QuestionPoint Librarian 1: QuestionPoint Overview and E-mail Reference Class Handout

QuestionPoint overview

Key concepts

- **Reference Management Service** provides tools for libraries to communicate with patrons in a virtual environment and to manage a library’s reference service.
- **24/7 Reference Cooperative** provides a library’s patrons with round-the-clock chat service.
- **Policy Page** contains information that a QuestionPoint library provides about itself and its policies.
- **Base Management Environment (BME)** covers access to the entire suite of tools in the Reference Management Service, including e-mail management, chat reference and follow-up, local knowledge base, etc.
- **Subscription Unit Profile (SUP)** covers the identification of a library as a discrete, reference work unit. Each library that has a Subscription Unit Profile has access to its own questions, chat transcripts, librarian accounts, policy information, etc.

Modules

- **My QuestionPoint page (Home)** is used to navigate to frequently used areas in the QuestionPoint system.
- **Administration** is used to manage librarian accounts and customize communications with patrons.
- **Ask** is used to access questions and chat transcripts to send answers or conduct chat follow-up with patrons.
- **Chat** is where librarians monitor chat requests and chat with patrons.
- **Knowledge Base (KB)** is used to search for question and answer pairs in the local and Global knowledge base to answer patron’s questions, as well as, add new KB records or edit existing KB records.
- **Profile** is used to provide and view library profile information and policy pages.
- **Report** is used to view statistical reports for QuestionPoint.

QuestionPoint access and logon

1. Go to [https://questionpoint.org](https://questionpoint.org)
2. Click **Librarian Logon** button
3. Enter **User ID** and **Password**
Questions status

<table>
<thead>
<tr>
<th>Key</th>
<th>Status</th>
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<tbody>
<tr>
<td>?</td>
<td><strong>New</strong> – Questions or chat transcripts that need action by you or your library</td>
</tr>
<tr>
<td>📝</td>
<td><strong>Pending</strong> – Questions or chat transcripts that need action by someone outside your library</td>
</tr>
<tr>
<td>💌</td>
<td><strong>Answered</strong> – Questions or chat transcripts for which an answer has been sent to the patron</td>
</tr>
<tr>
<td>📜</td>
<td><strong>Closed</strong> – Questions or chat transcripts that has closed because work on them is done</td>
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Questions lists

- **Active** – Combined list of all questions and chat transcripts in the New, Pending, and Answered questions list.
- **New** – Questions and chat transcripts that need action by your or your library.
- **Pending** – Questions and chat transcripts that need action by someone outside your library.
- **Referred** – Combined list of questions and chat transcripts in the New, Pending, and Answered questions lists that were referred for answer BY your library or TO your library.
- **Answered** – Questions and chat transcripts for which an answer has been sent to the patron.
- **Closed** – Questions and chat transcripts that have been closed by a librarian or a patron.
- **All** – Combined list of all questions and chat transcripts in the New, Pending, Answered, and Closed questions list.
- **Shared Followup** – Questions and chat transcripts for any library in your BME (or group) that are waiting for any librarian in your BME to claim for answering or follow-up. _Note – This list is only available if this feature is turned on for your BME._
Create personal scripts

You can create personal text and URL scripts to streamline your processes while chatting with a patron or answering an e-mail reference question.

To create *My Scripts*:
- Navigate to *Ask* module
- Click *Settings* link
- Click *My Scripts* link
- Enter a *name* for your new script
- Enter the *text* for your new script
- Click *Add* to add your new script

To create *My URL Scripts*:
- Navigate to *Ask* module
- Click *Settings* link
- Click *My URL Scripts* link
- Enter a *name* for your new URL script
- Enter the *URL* for your new URL script
- Click *Add* to add your new URL script

Resources

- QuestionPoint Community
  - [https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Community](https://help.oclc.org/Discovery_and_Reference/QuestionPoint/Community)

- Documentation and Training
  - [https://help.oclc.org/Discovery_and_Reference/QuestionPoint](https://help.oclc.org/Discovery_and_Reference/QuestionPoint)

Contact Customer Support

- **United States**: 1-800-848-5800 or support@oclc.org
- In your region: [http://www.oclc.org/support/contact-support.en.html](http://www.oclc.org/support/contact-support.en.html)