settings** area.

Change your personal settings

To change your account settings on the View/Change My Settings page:

- 1 Change the settings fields as needed in the **Current Settings** area.
- 2 Click the **Save** button.

You cannot change your account privileges

You cannot change your account type or privileges. Contact your library's QuestionPoint administrator to request changes.

Account privileges description

Field	Definition
Account Type	Your account type is one of the following: <ul style="list-style-type: none"> • Librarian if you are not a QuestionPoint institution administrator or a BME administrator • Institution Administrator if you are an institution (SUP) administrator but not a BME administrator • Consortia Administrator if you are a BME (also called Subscription Group) administrator
Institution Report	Your account's privilege for the Institution Report available in the Home module
Profile	Your account's privilege for the Profile module, which includes Policy Pages
Ask A Librarian	Your account's privilege for the Ask a Librarian module
Knowledge Base	Your account's privileges for the Knowledge Base module You have privileges for the Global Reference Network KB (Global KB). You may have privileges for one or more local KBs. You may have different privileges for each KB.

Current settings description

Field	Definition
Name	Lets you change the name associated with your QuestionPoint account. Notes: <ul style="list-style-type: none"> • This is not your chat screen name.* • If you change the name, the new name does not appear in the service bar at the top of each page until the next time that you log on to QuestionPoint.
E-mail address	Lets you change the e-mail address associated with your QuestionPoint account.
Truncate questions in lists	Lets you control whether or not you want the questions in your Ask a Librarian question lists truncated.
Truncate after	Lets you set the number of characters to which you want the questions in your Ask a Librarian question lists truncated. Suggestion: If you truncate questions, try 200 as the maximum number. Later, you can adjust the number as needed.
Session time-out period	Lets you change the length of your QuestionPoint timeout period. Note: The time-out period is turned off and does not apply when you monitor chat sessions and chat with patrons.
Save button	If you change any of your account settings, you must click this button to save them.
Reset button	If you change any of your account settings but have not yet saved them, you can click this button to reverse your changes.

* If you and your library use chat, you have a screen name that you and the patron see in the transcript while you chat. Your library's QuestionPoint administrator sets your screen name in the Administration module. You cannot see or change the screen name on the View/Change My Settings page.

All available account privileges

For each QuestionPoint module, the following table lists and describes all privileges from lowest to highest abilities. Contact your library's QuestionPoint administrator if you have questions about your account privileges.

Module	Privilege	Description of abilities
Institution Report	None	Cannot view the Institution Report in the My QuestionPoint/Home module Note: This is always the setting for institution and group administrators. They can view this report in the Administration module.
	View	Can view the Institution Report in the My QuestionPoint/Home module
Profile	None	Cannot access the Profile module
	View Profile	Abilities: <ul style="list-style-type: none"> View own institution's profile and Policy Page Search and view the Policy Pages of all QuestionPoint libraries Search and view the profiles of libraries in your BME*
	Edit Profile	All the abilities of View Profile plus: <ul style="list-style-type: none"> Edit and submit own institution's profile and Policy Page
	Approve Profile	All the abilities of Edit Profile plus: <ul style="list-style-type: none"> Approve and change the status of own institution's profile only
Ask A Librarian (Ask)	None	Cannot access the Ask module or launch the chat monitor
	Ask Librarian	Abilities: <ul style="list-style-type: none"> Launch the chat monitor chat and chat with patrons Follow up chat sessions Answer questions Refer questions to other libraries or subject-matter experts Create scripted answers for own use
	Ask Administrator	All the abilities of Ask Librarian plus: <ul style="list-style-type: none"> Assign questions to other librarians See and participate in Chat sessions of their library's patrons along with other librarians who have picked up the chat session (using the Chat module). Create scripted answers for use by all of a library's librarians View reports in Ask
Knowledge Base**	View KB	Abilities: <ul style="list-style-type: none"> Search active records Copy or forward active records to answer questions Browse active and inactive records
	Add/Submit	All the abilities of View KB plus: <ul style="list-style-type: none"> Add inactive records
	Edit KB	All the abilities of Add/Submit plus: <ul style="list-style-type: none"> Edit inactive records Activate inactive records Update active records
	Edit/Delete KB	All the abilities of Edit KB plus: <ul style="list-style-type: none"> Remove records from the KB

* Institution and BME administrators can search and view the profiles of all QuestionPoint libraries.

** You have privileges for the Global Reference Network KB (Global KB). You may have privileges for one or more local KBs. You may have different privileges for each KB.

Adjust your system timeout length

What is the QuestionPoint timeout?

The browser status bar includes a QuestionPoint session timer that counts down the minutes remaining until your QuestionPoint session ends automatically (times out).

When you are monitoring chat, the timer is turned off and you cannot timeout.

When you are not monitoring chat, the timer resets (starts over) when you click most buttons or links on a QuestionPoint page or menu.

If your QuestionPoint session times out, any unsaved work in progress is lost and the QuestionPoint Logon page appears.

Reset the timeout

Reset the timeout when you receive the warning

When only a few minutes remain until your QuestionPoint session times out, QuestionPoint displays a timeout warning message in a separate browser window.

To reset the timeout, click the **Reset Clock** button in that message.

Reset the timeout at any time

To reset the timeout at any time, click **Reset Clock** in the Service bar at the top of any QuestionPoint page.

Change the timeout length

Change the length of your QuestionPoint timeout period on the View/Change My Settings page.

- 1 In the Session time-out period field, click one of the buttons:
 - 30 minutes (the default length)
 - 1 hour
 - 2 hours
 - 4 hours
- 2 Click the **Save** button.
QuestionPoint redisplay the View/Change My Settings page with a message confirming your change.

Log off

To log off QuestionPoint:

- Click the **Exit** link at the top of any QuestionPoint page.

The **QuestionPoint Logon** page appears. You are logged off QuestionPoint.

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.

Tip: Help is contextual to the Module that you are using. If you do not see results for a topic you have entered, try switching to another Module to see if the topic is covered in that particular module

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 the 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

Resources

- **QuestionPoint Overview (a guide for new QuestionPoint users):** http://www.questionpoint.org/support/documentation/gettingstarted/questionpoint_overview.pdf
- **Training resources:** <http://www.questionpoint.org> click Training
- **Documentation:** <http://www.questionpoint.org> click Support
- **24/7 Reference Policies:** <http://www.questionpoint.org> click Policies

Comments, suggestions, feedback about this guide

Please send us your comments about this guide at <http://www.surveymonkey.com/s.asp?u=685031335509>