

Why would I use offline review?

New: Offline review now includes your Service History too.

Offline review lets you:

- Review your current questions and transcripts or your Service History 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.
- Schedule up to 5 reviews at a time for next-day downloading.
- Receive e-mail notification of reviews ready for downloading.
- Save specifications of up to 25 reviews to be run again.

Offline review provides these advantages over online review:

- A single review can include up to 90 days of current data for an institution or an entire Subscription Group (BME).
- Reviews can include data from your Service History or your current questions and transcripts (active data)
- More options and more data at one time.
- The patron's question can be included in reviews containing patron data.
- Sort options are available for all reviews.

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

What is the scope of offline review?

Offline review includes questions and transcripts:

- Available now in your Service History or 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 have been stripped.)

Questions and transcripts in question lists are available to be included in offline review of active data until they have been inactive for 90 days.

In addition, offline review lets you include questions and transcripts that have moved to the Service History after 90 days of inactivity.

All times shown in reviews reflect your time zone (the time zone of the person requesting the data).

May I access offline review?

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

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

Others can view completed reviews if an administrator shares them after downloading.

Where is offline review located?

In the Ask a Librarian (Ask) module:

- Click the **Review Transcripts** tab and then click **Offline**.

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

How do I manage offline review?

Tab	Purpose
Create New	<ul style="list-style-type: none"> • Schedule (request) a new review. • Save the specifications for a new review.
Saved	<ul style="list-style-type: none"> • Edit (change) a saved review. • Schedule (request) a saved review. • Delete (remove) a saved review.
Scheduled	<ul style="list-style-type: none"> • Edit (change) a scheduled review. • Delete (cancel) a scheduled review.
Completed	<ul style="list-style-type: none"> • 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.

Tips

- If you have 5 scheduled and/or completed reviews, delete one before you schedule another.
- If you have 25 saved reviews, delete one before you save another.
- When you request a review, provide an e-mail address that will receive a notice when the review is ready to download.
- Download reviews within 7 days after they are completed; they are automatically deleted after 7 days.
- The file name of a downloaded review is your library's QuestionPoint ID and the number (1-5) of the review in the list of completed reviews.
- You can e-mail a downloaded review to others to share data.

Troubleshooting and support

- **Caution:** Some data does not appear in older records in Service History, such as session type, resolution codes and descriptive codes. Selecting such fields may limit your results in unexpected ways.
- If the e-mail 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.
- 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)

How do I request a new review?

To schedule or save a new review:

- 1 Click the **Create New** tab.
- 2 For **Select Database**:
 - Check Add to Schedule, Save, or both.
 - Type a review title.
 - Select Active data or Service History
 - Select a Report Type: Transcripts or Fielded Data.
 - Click the **Limit Search** button (at top of page).
- 3 For **Limit Search**:
 - Select the desired options.
 - Be sure to select a date range at the bottom of the page.
 - Click the **Select Fields** button (at top of page).
- 4 For **Select Fields**:
 - Type the e-mail address that will receive a notice when the completed review is ready for downloading.
 - Select Format.

Format	Type	Review file extension
Export delimited file	Fielded Data	.txt
Export Excel format (HTML Table)	Fielded Data	.xls
Export XML file	Transcripts Fielded Data	.xml
HTML	Transcripts	.htm

- Select Field Data.
- 5 Click the **Submit** button (at top of page).

How do I download a completed review?

Reviews are usually completed the day after they are scheduled. You receive an e-mail notice when a completed review is ready if a notice was requested.

To download a completed review:

- 1 Go to **Ask > Review Transcripts > Offline > Completed**.
- 2 Click the **Download** link for a completed review.
- 3 Save the Zip file to your computer.
(The default file name is your library's QuestionPoint ID and the number (1–5) of the review in the completed-reviews list.)
- 4 Open the Zip file and extract the review file.
- 5 Open the review file and view or analyze the data.

Review file extension	Open the file with
.htm	Web browser
.txt	Microsoft Excel or other spreadsheet program
.xls	Microsoft Excel
.xml	Microsoft Excel or XML editor

What are the offline review options?

Step	Options
Select Database	<ul style="list-style-type: none"> • Add to schedule, Save, or both • Title of review • Active data (last 90 days) or Service History • Review type: Transcripts or Fielded Data
Limit Search	<ul style="list-style-type: none"> • Institution: one or all (group admin only) • *Assigned librarian: One or all • Session type: Question form, Chat sessions, several sub-types for individual library reviews • Survey status (Did patron submit survey?) • Session resolution code • Descriptive code • *Current status: All (Not Deleted), All, New, Pending, New or Pending, Answered, Closed, Deleted (Select All to include questions/transcripts for which another library is now assisting the patron's library) • Range of date entered • Sort by: Question ID, Patron, *Date entered, Wait time, Session time, Authorization, Resolution <p>* Available only for individual library reviews</p>
Select Fields	<p>If Transcripts review type selected:</p> <ul style="list-style-type: none"> • E-mail notification address • Format: Export XML File (.xml), HTML (.htm) • Field Data: Question Detail, Question History, Global routing information, All form fields <p>If Fielded Data review type selected:</p> <ul style="list-style-type: none"> • E-mail notification address • Format: Export XML File (.xml), Export Excel format–HTML Table (.xls), Export Delimited file (.txt) • Field Data: Question ID, Question, Date entered, Patron's Institution, Patron E-mail Domain, Form type (chat/question), Resolution code, Session time, Wait time, IP address, Referer, Browser/OS, Co-browse compatibility, custom fields from your chat and question forms, Include labels (No, As table cells, As column headings)

Resources

- **Review Your Transcripts Online:** http://www.questionpoint.org/support/documentation/gettingstarted/qp_reviewonline_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>