

## 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.

Librarian	Queues	Queue (Library)	Active	Time
Donald Hartley	5	A CA ASKNOW	0	12:53:26
Carol Bonnefil	37	A CA ASKNOW	1	12:45:08
Jill Kreis (1063)	1	A King County	0	11:57:06
Sean Dean (10)	36	A King County	1	11:59:11
stcharles (1111)	1	A ST CHARLES	0	09:59:07
Erin Kelly (112)	3	A MD PUBLIC (	1	12:42:50
Bruce Jensen (	81	After Hours Co	2	11:55:42

### 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.


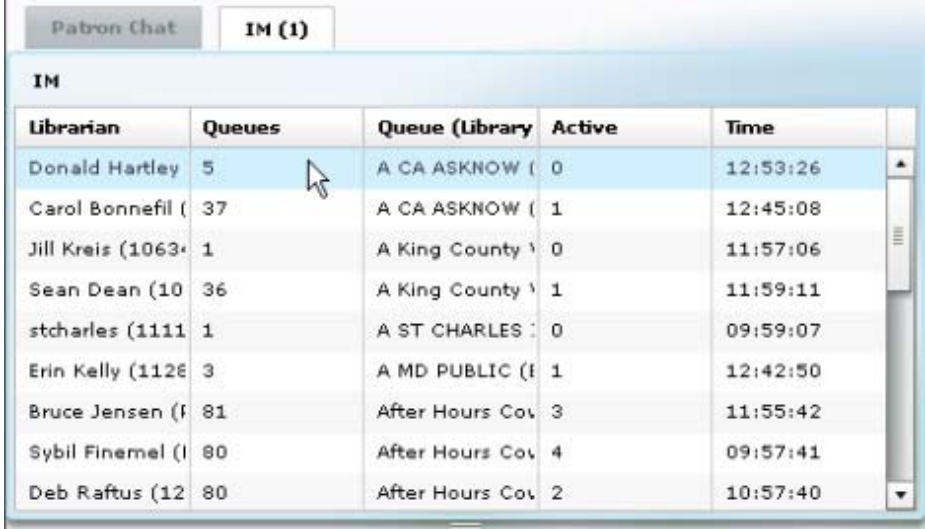
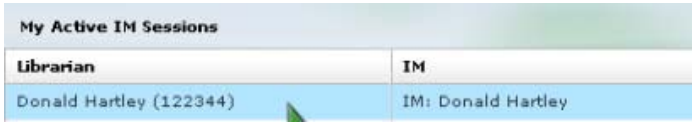

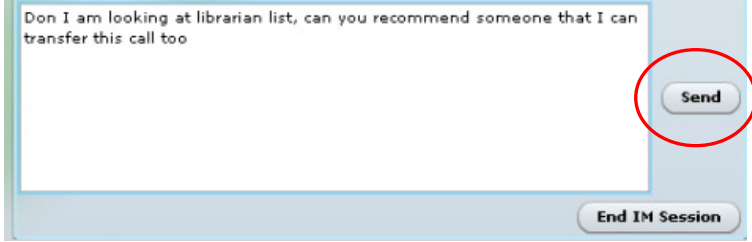
To adjust the width of a column, drag the column-heading border to the left or right.



## 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.

<p><b>1</b> Click the <b>IM</b> tab.</p> <p>The IM link shows how many IM sessions you currently have.</p>																																																			
<p>The Librarians list appears.</p> <p><b>2</b> Click on the librarian with whom you want to IM.</p> <p>This sends an alert to the librarian.</p>	 <table border="1"> <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>A CA ASKNOW (</td> <td>0</td> <td>12:53:26</td> </tr> <tr> <td>Carol Bonnefil (</td> <td>37</td> <td>A CA ASKNOW (</td> <td>1</td> <td>12:45:08</td> </tr> <tr> <td>Jill Kreis (1063</td> <td>1</td> <td>A King County \</td> <td>0</td> <td>11:57:06</td> </tr> <tr> <td>Sean Dean (10</td> <td>36</td> <td>A King County \</td> <td>1</td> <td>11:59:11</td> </tr> <tr> <td>stcharles (1111</td> <td>1</td> <td>A ST CHARLES :</td> <td>0</td> <td>09:59:07</td> </tr> <tr> <td>Erin Kelly (1126</td> <td>3</td> <td>A MD PUBLIC (E</td> <td>1</td> <td>12:42:50</td> </tr> <tr> <td>Bruce Jensen (f</td> <td>81</td> <td>After Hours Cov</td> <td>3</td> <td>11:55:42</td> </tr> <tr> <td>Sybil Finemel (l</td> <td>80</td> <td>After Hours Cov</td> <td>4</td> <td>09:57:41</td> </tr> <tr> <td>Deb Raftus (12</td> <td>80</td> <td>After Hours Cov</td> <td>2</td> <td>10:57:40</td> </tr> </tbody> </table>	Librarian	Queues	Queue (Library	Active	Time	Donald Hartley	5	A CA ASKNOW (	0	12:53:26	Carol Bonnefil (	37	A CA ASKNOW (	1	12:45:08	Jill Kreis (1063	1	A King County \	0	11:57:06	Sean Dean (10	36	A King County \	1	11:59:11	stcharles (1111	1	A ST CHARLES :	0	09:59:07	Erin Kelly (1126	3	A MD PUBLIC (E	1	12:42:50	Bruce Jensen (f	81	After Hours Cov	3	11:55:42	Sybil Finemel (l	80	After Hours Cov	4	09:57:41	Deb Raftus (12	80	After Hours Cov	2	10:57:40
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<p>The session appears in the My Active IM Sessions list below the Librarians list.</p>	 <table border="1"> <thead> <tr> <th>Librarian</th> <th>IM</th> </tr> </thead> <tbody> <tr> <td>Donald Hartley (122344)</td> <td>IM: Donald Hartley</td> </tr> </tbody> </table>	Librarian	IM	Donald Hartley (122344)	IM: Donald Hartley																																														
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<p>Information about your IM request appears in your IM chat history box.</p>	 <p><b>Carol Bonnefil:</b> Instant Message request from librarian: Carol Bonnefil (118716) to librarian: Donald Hartley (122344).</p>																																																		
<p><b>3</b> Type your message in the Message box</p> <p><b>4</b> Press the Enter key or click <b>Send</b>.</p> <p><b>5</b> Wait for a response.</p>	 <p>Don I am looking at librarian list, can you recommend someone that I can transfer this call too</p> <p><b>Send</b></p> <p>End IM Session</p>																																																		

## 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.

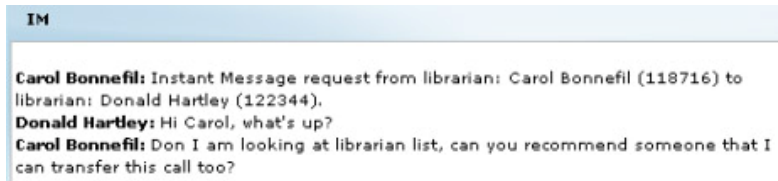
The IM link shows how many IM sessions you currently have, including the one that you just received.



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

My Active IM Sessions	
Librarian	IM
Carol Bonnefil (118716)	IM: Carol Bonnefil

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

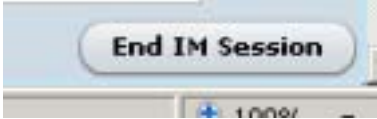



Toggle between Patron Chat and active IMs as necessary to continue with your sessions.	
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### Return to an active IM session

1 Click the <b>IM</b> tab.					
2 Click on the session in the My Active IM Sessions list.	 <table border="1"><thead><tr><th data-bbox="613 611 979 636">Librarian</th><th data-bbox="979 611 1182 636">IM</th></tr></thead><tbody><tr><td data-bbox="613 642 979 667">Carol Bonnefil (118716)</td><td data-bbox="979 642 1182 667">IM: Carol Bonnefil</td></tr></tbody></table>	Librarian	IM	Carol Bonnefil (118716)	IM: Carol Bonnefil
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Carol Bonnefil (118716)	IM: Carol Bonnefil				
3 Read any new IM messages in the transcript box.	 <p><b>IM</b></p> <p><b>Carol Bonnefil:</b> Instant Message request from librarian: Carol Bonnefil (118716) to librarian: Donald Hartley (122344). <b>Donald Hartley:</b> Hi Carol, what's up? <b>Carol Bonnefil:</b> Don I am looking at librarian list, can you recommend someone that I can transfer this call too? <b>Donald Hartley:</b> let me check... <b>Donald Hartley:</b> I see George a Backup librarian on who isn't busy.. <b>Carol Bonnefil:</b> Good idea! Thanks!</p>				
4 Type your response in the Message box and press the Enter key or click <b>Send</b> .	 <p>Glad to help</p> <p><b>Send</b></p>				

## End an IM session

To end an IM session:

<p>1 Click <b>End IM Session</b>.</p>	
<p>The session is removed from each librarian's Active IM Sessions list when either librarian clicks <b>End IM Session</b>.</p>	
<p>2 Toggle back to Patron Chat</p>	
<p>3 Click the <b>New</b> tab to respond to a new patron session. Click the <b>My Active</b> tab to return to an active patron session. Click <b>Librarians</b> to start another IM.</p>	

## Transfer an active patron session to another monitoring librarian

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


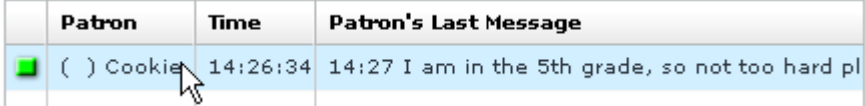
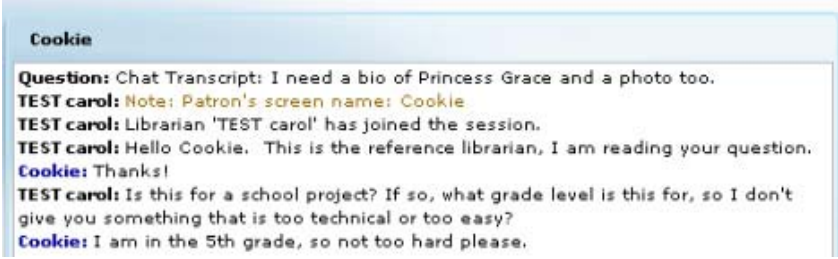
- View the list of monitoring librarians to see who is available to receive the session (see page 2), and
- Send an IM to ask an available librarian to take the session (see page 3).

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.

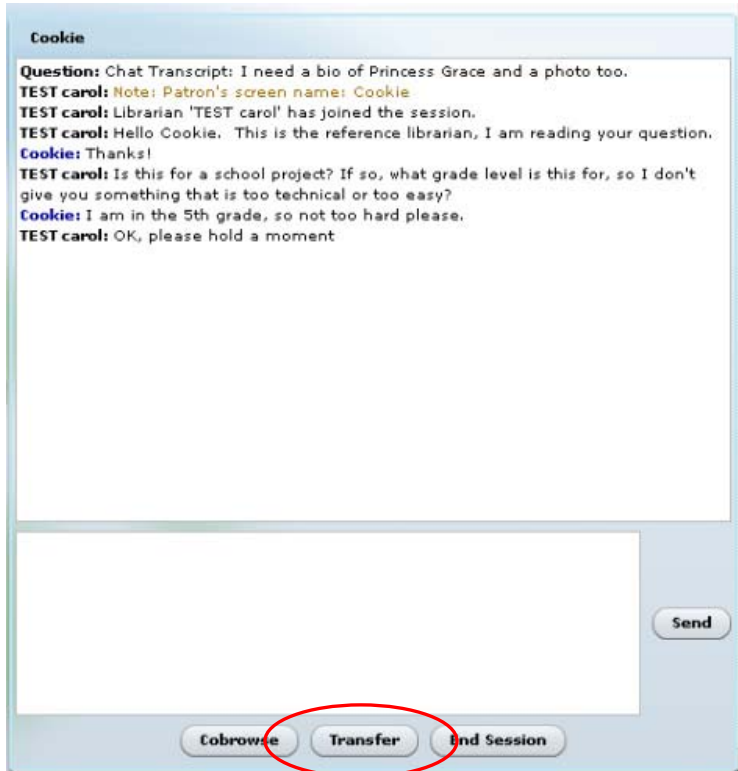
To transfer a patron session to another librarian who is monitoring any of the same queues as you:

<p>1 Click the <b>My Active</b> tab to return to the session that you will transfer.</p>							
<p>2 Click on the session.</p>	 <table border="1"> <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>	Patron	Time	Patron's Last Message	( ) Cookie	14:26:34	14:27 I am in the 5th grade, so not too hard pl
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<p>The session reloads.</p> <p>3 Read any new patron messages in the transcript box.</p>	 <p><b>Cookie</b></p> <p><b>Question:</b> Chat Transcript: I need a bio of Princess Grace and a photo too.  <b>TEST carol:</b> Note: Patron's screen name: Cookie  <b>TEST carol:</b> Librarian 'TEST carol' has joined the session.  <b>TEST carol:</b> Hello Cookie. This is the reference librarian, I am reading your question.  <b>Cookie:</b> Thanks!  <b>TEST carol:</b> 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?  <b>Cookie:</b> I am in the 5th grade, so not too hard please.</p>						

4 Send a message to the patron.



5 Click Transfer.



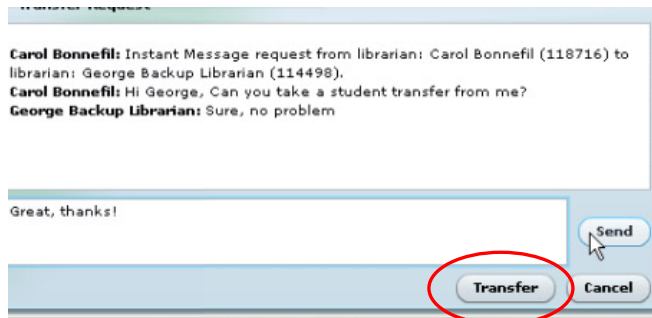
6 In the list that appears, find the librarian who will receive the session. (Scroll the list of librarians if necessary.)



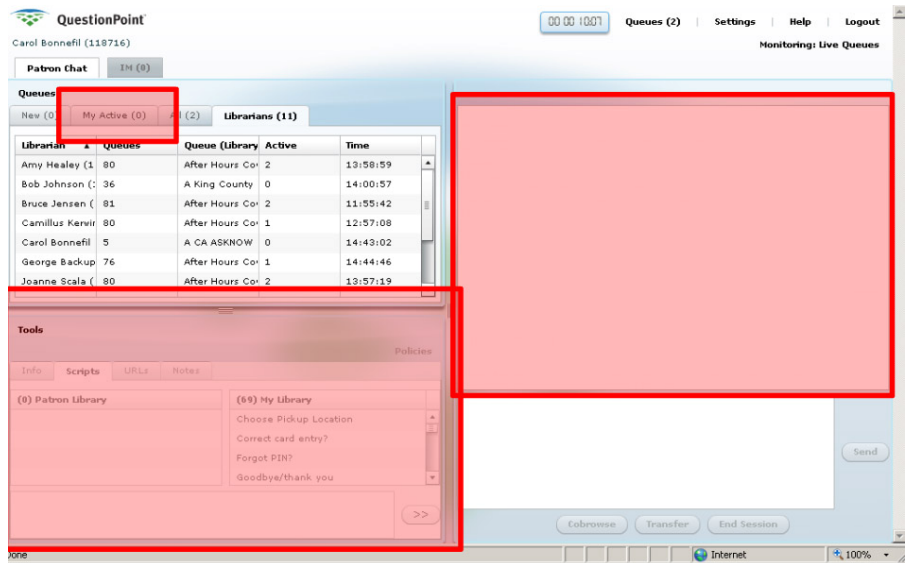
7 Click on the librarian.



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.




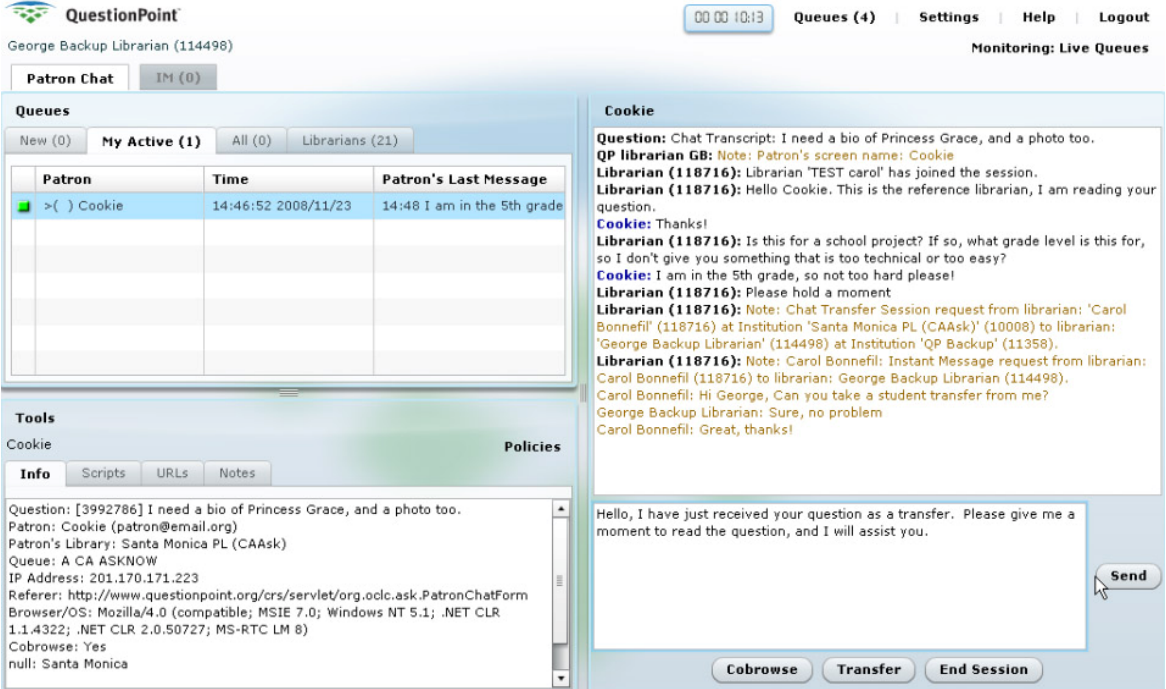


## Receive a transferred patron session from another librarian

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.

<p>When a librarian transfers a session to you, the transfer alert box pops up and an alert sounds.</p> <p>1 Click <b>OK</b>.</p>							
<p>2 Click <b>My Active</b> under the Patron Chat tab.</p>							
<p>3 Click on the patron.</p> <p>The &gt; transfer indicator is in the patron stripe</p>	 <table border="1"> <thead> <tr> <th>Patron</th> <th>Time</th> <th>Patron's Last Message</th> </tr> </thead> <tbody> <tr> <td>&gt; ) Cookie</td> <td>14:46:52 2008/11/23</td> <td>14:48 am in the 5th grade</td> </tr> </tbody> </table>	Patron	Time	Patron's Last Message	> ) Cookie	14:46:52 2008/11/23	14:48 am in the 5th grade
Patron	Time	Patron's Last Message					
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<p>The session loads.</p> <p>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.</p> <p>The patron library's policy page and scripts are also available for you to use.</p>	 <p>QuestionPoint George Backup Librarian (114498)</p> <p>Queues (4)   Settings   Help   Logout Monitoring: Live Queues</p> <p>Patron Chat IM (0)</p> <p>Queues New (0) My Active (1) All (0) Librarians (21)</p> <table border="1"> <thead> <tr> <th>Patron</th> <th>Time</th> <th>Patron's Last Message</th> </tr> </thead> <tbody> <tr> <td>&gt; ( ) Cookie</td> <td>14:46:52 2008/11/23</td> <td>14:48 I am in the 5th grade</td> </tr> </tbody> </table> <p>Tools Cookie Policies</p> <p>Info Scripts URLs Notes</p> <p>Question: [3992786] I need a bio of Princess Grace, and a photo too. Patron: Cookie (patron@email.org) Patron's Library: Santa Monica PL (CAAAsk) Queue: A CA ASKNOW IP Address: 201.170.171.223 Referer: http://www.questionpoint.org/crs/servlet/org.oclc.ask.PatronChatForm Browser/OS: Mozilla/4.0 (compatible; MSIE 7.0; Windows NT 5.1; .NET CLR 1.1.4322; .NET CLR 2.0.50727; MS-RTC LM 8) Cobrowse: Yes null: Santa Monica</p> <p>Librarian (118716): Note: Chat Transfer Session request from librarian: 'Carol Bonnefil' (118716) at Institution 'Santa Monica PL (CAAAsk)' (10008) to librarian: 'George Backup Librarian' (114498) at Institution 'QP Backup' (11358). Librarian (118716): Note: Carol Bonnefil: Instant Message request from librarian: Carol Bonnefil (118716) to librarian: George Backup Librarian (114498). Carol Bonnefil: Hi George, Can you take a student transfer from me? George Backup Librarian: Sure, no problem Carol Bonnefil: Great, thanks!</p> <p>Cookie Question: Chat Transcript: I need a bio of Princess Grace, and a photo too. QP librarian GB: Note: Patron's screen name: Cookie Librarian (118716): Librarian 'TEST carol' has joined the session. Librarian (118716): Hello Cookie. This is the reference librarian, I am reading your question. Cookie: Thanks! Librarian (118716): 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 (118716): Please hold a moment</p> <p>Hello, I have just received your question as a transfer. Please give me a moment to read the question, and I will assist you.</p> <p>Send</p> <p>Cobrowse Transfer End Session</p>	Patron	Time	Patron's Last Message	> ( ) Cookie	14:46:52 2008/11/23	14:48 I am in the 5th grade
Patron	Time	Patron's Last Message					
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<p><b>4</b> Send a message to let the patron know that you have taken over the session.</p>	
<p>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.</p> <p><b>5</b> Complete the session with the patron.</p>	

## Resources

- **Training resources:** <http://www.questionpoint.org/education/index.html>
- **Documentation:** <http://www.questionpoint.org/support/documentation/gettingstarted/index.html>
- **24/7 Reference Policies:** <http://wiki.questionpoint.org/247-Policies>

## Support

- **OCLC support staff:**  
E-mail: [support@oclc.org](mailto: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 guide at <http://www.surveymonkey.com/s.asp?u=685031335509>



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