

Where is online review located?

In the Ask a Librarian (Ask) module:

- Click the **Review Transcripts** tab.

Note: To view statistical reports, click the **Reports** tab on the My QuestionPoint page.

Why would I use online review?

Online review lets you:

- Review questions and transcripts to provide quality control for your institution or group.
- View data about questions, chat transcripts, and patrons.
- Use the data in spreadsheets or databases to analyze your reference service.

Online review is available immediately. Offline review is available the day after you request it.

What is the scope of online review?

Online review include questions and transcripts:

- Available now in your question lists
- Removed from your question lists because another library is now assisting the patron's library or because your library excludes transcripts for other libraries' patrons
- Deleted from your question lists by an administrator (These are included for statistical purposes only. Therefore, patron fields, chat messages, questions, and answers are excluded.)

Questions and transcripts are available to be included in online review until they have been inactive for 90 days.

All times shown in online review reflect your time zone (the time zone of the person viewing the data).

May I access online review?

Online review is available to the following accounts, that are described in the [Administrator setup guide](#):

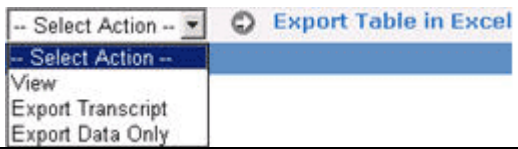
- Subscription Group (BME) administrator can review for his or her group or institution
- Institution (SUP) administrator can review for his or her institution
- Ask administrator can review for his or her institution

Quality control (24/7 Ref Coop)

BME, SUP, and Ask administrators who participate in the 24/7 Reference Cooperative can send transcripts to the Cooperative's quality control staff from Review Transcripts:

- 1 Click **Send to Quality Control** in a Full Question.
- 2 Type a note to quality control staff and click **Send**.

What are the online review options?

Link	Description of page
General	<p>Search questions/transcripts using parameters:</p> <ul style="list-style-type: none"> • Institution (group administrator only) • *Assigned librarian • Session type: several available to choose • Survey status (Did patron submit survey?) • Session resolution code • *Current status (Select All to include questions/transcripts for which another library is now assisting the patron's library) • Time/date entered <p>Work with search results in various ways:</p> <ul style="list-style-type: none"> • Specify results per page (25 or 100) • Sort all search results • View search results as an Excel table, up to 100 entries at a time • View full questions/transcripts individually • Send to quality control (24/7 Ref Coop only) • View multiple full questions/transcripts, up to 25 at a time • Export full questions/transcripts (up to 25 at a time) in XML format: Export Transcript (header and history/transcript) or Export Data Only (header only) <p>Tools at bottom of search results:</p> 
Form Fields	<p>Export data about questions, transcripts, patrons for use in spreadsheets, reports or databases.</p> <p>Institution (group administrator only)</p> <p>Session type: All, Question form, Chat sessions.</p> <p>Month</p> <p>Formats: Export XML file, Export delimited file, View Excel file.</p> <p>Field data: Custom fields from your forms, Question ID, Date entered, Patron e-mail domain, Form type (chat/question), Resolution code, Session time, Wait time, Patron IP address, Referer, Browser/OS, Chat/co-browse capability, Include labels (No, As table cells, As column headings).</p>
Offline	<p>Offline review: see Resources.</p>

* Available only when searching for data about an individual library

Sample uses of online review

Number of sessions with your patrons that needed follow-up

Link/Page:	General/Reviews
Where/How:	<ol style="list-style-type: none"> 1 For Session Type, select Our Patrons: all chat sessions. 2 For Session Resolution, select Followup By Patron's Library. 3 Search and note the total number of records found. 4 For Session Resolution, select Followup By Me. 5 Search and note the total number of records found. 6 Combine the two totals.

Analysis of patron data in an Excel spreadsheet

Link/Page:	Form Fields
Where/How:	<ol style="list-style-type: none"> 1 Change institution and/or month as needed. 2 Select View Excel file format. 3 Select/deselect fields as needed. 4 Click Submit button. 5 Sort, format, and analyze data as needed or save to disk.

Export of patron data in XML or delimited-text format

Link/Page:	Form Fields
Where/How:	<ol style="list-style-type: none"> 1 Change institution and/or month as needed. 2 Select Export XML file or Export Delimited file format. 3 Select/deselect fields as needed. 4 Click Submit button. QuestionPoint sends a message containing the data to your e-mail address (Home/My QuestionPoint > Settings > E-mail address) 5 Save the message to your computer as a text file. 6 Open file in a text editor like Notepad, remove the e-mail header, and save the file. 7 If you exported an XML file, change the file extension to .xml 8 Import the file into your spreadsheet or database program.

Resources

- **Review Your Transcripts Offline:**
http://www.questionpoint.org/support/documentation/gettingstarted/qp_reviewoffline_ref.pdf
- **Reports:**
http://www.questionpoint.org/support/documentation/gettingstarted/qp_reports_ref.pdf
- **Training resources:**
<http://www.questionpoint.org/education/index.html>
- **Documentation:** <http://www.questionpoint.org/support/documentation/gettingstarted/index.html>

Troubleshooting and support

- Document problems that you encounter so you can describe them when you request support.
- **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)

Comments, suggestions, feedback

Please send us your comments about this quick reference at <http://www.surveymonkey.com/s.asp?u=685031335509>