

## Audience for this guide

This Administrator Setup Guide helps groups and libraries prepare to use the QuestionPoint service.

It was written for you if:

- You manage the service for a group or library that recently joined QuestionPoint, or
- You are a 24/7 Reference Supervisor, Super-Supervisor, or Local Supervisor preparing to complete the migration to the QuestionPoint platform.

## Purpose of this guide

This guide helps you decide which setup tasks to do, confirm those you have already done, and complete those that remain. It describes the setup tasks needed to:

- Provide chat service to patrons and follow up on chat sessions
- Refer questions (or chat transcripts that require further followup) to other libraries or subject-matter experts
- Provide e-mail reference service for questions submitted through a web form

## Collaboration is important

If your group contains two or more libraries, the person who manages QuestionPoint for the group and those who manage QuestionPoint for each library should work together to plan and coordinate the setup tasks.

## Support is available

Setup tasks can be confusing and we can help. Please contact OCLC support staff if you need assistance.

- E-mail: [support@oclc.org](mailto:support@oclc.org)
- Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

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## Setup checklist for chat, followup, and referral

This checklist is a reference point for the setup tasks for chat, followup, and referral that are described in this guide. The checklist helps you track your progress as you use this guide to decide which setup tasks to do, confirm those you have already done, and complete those that remain. If your group contains two or more libraries, the person who manages QuestionPoint for the group and those who manage it for each library should work together to plan and coordinate the setup tasks.

### Administrator collaboration in a group containing two or more libraries

Institution administrator

✓	Task	Note	Page
	Permit your Subscription Group administrator to help with setup	A	5

### Chat and followup: setup

Subscription Group administrator

✓	Task	Note	Page
	Turn on shared followup	A	7
	Create chat forms for your Queues		7
	Create scripts for use by all libraries in your group		7

Institution administrator

✓	Task	Note	Page
	Create any needed librarian accounts	B	8
	Confirm that librarians are trained and ready	B	8
	Confirm that librarians' workstations are set up	B	8
	Verify that your library's network does not conflict with chat	B	8
	Verify or edit your policy page and make it viewable	B	8
	Submit your policy page if you are a member of the Cooperative	B	8
	Create scripts for use by your library	B	9
	Remind librarians to create scripts for their personal use	B	9
	Verify or configure your library's chat form	B	9
	Set your library's Viewport URL	B	9
	Verify important profile information	B	9
	Turn on e-mail notices of new questions or followup	B	10
	Customize system-generated e-mail messages sent to patrons	B	10
	Turn on capture of patron replies to system e-mail messages	B	10
	Turn on patron survey form	B	11
	Display links in WorldCat.org to your library's reference service	B	11
	Exclude transcripts of chat sessions with other libraries' patrons	B	11

A. Applies only to Subscription Groups with two or more libraries.

B. Subscription Group administrator also does this for his or her own library.

### Partner (Subscription) referral: setup

Subscription Group administrator

✓	Task	Note	Page
	Activate the profiles submitted to you by libraries in your group	A	13
	Select the libraries to which the group may refer questions	A	13

Institution administrator

✓	Task	Note	Page
	Submit your library's profile to your group	A,B	14

### Partner (Cooperative) referral: setup

Make a Subscription Group public: Subscription Group administrator, OR

Create a Virtual Group: Subscription Group administrator or Institution administrator

✓	Task	Note	Page
	Submit your library's profile to the Global Reference Network		16
	Form a Cooperative Group		16
	Notify prospective members that they can join the group		16
	Activate group members		16

Join a group: Institution administrator

✓	Task	Note	Page
	Submit your library's profile to the Global Reference Network	B	17
	Join a Cooperative Group	B	17

### Global Network referral: setup

Institution administrator

✓	Task	Note	Page
	Submit your library's profile to the Global Reference Network	B	18

## Setup checklist for e-mail (web form) reference and referral

This checklist is a reference point for the setup tasks for e-mail (web form) reference and referral that are described in this guide. The checklist helps you track your progress as you use this guide to decide which setup tasks to do, confirm those you have already done, and complete those that remain. Most of these tasks also apply to setup for chat and followup. If you have done that setup, you have already done most of these. If your group contains two or more libraries, the person who manages QuestionPoint for the group and those who manage it for each library should work together to plan and coordinate their setup tasks.

### Administrator collaboration in a group containing two or more libraries

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✓	Task	Note	Page
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### Chat and followup: setup

Subscription Group administrator

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Institution administrator

✓	Task	Note	Page
	Create any needed librarian accounts	B	8
	Confirm that librarians are trained and ready	B	8
	Create scripts for use by your library	B	9
	Remind librarians to create scripts for their personal use	B	9
	Create your library's web question form [Link: <a href="#">Online help</a> ]	B	—
	Verify important profile information	B	9
	Turn on e-mail notices of new questions or followup	B	10
	Customize system-generated e-mail messages sent to patrons	B	10
	Turn on capture of patron replies to system e-mail messages	B	10
	Turn on patron survey form	B	11
	Display links in WorldCat.org to your library's reference service	B	11

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## Administrator accounts

The people who manage the QuestionPoint service in their Subscription Groups (BMEs) and libraries (SUPs) are called *administrators*. The three types of QuestionPoint administrator accounts are described below: Subscription Group administrator, Institution administrator, and Ask administrator.

QuestionPoint administrators	Am I one?	Notes	Privileges/responsibilities
<p><b>Subscription Group administrator</b></p> <p><b>Also called:</b></p> <ul style="list-style-type: none"> <li>BME (base management environment) administrator</li> <li>Consortium administrator</li> </ul> <p>A <b>24/7 Supervisor</b> is similar to the Subscription Group administrator of a group that has one library.</p> <p>A <b>24/7 Super-Supervisor</b> is similar to the Subscription Group administrator of a group that has two or more libraries.</p>	<p>You are the Subscription Group administrator for your group if your</p> <p><b>Account Type is Consortium Administrator</b></p> <p>at My QuestionPoint &gt; Home &gt; Settings &gt; Account Privileges.</p>	<p>Your group may contain your library only or your library and one or more others.</p> <p>You can see a list of the libraries in your group at Administration &gt; Subscription Group &gt; Accounts &gt; List All Institutions.</p> <p>You are also the Institution administrator for your library.</p> <p>You have an Institution tab and a Subscription Group tab in the Administration module.</p> <p>You have a 9-digit QuestionPoint authorization number.</p>	<p>You serve as the <b>Subscription Group administrator</b> for your group:</p> <ul style="list-style-type: none"> <li>If the group contains your library only, you can create shared scripts and activate your local knowledge base.</li> <li>If the group contains your library and one or more others, you can coordinate group activities, turn on shared followup, create shared scripts, view group reports, and activate your local knowledge base.</li> </ul> <p>You serve as the <b>Institution administrator</b> for your library (see below).</p> <p>You can function as:</p> <ul style="list-style-type: none"> <li>an <b>Ask administrator</b> (see below).</li> <li>a <b>Librarian</b> (chat, follow up, answer questions, close questions, refer questions for followup, create personal scripts).</li> </ul>
<p><b>Institution administrator</b></p> <p><b>Also called:</b></p> <ul style="list-style-type: none"> <li>SUP (service unit profile) administrator</li> <li>Library administrator</li> </ul> <p>A <b>24/7 Local Supervisor</b> is similar to the Institution administrator of a library in a group of two or more libraries.</p>	<p>You are the Institution administrator for your library but <b>not</b> the Subscription Group administrator for your group if your</p> <p><b>Account Type is Institution Administrator</b></p> <p>at My QuestionPoint &gt; Home &gt; Settings &gt; Account Privileges.</p>	<p>Your library is in a group that contains your library and one or more others.</p> <p>You have an Institution tab, but not a Subscription Group tab, in the Administration module.</p> <p>You have a 9-digit QuestionPoint authorization number.</p>	<p>You serve as the <b>Institution administrator</b> for your library (create librarian accounts, manage patron surveys, provide policy page and profile information, set up communications with patrons, delete unneeded questions, and view library reports).</p> <p>You can function as:</p> <ul style="list-style-type: none"> <li>an <b>Ask administrator</b> (see below).</li> <li>a <b>Librarian</b> (chat, follow up, answer questions, close questions, refer questions for followup, create personal scripts).</li> </ul>
<p><b>Ask administrator</b></p>	<p>You are an Ask administrator for your library if your</p> <p><b>Account Type is Librarian and Ask a Librarian is Ask Administrator</b></p> <p>at My QuestionPoint &gt; Home &gt; Settings &gt; Account Privileges.</p>	<p>Your library's Institution administrator gave you Ask administrator privileges.</p> <p>You cannot access the Administration module.</p> <p>You have a 6-digit QuestionPoint authorization number.</p>	<p>You serve as an <b>Ask administrator</b> for your library:</p> <ul style="list-style-type: none"> <li>Create institution scripts for your library</li> <li>View reports in the Ask module</li> <li>Assign questions and followup to individual librarians in your library</li> </ul> <p>You can function as a <b>Librarian</b> (chat, follow up, answer questions, close questions, refer questions for followup, create personal scripts).</p>

## Administrator collaboration in a group containing two or more libraries

If your Subscription Group contains two or more libraries, the Subscription Group administrator and the Institution administrators work together to plan and coordinate group activities. Skip this section if your Subscription Group contains your library only.

Some setup tasks are done by the Subscription Group administrator and some by the Institution administrators. The Subscription Group administrator also does the Institution administrator tasks for his or her own library.

Some groups may decide that the Subscription Group administrator will assist the Institution administrators with some of their setup tasks.

Institution administrators can give permission in QuestionPoint for their Subscription Group administrator to help them with the following tasks:

- Create any needed librarian accounts (page 8)
- Verify or edit your policy page and make it viewable (page 8)
- Turn on patron survey form (page 11)
- Create scripts for use by your library (page 9)

### Institution administrator

If you are an Institution administrator in a Subscription Group that contains two or more libraries, review the current settings for this task and make changes as needed.

Space for your notes	Task	Feature	Location in system	What to do	Tips/resource links
	Permit your Subscription Group administrator to help with setup	BME/Subscription Group Permissions	Administration > Institution > Permissions > BME/Subscription Group	<p>Select <b>Yes</b> (give permission) or <b>No</b> (do not give permission) for each task and click <b>Save</b>.</p> <p>Tasks:</p> <ul style="list-style-type: none"> <li>• Create and update authorizations (accounts) at my institution</li> <li>• Update my Policy Page content</li> <li>• View and update my survey content</li> <li>• Create and update scripts at my institution</li> </ul>	You and the Subscription Group administrator can both do tasks for which you give permission. Only you can do tasks for which you do not give permission.

### Subscription Group administrator

If an Institution administrator gives permission, the Subscription Group administrator can go to Administration > Subscription Group > Permitted Access in his or her own account to perform the permitted tasks for the Institution administrator's library.

## Chat and followup: overview

This overview of chat and followup provides context for setup activities and decisions.

### Chat workflow





- 1 Librarian logs on to QuestionPoint, launches the chat monitor, selects queues.
- 2 Librarian accepts a chat request and chats/co-browses with a patron.
- 3 Librarian selects a **resolution code** at the end of the chat session.
- 4 QuestionPoint sends the transcript to the patron's e-mail address.
- 5 QuestionPoint creates a *question* (reference transaction) for the session and places it in the QuestionPoint system, including the chat transcript and other information about the session.
- 6 Based on the resolution code selected, QuestionPoint assigns a status to the question and adds it to a question list in the Ask module.
- 7 Librarian logs out of the chat monitor upon completion of his or her chat shift.

### Resolution codes and their effect in QuestionPoint

- **Followup by patron's library:** The status of the question is New for the patron's library. The question is unassigned. If Shared Followup is turned on for the patron library's group, the question is also included in the Shared Followup list. The question is not included in the question lists of the chatting librarian's library.
- **Followup by me:** The question is assigned to the chatting librarian, whether or not he or she is from the patron's library. The status of the question is New for the librarian's library. The status is Pending for the patron's library if it is not the librarian's library. The question is **not** included in the Shared Followup list even if Shared Followup is turned on.
- **Answered:** The status of the question is Answered for the patron's library. The status is Answered for the chatting librarian's library also if it is not the patron's library. The question is assigned to the chatting librarian.
- **Practice:** Same as Answered
- **Lost call:** The status of the question is Closed for the patron's library. The status is Closed for the chatting librarian's library also if it is not the patron's library. The question is assigned to the chatting librarian.

The [24/7 Reference Cooperative's best practices document](#) contains guidelines for use of the Resolution codes by members of the cooperative. Libraries and groups should provide guidelines for use of the codes by their librarians when they are not participating in the cooperative.

### Question status

- **New** : Needs followup by your library
- **Pending** : Needs followup by another library, subject-matter expert, or patron
- **Answered** : Answer was sent to the patron during or after the chat session
- **Closed** : Work on the question is considered to be complete (librarians can close questions in QuestionPoint)

### Question lists

Under the **Questions** tab:

- **Active Questions:** Your library's questions that have New, Pending, or Answered status.
- **New Questions:** Your library's questions that have New status.
- **Pending Questions:** Your library's questions that have Pending status.
- **Referred Questions:** Your library's questions that involve another library or a subject-matter expert and have New, Pending, or Answered status. This list is used primarily by libraries that provide e-mail reference. They use it to monitor questions that they have referred to another library or a subject-matter expert.
- **Answered Questions:** Your library's questions that have Answered status.
- **Closed Questions:** Your library's questions that have Closed status.
- **All Questions:** Your library's questions that have New, Pending, Answered, or Closed status.
- **Shared Followup Questions:** Questions, for any library in your group, that have New status and are waiting for any librarian in your group to claim for followup; list appears only if Subscription Group administrator turns on Shared Followup.

Under the **My Questions** tab:

- For each of your library's librarian accounts, the question lists under this tab contain the subset of your library's questions that are assigned to that librarian. (For example, in your account, the lists contain the questions assigned to you.)
- The following lists are provided: **My Active Questions, My New Questions, My Pending Questions, My Referred Questions, My Answered Questions, My Closed Questions, All My Questions.**

### Service History

Inactive questions remain in question lists for 90 days. Then QuestionPoint moves them to the Service History (Ask > Service History).

### Followup workflow

- 1 Librarian logs on to QuestionPoint; goes to a list of questions needing followup:
  - **Shared Followup Questions** (Question Lists > Shared Followup),
  - **New Questions** (Question Lists > New), or
  - **My New Questions** (My Questions > New)
- 2 Librarian selects a question and sends an answer to the patron.  
**Referral:** Rather than send an answer, the librarian could refer a question to another library or a subject-matter expert. See "Referral of questions and transcripts: overview" on page 12.
- 3 QuestionPoint sends the answer to the patron's e-mail address, changes the status of the record to Answered, and moves it to the Answered Questions list.

For more information, see [Chat followup and referral: Librarian Guide](#).

## Chat and followup: setup

Do the setup tasks below to provide chat and followup to patrons. Some tasks are done by the Subscription Group administrator and some by the Institution administrators. The Subscription Group administrator also does the Institution administrator tasks for his or her own library.

### Subscription Group administrator

**Chat service and followup:** If you are the Subscription Group administrator, review the current settings for each of these tasks and make changes as needed.

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Turn on shared followup  (This task applies to groups that contain <b>two or more libraries</b> and use chat with co-browse.)	Shared followup	Administration > Subscription Group > Settings > Shared Followup	Check or uncheck the box and click <b>Save</b> to turn shared followup on or off.	If turned on (checked), sessions marked for <b>Followup by patron's library</b> are listed for any group librarian to claim at Ask > Questions > Shared Followup. And the Shared Followup referral option becomes available (see page 12).  If turned off (unchecked), you have no Shared Followup question list. Each library does its own followup.
	Create chat forms for your Queues	Chat Forms Manager	Administration > Subscription Group > Chat Forms Manager > Chat Form	Choose and configure fields for inclusion on the chat form for each queue.	Link: <a href="#">Online help</a>
	Create scripts for use by all libraries in your group  (This task applies to groups that contain <b>one or more libraries</b> and use chat with co-browse.)	Shared scripts; Shared URL Scripts  (See Tips/resource links column)	Administration > Subscription Group > Settings > Shared Scripts; Shared URL Scripts	For each script, supply a name and text or a URL and click <b>Add</b> .	Link: <a href="#">Online help</a>

## Institution administrator

**Chat service and followup:** If you are an Institution administrator, review the current settings for each of these tasks for your library and make changes as needed. If you are the Subscription Group administrator, review the current settings for each of these tasks for your own library and make changes as needed.

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Create any needed librarian accounts	Librarian accounts	Administration > Institution > Accounts	Create any new librarian accounts that are needed.	You can create as many librarian accounts as you need to provide your library's reference service, at no additional cost.  We recommend that every librarian who uses chat have his or her own QuestionPoint account. Two people cannot use the same account at the same time to chat.  Link: <a href="#">Online help</a>
	Confirm that librarians are trained and ready			Provide opportunities for training and practice with QuestionPoint.	Links: <ul style="list-style-type: none"> <li>• <a href="#">Training</a></li> <li>• <a href="#">Chat quick reference</a></li> <li>• <a href="#">Followup guide</a></li> </ul>
	Confirm that librarians' workstations are set up			Ensure that the browser setup procedures have been followed.	Link: <a href="#">Training</a>
	Verify that your library's network does not conflict with chat			Ensure that your library's network accesses the Internet without passing through a proxy server.  Or, if it does pass through a proxy server, request that traffic to and from port 80 not be cached for questionpoint.org	These requirements are necessary because QuestionPoint chat refreshes every few seconds.  Ask your network administrator to contact OCLC support staff with questions (E-mail: <a href="mailto:support@oclc.org">support@oclc.org</a> ).
	Verify or edit your policy page and make it viewable  (Required, if you are a member of the 24/7 Reference Cooperative)	Policy page	Profile > Institution Services > Policies	If status is Hidden, click <b>Change</b> to change status to Viewable.  Click <b>Edit</b> to edit a field.  Click <b>Save</b> to save changes to a field.  Click the <b>View Policy Page</b> to view the results of saved changes.	Link: <a href="#">Online help</a>
	Submit your policy page if you are a member of the Cooperative	Policy page	Profile > Institution Services > Policies	Click <b>Submit</b> when your policy page is ready in order to begin your chat service and your participation in the Cooperative.	After you submit the policy page, the QuestionPoint team sets up your primary chat queue and notifies you. Then you can place links to your chat form on your library's web site.



Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Create scripts for use by your library	Institution's Scripts; Institution's URL Scripts  (See Tips/resource links column)	Ask > Settings > Institution's Scripts; Institution's URL Scripts	For each script, supply a name and text or a URL and click <b>Add</b> .	Link: <a href="#">Online help</a>
	Remind librarians to create scripts for their personal use	My Scripts; My URL Scripts  (See Tips/resource links column)	Ask > Settings > My Scripts; My URL Scripts	For each script, supply a name and text or a URL and click <b>Add</b> .	Link: <a href="#">Online help</a>
	Verify or configure your library's chat form		Administration > Institution > Forms > Forms Manager > Chat Settings and URLs	View the published chat forms, which are hosted by QuestionPoint, and get the URLs needed to create links to the forms.  Customize the look and feel of the chat form banner, and add your customized banner to the published chat forms (optional).  View and customize the chat-closed page that your patrons see if chat is not available (optional).	Contact your Group/BME administrator to discuss any questions.  Link: <a href="#">Online help</a>
	Set your library's Viewport URL	Viewport URL	Administration > Institution > Forms > Viewport URL	Type the Viewport URL in its box and click <b>Save</b> .  When a librarian accepts a chat request, the page for the URL appears in the left side of the patron's chat window.	Do not use a framebusting URL.
	Verify important profile information	Institution Information Institution Contact Information Group Branding	Profile > Institution Services > Inst Info; Contact  Administration > Subscription Group > Settings > Branding (Subscription Group administrator only)	Provide your library's information for the following fields: <b>Inst Info:</b> Inst (Institution) Name; State/Province; Country; Time Zone; Daylight savings <b>Contact:</b> Alert E-mail; Library Type(s) <b>Group Branding:</b> Short Name  Click <b>Save</b> on each page.	You can change pre-existing information as needed. For example, change uppercase letters only to upper and lower case letters.  Do <b>not</b> click the <b>Submit</b> or <b>Requirements</b> button for the <b>QP Global Reference Network</b> . More profile information is required before you do that and you do not need to do it for this task.  Link: <a href="#">Online help</a>

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Turn on e-mail notices of new questions or followup	E-mail notification	Administration > Institution > Settings > E-mail Notification	<p>Click <b>Yes</b> if you want to receive an e-mail notice when a new question or chat transcript needing followup arrives in your library's account. Click <b>No</b> if you do not.</p> <p>If you click <b>Yes</b>, type an e-mail address or addresses in the box.</p> <p>Click <b>Save</b>.</p>	<p>You can use a mailing list address.</p> <p>Separate multiple addresses with semicolons.</p> <p>Click <b>Test</b> to send a test message to the address or addresses that you specified.</p> <p>Link: <a href="#">Online help</a></p>
	Customize system-generated e-mail messages sent to patrons	Custom Messages	<p>Administration &gt; Institution &gt; Settings &gt; Custom Messages</p> <p><b>Custom Messages:</b></p> <p>Custom Reply Text appears at the bottom of all messages to patrons.</p> <p>Messages related to chat and/or followup:</p> <ul style="list-style-type: none"> <li>-Answer</li> <li>-Clarification Request</li> <li>-New Account from Chat</li> <li>-Chat Transcript</li> </ul> <p>Messages related to e-mail (web form) reference:</p> <ul style="list-style-type: none"> <li>-Answer</li> <li>-Clarification Request</li> <li>-New Accounts</li> <li>-New Question</li> <li>-Acknowledgement Page</li> </ul>	<p>Click <b>Change</b> to exclude (<b>off</b>) or include (<b>on</b>) patron account information in messages to patrons.</p> <p>Click <b>Edit</b> to edit a particular message.</p> <p>To edit Custom Reply Text, click <b>Yes</b>, type the text, and click <b>Save</b>. It does not have a Test button. Custom Reply Text appears in the other patron messages when you test them.</p> <p>To edit other messages, click <b>Custom</b>, type the text, and click <b>Save</b>. Click <b>Test</b> to view a mockup of a message as saved.</p> <p>Click <b>Cancel</b> to return to the main Custom Messages page.</p>	<p>Link: <a href="#">Online help</a></p>
	Turn on capture of patron replies to system e-mail messages	Outgoing address	Administration > Institution > Settings > Outgoing Address	<p>Click <b>On</b>, click <b>Custom</b>, type a custom e-mail address, and click <b>Save</b>.</p> <p>If you do this, QuestionPoint sends an e-mail notice to the librarian and adds the patron's reply to the question history when a patron replies to a chat transcript, answer or clarification request.</p>	<p>The custom e-mail address appears as the <i>From</i> address in system e-mail messages to patrons. You may want to use an address that identifies your library. You can use a valid address or one that just looks valid because patron replies do not actually go to the custom address.</p> <p>Link: <a href="#">Online help</a></p>

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Turn on patron survey form	Patron survey form	Administration > Institution > Surveys > Survey Form	<ol style="list-style-type: none"> <li>1 Check the boxes for both survey forms (<b>Chat</b> Session and <b>Ask</b> Answers).</li> <li>2 Check the box for each question (up to 15) that you want to include in each form. (You can choose the same or different questions for each form.)</li> <li>3 Click <b>Save</b>.</li> </ol> <p>After you save, you can click each <b>View</b> button to test the results.</p>	<p><b>Chat</b> survey form: Patron can complete it when a chat session ends or the transcript e-mail arrives.</p> <p><b>Ask</b> survey form: Patron can complete it when a followup answer arrives via e-mail.</p> <p>Link: <a href="#">Online help</a></p>
	Display links in WorldCat.org to your library's reference service  (These links increase the visibility of your reference service.)	Open WorldCat Setting; Question Form URL	Administration > Institution > Forms > Question Form	<p>If you want to include a link in WorldCat.org to your library's reference service and your library makes its holdings available in WorldCat.org, click <b>Yes</b> and type the <b>URL for your reference service</b> in the Question Form URL.</p> <p>Otherwise, click <b>No</b>.</p>	Link: <a href="#">Online help</a>
	Exclude transcripts of chat sessions with other libraries' patrons	Chat Transcripts	Administration > Institution > Settings > Chat Transcripts	<p>If you want to exclude transcripts of your library's chat sessions with other libraries' patrons from your library's question lists, click the <b>Exclude</b> button and click <b>Save</b>.</p> <p>If you do nothing, these transcripts will be included in question lists because that is the default option.</p>	<p>The Exclude setting applies to libraries that pick up chat sessions with other libraries' patrons, whether or not they participate in the 24/7 Reference Cooperative. Excluding these transcripts simplifies workflow for some libraries.</p> <p>Link: <a href="#">Online help</a></p>

## Referral of questions and transcripts: overview

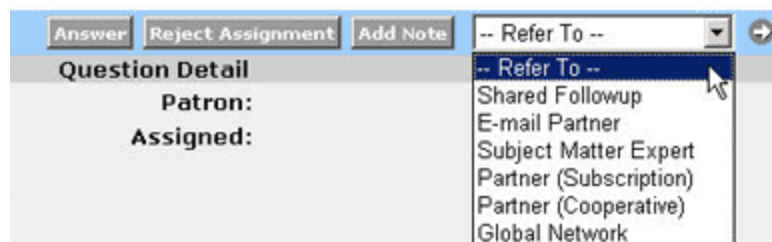
This overview of referral provides context for setup activities and decisions.

The figure below shows all possible referral options; some of them require setup by the Subscription Group administrator and Institution administrators before they are available for librarians to use. Administrators work together to decide which ones to set up and what guidance to provide librarians about their use.

### Referral workflow

- 1 In QuestionPoint, librarian goes to a question (or transcript that requires further followup) that he or she wants to refer to another library or a subject-matter expert for an answer.
- 2 Librarian selects a **referral option** in the Refer To drop-down list and clicks arrow.

**Full Question** << 1 of 9 >> | [Return to List](#)



- 3 QuestionPoint displays the request form for the referral option selected.
- 4 Librarian selects a library or subject-matter expert to receive the request, provides any needed information in the form, and sends the referral request.
- 5 For the library sending the referral, QuestionPoint changes the status of the record to Pending and moves it to the Pending Questions list and the Referred Questions list.  
For the library or expert receiving the referral, QuestionPoint changes the status of the record to New and places it in the New Questions list.
- 6 The library or expert receives the request and sends the answer to the patron.
- 7 QuestionPoint changes the status of the question to Answered and moves it to the Answered Questions list.

### Referral options in the Refer To drop-down list

The referral options that require setup appear in the drop-down list only after the setup is complete.

Option	Description	Setup required?
Shared followup	Places the question in the Shared Followup Questions list for any library in your Subscription Group (BME) to claim.	Yes, see page 7
E-mail partner	Sends the request via e-mail to one of the librarian's personal subject-matter experts.  All other referral options send the request to libraries or experts who have QuestionPoint accounts.	No
Subject matter expert	Sends the request to one of the 24/7 Reference Cooperative's subject-matter experts.  This option appears only for members of the 24/7 Reference Cooperative.	No
Partner (Subscription)	Sends the request to a library or subject-matter expert in your Subscription Group.	Yes, see page 13.
Partner (Cooperative)	Sends the request to a library or subject-matter expert in your Cooperative Group.  A Cooperative Group includes some libraries that are not members of your Subscription Group; it may also include libraries that are members of your Subscription Group.  Cooperative Groups are separate from the 24/7 Reference Cooperative.	Yes, see page 15
Global Network	Sends the request to the Global Reference Network, which automatically routes the request to a qualified library or organization.  The Global Reference Network includes libraries and organizations worldwide committed to collaborative, digital reference and to sharing their expert resources to answer questions for patrons worldwide.  The Global Reference Network is separate from the 24/7 Reference Cooperative.	Yes, see page 18

## Partner (Subscription) referral: setup

Skip this section if your Subscription Group contains your library only.

If your Subscription Group contains two or more libraries, do the tasks below if you want to let the libraries in your group refer questions (or transcripts that require further followup) to selected libraries in the group. The selected libraries are called *Referral Partners*. If you do these tasks, the **Partner (Subscription)** referral option will be available to the libraries in your group.

If you are the Subscription Group administrator, discuss this referral option with the Institution administrators in your group. Let them know whether the group will use this option. If it will, some setup tasks are done by the Subscription Group administrator and some by the Institution administrators. The Subscription Group administrator also does the Institution administrator tasks for his or her own library.

If you want to include subject-matter experts in this referral option, contact your OCLC library services consultant.

## Subscription Group administrator

**Partner (Subscription) referral:** If you are the Subscription Group administrator, review the current settings for each of these tasks and make changes as needed.

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Activate the profiles submitted to you by libraries in your group	Activation setup	Administration > Subscription Group > Settings > Activation Setup	<p>Select <b>Automatic</b> and click <b>Save</b> to approve each profile automatically when it is submitted.</p> <p>If you want to be notified when a library submits a profile, type your address in the Activation E-mail Address box and click <b>Save</b>.</p>	<p>Unless you have a particular reason to review the profile, the other available methods are unnecessary.</p> <p>Only the libraries whose profiles you activate will be able to refer questions.</p> <p>Link: <a href="#">Online help</a></p>
	Select the libraries to which the group may refer questions	Referral Partners	Administration > Subscription Group > Settings > Referral Partners	<p>If you want to make <b>all libraries</b> in the group available to receive referred questions and transcripts, select <b>All Institutions</b> and click <b>Save</b>.</p> <p>If you want to make <b>only some libraries</b> in the group available to receive referred questions and chat followup:</p> <ol style="list-style-type: none"> <li>1 Select <b>List of Institutions</b> and click <b>Save</b>.</li> <li>2 In the Current Referral Partners drop-down list, remove any libraries that should <b>not</b> receive them. (Select a library and click <b>Remove</b>.)</li> <li>3 If a library that should receive them is <b>not</b> included in the Current Referral Partners drop-down list, select that library in the Add Institution drop-down list and click <b>Add</b>.</li> </ol>	<p>A library must submit its profile to your group and you must activate the profile before you can select the library to receive referred questions.</p> <p>Link: <a href="#">Online help</a></p>

## Institution administrator

**Partner (Subscription) referral:** If you are an Institution administrator, do this task. If you are the Subscription Group administrator, do this task for your own library.

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Submit your library's profile to your group	Profile	Profile > Institution Services	<ol style="list-style-type: none"> <li data-bbox="1199 263 1593 375">1 Click the <b>Requirements</b> button for your group to verify that no fields are required by your group.</li> <li data-bbox="1199 378 1593 474">2 Click the <b>Submit</b> button for your group if you are an Institution administrator.</li> </ol> <p data-bbox="1247 500 1593 612">Or, click the <b>Activate</b> button for your group if you are the Subscription Group administrator.</p>	Do <b>not</b> click the <b>Submit</b> or <b>Requirements</b> button for the <b>QP Global Reference Network</b> . More profile information is required before you do that and you do <b>not</b> need to do it for this task or for participation in the 24/7 Reference Cooperative.

## Partner (Cooperative) referral: setup

Set up the following features to form a voluntary Cooperative Group if you want to refer questions (or transcripts that require further followup) to selected libraries outside of your Subscription Group. If you form a Cooperative Group, the **Partner (Cooperative)** referral option will be available to the libraries who become members of the group.

For example, you may want to enable some or all of the libraries in your Subscription Group to refer questions to some or all of the libraries in other Subscription Groups. To do that, you would form a Cooperative Group and libraries would join. Then, libraries in your Subscription Group and libraries in the other Subscription Groups could refer questions among themselves. It is not necessary for all the libraries in each Subscription Group to join. One of your Subscription Group's libraries that joined could receive a referred question and then refer it to a library that joined from another Subscription Group.

Before you set up these features, consult the administrators of the other Subscription Groups and libraries about decisions such as these:

- Which type of Cooperative Group should be formed?
- Who will form the Cooperative Group?
- Who will join the Cooperative Group?

### Notes:

- Cooperative Groups are separate from the 24/7 Reference Cooperative.
- If you want to include subject-matter experts in the Cooperative Group, contact your OCLC library services consultant.
- If you are a Subscription Group administrator with two or more libraries in your group, set up the Partner (Subscription) referral option (see page 13) before you make a Subscription Group *public*.

## Comparison of the two types of Cooperative Groups

This table compares the two types of Cooperative Groups: Public Subscription Groups and Virtual Groups.

FAQs about Cooperative Groups	Public Subscription Group	Virtual Group
Who can form the group?	Subscription Group administrator	Subscription Group administrator Institution administrator
Does the forming administrator control who joins?	Yes	Yes
How is the group formed?	Make a Subscription Group <i>public</i>	Create a Virtual Group
Where in QuestionPoint is the group formed?	Administration > Cooperative Groups > My Cooperative Groups > Make Public	Administration > Cooperative Groups > Create a Group
Who are the group's members?	All libraries in the Subscription Group Libraries who join the group online	Libraries who join the group online
Who needs an activated <b>Global</b> profile?	Libraries who join the group online Administrator who forms the group	Libraries who join the group online Administrator who forms the group
Who can refer questions?	All libraries in the Subscription Group with activated <b>group</b> profiles Libraries who join the group online	Libraries who join the group online
Who can receive referred questions?	Referral Partners in the Subscription Group Libraries who join the group online	Libraries who join the group online
Does the group share a local KB?	Yes	No

## Make a Subscription Group public: Subscription Group administrator, OR Create a Virtual Group: Subscription Group administrator or Institution administrator

**Note:** Set up the Partner (Subscription) referral option (see page 13) before you make a Subscription Group *public* if you are a Subscription Group administrator with two or more libraries in your group.

**Partner (Cooperative) referral:** Do the following to set up the Partner (Cooperative) referral option by forming a Cooperative Group.

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Submit your library's profile to the Global Reference Network	Profile	Profile > Institution Services	<ol style="list-style-type: none"> <li>1 Click the <b>Requirements</b> button for the QP Global Reference Network to view a list of its approval requirements.</li> <li>2 Gather the needed information.</li> <li>3 Enter and save the needed information.</li> <li>4 Click the <b>Submit</b> button for the QP Global Reference Network.</li> <li>5 Wait for the Global Network administrator to activate your profile. (You should receive an e-mail message within 24 hours.)</li> </ol>	<p>After your profile is activated by the Global Reference Network, the Cooperative Groups tab is added to the Administrative module for your account. Then you can form a Cooperative Group.</p> <p>Link: <a href="#">Online help</a></p>
	Form a Cooperative Group	Make a Subscription Group <i>public</i>  OR  Create a Virtual Group	Administration > Cooperative Groups > My Cooperative Groups > Make Public  OR  Administration > Cooperative Groups > Create a Group	Supply all the requested information and click <b>Save</b> .	<p>Recommended settings:</p> <ul style="list-style-type: none"> <li>• Viewing Status: Public</li> <li>• Use This Group for: Referral</li> <li>• Enrollment Status: Open</li> <li>• Activation Status: Active</li> </ul> <p>Link: <a href="#">Online help</a></p>
	Notify prospective members that they can join the group			Do this outside the system. Provide the name of the group. Remind each that they must have an active profile with the Global Reference Network in order to join.	
	Activate group members	Activate group members	Administration > Cooperative Groups > My Cooperative Groups	<ol style="list-style-type: none"> <li>1 Click the <b>Member</b> button for the group.</li> <li>2 Check the box for each library you want to activate.</li> <li>3 Select <b>Activate</b> in the drop-down list.</li> <li>4 Click <b>Update Status</b>.</li> </ol>	Link: <a href="#">Online help</a>



## Join a group: Institution administrator

**Partner (Cooperative) referral:** Do the following to join a Public Subscription Group or a Virtual Group. The Subscription Group administrator does this if his or her own library is joining a group

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Submit your library's profile to the Global Reference Network	Profile	Profile > Institution Services	<ol style="list-style-type: none"> <li><b>1</b> Click the <b>Requirements</b> button for the QP Global Reference Network to view a list of its approval requirements.</li> <li><b>2</b> Gather the needed information.</li> <li><b>3</b> Enter and save the needed information.</li> <li><b>4</b> Click the <b>Submit</b> button for the QP Global Reference Network.</li> <li><b>5</b> Wait for the Global Network administrator to activate your profile. (You should receive an e-mail message within 24 hours.)</li> </ol>	<p>After your profile is activated by the Global Reference Network, the Cooperative Groups tab is added to the Administrative module for your account. Then you can join a Cooperative Group.</p> <p>Link: <a href="#">Online help</a></p>
	Join a Cooperative Group	Join a Group	Administration > Cooperative Groups > Join a Group	Find the group and click <b>Join this group</b> .	<p>The administrator who forms the group should tell you when you may join and what the group's name is.</p> <p>Link: <a href="#">Online help</a></p>

## Global Network referral: setup

### Institution administrator

If you formed or joined a Cooperative Group, you have already done this.

The Global Reference Network includes libraries and organizations worldwide committed to collaborative, digital reference and to sharing their expert resources to answer questions for patrons worldwide. The Global Reference Network is separate from the 24/7 Reference Cooperative.

Submit your library's QuestionPoint profile to the Global Reference Network if you want to refer questions (or transcripts that require further followup) to the Global Reference Network and receive referred questions from it.

If you submit your profile and the Global Network administrator activates it, the **Global Network** referral option will be available for your library.

The profile is submitted by the Institution administrator. The Subscription Group administrator submits it for his or her own library.

Space for your notes	Task	QuestionPoint feature	Location in system	What to do	Tips/resource links
	Submit your library's profile to the Global Reference Network	Profile	Profile > Institution Services	<ol style="list-style-type: none"> <li><b>1</b> Click the <b>Requirements</b> button for the QP Global Reference Network to view a list of its approval requirements.</li> <li><b>2</b> Gather the needed information.</li> <li><b>3</b> Enter and save the needed information.</li> <li><b>4</b> Click the <b>Submit</b> button for the QP Global Reference Network.</li> <li><b>5</b> Wait for the Global Network administrator to activate your profile. (You should receive an e-mail message within 24 hours.)</li> </ol>	<p>After your profile is activated by the Global Reference Network, you can refer questions and transcripts to the Global Reference Network. You may also receive questions and chat followup through the Network.</p> <p>Link: <a href="#">Online help</a></p>

## Troubleshooting

- Document problems that you encounter so you can describe them when you request support. Tell support staff which browser you use and its version number. Provide screen shots that illustrate the problem, if you can.

## More information

Available on the QuestionPoint web site at <http://www.questionpoint.org/>

- **Policies** at <http://www.questionpoint.org/policies/index.html>
- **Training and videos** at <http://www.questionpoint.org/education/index.html>
- **Documentation page** at <http://www.questionpoint.org/support/documentation/gettingstarted/>

**Note:** This Administrator setup guide's PDF file is available at [http://www.questionpoint.org/support/documentation/gettingstarted/qp\\_ref\\_adminsetup.pdf](http://www.questionpoint.org/support/documentation/gettingstarted/qp_ref_adminsetup.pdf)

## Support

**OCLC support staff:**

- E-mail: [support@oclc.org](mailto:support@oclc.org)
- Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

## Comments, suggestions, feedback

We welcome your comments about this guide. Use the form at <http://www.surveymonkey.com/s.asp?u=685031335509>



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