Log on (start your chat shift)

(See Resources for more information about browser setup.)

1. Open your browser.
2. Turn off any pop-up blockers.
3. Go to http://www.questionpoint.org/
4. Click Librarian Logon (at top of page).
   The QuestionPoint Logon page appears.
5. Optional: Select a different language and click Go.
   (Bookmark this page as a shortcut for steps 3–5.)
6. Type your QuestionPoint authorization (User ID).
7. Type your QuestionPoint password.
   (Case sensitive; be sure that Caps Lock is off.)
8. Click the Logon button to go to the My QuestionPoint page.
9. Optional: Click Chat Monitoring Tool in Quick Links for list of librarians now monitoring. Click Home when done.
10. Click Launch Chat in the Quick Links to start your chat shift.
    The Chat Monitor opens in a separate window.
11. Keep QuestionPoint window open/minimized during chat shift.
12. Select queues and click Save.
    (See Resources for more information.)
13. Optional: Resize the Chat Monitor window. Click Settings to change your preferences for patron alerts and font size.

Pick up a call (accept a chat request)

1. Click OK to close pop-up message (if any); go to the New tab under the Patron Chat tab.
2. Move mouse pointer over patron to view Question Preview.
3. Click on the patron line to accept the chat request.
4. After patron information loads, send a script or message.

Current session

The chat monitor contains the transcript for your current session, including the question and patron screen name from the chat form.

During a call (chat session)

Send a message
1. Type or paste the message in the message box.
2. Press the Enter key or click Send.

Send a script
1. Click the Scripts tab.
2. Select a script to display its text in the preview box.
3. Click the arrow button to move the text to the message box.

Push (send) a web page
1. Click the URLs tab.
2. Select a URL script to display its URL in the preview box.
   Or, type or paste a URL in the preview box.
3. Click Preview to preview the page in a separate window.
4. Edit the URL in the preview box as needed.
5. Click the arrow button to move the URL to the message box.
6. Click Send to send the page to the patron.
7. Verify that the patron sees the page.

Reminders/tips

- Use one browser for QuestionPoint and chat and another browser for research and other web activities to help prevent closing your chat sessions inadvertently.
- Limit the number of programs running on your computer.
- Verify and clarify patron’s request.
- Remind patron to click Exit Chat to receive transcript.
- Send messages often to keep patron engaged.
- Explain your actions and verify that patron sees pages sent.
- Verify that patron’s need was met before you end the call.
- Refer questions to others as needed:
  - Use Transfer button during session.
  - Use Follow Up resolution codes at end of session.
  - Use Refer To drop-down in QuestionPoint after session.
End a call (chat session)

End each call when finished to improve system performance.

1 Verify that the patron’s need was met and confirm any needed followup.
2 Click the End Session button. The system removes the session from the My Active list and sends transcript to patron’s e-mail address if provided.
3 Select a resolution code and click Add.
4 If you wish:
   • Select and add up to four description codes. Do this only if you chatted with one of your library’s patrons.
   • Add a librarian note and click Send.
   • Add a patron message and click Send to send the message and transcript to patron’s e-mail address.
5 Click Close to clear the session from the monitor.

The resolution code, description codes, and librarian notes are added to the transcript in QuestionPoint only. Each patron message is sent to the patron in another copy of the transcript.

Log off (end your chat shift)

You must log off so that the system knows your shift has ended.

1 End any active chat sessions.
2 If you expect a replacement, click the Librarians tab to see if your replacement is logged on.
3 Click Logout.
4 Click Close Window.
5 Return to the QuestionPoint window.
6 Click Exit if you have finished using QuestionPoint.

Troubleshooting

- View the patron’s connection status under My Active:
  - Good
  - Slow or not responding
  - No longer connected
- If the patron does not reply right away, wait until ✉️ appears before ending the call.
- Document problems for use when requesting support. Include Question ID from Question Preview or Info tab.

Resources

- Browser requirements and setup instructions: http://www.questionpoint.org/support/documentation/gettingstarted/chatsetup.pdf
- Training resources, including Queue Selection: http://www.questionpoint.org/education/index.html
- Documentation: http://www.questionpoint.org/support/documentation/gettingstarted/index.html
- Community Resources: http://wiki.questionpoint.org/
- Blog, including the Tips and Tricks category: http://questionpoint.blogs.com/

Support

Contact OCLC Support Staff: E-mail: support@oclc.org
Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
Comment about this quick reference: http://www.surveymonkey.com/s.asp?u=685031335509

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