Purpose of this guide
This guide describes how to use QuestionPoint Flash-based chat to:

- View a list of monitoring librarians
- Instant Message (IM) with another monitoring librarian
- Transfer an active session to another monitoring librarian

Important note about transfer
Before you transfer a session to another librarian, you should:

- View the list of monitoring librarians to see who is available to receive the session, and
- Send an IM to ask an available librarian to take the session.

Transfer the session after a librarian agrees to take it. If you transfer the session without asking first, the receiving librarian may not be able to provide prompt attention to the session.

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View the list of monitoring librarians

You can view a list of the librarians who are monitoring any of the same queues as you. You might view the list to see who is available to receive a session transfer.

Click the **Librarians** tab to view the Librarians list.

This sample Librarians list contains:

- Two librarians who are monitoring only their primary queue (1 queue).
- Three librarians, including one after-hours-back-up librarian, who are monitoring for the 24/7 Reference Cooperative (37, 36, and 81 queues).
- Three librarians who currently have no active sessions.

<table>
<thead>
<tr>
<th>Librarian</th>
<th>Queues</th>
<th>Queue (Library)</th>
<th>Active</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donald Hartley</td>
<td>5</td>
<td>CA ASHNOW</td>
<td>0</td>
<td>12:53:26</td>
</tr>
<tr>
<td>Carol Bonnefill</td>
<td>37</td>
<td>CA ASHNOW</td>
<td>1</td>
<td>12:45:06</td>
</tr>
<tr>
<td>Jill Kreis (1069)</td>
<td>1</td>
<td>King County</td>
<td>0</td>
<td>11:57:06</td>
</tr>
<tr>
<td>Sean Dean (10)</td>
<td>36</td>
<td>King County</td>
<td>1</td>
<td>11:59:11</td>
</tr>
<tr>
<td>stcharles (1111)</td>
<td>1</td>
<td>St CHARLES</td>
<td>0</td>
<td>09:59:07</td>
</tr>
<tr>
<td>Erin Kelly (1120)</td>
<td>3</td>
<td>MD PUBLIC</td>
<td>1</td>
<td>12:42:50</td>
</tr>
<tr>
<td>Bruce Jensen (91)</td>
<td>9</td>
<td>After Hours Col</td>
<td>2</td>
<td>11:55:42</td>
</tr>
</tbody>
</table>

**Description of columns:**

- **Librarian**: A list of the monitoring librarians and their QuestionPoint authorization numbers.
- **Queues**: The number of queues that each librarian is monitoring. Librarians monitoring several are monitoring for the 24/7 Reference Cooperative.
- **Queue (Library)**: The primary queue and the library of each librarian.
- **Active**: The number of active sessions that each librarian currently has.
- **Time**: The time when each librarian began monitoring.

To adjust the width of a column, drag the column-heading border to the left or right.
Send an Instant Message (IM) to another monitoring librarian

You can IM with another librarian who is monitoring any of the same queues as you. You might ask the librarian to take a session that you want to transfer. **Tip:** Participate in one IM session at a time, keep each session brief, and end each session promptly.

1. Click the **IM** tab. The IM link shows how many IM sessions you currently have.

2. Click on the librarian with whom you want to IM. This sends an alert to the librarian.

The session appears in the My Active IM Sessions list below the Librarians list.

Information about your IM request appears in your IM chat history box.

3. Type your message in the Message box.
4. Press the Enter key or click **Send**.
5. Wait for a response.
Respond to an IM from another librarian

When you receive the first message in an IM session, a box pops up and an alert sounds.

1. Click Close.

2. Click the IM tab. The IM link shows how many IM sessions you currently have, including the one that you just received.

3. Click on the session in the My Active IM Sessions list.

4. Read the IM message in the transcript box.

5. Type your response in the Message box and press the Enter key or click Send.
Leave and return to an active IM session

You can leave and return to an active IM session if necessary.

**Leave an active IM session**

Toggle between Patron Chat and active IMs as necessary to continue with your sessions.

**Return to an active IM session**

1. Click the IM tab.

2. Click on the session in the My Active IM Sessions list.

3. Read any new IM messages in the transcript box.

4. Type your response in the Message box and press the Enter key or click Send.
End an IM session

To end an IM session:

1. **Click End IM Session.**

The session is removed from each librarian’s Active IM Sessions list when either librarian clicks End IM Session.

2. **Toggle back to Patron Chat**

3. **Click the New tab to respond to a new patron session. Click the My Active tab to return to an active patron session. Click Librarians to start another IM.**

Transfer an active patron session to another monitoring librarian

**Before you transfer a session** to another librarian, you should:

- View the list of monitoring librarians to see who is available to receive the session (see page 2), and
- Send an IM to ask an available librarian to take the session (see page 3).

Transfer the session after a librarian agrees to take it. If you transfer the session without asking first, the receiving librarian may not be able to provide prompt attention to the session.

**Notes:**

- Tell the patron that you are transferring the session to another librarian.
- The patron does not see the messages between the librarians about the transfer.
- The patron sees the new librarian’s name when the librarian sends a message to the patron after the transfer.
- When a transferred session ends, its transcript is not included in the question lists of the library of the librarian who transferred the session (unless it is the patron’s library). The transcript is included in the Reports in the Ask module that are available to administrators.

To transfer a patron session to another librarian who is monitoring any of the same queues as you:

1. **Click the My Active tab to return to the session that you will transfer.**

2. **Click on the session.**

<table>
<thead>
<tr>
<th>Patron</th>
<th>Time</th>
<th>Patron’s Last Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cookie</td>
<td>14:26:34</td>
<td>14:27 I am in the 5th grade, so not too hard pl</td>
</tr>
</tbody>
</table>

   The session reloads.

3. **Read any new patron messages in the transcript box.**
4  Send a message to the patron.

5  Click Transfer.

6  In the list that appears, find the librarian who will receive the session. (Scroll the list of librarians if necessary.)
7 Click on the librarian.

8 Engage in an IM session with the target librarian.

9 Once they confirm that they will take the call, click **Transfer** again.

The system immediately removes the session from your active sessions list. Your part in the transfer is complete.

10 Click the **New** tab to respond to a new patron session. Or click the **My Active** tab to return to an active patron session.
Receive a transferred patron session from another librarian

You may receive a transferred patron session from another librarian while you are monitoring chat.

Notes:

- Although the other librarian should ask you before transferring the session, he or she may transfer it without asking. You cannot refuse or block a transferred session. It is automatically placed in your My Active list. **If you do not communicate with the patron, the session will remain unattended in your list.**
- When a transferred session ends, its transcript is **not** included in the question lists of the library of the librarian who transferred the session (unless it is the patron’s library). The transcript is included in the Reports in the Ask module that are available to administrators.

When a librarian transfers a session to you, the transfer alert box pops up and an alert sounds.

1. Click OK.

2. Click **My Active** under the Patron Chat tab.

3. Click on the patron.

   The > transfer indicator is in the patron stripe

The session loads.

The session transcript contains all messages between the patron and the other librarian and the transfer detail, along with the IM conversation between the two librarians.

The patron library’s policy page and scripts are also available for you to use.
4 Send a message to let the patron know that you have taken over the session.

Hello, Cookie (patron@email.org)

Chat Transcript: I need a bio of Princess Grace, and a photo too.
Librarian: Librarian 'TEST carol' has joined the session.
Librarian: Hello Cookie. This is the reference librarian, I am reading your question.
Cookie: Thanks!
Librarian: Is this for a school project? If so, what grade level is this for, so I don't give you something that is too technical or too easy?
Cookie: I am in the 5th grade, so not too hard please!
Librarian: Please hold a moment
Newest Message
QP librarian GB: Hello, I have just received your question as a transfer. Please give me a moment to read the question, and I will assist you.

The patron receives your message. Your screen name appears to the patron with your message. The previous librarian’s screen name is replaced by “Librarian.” The patron does not see the transfer detail or the messages between the librarians.

5 Complete the session with the patron.

Resources
- Training resources: http://www.questionpoint.org/education/index.html
- Documentation: http://www.questionpoint.org/support/documentation/gettingstarted/index.html

Support
- OCLC support staff:
  E-mail: support@oclc.org
  Telephone: 1-800-848-5800 (USA) or +1-614-793-8682

Comments, suggestions, feedback
Please send us your comments about this guide at http://www.surveymonkey.com/s.asp?u=685031335509