Section 2:
For VR Managers
(Administrative Duties)

Created by the
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Manage Librarian Accounts

Only administrators can create, change, or delete a librarian account. Sign in to QuestionPoint by going to www.questionpoint.org and clicking on the blue Librarian Login button.

Create Librarian Account

Click on the Admin link at the bottom of the list on the left side of the screen.

By default, this will take you to the Create Librarian Account screen. To create a new librarian account, enter the information on the form.

- Screen Name: Librarian’s name as it will appear to patrons during an active chat session and to other librarians monitoring the service. (Example: ChristineMSU).
- Profile: Select *Edit Profile* if the librarian will have editing rights to the institution’s Policies page. Otherwise, select *View Profile*.
- Ask A Librarian: If the librarian will have administrative rights for your institution, select *Ask Administrator*. Otherwise, select *Ask Librarian*.
- Knowledge Base: *View KB*
- Type: *Global* (necessary to monitor the 24/7 Cooperative queue)

**Edit or Delete Librarian Account**
Click on the Admin link at the bottom of the list on the right side of the screen. To get to *Current Librarian Accounts*, click on the *View/Update* tab. To edit, click on the *Edit* button next to the librarian’s name. To delete the librarian’s account, click on the *Remove* button.

**Create/Edit Policies Page**
Each library is provided with a Policies page, a standardized template used to display institution-specific information to help librarians from other institutions
answer your patrons’ questions. VR managers will create and maintain the Policies page for their institutions. It is important to keep the Policies page as current as possible since dead links and outdated material on the Policies page can negatively impact the quality of service provided.


**Institutional Scripts and Institution’s URL Scripts**
The administrator can create a collection of scripts, including URL’s, to help librarians answer questions from their library’s patrons. For complete information on creating, changing, or removing scripts, see *Add, Change, or Remove Scripts*: http://www.questionpoint.org/crs/html/help/fi/ask/ask_process_scripts.html.

**Forms Manager**

**Create Qwidget**
The Qwidget is QuestionPoint’s instant messaging widget. The code for the Qwidget can be installed on any web page for easy access to your chat service. Qwidget questions will appear in the chat monitor just as web chat questions do. The Qwidget can be created or customized at any time in the Question Point Forms Manager, which can be access only by administrators. For complete information about creating the Qwidget, see *Create Your Qwidget (QuestionPoint Widget)*: http://www.questionpoint.org/crs/html/help/pt/admin/ad_forms_qwidget_setup.html.
Create Chat Form
The chat form is a web-based form by which patrons can enter the service. For complete setup instructions, see Create Your Group’s Chat Forms: http://www.questionpoint.org/crs/html/help/ko/admin/ad_forms_chat_setupgroup.html.

Create Patron Survey
At the end of every chat session, the patron is prompted to complete a survey to evaluate the service quality of the session. Completion of the survey is optional. To create and manage the patron survey, see Create/Manage Survey Forms: http://www.questionpoint.org/crs/html/help/ko/admin/ad_surveyformcreate_task.html.

Research Help Now institutions originally agreed to use the following five questions in the patron survey:
1. Did you have any problems or difficulties using the service?
2. Are you satisfied with the hours of service?
3. Were you satisfied with the answer to your question?
4. The quality of the library staff service in answering this request was?
5. Will you use this service again?

Create Customized Descriptive Codes
Each library may create up to 50 customized descriptive codes to use uniquely to classify or categorize questions. Each question may be assigned up to 4 customized descriptive codes. For complete information on how to create and use customized descriptive codes, see Descriptive Codes: http://www.questionpoint.org/crs/html/help/it/admin/ad_descriptivecodes_task.html.

Shared Follow Up and Referrals
Shared Follow Up is a list of questions for libraries in your cooperative to answer. These have been answered by other librarians and have been marked “Follow Up by Patron’s Library” to have additional information or clarification provided. VR Managers should check for Shared Follow Up questions daily at minimum.
How to Claim and Answer Shared Follow Up Questions

Log on to QuestionPoint.
Click on “Shared Followup” in the Questions List.

Select only questions from your institution from the Shared Follow Up list. Click on the question to select.

Claim the question by clicking on the Claim button above the transcript.

Click the Answer button.
Type an answer in the Answer box and click either Send Answer buttons to send the answer to the patron.


How to Refer A Question to Another Librarian
To refer a question to another librarian for follow up, click on the question in the Active Questions list. Select Email Partner from the Refer To drop down menu. Type in the email address for the librarian who should receive the question. Provide a brief message or explanation in the Message box. Click on the Email button to send the question.

**Quality Assurance**

**Training VR Librarians**

In addition to using Section 1 of the RHN VR Training Manual to learn how to conduct chat reference, new VR librarians can practice by using the Practice Monitor. After launching the chat monitor, check the Monitor ‘Practice Queue’ Only box in the bottom left corner of the Select Queue box. Click on Save. The Chat Monitor Practice Form should be used to send a question to the VR librarian in the Practice Monitor.
Best Practices for VR training

When asked to provide which training methods were most effective for learning how to conduct virtual reference, RHN librarians offered:

- Screenshots
- Exercises (to get over the fear of chat)
- Video tutorials
- Practice Queue/Patron Practice Form
  - Role playing: Librarians act as patrons
  - Helps librarians understand patron’s perspective and user experience in terms of technology, interaction, communication
- Team training – new VR librarians work as a group to practice live questions together
- Chat shadowing - Observing an experienced VR librarian during a chat shift or two; Trying a live shift while having an experienced VR librarian observe and advise
- Reading actual transcripts and analyzing how they did (or did not) meet service quality standards

Review Transcripts

VR managers should review transcripts of sessions done with their patrons on a regular basis in order to address quality control issues in a timely manner. If a quality control issue arises with a RHN librarian, contact the VR manager for that librarian’s institution and ask them to address the situation. If a quality control issue arises with a 24/7 Academic Cooperative librarian or a QuestionPoint AfterHours librarian, the question should be reported to QuestionPoint Quality Control (see Refer Questions to QP Quality Control section). If you have any
questions or need assistance, contact the Quality Assurance Manager for Research Help Now.

Recent transcripts can be accessed from the Active Questions list. To review questions that have been closed or are older than 90 days, an offline report will be needed.

For information about transcript review, see General Review of Your Transcripts: Quick Reference:

For information about how to conduct an offline review (for transcripts that are Closed or older than 90 days), see Review Your Transcripts Offline: Quick Reference:

**Damage control – Negative Surveys**
VR managers receive copies of completed patron surveys via email. If a survey shows that the patron is not satisfied with the service, it is important to review the transcript for that session and contact the patron to do damage control and rectify the situation.

**Refer questions to QP Quality Control**
If a 24/7 Academic Cooperative librarian or a QuestionPoint After Hours librarian has not followed the virtual reference best practices or has not provided quality service to your patron, refer the question to QuestionPoint’s Quality Control division. The question will be reviewed and the offending librarian will be contacted with suggestions to improve service.

To refer a question to QP Quality Control, click on the question in the Active Questions list. Click on the Refer To drop down menu. Select Subject Matter Expert and click on the gray arrow button. Select Quality Subject Expert in the drop-down menu. Provide a brief explanation of the quality control issue to be
addressed in the *Reason for Referral* box. Click on either *Refer* button to send the question to QP Quality Control.
Closing Questions

Questions in the Active Questions list should be Closed after a complete answer or final response has been sent to the patron by one of your librarians. If your library uses descriptive codes, be sure to add these as appropriate to your library’s questions before closing. Do not close questions belonging to another institution. Only close questions from your own library’s patrons.

To close questions, go to the Ask module and click on the Active questions list. You can close questions individually or in groups by checking the box(es) to the left of the question(s), scrolling down to the bottom of the page, selecting Close Question from the –Select Action— menu, and clicking on the gray arrow button. This will move the selected question(s) to the Closed folder. After 90 days, QuestionPoint removes the question from the Closed folder and puts the question in the Service History.

For more information about closing questions, see the Frequently Asked Questions About Using QuestionPoint:
http://www.questionpoint.org/support/faq/usingqp_faq.html#ask_close.

Excluding Sessions with Other Institutions from Active Questions List

To reduce the risk of accidentally closing another institution’s questions, you can set up your Active Questions list to exclude your library’s sessions with other libraries’ patrons. To change the settings to exclude these sessions, log on as an Administrator and click on Settings under the Institution Tab. Select the Chat Transcripts tab and and select “Exclude from our question lists the transcripts of future chat sessions....”. Click on Save. From that point, unless a session from
another library is marked as “Follow Up by Me” or not assigned any resolution code, it will not appear in your Active Questions list.

For more information, see http://www.questionpoint.org/crs/html/help/zs/admin/ad_chattranscripts_overw.html.

Scheduling

Minimum Requirements
To participate in the QuestionPoint 24/7 Academic Cooperative, Research Help Now must contribute 35?? hours of staffing per week. The schedule for RHN is based on a combination of highest need and librarian availability. The schedule is coordinated by RHN’s Chief Scheduler and sent out to the VR listserv and posted on the RHN Intranet for easy referral.

While some RHN institutions have limited staffing to cover VR, having a librarian staff the Reference Desk and chat reference simultaneously is highly discouraged. The VR service is usually busy and doing so may reduce the quality of service provided to our virtual patrons. If this situation is not practical to avoid, ask the VR librarian to cover only the Michigan Academic Queue during the shift.

Emergency closing of your library/campus
Should your college/university close for an emergency:
1. If possible, send an email to the collaborative listserv with the information about the closing and anticipated reopening. Send to Virtual_reference@mail.mlcnet.org.

2. In the subject line, enter the name of the college/university, closed date. For example: Washtenaw Community College CLOSED March 12, 2012.

3. In the body of the message, provide an explanation as to what is going on.

4. Also inform the group if there is an impact on your VR shift (if you are able to cover VR from home or not).

5. Send to listserv.

When your library/campus is reopened for business:

1. Send an email to the listserv with an update.

2. In the subject line, enter name of college/university, open date. For example: Washtenaw Community College OPEN March 12, 2012.

You may also want to update your Policy Page Alert section with the information since we are part of a 24/7 Cooperative.

1. Login to QuestionPoint.

2. Upper right corner, click on Ask link from drop down menu.

3. Select Profile.

4. Click on Institution Services tab.

5. Click on Policies link.

6. Click on Edit for any sections being updated. Insert HTML code for text and hyperlinks.

7. Save.

8. It is recommended that each library’s VR manager review and update library profiles on a semester basis.

**Reports**

**Usage statistics**
Usage statistics show the number of questions received by your library’s patrons and the number of questions answered by your librarians. These reports are sent
Usage statistics can also be compiled at any time by a VR Manager by using the *Reports* tab of the My QuestionPoint page and selecting *Institution Report*. For more information about generating reports, see *Reports: Quick Reference*:

**Answering Percentage Rate – Weekly Reports**
In order to allow Qwidget questions to be answered by the 24/7 Academic Cooperative when no RHN librarians are available, the answering percentage for our cooperative must be at least 75% each week. The answering percentage is figured by dividing the total number questions asked by RHN patrons by the number of questions answered by RHN librarians. QuestionPoint provides a report of the Answering Percentage Rate weekly to one of the RHN Managers who then shares it via email with the VR Managers.

**Marketing**

*Materials on Intranet*

*RHN Facebook Page*

*@ResearchHelpNow - Twitter*