QuestionPoint™

General Review of Your Transcripts

Quick reference

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About this quick reference guide

This guide describes transcript reviews online for all types of sessions (web form, Add Question, chat, Qwidget, texting). These reviews are available immediately. To see a similar guide for offline reviews, which cover older data, as well, and are available the day after your request, see "**Review Your Transcripts Offline**." For reviews of *form field data* from all types of question forms, see "**Review Your Form Field Data**."

Where are General reviews located?

In the Ask a Librarian (Ask) module:

- Click the **Review Transcripts** tab.

The system defaults to the first link under the tab, ***General.***

Another way to review transcripts is via the Reports module.

1. Click one of the following reports in the Counts of Current Data section to see statistics: ***Descriptive Codes***, ***Reports of Sessions***, ***Reports of Sessions by Authorization***, ***Resolution Codes***.
2. Click on any of the hot linked numbers in the reports to see the transcripts that make up those numbers.

Why would I use General reviews?

A General review lets you:

- As a BME administrator, review questions and transcripts of all the institutions in your group to provide quality control.
- View transcripts for sessions your library responded to for someone else and no longer has access to via the questions lists (Active, New, Answered, Closed).
- Export data about questions, chat transcripts, and patrons to use in spreadsheets or databases to analyze your reference service.
- Quickly scan session and wait times, and IP addresses.
- Get a quick read on how many surveys were completed versus the number of questions or requests received.
- Analyze the transcripts that contribute the statistics to the reports in the Reports module, Counts of Current Data section.

What is the scope?

General reviews include transcripts of all session types: web form/email questions, walk-up questions (Add Question), Chat, Qwidget, and texting.

A BME administrator can see all sessions for all libraries in the group.

Transcripts are available in General review for 90 days after the last significant activity.

All times shown when you review transcripts reflect the time zone of the account you are using.

Who may access General reviews?

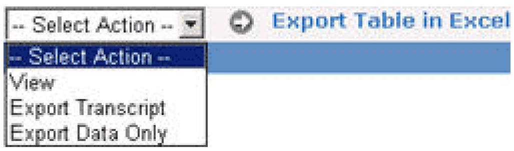
General reviews are available to the following accounts, which are described in the **Administrator setup guide**:

- Subscription Group (BME) administrator can review for his or her institution or group.
- Institution (SUP) administrator can review for his or her institution
- Ask administrator can review for his or her institution

What are the General review options?

You can	Description
Search transcripts	Set parameters to limit your search: • Institution (group administrator only). If the administrator selects All, some of the following options become unavailable. See asterisks. • *Assigned librarian • Session Type: web form questions ("email"), chat, etc. If reviewing a single institution, these are further subdivided into Our Patrons and who answered them, and Others' Patrons we helped • Survey Status: "Yes" means a completed patron survey is attached to the transcript and viewable from this

You can	Description
	page. • Session Resolution. For chat or Qwidget transcripts only • *Current status (select All to include transcripts currently in session) • Date range for when transactions entered the system. Dates are inclusive *Available only when searching for data about an individual library
View	• ***Summary in table format.*** View 25 or 100 results per page. o ID. Unique ID of the transaction o Received. Time and date the transaction was received by the system. o Wait Time in seconds. How long the user waited for a librarian to pick up his/her chat request. Wait Time is 0 for web form, walk up, and texting transactions o Session Time in seconds. How long the session lasted (librarian pick up to chat session ended). Session Time is 0 for web form, walk up, and texting transactions o Resolution. Code assigned to a transaction at the end of the chat session. Resolution column is blank for web form, walk up, and texting transactions. o Patron's Institution. "Home" or "owning" library. Library where the patron asked his/her question. o Patron. Patron's email address. o Librarian. Library currently or last assigned to the transaction. o Chat Librarian. Librarian who picked up a chat request. o IP Address. Patron's IP address for this transaction. There is no IP address if the patron chose anonymity in a chat session or if the administrator chose to mask the IP address for all Qwidget sessions. Also, some browsers do not disclose that information • ***Single full record.*** Click on hot linked ID. Record is displayed in full.
	• ***Multiple full records.*** 1. Set Results per Page to 25. 2. Check boxes beside the IDs you want to view. 3. Select View option from drop down at the end of the table on each page. All checked records display one after another.
Sort table	Click on sort link at the top of the table. The entire table is sorted, even though the table may span many pages. Click once to sort by a particular element, descending, and a second time to sort ascending. • Question/transcript ID • Patron (patron's email address). • Received. This will usually sort like the ID element • Wait Time • Session • Resolution
Export	You can export and immediately receive the results on your screen or in your email inbox. • ***Export Table in Excel***. Available while viewing 25 or 100 results per page. 1. Check boxes of those to include (check box at bottom to include all). 2. Then click *Export Table in Excel* link. 3. Save the resulting Excel file to your PC. 4. Repeat to build a spreadsheet for each subsequent page, copying and pasting the entire spreadsheet to append it to the first. • ***Export Transcript***. This exports transcript in their entirety. Available only when viewing 25 results per table page. 1. Check boxes of those to include. 2. Select Export Transcript from drop-down menu and click arrow key. An XML file is sent to the email address associated with your account.

You can	Description
	• ***Export Data Only***. This exports only the metadata of the selected transcripts. Available only when viewing 25 results per page. 1. Check boxes of those to include. 2. Select Export Data Only from drop-down menu and click arrow key. An XML file is sent to your email address. 
Send to Quality Control	If your library is a member of the 24/7 Reference Cooperative, you can send any single transcript to the Cooperative's quality control group. A note box provides space for an explanation. 1. Click on the transcript you want to report. 2. Click on the **Send to Quality** button. 3. Complete the message with the reason for your report. 4. Click the **Submit** button.

Sample uses of online review

Review sessions others answered for the patrons of your library or libraries

To review one institution at a time:

1 Go to the **Reports** module.

2 Click on the ***Institution*** or ***Group*** (BME admin) link.

3 Click on the ***Reports of Sessions*** link.

4 Set the date range you want to review.

5 For the institution you want to review, click on the hot linked number (if any) under the "Outside BME" column in the "Sessions with Our Patrons" section.

Or

1 Go to the **Ask a Librarian** module.

2 Click on the **Review Transcripts** tab.

3 Select ***Our Patrons: Sessions handled outside our BME*** for the Session Type.

4 Set the date range you want to review.

5 Review one transcript at a time by clicking on the transcript ID (do this to send transcript to Quality control) or 25 at a time by selecting the *View* option from the table drop-down menu.

To review all institutions at one time (BME admin):

1 For Institution, select *All*.

2 For Session Type, select *Chat Sessions*.

3 For Session Resolution, select *Followup By Patron's Library* or *Answered*.

4 Enter the inclusive dates you want to review

5 Click the **Search** button.

6 Look at the Patron's Institution column and determine which institutions (libraries) are part of your group and which are not.

7 Check the boxes to the left of the IDs for your group's institutions

8 Select *View* from the drop-down menu at the bottom left of the table, then click the arrow button.

9 Review the transcripts and note the ID of those on which you want to follow up with Quality.

10 Click the ***Return to List*** link.

11 Open the noted transcripts one by one, by clicking on the ID number.

12 Click the **Send to Quality Control** button, enter the reason for your referral, and click the **Send** button.

Determine how long your chat patrons wait, on average, to get picked up.

1 Change institution (if BME administrator) as needed.

2 Select Session Type select *Our patrons: all chat sessions*.

3 Enter the inclusive dates you want to cover.

4 Click **Search** button.

5 At bottom of table click on the ***Export Table in Excel*** link.

6 When the dialog box pops up, click the **Open** button and place your cursor in the first open cell at the end of the data in the spreadsheet.

7 On the QP General page, go to the next page of the table, and click the ***Export Table in Excel*** link again.

8 Highlight and copy the data.

9 Paste the data into the first spreadsheet at your cursor.

10 Repeat until all pages are appended to the first file.

11 In the Excel file, highlight the entire Wait Time column.

12 Use Excel's function icon (sometimes a ∑ symbol) and select the *Average* function.

Excel will calculate and display the Wait Time average in the cell at the bottom of the column.

Export your transcripts or fielded data (form fields, dates, library names, status, descriptive codes, etc.) for use in another application.

1. Go to the **Ask a Librarian** module.
2. Click on the **Review Transcripts** tab.
3. Set all parameters as needed.
4. Select **Export Transcript** or **Export Data Only**.
5. Click the arrow key.
   QuestionPoint sends a message containing the data to your email address on record (Home/My QuestionPoint > Settings > Email address)
6. Save the message to your computer as a text file.
7. Open file in a text editor like Notepad, remove the email header, and save the file.
8. Change the file extension to .xml.
9. Import the file into your spreadsheet or database program.

Resources

- **Review Your Transcripts Offline:** http://www.oclc.org/content/dam/support/questionpoint/R_005_qp_reviewoffline_ref.pdf
- **Review Form Field Data** http://www.oclc.org/content/dam/support/questionpoint/R_003_qp_review_formfields_ref.pdf
- **Reports:** http://www.oclc.org/content/dam/support/questionpoint/R_001_qp_reports_ref.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

Troubleshooting and support

- Document problems that you encounter so you can describe them when you request support.
- **OCLC support staff**: Email: support@oclc.org
  Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
  (7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Comments, suggestions, feedback

Please send us your comments about this quick reference at http://www.oclc.org/content/forms/worldwide/en/questionpoint/feedback.html