Training Agenda

Morning
  Introduction & Overview of a chat transaction from both patron & librarian side.
  Logging in
  What am I seeing? (views and windows)
  How does this work? (buttons and menus)
  Free play!

Afternoon
  Downloading
  Customizing & Importing
  Service & Staffing Guidelines (Appendix I)
  Differences in Communication styles (Appendix II)
  Free Play

(Last hour for Site Administrators)
  Setting up accounts (Appendix III)
  Trouble Shooting
OhioLINK Chat Reference Training Documentation

Overview

Starting at the OhioLINK website, a student from the University of Toledo is trying to find the right place to look for a picture of a wombat for their biology project. They think that they want something in a book, but maybe what they want is on the Internet. Not knowing where to start, they click on Help. The page that appears promises that Live Help is available with a librarian, so they click on the picture. A short form appears, and they fill in their name, email, and other information. There’s even a place to indicate that it is a science question. After they hit send, the form disappears and the picture changes to indicate that a librarian will soon be with them. Sure enough, in a few seconds a chat window pops up with a welcoming message from the librarian. After the patron explains what they’re after, the librarian suggests that they start on the University of Toledo library catalog and look for a zoology encyclopedia. As the librarian finds web pages, they appear on the student’s computer in a new web browser window. A further search using Google finds more pictures. The librarian sends a copy of the session by e-mail so that the student can return to the suggested web sites. Lastly, the librarian sends them to a web page with a short survey about the service before closing the chat session.

While sitting in his office on duty at the OhioLINK chat desk, a librarian at Wittenberg hears a sound from his computer speakers. Glancing at the tab that says “Calls”, he sees a small red light that indicates a new reference call has been routed to him. He clicks on the Calls tab, and clicks on the name shown. Now that he’s connected with the patron, the tab shifts to the Chat tab, and he can choose one of his greetings from the AutoMessages menu. A short greeting message appears in the text box at the bottom of the window, and he hits the Send button. As he’s waiting for the patron’s reply, he looks at the information in the Patrons list above the chat window. He can see the patron’s name, status (i.e., student, faculty, staff), and e-mail address. “Good,” he thinks, “I can e-mail a transcript when I’m finished.” Noticing that the patron is from the University of Toledo, he pulls up the UT library page on his browser to have just in case. A different sound alerts him that the patron has replied, and he clicks back on the Chat tab. He suggests first that they look for encyclopedias in UT’s catalog, and copies the URL from his browser and pastes it into the chat box, preceding it with the command push:. After walking through a keyword search, he suggests that they also try the search engine Google, which has an image search as well. Choosing the site from his ‘Push Content’ menu, he tells the student how to use Google. The student appears satisfied, so the librarian asks if he’d like a transcript mailed (from the Extras menu) and finally sends him to a survey page before closing the session. Before he moves on to the next transaction, he opens a chat librarian survey to record statistical information about the transaction.
logging in

to log in to the chat software installed on your machine, open the program from an icon on your desktop or from the start menu under programs (windows). on macintosh computers, the groopz operator icon may be on your desktop or in a folder named “groopz”.

you will be prompted at the authentication screen to select a profile to login. there may be a list of profiles shown, which are the librarians that have set up individual profiles on the computer where you are.

if your profile isn’t shown, or if this is your first time logging in, you will need to create a profile by clicking on the icon of a small person in the lower left. your profile username and profile password can be anything that you wish (these are separate from your server username and password used in the connection set up below.) if you choose ‘save password’, you will not be prompted when logging into the chat reference service from this computer. when you click on ‘ok’, you will be returned to the authentication screen.

click on the name of the profile you wish to use and then on the enter (bent arrow) button in the lower right to log in.

if this is your first time logging in, you will be shown a blank log on screen. to use the ohioLINK chat reference service, you will need to set up a connection to the ohioLINK site. click on the double arrow icon (<=>) on
the left of the screen to set up a connection. This will automatically connect upon subsequent log in.

**Connections**

To connect to the OhioLINK server, fill out the connections dialogue box as shown here. The server username and server password will be given to you by your local site coordinator.

![Connect to Groopz site](image)

**Main Buttons**

From left to right, the buttons that are visible are:

- **Connect to Site** (See above)
  - This allows you to connect to the OhioLINK chat reference server.

- **Connections**
  - Shows which connections are active. If there is a disruption in communication with the server, you can reconnect to the OhioLINK web server using this menu.

- **Views & Filters**
  - Allows you to customize your views for the Patrons & Librarians tabs (more below)

- **Groups**
  - Choose your school from the list shown in order for you to get priority in serving patrons from your institution. You do not need to choose OhioLINK (or all of the schools shown) in order to get patrons from other schools, you will get them automatically if you are available and the call is not routed to another librarian.

- **Availability**
  - This button will appear green when you are available, or red when you are not available. To change your status, click on the icon. Set yourself to ‘Unavailable’ if you are away from your computer and do not want to receive incoming patron requests. Note: when you log in, wait till you have connected with the OhioLINK server before setting your availability to Unavailable, or it will not show the correct status.
Explanations of different frames:

1.) On the left is the Site Map. For our purposes, this frame will not be used with OhioLINK chat reference and can be minimized by clicking on the small left arrow on the border between the frames.

2.) On the top are the default Views. Each tab shows a list of people connected to the chat server.

**Patrons View:**

<table>
<thead>
<tr>
<th>Username</th>
<th>Name</th>
<th>Groups</th>
<th>Status</th>
<th>Email</th>
<th>Chats Opened</th>
<th>Time on Page</th>
<th>Operating System</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This shows information for people that have their web browser displaying a page with the OhioLINK Chat Reference icon. **They may not have clicked on the icon and requested a chat session!** The columns that you see displayed can be customized for your individual profile (see below), but we recommend the following information be displayed for maximal help to you in assisting the patrons:

- Username (assigned by the server)
- Name (entered by the patron as they log in)
- Groups (Institution according to their IP address)
- Status (Undergraduate, Graduate, Faculty, etc. entered by the patron)
- Email (entered by the patron… necessary for sending transcripts)
- Chats Opened (value is 1 if patron is chatting with a librarian currently)
- Time on page (How long have they been at the Chat icon page)
- Operating System (automatically detected by software)

**Librarians View:**

<table>
<thead>
<tr>
<th>Username</th>
<th>Availability</th>
<th>Chats Opened</th>
<th>Time on Site</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100%</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>100%</td>
<td></td>
<td>3:20:40</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0</td>
<td>2:07:10</td>
</tr>
</tbody>
</table>

This shows information about which librarians are logged into the chat reference service. Again, the columns that you see displayed can be customized for your individual profile (see below), but we recommend the following information be displayed. Double click on a name to chat with another librarian.

- Username (initially your server username, but we recommend you change it to Firstname@School)
- Availability (0% if unavailable for patron chats or transfers, 100% if available).
- Chats Opened (number of chat sessions librarian is engaged in)
- Time on Site (time since librarian logged in to service.)
- Operator Groups (patron groups the operator has preference for.)
Open Chats:

Displays any chat sessions that are currently in progress.

3.) On the bottom are the information frames associated with the selected individual from the Patron or Librarian Views. Single click on a name in either view and more information is available by clicking on one of the tabs in the lower frame. Note: Double clicking will engage the person in a chat session! If you accidentally double click, just click ‘Close’ in the chat window and the session will close without starting a chat.

Info

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>Guest 2102</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:jace@jedodo.edu">jace@jedodo.edu</a></td>
</tr>
<tr>
<td>Special topic</td>
<td>Science</td>
</tr>
<tr>
<td>Name</td>
<td>John Doe</td>
</tr>
<tr>
<td>Institution</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>Status</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Time on Site</td>
<td>13:32</td>
</tr>
<tr>
<td>Page title</td>
<td>OhioLINK Ask a Librarian</td>
</tr>
<tr>
<td>Address</td>
<td><a href="mailto:bastagnet@ohiostate.edu">bastagnet@ohiostate.edu</a></td>
</tr>
<tr>
<td>Chats Opened</td>
<td>1</td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>Operating sys</td>
<td>Windows NT 4.0</td>
</tr>
<tr>
<td>Browser</td>
<td>Netscape Communicator</td>
</tr>
<tr>
<td>Organs</td>
<td>University of Toledo</td>
</tr>
<tr>
<td>E-mail</td>
<td><a href="mailto:jace@jedodo.edu">jace@jedodo.edu</a></td>
</tr>
<tr>
<td>Assisted on</td>
<td>9/11/12 11:14 AM</td>
</tr>
<tr>
<td>Referrer</td>
<td>none</td>
</tr>
<tr>
<td>Time on Page</td>
<td>13:32</td>
</tr>
<tr>
<td>Affiliate</td>
<td>none</td>
</tr>
<tr>
<td>Assisted by</td>
<td>Wode@UT</td>
</tr>
<tr>
<td>Page URL</td>
<td><a href="http://ohio.ohiolink.edu">http://ohio.ohiolink.edu</a></td>
</tr>
</tbody>
</table>

The information pane will show a list of information that has been either detected automatically by the server, entered by the patron when they log in, or added by the librarian. Since this information is saved as a cookie on patrons’ computers, it could appear incorrectly for users of public workstations unless the information is overwritten by the patron entry form information. Any of the information displayed here can also be displayed in the Patrons or Librarians View, but having all columns displayed could get crowded!

You can edit or add information to this form in two ways. The first is to double click on the value on the right and replace it with new information. The second is to highlight information in a chat session and then right click on the selection. You can then add it to the information pane using ‘set as…’.
times that changing Info values can be useful are when you want to set your Username as a librarian to something different from your server username (we suggest FirstName@School, e.g., Wade@UT), or when the patron has not filled in their e-mail address and you want to send them a transcript.

Path
This information pane is not terribly important for our purposes. It should have the URL of the page they saw the Chat Icon on, and may also show what pages you have sent them to during the course of your chat.

Chat
When engaged in a chat session, this pane shows the entire conversation. If multiple chat sessions are open simultaneously, they appear as tabs at the bottom of the chat pane. When a new message is sent by the patrons in any open chat session, a red ‘light’ appears on the Chat tab, and a sound is played. This pane and the menus on it will be described in more detail below.

Calls
When you are selected by the software as the librarian to help a patron with a question, you will hear a sound, and a red ‘light’ will appear on your Calls tab. Click on the tab and double click on the patron’s username to start a chat session. If you do not click on the patron within a short time, the call disappears from your Calls tab and is routed to another available librarian. Do not pick up Patrons from the Patron’s view, only from your Calls tab.

Personal Chat Logs
A ‘file cabinet’ listed by date of transcripts of the chat sessions that you have engaged in while logged on from a particular computer.

Monitor
Used to monitor another chat in progress.

Additional options in Chat window
All communication between the librarian and the patron (or between librarians that are logged in) takes place in the Chat pane. As mentioned above, you may have multiple chat sessions open at a time, so this pane can be very busy! The important thing to remember is that a small red light will appear on the tab when a new message is sent, and will remain visible till you click on the tab to bring up that conversation. This helps you keep track of which conversations are ‘active’ and which ones you have responded to already.

In order to keep repetitive typing to a minimum, you can create ‘canned’ messages and web pages to send to the patrons. Additionally, there are additional options such as transferring a call to another librarian, e-mailing a transcript to the patron, or initiating a co-browsing session. These are all accessed through the menus at the top of the Chat pane.
AutoMessages

This is your menu of frequently used phrases. They can be grouped into folders to make finding similar messages easier. Choosing an AutoMessage places it in your text entry field so that you can edit the message, if necessary, before sending it out. The message will not be sent to the patron until you press ‘Send’.

These messages can be customized for each librarian, and are stored with the profile on your computer. Each profile name can have a different set of AutoMessages. (See below for more information on customizing and importing AutoMessages.)

Transfer Call

To transfer the current chat session to another available librarian, choose the librarian name from this menu. The number in parenthesis after the name indicates the number of chat sessions that librarian currently has active. You cannot transfer a call to a librarian who is set to Unavailable. After you select a librarian, they will hear their new call alert sound and will be able to pick up the patron from their Calls tab. This feature is especially useful if you want to transfer a patron to a subject specialist who is logged on, or to an available librarian from their own institution.

Push Content

To show a patron a particular web page, you can push the page to their browser. One way to do this is to select from the predefined web pages in your Push Content menu. Another way is to type the word push: (with the colon) followed by the URL of the web page. Note: You can copy and paste the URL into the text entry box, but you will need to use the keyboard shortcuts to paste information into the text entry box, such as Ctrl-V or OpenApple-V. If you choose a page from the Push Content menu, the patron is immediately sent to the page; there is no opportunity to edit the URL in your text entry box. After you have pushed a page to the patron (by either method) a new folder appears in the Push Content menu that has all of the recently pushed pages.

As with the AutoMessage menu, the URLs in the Push Content menu can be customized for each librarian, and are stored with the profile on your computer. Each profile name can have a different set of Push Content URLs. (See below for more information on customizing your Push Content.)
Extras

Three options are available on the Extras menu.

**E-mail Transcript**
Will e-mail a transcript (including pushed URLs) to the patron’s e-mail address. In order for this feature to work, the patron must have a valid e-mail address in their Info. This can either be supplied by the patron at log in, or be added by the librarian. (See Info tab above for more information about adding or modifying e-mail addresses.) Also, the librarian must have their e-mail setting properly configured (See Preferences, below).

**Send Path to User**
Will send a screen to the user that lists all of the web addresses they have been sent during the session.

**Co-Browse**
To lead a patron through a web session simultaneously with the librarian. You can also type ‘cobrowse:http://…’ in the text entry box to start a co-browsing session.

**Downloading the Chat Software**
While users will not need to download any special software to use the chat service, the librarians will need to download and install the Chat software on each machine that they will be staffing the ‘Chat desk’ from. To download the software, choose the correct download for your operating system from http://www.groopz.com/downloads/updates/

Double click on the file InstallGroopzOperator2 after the download is complete.

**Customizing your interface**
Many of the features of the chat software can be customized by each librarian. The customizations are saved in files on the particular computer that was used when customizing, and are specific to the profile that is on that computer. All of the files are saved in a folder called .Groopzconfig, and files in this folder can be copied to other computers to transfer the settings to the profiles on those computers (for example, if you staff the Chat Desk in two different locations, and want to have the same settings in each.) The main files are: Profilename.inf, which has information about Views & Filters, Connections, and Preferences; Profilename.say, which has your AutoMessages; and Profilename.push, which has your Push Content settings. Additional files in the .GroopzConfig folder include header.txt and signature.txt used in e-mailing the transcripts, and a Transcripts folder which has chat transcripts associated with the profile.
Views & Filters

These settings control which columns to display in the Patron and Librarian Views. To configure this setting, you can choose ‘Views and Filters’ from the Configure Menu, or click on the icon in your tool bar that looks like three stacked windows. (The third icon).

Choose which tab you want to configure from the ‘Existing Views’ drop down menu at the top of the dialogue box. You can edit the Name of the View if you prefer a different terminology (for example, Library Users instead of Patrons, or eLibrarians instead of Librarians.) The list on the left displays all of the columns that will not be displayed, those on the right are the columns that will be displayed for the selected View tab. Up and Down control the order in which the columns will be displayed (or you can drag the column headings into the correct order when you are looking at a View while not in Edit mode.)

Suggested columns to have displayed for the Patrons tab are: Name, Groups, Status, Special Topic, Email, Chats Opened, Time on page, and Operating System. (The first column, Username, is shown automatically.)

For the Librarians view, we suggest: Name, Availability, Chats Opened, Operator Groups, and Time on Site.

AutoMessages

This controls the display and content of your AutoMessages to send during a chat session. Again, these are associated with your profile on a specific machine, and are saved in a file called Profilename.say in your .GroopzConfig folder. To configure this setting, choose ‘AutoMessages’ from the Configure Menu.

The messages are grouped into folders, which are displayed as sub-menus when you use the AutoMessages function during chat. You can create new sub-menus by clicking on Add Folder in the AutoMessages editing dialogue box. To add a new message to a particular folder, click on the folder name and then Add message to create a new message. The label will be ‘New Message’
initially; click on the name and then Rename to change the menu label. Click on a name and enter the message in the text entry box at the bottom to type the text of the new message. Existing messages can be edited by clicking on the name and editing the text in the text entry box. Click ‘ok’ to exit the dialogue box. In order for the changes to take effect, you must log out and log back in before the messages will actually appear in your AutoMessage menu!

**Content Push**

This controls the display and content of your Push Content Menu to send web pages during a chat session. Again, these are associated with your profile on a specific machine, and are saved in a file called Profilename.push in your .GroopzConfig folder. To configure this setting, choose ‘Content Push’ from the Configure Menu.

The web sites are grouped into folders, which are displayed as sub-menus when you use the Push Content function during chat. You can create new sub-menus by clicking on Add Folder in the Push Content editing dialogue box. To add a new location to a particular folder, click on the folder name and then Add location to create a new site. The label will be ‘New Location’ initially; click on the name and then Rename to change the menu label. Click on a name and enter the URL in the text entry box at the bottom. Existing URLs can be edited by clicking on the name and editing the address in the text entry box. Click ‘ok’ to exit the dialogue box. In
order for the changes to take effect, you must log out and log back in before the messages will actually appear in your Push Content menu!

**Importing AutoMessages or Push Content**

If you want to use another profile’s automessages or push pages, it is very easy to import them into your own profile. Copy the .push and .say files from that profile to your .GroopzConfig folder and rename them to Profilename.say and Profilename.push (to match your profile). Note, however that this will overwrite your existing AutoMessages and Push content. If you want to add portions of another profile’s .push or .say file to your own, you can cut and paste the contents from one .push (or .say) file to your existing profile using any text editor.

**Preferences**

You can configure the following settings by selecting Preferences from the Configure menu. Each tab controls different settings. All settings on this menu take effect immediately (you do not need to log out to update your settings.)

**General**

This controls two functions. The ‘Time until user is removed from view’ is the time that a Patron’s information remains on the Patron View after the Patron has left the web page with the Chat icon. ‘Time until No Answer Transfer’ is the time after which a Call that has not been picked up will be routed to another available librarian.

![Preferences](image)

**Notifications**

From this dialogue box, you can customize the sounds that play when 
a) There is a new message from the patron in an open chat session (‘New message’)
b) You send a message in a chat session ('Message sent')
c) A chat session has been requested or a call has been transferred to you. You should check your Calls tab to pick up the call. ('Help requested').

For each of these sounds, you can browse a list of pre-installed sounds, or use 'play' to hear what the current selection sounds like.

E-mail Transcript

These settings allow you to send an e-mail containing the transcript of the chat session, including any URLs that you have pushed to the patron. The SMTP server needs to be a valid server name and the address should be either the librarian's e-mail address or an invalid address, such as none@ohiolink.edu. The Subject line can be changed to anything that you want. Header and Signature files are text files that you can create and place in the same folder as your profiles (.GroopzConfig). These will be appended to the beginning and the end of the transcript.
Appendix I: Service & Staffing Guidelines (June 25, 2002)
(Developed by K.Broughton, W.Lee, F.Scott, C.Singer)

I. Purpose of Guidelines
These guidelines are intended to facilitate quality and consistency in service from librarian to librarian and institution to institution, and to outline the responsibilities of participating librarians.

II. Scope of Service
A. The only users served by this service are the students, faculty and staff of OhioLINK member institutions, and visitors to OhioLINK libraries’ campuses. All users from outside OhioLINK libraries’ campuses will be authenticated.

B. Types of questions answered
1. Ready reference will be answered, given resource availability, and are appropriate for this service.
2. Reference inquiries involving instruction will be answered in a reasonable manner given the limitations of the medium.
3. Instructions on how to view one’s own circulation record within any of the OL institution’s catalogs will be expected, but this service will be unable to look-up patron records and will refer all questions about specific patron records to local institutions.
4. Individual institutions’ periodical holdings will be interpreted as much as reasonable, but for detailed holdings information the user may be referred to the local institution.
5. Librarians should use their own discretion and professional judgment and refer users to their local libraries when the librarian determines that the question cannot be reasonably answered using this service.
6. When dealing with legal or medical information, the source of the information should be cited and no attempt made to interpret the implications or to influence the user’s subsequent behavior.

C. Librarians may demonstrate the service to individuals or groups, and are asked to:
   1. Immediately identify themselves and their purpose
   2. Not ask “fake” reference questions
   3. Inform the chatref list of the day(s) and approximate time(s) of extensive demonstrations.

D. Use in a classroom situation should be restricted to a demonstration. Given the limitations of our staff, having an entire class start a chat session is discouraged.

III. Scheduling
A. There will be a scheduling coordinator in charge of scheduling for the entire consortium.
B. When only one librarian from a particular library wishes to participate, it will be beneficial, in terms of replacements and coordination, for that librarian to become part of a larger group of participating librarians (e.g. CONSORT librarians).
C. There will be a coordinator for each library/library group who is in charge of the scheduling for that library (see section X on Local Digital Reference Coordinators below).
D. The schedule will be done quarterly.
E. The campus coordinator for each library/group will be asked to sign up for the shifts they want.
F. There will be at least 2 libraries assigned to each shift (therefore, at least 2 librarians on duty at all times).
G. After campus coordinators sign up for the times they wish to staff, the central coordinator will send a list, to the Internet mailing list, of the shifts that still need to be staffed.
H. If not enough libraries volunteer for some shifts, those shifts might not be staffed.
I. It is the responsibility of the scheduling coordinator to post the completed schedule, making librarians and users aware of hours of service.
J. The finished schedule will be posted on the web, as well as being sent to the Internet mailing list.
K. Times that will be covered by the service (according to the grant)
   1. Fall, Winter & Spring (mid-August to mid-June)
      Monday - Thursday  9 am - 10 pm
      Friday           9 am - 5 pm
      Saturday        1 pm - 10 pm
      Sunday          1 pm - 10 pm
   2. Summer schedule (mid-June to mid-August)
      Sunday-Thursday  1 pm - 8 pm
      Friday          1 pm - 5 pm
      Saturday       Closed
   3. Holidays we won't be open
      New Year's Eve after 5 pm, New Year's Day
      Memorial Day
      Independence Day
      Labor Day
      Thanksgiving Eve after 5 pm, Thanksgiving Day, Day after Thanksgiving
      Christmas Eve after 5 pm, Christmas Day

IV. Staffing
A. All participants are required to subscribe to CHATREF@ohiolink.edu. This mailing list is used for scheduling, training, tips, etc.
B. Shifts will be assigned to a library/group, not to a person.
   1. Shifts will be 2 or 3 hours long.
   2. The schedule will list specific times for each shift to begin and end.
      Libraries/groups will not be able to make up alternative times for their shifts.
   3. Librarians should make every effort to be prompt in signing on for their shift so the librarian they’re replacing is not inconvenienced.
   4. Librarians should stay signed on and available until their shift is completely over.
   5. If a librarian's shift is done and no other librarian has signed on for the next shift, the librarian is not required to stay on duty.
C. Finding a replacement is the responsibility of the library/group, as shifts are assigned to libraries/groups, not to a person.
   1. If the library/group is unable to cover an assigned shift with its own staff, a request should be sent to the chatref mailing list for another librarian to staff the shift.
2. The problem should be referred to the central coordinator only if the library/group is unable to find a substitute.
3. The commitment to work a shift is just as important as the commitment to work a shift at a library's reference desk.
4. Librarians should report no-shows to the chatref@ohiolink.edu discussion list.

D. Participating librarians
1. A participating librarian can be a librarian or a staff member with experience working at the reference desk.
2. All participating librarians must have been trained to use the OhioLINK chat reference software.

E. Because traffic patterns are not yet discernible, it is highly recommended that the service be staffed away from the reference desk.

V. Responses
A. Calls should be answered as quickly as possible.
B. Librarians will identify themselves with a name and institutional affiliation.
C. Chat netiquette for librarians (adapted from LSSI and LivePerson documentation)
   1. Most often, non-scripted information should be sent in small pieces, not large paragraphs. This facilitates communication and reduces delay time.
   2. Responses shall include an explanation of the librarian's search process or strategy when possible.
   3. The librarian shall be friendly.
   4. The librarian shall try to let the user know what he or she is doing approximately every minute - so that the user does not feel abandoned. If the librarian must be away from the transaction, he or she should send something for the user to review or read until the librarian's quick return.
   6. The appropriate use of spelling, grammar, punctuation & capitalization is expected. Striking a balance between speed and professionalism while also adapting to the customer's comfort level with the medium is also appropriate.
D. Appropriate use of AutoMessages, etc. is expected and can help with speed.
E. All resources quoted or used in responses shall be fully cited.
F. Appropriate patron behavior is expected and if unacceptable patron behavior is encountered, librarians may end the call.
G. This service is intended to supplement our existing reference services and it may often be appropriate to suggest to the patron that his or her home institution's reference services would be the best place to seek reference assistance.

VI. Recommended length of transactions
A. Librarians will strive to answer questions in approximately 15 minutes. However, this will often be an insufficient amount of time to provide a complete response. Librarians are expected to be aware of others waiting for assistance and responses that are too complex for the medium. In these instances, librarians are expected to either get the user started and ask that he or she return with more questions, ask the user if it would be o.k. to follow-up with him or her by email, or to follow the referral procedures below.
VII. Appropriate resources for responses
   A. Since all users will have already been authenticated or will be located on a computer on an OhioLINK libraries’ campus, each will have access to the OhioLINK databases.
   B. Databases provided by the users’ institution might also be used, especially if the librarian also has access to this resource.
   C. Quality free web sources may also be used when deemed appropriate by the librarian.
   D. Access to OhioLINK libraries' catalogs, web sites, local contact information and other resources will be conveniently available at http://adler.lib.muohio.edu/~bbarr/webrefinfo/index.html

VIII. Referrals
   A. Situations needing referral to other librarians/libraries
      1. Response involves detailed information specific to the user’s institution, such as periodical holdings details or patron record information, or institutional policies not commonly answered or located by online librarians.
      2. Response involves information or resources that might be handled better by libraries with particular materials or resources, or by librarians who have defined a particular digital reference subject queue.
   B. Method of referral (in priority order)
      1. If a librarian from the particular institution is available online, the call should be transferred to that librarian.
      2. The patron will be pointed to the contact information for the particular institution or to the available hours of a particular digital reference subject queue.

IX. Local Digital Reference Coordinators
   A. Each campus or group of participating librarians shall have a local coordinator. The name, email, phone number, and institution(s) this person is representing shall be given to OhioLINK.
   B. Local coordinators may have administrative access to statistics, transcripts, monitoring and other functions or information.
      1. Before monitoring any transactions, coordinators and administrators MUST ask for and be granted permission by the librarian. When monitoring a transaction in progress, past communications are not available to the monitor.
   C. Responsibilities of the Local Coordinators
      1. Scheduling of librarians within their campus/group.
      2. Substitutions within their campus/group.
      3. Coordination of substitutions outside of their campus/group.
      4. Creation and maintenance of logins for librarians within their campus/group.
         a. The naming convention for participating librarians will be lastname.firstname
      5. First line of support for non-urgent technical support and the reporting of verified problems to support@ohiolink.edu, chatref@ohiolink.edu and to Digi-Net (see section X below).
         a. When reporting problems to the OhioLINK lists, please be as specific and complete in your report as possible.
X. Support

A. Technical Support
   1. Urgent problems, such as the OhioLINK server not responding, shall be reported immediately to the OhioLINK hotline at 614-728-3600.
   2. Non-urgent problems should be reported to your local coordinator. Once verified, these problems should be reported to chatref@ohiolink.edu (see section X.C.5.a. for more information).
      a. Problems that may involve the OhioLINK chat reference server should be reported to support@ohiolink.edu.
      b. Technical glitches and bugs should be reported to Digi-Net at 1-352-333-3160. Support hours are M-F 8a-10p and S-S 10a-6p. When contacting Digi-Net, please identify yourself as a member of OhioLINK using the e-librarian software.

B. Non-technical Support
   1. Other support issues such as problem patrons, policy or procedure questions should be reported to chatref@ohiolink.edu.
### Appendix II:

<table>
<thead>
<tr>
<th>Differences in the two environments that call for Different Skills and Habits*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In the Face-to-Face environment</strong>...</td>
</tr>
<tr>
<td><strong>Communicating is (relatively) simple.</strong> The dialogue between you and the client is direct. You speak and the client hears and vice versa.</td>
</tr>
<tr>
<td><strong>Visual cues give you information.</strong> Seeing the client gives you information that can be helpful in conducting the interview. However, it can also lead you to make unwarranted assumptions about the question being asked.</td>
</tr>
<tr>
<td><strong>Silence is OK.</strong> The client can see that you are working on the request and so is content with your silence.</td>
</tr>
<tr>
<td><strong>Pacing the transaction is simpler.</strong> You have a sense of how long you can spend on a question based on whether other people are waiting. You factor into your timing the knowledge that those waiting can see you working and can make their own judgment about how long their wait will be. You can even look at the next person in line and say, “I'll be with you in a moment.” Or “This will take a while; perhaps you’d like to come back in 10 minutes...”</td>
</tr>
<tr>
<td>In the Face-to-Face environment… (cont.)</td>
</tr>
<tr>
<td>----------------------------------------</td>
</tr>
<tr>
<td>Responsibility for follow-up can be transferred to the patron. When a line of people is waiting you can start each client off with a resource to check or a strategy to pursue and urge them to return if they do not find what they need.</td>
</tr>
<tr>
<td>Process is sequential. The transaction between you and the client is a series of discrete, unoverlapping sequential events: you hear the question, ask for clarification, the client replies, you search for and answer, and show what you found to the client. Throughout the transaction, the additional information you get from visual cues comes as part of the physical reference environment.</td>
</tr>
<tr>
<td>Serving a primary clientele. At the physical desk, your clients are usually from your own college or university, so there is a likelihood that your collections and expertise match their needs.</td>
</tr>
</tbody>
</table>

Appendix III: Site Administrator Training

Creating User accounts on the Server

Local site administrators will be responsible for creating the Server Usernames (accounts) for the librarians at their sites. The server account must be set up before a librarians can log on to the chat software for the first time. To create an account on the server, select “Accounts” from the “Admin” menu. This will open the “Edit Accounts” window, which offers a list of server accounts already created (available for editing), and the chance to create new accounts. To create a new account, click the “Add” button; this will open a blank “Edit Account Info” dialog box. Use it to set the Server User Name for the librarian; set and confirm a password.

The User Name should be formatted as lastname.firstname (e.g. doe.jane). (Note: this format was devised after many accounts had already been set up, so you will see accounts in the list that do not follow this format.)

Having entered the username and password, set the user permissions (“rights”). To do this, select the each desired permission in the “Available Rights” box, and click the [>] button to add that right to the “Current Rights” list for the user. Every user must have the following rights: Connect, Co-Browse, and See the User List. At the discretion of the Site Administrator, users may also be given the “Monitor” right, which will allow librarians to observe other reference transactions in process. The “Monitor” right may be restricted to supervisors if desired, or may be granted to each user as local decisions dictate.

Click the “OK” button to create the user’s Server Account once all desired rights have been set.

Editing Server Accounts

Once a user account is created on the server, it may be removed or edited by using the “Edit” and “Remove” buttons on the “Edit Accounts” screen. Using the Edit feature, you may change the user’s password or add/subtract rights.