Review Your Transcripts Offline
Quick reference

About this quick reference guide

This guide describes reviews of *Full Transcripts* only and how to request them. To read about offline reviews of *Fielded Data* (Form Fields) and how to request them, see the "**Review Your Form Field Data**" quick reference guide.   To see a similar guide for reviewing transcripts online, see "**General Transcript Reviews**."

Why would I review transcripts?

Reviews let you:
- Review your questions and transcripts to provide quality control for your institution or group.
- Review transcripts you may no longer have access to in your questions list, such as transcripts from chat sessions you picked up for another library
- Import the data into various applications to analyze your reference service.

What is the scope?

Offline transcript reviews cover both the current 90 days and your Service History.

Transcripts of all transaction types are available for review: chat and Qwidget, question form and walk-up (Add Question), and texting.

Where are the reviews located?

- In the Ask a Librarian module, click the **Review Transcripts** tab.
- Click the ***Offline*** link
- Select *Transcripts* as the Report Type

Who can access offline reviews?

Offline 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

Why choose offline instead of online?

- **No impact on system resources.** Offline reviews are run during slow times, so they are not in competition for system resources. Online reviews are limited to only 25 transactions to ensure they will have no 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. Online reviews are run immediately and are not saved.
- **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 review all institutions at the same time. Online, they must select a single institution if they want to have certain limit options. And they can export only 25 transactions at a time.

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

How do I manage offline 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. Instead, use the Create New tab.

How do I request a new review?

1. Go to Ask >> Review Transcripts >> Offline
2. Click the **Create New** tab.
3. Schedule a new review and enter a title for your review.
4. Click the *Active* or *Service History* radio button.
5. Select *Transcripts* 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 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 Field Data you want.
13. Click **Submit** button at the top of the page. Your request will appear under the **Scheduled** tab.
14. After 11:00 **Universal Time Coordinated**, return to the Offline module.
15. Click the **Completed** tab.
16. Click the *Download* link and save the compressed (zipped) file to your computer.

Options and tips for offline reviews

Option	Description
Schedule or Save	Schedule the review to be run during 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 at 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 *Transcripts* for a transcripts review.
Institution	Institution (group administrator only). Select one or all institutions.
Assigned Librarian	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	- Email/Walkup Forms (choose All, Our Patrons, or Others' Patrons). Elsewhere in QP "email" may be referred to as "Question Form Link" - Add Question (Walk-up form) are included with Emails - Chat Sessions (choose All, Our Patrons, or Others' Patrons) - Qwidget Sessions are 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,	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

Option	Description
Descriptive Codes, Status	addition of session types, resolution codes, and descriptive codes. Selecting from these parameters could limit your result set in unexpected ways.
Date 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.
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.
Email	Enter an email address if you want to be notified when the review is ready.
Format	• Export XML file (default). Select this format if you intend to import the data into a database application • HTML

Option	Description
Default Fields	• Question Detail . Includes information such as ID, date entered, IP address, library name, etc. • Question History. This is the actual transcript, the exchange between patron and librarian, and any noting or forwarding the librarian might have done. • Global routing information. If the question was routed to the Global Reference Network, data concerning that transaction is included here. • All form fields. Any data collected on your intake form.

If the email notice for a completed review indicates that the review was truncated (currently at 10,000 records), you may want to request the review again using 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.

Resources

- **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
- **Online form field data:**
  http://www.oclc.org/content/dam/support/questionpoint/R_003_qp_review_formfields_ref.pdf

Troubleshooting and support

- Document problems that you encounter so you can describe them when you request support.
- **OCLC support:**
  - o Email: **support@oclc.org**
  - o Support via **Webform**
  - o Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
  - o

Comments, suggestions, feedback

Please send us your comments about this quick reference guide:
https://www.oclc.org/forms/questionpoint/feedback.en.html