REFSTAFFER – Questions for Sara Washington

- Quality Assurance
  - Who’s the QA contact at RefStaffer - Right now we are funneling all questions related to RS to Sara which may be overload.
  - OK to have each library’s manager contact the RefStaffer QA point person? We prefer this to having one person from RHN ask quality control questions to RefStaffer. Jill has been contact for quality control within our members – we could keep that function in-house.

- Who is who at RefStaffer?
  - Who do we contact at RefStaffer for any questions?
  - Who do we contact to provide tips for answering MI group?
  - Need greeting message with name and message about service when MI libs are not online [a generic canned message greeting?] Can RefStaffer see our canned messages? This relates back to question – can librarians from another institution see the canned messages associated with the patron’s institution? If they see the patron’s canned messages, the RefStaffers will too. Also note that the canned messages icon page in RCdashboard, the “canned message pool” is not well organized. For example there are 5 pools of “goodbye” messages with no other identifying information.

- Questions about the timing on the roll-up. Confirm that as long as a librarian is “available”, questions will not roll-up to RefStaffer? We have observed waits of 25 minutes (when a librarian what having difficulty navigating the software).

REFTRACKER – Questions for Sara Washington
1. RefTracker  We realized that MSU was constantly logged in for answering emails, shutting out other libraries. We would like to investigate the costs to add more simultaneous logins for RefTracker.
   a. Cost for login add on? Could you offer costs for varying numbers of added logins?

2. Flag for Follow up in RefChatter
   a. What is the time delay before it goes to RefTracker and send email alert to librarians?
   b. Should this be instant?

3. Quick Text
   a. Can we receive training for Quick Text? Could this be used to make canned messages available in RefTracker? Would these be visible according to the institution for the patron? Or would we need to create very generic canned messages? Or only be personal messages according to the person who is logged in?

REPORTS/STATISTICS
1. Schedule training for Reports/Statistics
2. We set the agenda
3. We create a list of reports / stats we want her to cover.
4. Ask Sara to set up a sample and demo at the training: We would like canned reports to be sent monthly including:
   a. Monthly reports at collaborative level to include:
   b. In Excel
   c. By Institution
   d. Chat and Email separate
   e. Number of questions from our library answered by RefStaffer (and totals across board)
   f. Number of questions from our patrons answered by our library
   g. Number of questions from our patrons answered by another RHN library
   h. Number of questions from other libraries answered by our librarians
5. Show how we can create our own reports for our library
6. Stick to the time
7. Librarians are to hold off all questions until the end – last 10 minutes
8. Doodle Poll to librarians
9. Email to Sara Washington – Week of September 18 or 25.
REFCHATTER -- Questions for Sara Washington

1. How do we search for transcripts in RefChatter?
   a. Can we search by name or key term? If so, how?

2. Texting in RefChatter – We can see “RHNtext” in the queues along with a phone number. Is this a product teaser?
   a. Do we have this for free? See image

3. Does the patron see the concierge message? Yes

4. Does the concierge message appear in transcript? And also in the chat log during an active session.
   a. If no, we request this enhancement
5. Please define the following messages we see [what are the differences?]
   a. Client has disconnected
   b. Client has left the conversation

6. Active Chat Question -
   Ann’s Screen – We should all see this

What exactly does #active chats mean? We noticed that it relates to the number of chats from patrons of the queue. Would prefer to see #chats being answered by a librarian from the queue (as a gauge of how busy they are).

From Sara Washington email September 11, 2017
7. Profile opening in new window. Currently there is a button in preferences to “Open profile in a new tab/window”. However, it does not always work. Ideally, this would allow the profile to open in a new window, not just a new tab. That would allow more flexibility in moving a reduced-sized screen around so that it is visible while chatting without the need to toggle.

8. Viewing canned messages from patrons at another institution. Canned messages should correspond with the institution of the patron. This would allow us to capture each institution’s preferred closing messages, etc.

9. What happens if you pick up a question and then realize another librarian has picked up the same question?
   a. First, how is this possible?
   b. Second, is proper procedure to X out of that session? We do not want to leave a patron stranded.

EMAIL Service
   OCC
   MSU
   EMU
   Marygrove -- wording of the form to “Ask a Marygrove Librarian”.
• Branding on Form
  o Can libraries brand form with their logo?
  o Remove Altarama and RefTracker branding on top left and right side of form. Also remove “Ask Oakland CC” etc branding. Seeing what Marygrove was able to do, could we customize that wording as indicated by each library? In OCC’s case to “OCC Libraries Email”? I wonder if everyone would be OK with Research Help Now or leave off rest of the branding? Sounds like we cannot customize the banner.
  o Change the “return to our website”
    ▪ Currently goes to Researchhelpnow.org
    ▪ Please change link to local library’s website of choice, such as home page or Ask a Librarian page. [Managers agree]

EMAIL FROM SARA WASHINGTON September 11, 2017

Email from Sara W. to Mary Kickham-Samy about Email Branding.

Collaborative need to think about the RefTracker and Altarama branding. Since this is part of the CSS header, any changes we make will be across the whole system. May I (Sara W.) suggest you put a Research Help Now branding on the form instead? I (Sara W.) can
upload any image(s) you choose. Otherwise, I (Sara W.) can take out the current RefTracker and Altarama branding all together – whatever you’d like!

ENHANCEMENT REQUESTS

1. Close button to end chat by patron
2. Require patrons to enter email with chat
3. RefChatter Flag for Follow-up
   a. Librarian is able to move the profile pop-up (currently you cannot move the pop-up). If we are able to move the pop-up, we can easily copy and paste name and email from chat into Flag for Follow-up Profile opening in new window. Currently there is a button in preferences to “Open profile in a new tab/window”. However, it does not always work. Ideally, this would allow the profile to open in a new window, not just a new tab. That would allow more flexibility in moving a reduced-sized screen around so that it is visible while chatting without the need to toggle.
4. When RefChatter is updated with new features, we would like to be notified of the updates. Newsletter? Is there a listserv?
NOTES for Librarians

- Remind patrons to click Clear History when they end chat
- Remind patrons to close pop-up widget when they end chat
- Track busy times while on chat
- We need to schedule the day after Thanksgiving

RESEARCH HELP NOW WEBSITE

- Remove drop down option from homepage
- Replace with list of colleges/universities with links to Ask Service
- Add widget
- Added Fall 2017 calendar to Intranet -- Done

POLICY and PROCEDURES MANUAL

- Needs to be revised
- Sent most current Policy and Procedures Manual to Elizabeth Walker -- added to Google Drive -- Done

https://drive.google.com/drive/folders/0BwVdHgSm_AeRaWU1U2hjSEFZQnM?usp=sharing