QuestionPoint™

Review Your Form Field Data

Quick reference

Last updated: February 2012

About this quick reference guide

This guide addresses Form Field reviewing both online and offline. To see a similar guide for *online* reviews of *transcripts* of all types of questions (web form, Add Question, chat, Qwidget, texting), see "**General Transcript Reviews**." Another guide, "**Review Your Transcripts Offline**," covers transcript reviews of all types of questions that you can produce offline.

Why would I review Form Fields?

Form Fields are the fields you provide on your intake form(s), both chat and web form, to gather information about the user asking a question.

Reviewing the data provided on your intake forms allows you to:

- Gather demographic information about your users
- Compile statistics on referrer pages, session times, and wait times
- Gauge the general equipment level of your users
- Produce cross-tab studies based on demographics, dates, Email domains, session times, descriptive codes, referrer pages, browser type, and more

Who can access reviews?

Form Field 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

Where are the reviews located?

To review the last 90 days, immediately, in the Ask a Librarian (Ask) module:

- Click the **Review Transcripts** tab.
- Click *Form Fields* link. These are the *online* reviews

To review the last 90 days or older to be delivered within 24 hours:

- Click the **Review Transcripts** tab.
- Click the ***Offline*** link.
- Select *Fielded Data* as the Report Type.

Procedures for online review

***Form Fields* for immediate review of current 90 days**	
1	Go to Ask >> Review Transcripts >> Form Fields
2	Change institution (BME admins only)
3	Change month as needed.
4	Select delivery Format.
5	Select Session Type. Currently, question web forms are called "Question Form Links."
6	Select/deselect Default Fields as needed.
7	Select/deselect custom Form Fields as needed
8	Click **Submit** button. If you selected a delivery format of XML or Delimited file, QuestionPoint sends a message with the data to your Email address (Home/My QuestionPoint > Settings > Email address)
9	Save the file to your computer. If an XML or delimited file was delivered, save it as a text file.

Options and tips for *online* Form Field reviews

Option	Description
Institution	Institution (group administrator only)
Month	Current month and earliest month are likely to be partial due to only 90 days in the current database
Format	• View Excel file (default) • Export XML file • Export delimited (CSV) file. Select your own delimit character; piping symbol | is the default since it rarely appears in other data
Session Type	• Question Form Link/Walkup Forms (choose All, Our Patrons, or Others' Patrons). • Add Question (Walk-up form) *coming soon*; now included with Question Form Link • Chat Sessions • Qwidget Sessions *coming soon*; now included in Chat Sessions • Text Messages
Default Fields	• Question ID (F C T) • Date Entered (F C T). Includes time in the time zone of the library requesting the review • Patron Email Domain (F C) • Form Type (chat/question) (F C T) • Resolution Code (C) • Session Time (C) • Wait Time (C) • IP Address (F C) • Referrer (F C) • Browser/OS (F C) • Cobrowse (C) • Category (C) F - Question Form Link and Add Question; C - Chat and Qwidget; T - Text
Form Fields (Field ID)	Custom fields from your forms. If you created your forms using the Forms Manager, fields are displayed for you to select from. Preset fields you chose from the Forms Manager have an ID between 1 and 11000). New fields you created in the Forms Manager have IDs above 11000. If you created your forms using the Forms Manager, field labels are column headings (Excel) or data element labels (XML, CSV). If you did not create your forms using the QuestionPoint Forms Manager, data is reported in columns or after data elements labeled *Old Data1*, *Old Data 2*, and so on. In addition, each data element is preceded by the field label. Example: If you have a field with the label Zip on a self-hosted form, the actual data will appear as *Zip:43017.* If you collected different kinds of data in the same field position over time (e.g., you changed *Zip* in field position 2 to *Phone*), you will see the label that precedes the data also changes when the date range of your report spans the change.* *This sort of mixing of different kinds of data in one column will not happen when you make changes in a Forms Manager form.
Include labels?	• No • As table cells (use for old data if you've changed your form; this will make it easier to sort older from newer data in fields that occupied the same position on your forms) • As column headings (default; use with Excel)

Why choose offline?

- **No impact on system resources.** Offline reviews are run during slow times, so they are not in competition for system resources. Online reviews of large files can sometimes take a few minutes to run because they are given lower system priority than chatting and other work-related tasks to insure no negative impact on system performance.
- **Set up and results are saved.** Offline reviews are compiled overnight and a zipped file stored in your QuestionPoint account for up to one week. The setup can also be saved for repeat runs over time.

Why choose offline? *(cont'd)*

Online reviews are run immediately and only once. As soon as you exit the page, your set-up information is discarded and the page returns to defaults.

- **Review Service History.** You can review data in your Service History as well as data from the current 90 days.
- **Request 5 reviews at a time.** You can request 5 offline reviews simultaneously.
- **Review larger date ranges, multiple accounts.** You can run several months at one time, offline, and BME administrators can run reports for all institutions at the same time. Online, they must select a single institution and a single month.
- **Question included with data.** The patron's question can be included in offline reviews.
- **See data for other libraries.** You can see data for other libraries if you assisted the patron, offline. Online, you can see only transactions from your own patrons.

Caution: A single review is limited to no more than 10,000 records.

How do I manage these reviews?

Tab	Purpose
Create New	• Schedule (request) a new review. • Save the specifications for a new review.
Saved	• Edit (change) a saved review set-up • Schedule (request) a saved review. • Delete (remove) a saved review.
Scheduled	• Edit (change) a scheduled review. • Delete (cancel) a scheduled review.
Completed	• Download a completed review. • Delete (remove) a completed review.

Note: You **cannot** copy a saved or scheduled review to create a new one. You must use the Create New tab.

Procedures for offline review

***Offline* for larger and/or older data sets**

1. Go to Ask >> Review Transcripts >> Offline
2. Click the **Create New** tab.
3. Schedule a new review and enter a title for the review.
4. Click the *Active* or *Service History* radio button.
5. Select *Fielded Data* for Report Type.
6. Click the **Limit Search** button at the top of the page.
7. On the Limit Search page, select the Session Type you want. Currently, question web forms are called "Emails."
8. Set the date range you want.
9. Set any other parameters on the page to limit reviewed transactions to just those wanted.
10. Click the **Select Fields** button at the top of the page.
11. On the Select Fields page, enter a notification Email address and select the Format for the review.
12. Select/deselect Default Fields as needed.
13. Select/deselect custom Form Fields (if displayed) as needed.
14. Click **Submit** button at the top of the page. Your request will appear under the **Scheduled** tab.
15. After 11:00 Universal Time Coordinated, return to the Offline module.
16. Click the **Completed** tab.
17. Click the ***Download*** link and save the compressed (zipped) file to your computer.

Options and tips for *offline* Form Field reviews

Option	Description
Schedule or Save	Schedule the review to be run in the regular daily job, usually around 11:00 Universal Time Coordinated. You can only have 5 reviews scheduled or completed at any single time. If you have more, you must delete one. Save the review set-up so you can run it a later time. You can have only 25 reviews saved at any one time. You may select either or both.
Title	Provide your own title so you will recognize what the review is for.
Active or Service History	*Active* means transactions with activity in the most recent 90 days. *Service History* means all older transactions.
Report Type	*Transcripts* or *Fielded Data*. Select *Fielded Data* for a form field review.
Institution	Institution (group administrator only)
Assigned Librarian	Probably select All for form field reviews. You can select a specific librarian assigned to transactions. This would limit the retrieved data to just what that librarian did. If a BME administrator chooses to review All institutions at the same time, this option will not appear.
Session Type	• Question Form Link (choose All, Our Patrons, or Others' Patrons) • Add Question (Walk-up form) *coming soon*; now included in Question Form Link • Chat Sessions (choose All, Our Patrons, or Others' Patrons) • Qwidget Sessions *coming soon*; now included in Chat Sessions • Text Messages If a BME administrator chooses to review All institutions at once (see *Institution* option above), types of sessions to select from are fewer: All is the only option for each type, since "our patrons" and "your patrons" may originate from the same group.
Survey Status, Session Resolution, Descriptive Codes, Status	Set these parameters as desired to limit the transactions from which form field data will be extracted for the review. Very old data may have predated the addition of session types, resolution codes, and descriptive codes. Selecting from these parameters could limit your result set in unexpected ways.
Range	• All (current 90 days only) • Previous Month (current 90 days only) • Year (Service History only) • Date entered on or after - on or before (inclusive dates for a date range) For Service History, a note after the Range label indicates what the most recent date in the archive is. Anything entering the system after that date can be retrieved by requesting a review from the *Active* database on the previous set-up page. **Note:** If the Email notice for a completed review indicates that the review was truncated (currently at 10,000 records), request the review again selecting options that reduce the number of records included. You can run an online version of a review at **Ask > Review Transcripts > General** to see how many records it will include.
Sort by	Reviews are always sorted by Question ID unless you choose otherwise. QID and Date Entered are usually the same order, unless a new QID was created to enter or change a patron Email address, as the new QID will bear the Date Entered of the original. Not all sort options make sense for all session types.
Format	• Export XML file • Export Excel format (default) • Export delimited (CSV) file. Select

Option	Description
	your own delimit character; piping symbol | is the default
Default Fields	• Question ID (E C T) • Question(E C T) • Date Entered (EC T) **Note:** Includes time in the time zone of the library requesting the review • Patron Email Domain (E C) • Form Type (chat/question) (E C T) • Resolution Code (C) • Session Time (C) • Wait Time (C) • IP Address (E C) • Referer (E C) • Browser/OS (E C) • Cobrowse (C) • Category (C) E – Email/Walkups; C - Chat and Qwidget; T – Text

Option	Description
Form Fields (Field ID)	• Custom fields from your forms. If you created your forms using the Forms Manager, fields are displayed for you to select from. Preset fields you chose from the Forms Manager have an ID between 1 and 11000). New fields you created in the Forms Manager have IDs above 11000. You do not need to be concerned about the ID numbers • If you created your forms using the Forms Manager, field labels are column headings (Excel) or data element labels (XML, CSV). • If you did not create your forms using the QuestionPoint Forms Manager, data is reported in columns or after data elements labeled *Old Data1*, *Old Data 2*, and so on. In addition, each data element is preceded by the field label. Example: If you have a field with the label Zip, the actual data will appear as *Zip:43017* **Note:** If you created and "published" a form in the QuestionPoint Forms Manager, those are the fields displayed for you to select from whether or not you actually use that form or are asking for older data from an earlier form.

Sample uses of Form Fields reviews

As with anything, a report is only as good as the information that goes into it. To make the best use of Form Field reviews, make sure your forms are collecting the information you need. For forms creation, see **http://www.questionpoint.org/crs/html/help/en/admin/ad_forms.html**.

- **Correlate question type with ingress method.** Study the types of questions, based on Descriptive Codes, that you receive via texting, e.g., as opposed to Email or chat.
- **Identify geographic question types.** If you collect zip code information from the patron when they submit their question, you might want to see if there is any correlation between geographic areas and types of questions asked based on Descriptive Codes.
- **Determine average length of chat sessions.** If you collect information on patron status (e.g., undergraduate, graduate, faculty, staff), is there a difference in average session length by status?
- **Examine characteristics of various methods by which patrons reach you.** Perhaps you use Add Question to enter and track telephone, mail, Email, and walk-up questions. If you capture question origin in an add-question form field, you can get statistics on your various intake methods and cross tabulate them against other form field data. For example, do patrons using one intake method generally demand faster turnaround time than those using another?
- **Gauge how effective your marketing methods are.** If you've included a drop-down menu field on your form to find out how patrons heard about you, analyze those answers here and cross tabulate with other form data.
- **Determine some effects of wait times.** Is there a correlation, e.g., between chat wait time and the number of surveys received?
- **Identify usage trends.** Is there a trend in faculty use of your service over time? By ingress method? By question type?

Resources

- **Review Your Transcripts Offline:** **http://www.oclc.org/content/dam/support/questionpoint/R_005_qp_reviewoffline_ref.pdf**
- **General Transcript Reviews:** **http://www.oclc.org/content/dam/support/questionpoint/R_002_qp_generaltranscriptreview_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

Comments, suggestions, feedback

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

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