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 ^.

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

**Figure legend:**

1. Menu for accessing other parts of the My QuestionPoint/Home module.
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 QuestionPoint Overview.)
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.
4. Your account name, your library name and 5-digit institution ID number, and your library’s OCLC symbol.
5. Announcements from the QuestionPoint team at OCLC.
6. Announcements from your library’s QuestionPoint administrator.
7. Select the language in which to use QuestionPoint and click the arrow.
8. Links to news, resources, and support and feedback forms.

Start up your QuestionPoint account
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

![Sample page with elements labeled](image)

Description of page elements

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| Service bar  | • 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 | • 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  | • Menu tabs take you to sections of the module  
                • Menu links take you to pages of a module section |
| Page name    | • The page name identifies the page. |
| Work area    | • The work area is where you perform tasks and view information. |
| Status bar   | • 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.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Your account type is one of the following:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Librarian</strong> if you are not a QuestionPoint institution administrator or a BME administrator</td>
</tr>
<tr>
<td></td>
<td>• <strong>Institution Administrator</strong> if you are an institution (SUP) administrator but not a BME administrator</td>
</tr>
<tr>
<td></td>
<td>• <strong>Consortia Administrator</strong> if you are a BME (also called Subscription Group) administrator</td>
</tr>
<tr>
<td>Institution Report</td>
<td>Your account’s privilege for the Institution Report available in the Home module</td>
</tr>
<tr>
<td>Profile</td>
<td>Your account’s privilege for the Profile module, which includes Policy Pages</td>
</tr>
<tr>
<td>Ask A Librarian</td>
<td>Your account’s privilege for the Ask A Librarian module</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>Your account’s privileges for the Knowledge Base module</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

### Current settings description

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Lets you change the name associated with your QuestionPoint account.</td>
</tr>
<tr>
<td></td>
<td><strong>Notes:</strong></td>
</tr>
<tr>
<td></td>
<td>• This is not your chat screen name.*</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td>E-mail address</td>
<td>Lets you change the e-mail address associated with your QuestionPoint account.</td>
</tr>
<tr>
<td>Truncate questions in lists</td>
<td>Lets you control whether or not you want the questions in your <em>Ask a Librarian</em> question lists truncated.</td>
</tr>
<tr>
<td>Truncate after</td>
<td>Lets you set the number of characters to which you want the questions in your <em>Ask a Librarian</em> question lists truncated.</td>
</tr>
<tr>
<td></td>
<td><strong>Suggestion:</strong> If you truncate questions, try 200 as the maximum number. Later, you can adjust the number as needed.</td>
</tr>
<tr>
<td>Session time-out period</td>
<td>Lets you change the length of your QuestionPoint timeout period.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The time-out period is turned off and does not apply when you monitor chat sessions and chat with patrons.</td>
</tr>
<tr>
<td>Save button</td>
<td>If you change any of your account settings, you must click this button to save them.</td>
</tr>
<tr>
<td>Reset button</td>
<td>If you change any of your account settings but have not yet saved them, you can click this button to reverse your changes.</td>
</tr>
</tbody>
</table>

*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.

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

* 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 redisplays 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