

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.

Bob

Question: Chat Transcript: What is California?
HUL_John: Note: Patron's screen name: Bob
HUL_John: Librarian 'HUL_John' has joined the session.
HUL_John: Hello, tell me a little more about what you need.

It also contains scrollable patron information and a link to the policy page of the patron's library.

Bob **Policies**

Info Scripts URLs Notes

Question: [3810391] What is California?
 Patron: Bob (bob@mailroute.com)
 Patron's Library: Heartland University Library (OCLC Test)

To go to another active session, select it under **My Active (2)**.
Wait for the session to reload before you send a message.

Support

Contact OCLC Support Staff: E-mail: support@oclc.org
 Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
 (7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Comment about this quick reference:

<http://www.surveymonkey.com/s.asp?u=685031335509>

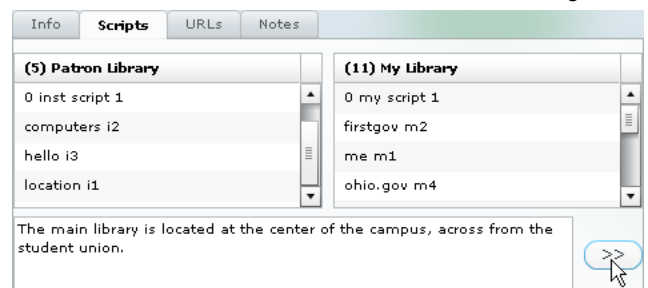
During a call (chat session)

Send a message

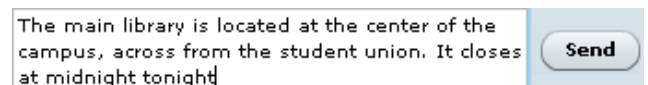
- 1 Type or paste the message in the message box.
- 2 Press the **Enter** key or click **Send**.

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.



- 4 Edit the message as needed.



- 5 Press the **Enter** key or click **Send**.

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 Internet Explorer to chat if you also co-browse. Use Internet Explorer or Firefox to chat if you never co-browse.
- 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.

Co-browse

Begin to co-browse

- 1 Click  to open the co-browse console.
- 2 Wait for "Cobrowse session joined by patron" to display.












```
HUL_John: [Cobrowse session created by librarian]
Bob: [Cobrowse session joined by patron.]
```

Co-browse or escort


If you see this in the patron information	Then the patron's browser is
Cobrowse: Yes	Fully compatible with co-browse
Cobrowse: No	Not fully compatible with co-browse but you can escort the patron

With escort, the patron cannot co-browse web sites that require authentication (such as licensed data bases), send pages to you, or see forms that you fill in.

While you co-browse

Click this button	If you want to
	Pause co-browse so patron cannot see your actions; button appears when you begin to co-browse if patron's browser is fully compatible with co-browse
	Start escort to send pages to the patron automatically; button appears when you begin to co-browse if patron's browser is not fully compatible with co-browse
	Restart co-browse so the patron can see your actions
	Pause escort so pages are not sent automatically to the patron
	Send the current page to the patron, used only if co-browse/escort is paused
	Prevent the patron from changing pages during co-browse
	Let the patron change pages during co-browse
 	Navigate the pages already viewed (Use instead of browser navigation)
	Refresh the current page (Use instead of browser refresh)
	End co-browse or escort (Does not end the chat session)

To send a page to the patron:

- Click a link on the current page.
 - Or, enter or select a URL in these tools and click  to send.
- Note:** Scroll to these tools below the co-browse buttons.

URL: 

My Favorite URLs: 

To focus attention on a part of a page:

Right click on a hard-coded link or an image to display a red triangle pointer in the librarian console and the patron chat window.

Exit co-browse

- To exit co-browse and finish the session in the chat monitor:
- 1 Click the **Exit** button in the librarian's co-browse console.
 - 2 Click **Yes** when asked if you want to close the window.

End a call (chat session)

End each call when finished to improve system performance.

- 1 Exit co-browse if you are co-browsing with the patron.
- 2 Verify that the patron's need was met and confirm any needed followup.
- 3 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.
- 4 Select a resolution code and click **Add**.
- 5 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.
- 6 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 sees a blank screen when co-browsing, ask patron to clear browser cache of temporary Internet files.
- 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>
- **Online help**, including **Settings** and **Transcript/End Session tips**
http://www.questionpoint.org/crs/html/help/en/ask/ask_flash_menu.html
- **Community Resources:** <http://wiki.questionpoint.org/>
- **Blog**, including the **Tips and Tricks** category:
<http://questionpoint.blogs.com/>