

## Training Introduction / Overview

Greetings Berkeley Librarians. We are excited to introduce our new platform for Virtual Reference, LibAnswers Version 2. There are three sections to this training, each corresponding with an important feature of the new system:

**1) Library Knowledge Base** – A website containing responses to hundreds of Frequently Asked Questions. This platform is available 24/7/365. This public website will not only prove useful to the Berkeley Community to find information on their own, but will also support us as librarians in providing quick virtual reference services to our patrons.

**2) LibAnswers** – Manages incoming questions (similar to the help desk). Students are able to ask questions via an eForm, email, or text message. We guarantee students a response to their inquiry within 24 hours.

**3) LibChat** – Our live chat reference tool, available over 80 hours a week. Librarians system-wide are expected to support LibChat when working.

### Library Knowledge Base

The Virtual Reference Committee has been working hard to create a comprehensive database of frequently asked questions. These FAQs can be used to respond to patron's information needs quickly and efficiently. Always check the Knowledge Base to see if a question has been answered, prior to responding to a patron in LibChat or LibAnswers. You should bookmark this page and use it as a point of reference going forward!

These FAQs have been tagged with keywords to make finding the information you need as easy as possible. For example, all FAQs relating to the Business Program are tagged with the key word business. Therefore, when a patron types business in the search box, all related questions will show up.

FAQs have also been categorized by topics, allowing you to browse and filter. Click the topic dropdown menu to browse through FAQs in a particular category.

You can continue to narrow down your results using the filters in the column to the left. After searching or browsing, if a patron can't find the information they are looking for, they are able to submit their question using the form in the column to the right.

Each FAQ should give you the basic answer to a question in the first couple lines, followed by a more in-depth response with related details. FAQs are filled with related information including images, videos, and links to external websites.

Also, use the Knowledge Base to brush up on your Virtual Reference skills. The FAQs you find here were created based on reference blitz and LibChat transcripts. These are the type of questions you should expect to answer regularly.

## LibAnswers – Understanding Tickets

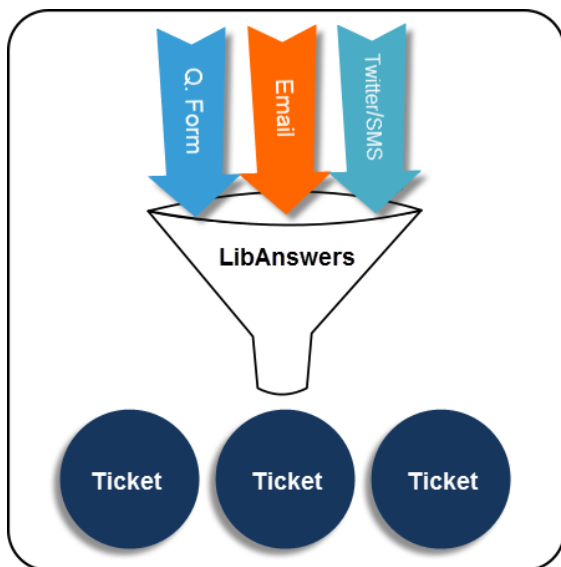
So what happens if a patron can't find the information they are looking for in our Knowledge Base? There are many options available to get virtual support. Some prefer live help. For this, we have LibChat, which we will talk more about later. For those who don't want to chat live, or inquire when chat is closed, we have LibAnswers. When students ask questions via LibAnswers, we guarantee a response within 24 hours.

In LibAnswers version 2, all incoming virtual reference requests are considered "tickets." This is a buzzword you will hear often as we move into a more organized way of providing reference online.

Let's think of tickets the same way our help desk does... a request for support. In the LibAnswers system, tickets can be submitted by patrons in three ways:

- 1) The "Ask a Question" eForm (found on the LibAnswers page, or embedded as a widget)**
- 2) Via email at [library@berkeleycollege.email.libanswers.com](mailto:library@berkeleycollege.email.libanswers.com)**
- 3) Via text at 973-947-8988**

A ticket is a private correspondence between a librarian and patron. If a public FAQ is available that addresses the question, you can simply send the patron a link to the documented answer. If a FAQ is not available, the librarian will answer the question to the best of their ability. Note that tickets are private while FAQs are public.



Picture from - <http://support.springshare.com/libanswers/gettingstarted/ticketsvsfaqs>

## **LibAnswers - Admin Dashboard & Daily Workflow**

The LibAnswers Dashboard will be your go-to place for accessing LibAnswers and LibChat.

This is the page that should be bookmarked, not the LibChat page (as many of us currently do). Check this page each morning for pending tickets prior to launching LibChat.

This page will also be used to post important information in the “Administrative Announcement” area, which will keep you aware of current information and problems. Announcements may include special initiatives, programs, “canned messages”, new FAQs, common technical problems, database subscription changes, and more. This information will be helpful to know about as you go about supporting students. Always check announcements prior to launching LibChat.

Take a look at the “Open Tickets” section of the Dashboard. This is the area you will check each day to see if there are any pending tickets. Don’t worry about any of the other tabs... the Virtual Reference Committee will take care of and errors, spam, pending comments, etc.

All Berkeley librarians will take part in responding to incoming tickets. Tickets will be responded to on a first-come first-serve basis. We’re used to this already in LibChat... when we hear the beep for an incoming chat, whoever claims it first will support that student. This concept will now broaden to include incoming tickets.

All new and open tickets will be displayed on the dashboard. Unclaimed questions will be obvious. There won’t be a librarian name listed in the “Owner” column, and the status will appear as “New.” Claimed tickets will have a status of “Open” or “Pending” and you will see a librarian’s name listed under owner.

If one is logged into LibChat when a ticket comes in, the ticket will show up just like any chat, and can be claimed in the same way. However, we anticipate the majority of tickets coming in when LibChat is not available, so we will need to get used to checking the “ticket queue” each morning to see if there are tickets pending. If everyone does their part, we have plenty of coverage across our campuses to ensure all tickets are responded to within 24 hours, even on weekends.

Remember, tickets are private, FAQs are public. Your response to a ticket is only visible to librarians and the patron. It will be the responsibility of the Virtual Reference Committee to review closed tickets and LibChat transcripts to determine which should be made public, and create those public FAQs accordingly. Only the Committee will have access to create public FAQs. The Committee will strive to create comprehensive public FAQs for all common questions, so responding librarians have the information needed at their fingertips for a quick and detailed response to incoming questions.

Always check to see if the question has been answered before responding to a ticket.

The screenshot shows the LibAnswers tickets dashboard. At the top, there are tabs for 'Open Tickets (44)', 'Pending Comments (0)', 'Errors (0)', and 'Spam (0)'. Below these are filter controls for Queue (View All Accessible), Source (All Sourc), Status (Not Clos), Owned by (View All), and Email. A 'Filter' button and a '(clear)' link are also present. The main table lists tickets with columns for Id, Status, Question, Owner, and Updated. Two tickets are shown: ticket 6084 is 'New' and 'Unclaimed', while ticket 6018 is 'Pending' and 'Claimed'. Annotations with green arrows point to various elements: 'Question Filters' points to the filter controls; 'Click to Preview w/o claiming' points to the eye icon for ticket 6084; 'Click to Claim' points to the eye icon for ticket 6018; 'Unclaimed Question' points to the 'New' status of ticket 6084; 'Claimed Question' points to the 'Pending' status of ticket 6018; and 'Click to View / Reply' points to the question text of ticket 6018.

Id	Status	Question	Owner	Updated ↓
6084	New	Did anyone win Warren Buffet's Bracket Challenge? Asked via Email	---	2014-03-22 04:16
6018	Pending	Where do I find articles about colonial buildings? Asked via Email	Sarah Pawlek	2014-03-13 06:55

Picture from - <http://support.springshare.com/LibAnswers/tickets/dashboard>

### LibAnswers - Claiming a Ticket

All Berkeley librarians will take part in responding to incoming tickets.

Let's quickly walk through the process of a patron submitting a ticket request via the form. Because there isn't a FAQ already created about frogs, the patron can now submit a question.

Instantly, the ticket shows up on the dashboard, pending a response from the first librarian who sees it. Before you "claim" a ticket you can preview it by clicking the quick look icon (looks like an eye). Once you click on the title of the question it belongs to you.

Once you claim a question you are expected to reply within 24 hours. Note, I am now the owner. If I realize I don't have time to answer this question right now, I can click "Unclaim" to put it back in the queue so another librarian can respond.

### LibAnswers - Responding to a Ticket

Responding to a ticket is easy! The interface you see here should be familiar, as it's similar to the one used in all Microsoft Office products.

Let's take a look at some of the features you have available when responding to a ticket.

Excellent overview of features - <http://support.springshare.com/LibAnswers/tickets/answermap>

Patron Information – Click on the (i) icon to see more information about the asker, including previously asked questions.

Reuse Answers – This feature allows you to pull information from Tickets and FAQs already responded to in LibAnswers. Before you respond to a ticket, check to see if the question has already been answered by another librarian.

Search through similar public FAQs and private ticket responses recommended by the system, or search by key word. In this particular example, there are no relevant responses in the system, however, let's take a look at a different example for demonstration purposes.

In this example, a student is asking for information about company research. As there are many FAQs already created to support this inquiry, one is able to copy this pre-written information into their response, rather than writing it out again.

Reply - Enter your reply to the patron here. Most of the same functionality is available as you get in Microsoft Office or other applications you work with regularly. Spell check is enabled. If you are writing a detailed response, you may be better off drafting your answer in Word first. Then copy/pasting it into LibAnswers.

Paste from Word – When you are copying content from another source, click the icon of the clipboard with the letter W. Microsoft Word & other programs add a lot of unnecessary formatting, and pasting this way will strip that out.

Embed Images – Upload an image from the Image Manager. The Image Manager is tied to all of your LibApps tools, so you can use images you also used in your LibGuides (post-migration).

Create Hyperlinks – Hyperlink text within the body of your response.

Add Links – Links added in this section will appear at the end of the email to the patron, labeled as the descriptive text you include. Use this feature to provide additional relevant websites the patron might be interested in exploring, like our library databases page.

Add Files – Attach PDFs, Word files, and more with this feature.

CC Answer to - Need to collaborate with a colleague on a question? Add their email to this section so they can add replies to the ticket. Stay tuned for more on ticket collaboration!

Reference Analytics – In effort to stay informed of Virtual Reference trends, certain data will be collected regarding each ticket. At this time we only ask you to record the Question Type. This is only necessary when closing a ticket.

Save Draft: If you start working on a reply but need to step away, save as a draft. No email will be sent to the patron and you can come back and finish your response at a later time.

Preview Email - Use this option if you're done with your response and want to make sure it looks okay before sending.

Cancel – Delete all current progress on the ticket.

## LibAnswers - Ticket Statuses

Each time you respond to a new ticket, you'll submit it with a change in status. Any time the status of a ticket is changed, the patron receives an email.

Click the dropdown to submit the ticket with a new status.

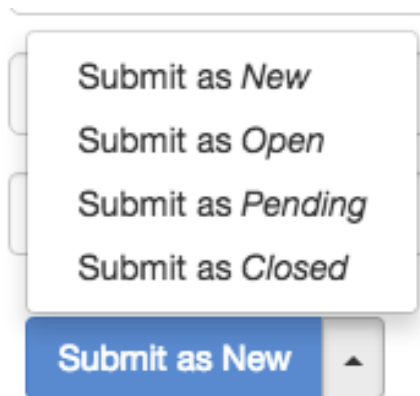
New Questions: This is the default status, and it indicates that a question has not been answered. Although, you have the option to re-save a ticket as new, this wouldn't make any sense. When you update a ticket status, you should be updated to open, pending, or closed.

Open Questions: This is for a question that you have claimed and are working on. You would use this status to acknowledge a patron's request for information when you aren't able to respond within 24 hours. These questions remain visible on your LibAnswers dashboard.

Pending questions: This status means you're waiting on information from the patron, and not actively working on the answer until you receive that information. These questions remain visible on your LibAnswers dashboard, and you will receive an email when the patron responds.

Closed questions: A ticket should be closed when you have provided the patron with the requested information. Closed tickets don't appear on your LibAnswers dashboard, as there is no further response necessary. If a patron replies to a closed question, we'll change the ticket status back to open, and the open ticket will appear back on the dashboard. The responding librarian will also receive an email.

These statuses represent the general lifecycle of a question and answer. Remember, they're fluid - a question can move between statuses depending on the flow of the conversation with your patron and coworkers.



## LibAnswers - Collaboration on Tickets

Sometimes you may need the help of a colleague when responding to a ticket. LibAnswers offers functionality that allows you to bring other librarians into the conversation, without starting a separate email thread.

**Internal Notes** - The new LibAnswers is all about increased communication and collaboration, so functionality has been added allowing you to chat with your colleagues about the tickets in the system. The internal notes you add aren't shown to the patron, rather, they're stored in LibAnswers as part of the overall question thread. If you copy another librarian when adding an internal note, LibAnswers will trigger an email to that librarian, alerting them to your request for support. The transcript of the conversation between you and the patron will be visible to the supporting librarian.

**Transferring Questions** – If you can't answer a question for whatever reason, you are able to transfer it to another librarian. This may be used in the event of a campus-specific question that needs to be answered by a librarian from that campus, or about a subject specific question that may need to be answered by a librarian liaising for a given program. When you transfer a ticket to another librarian you no longer have a claim to that ticket. The librarian will receive an email notifying them that they have been assigned to respond to the ticket, and they will automatically assume ownership of the ticket.

## LibChat - Overview

Librarians are expected to log into LibChat daily when they are available. We offer extensive chat hours and the only way to ensure coverage is participation by all librarians.

At your desk? Sign into LibChat. To sign in, click on the red box in the top right corner of your screen.

MORE - <http://support.springshare.com/libchat/basics>

The screenshot shows the LibChat Operator interface. At the top, there are two callout boxes: "Alert Notification Options (click to change):" with links for "On Off", "Audio Alerts - To beep, or not to beep?", "Desktop Notifications - Enable HTML Desktop Notifications", and "LibAnswers Alerts - show new ticket notifications by queue"; and "Monitoring Status (personal & department chats):" with instructions to "Click to change your availability for individual departments" and status indicators for "Monitoring" (green dot) and "Not Monitoring" (red dot). The main interface includes a "Chat Activity" panel on the left with a list of tickets and chats, a "Monitored Departments" panel on the right showing a list of monitored departments, and an "Operators Online" panel at the bottom right showing a list of online operators. Callouts explain the "Chat Activity" panel, the "Monitored Departments" panel, the "Operators Online" panel, and the "Group Chat" feature.

**Alert Notification Options (click to change):**

- On Off
- Audio Alerts - To beep, or not to beep?
- Desktop Notifications - Enable HTML Desktop Notifications
- LibAnswers Alerts - show new ticket notifications by queue

**Monitoring Status (personal & department chats):**

Click to change your availability for individual departments.

- Monitoring
- Not Monitoring

**LibChat Operator** Chatting as: Sarah Pawlek

Status: Connected [Go OFFLINE](#)

**Chat Activity**

The heart of the action! View all current chats in progress.

- New Chats - Click "Answer" to claim
- Chats in Progress
- LibAnswers Ticket Notifications

Hover over each notification for additional patron info.

**Monitored Departments**

- Sarah
- Dept Everyone Monitors
- GuideFaq test

**Group Chat**

Click to start a chat with all operators

**Operators Online**

Filter by name or dept

- Burt Reynolds
- Sarah Pawlek

**Operator Chat**

Click any operator name to start an internal chat

Click to view the departments an operator is monitoring

## **LibChat - Operator Console**

As you will be logging into LibChat as part of your daily routine, this is another interface you will want to become familiar with quickly. It looks cleaner than version 1, but the functionality hasn't changed much.

Monitoring – There is only one department that everyone monitors – Berkeley College Library. Make sure the Berkeley College Library department is always green, or you won't receive incoming chats. In the future we may create more specialized departments, with customized widgets to support them, so students are connected with the appropriate librarian for a specific question.

Toggle Sound & Notifications – Sounds and notifications should always be on! Without these features enabled, you won't be notified of incoming tickets. These alerts will work even if the LibChat console is minimized or hidden from view.

Group / Librarian Chat – See the "Operator Online" area to see who else is currently monitoring LibChat. Click on another librarian's name to initiate a chat. Click the chat icon, which looks like a talk bubble, to start a chat with all librarians. Take advantage of your colleagues to get help with difficult questions.

Chat Activity – When you are logged into LibChat, all incoming chats and tickets will show up in this interface. While logged in, there is no need to check the dashboard for incoming tickets, as you can claim and respond from here. Yellow notifications represent a new chat waiting, Green notifications represent a chat in progress. Blue notifications represent a ticket submitted through the eForm, email, or text message.

In-Chat Functionality (Librarian) – While engaged in a chat with a patron, there are many actions you can take from within that chat.

Canned Messages – You can respond to patrons with pre-written messages to save time. We'll talk more about these later.

Attach Image or File – It may be helpful to attach a screenshot or other document with more information. This feature will allow you to do so.

Hyperlinks – You can copy/paste hyperlinks into a chat. Be sure to include http:// so a student can get to the resource by clicking.

Transfer Chat – You can transfer the chat to any other librarian who is online. In this scenario the librarian will join the conversation so you can update them to the inquiry before leaving.

Create Ticket – Turn the transcript of the chat into a LibAnswers ticket so you can follow up at a later time, or if you need information from a specific librarian who is not online. Can be assigned to yourself, another librarian, or to the general queue (may be applicable to a librarian supporting chat at the end of the night right before closing).

Add to Reference Analytics – All chats should be added to reference analytics when complete. This will pop up automatically when you close the chat window.

Go Offline – Don't just exit the page or you may remain connected unknowingly. Make sure to click the "Go Offline" button.



## **LibChat – Patron Interface**

In order to provide patrons with the best experience possible, it's important to understand what they are seeing. Let's take a look at the patron interface of LibChat.

When launching a chat, patrons are required to enter their name, campus, status, and question

When in a chat the patron interface looks very similar to ours.

They also have the option of attaching an image or file. This can be very helpful if a patron sends you a screen shot of an error message.

Upon exiting a chat, the patron has the option to rate their experience and leave a comment. They can also email the transcript of the chat to themselves for future reference.

## **LibChat - Canned Messages**

When looking at the in-chat functionality in the last section, we saw how a librarian can use canned messages to save time. Canned Messages provide a quick and easy way for LibChat operators to send frequently used messages to patrons during a chat session.

There are a number of predefined canned messages already available to all librarians. Pause the video here and take a look at the various canned message options available to you in LibChat. Specifically, note the "Admissions Response." Online Admissions now demos LibChat when showing new students our resources. When an Admissions Associate identifies themselves in a chat, make sure you respond with the canned "Admissions Response" message.

As we saw before, these messages are available to all librarians when chatting with a patron.

Librarians can also create personalized canned messages only visible and available to them. To do this, click LibChat – Canned Messages – Add Canned Message.

Give your new canned message a Display Name and input the text of the message. Then click SAVE.

Once personal canned messages are created they can be edited, deleted, and/or reordered from here.

## **LibChat - Transcripts**

Another important LibChat feature is the ability to review transcripts. Every transaction that takes place through LibChat is archived in a transcript. You are able to access transcripts from all past LibChat conversations at will.

To access transcripts, click LibChat, then transcripts. Reviewing transcripts can help you develop your Virtual Reference skills as you see how other librarians interact with students, and stay aware of troublesome assignments and other commonly asked questions. It may also be helpful to review transcripts when "jumping in" to help support a patron at another librarian's request. You can view a transcript by clicking the view transcript icon (looks like an eye).

By default you will see transcripts listed ascending by date/time. You can search transcripts by name to just see those from yourself, another librarian, or a specific patron. You can also search within a specific date range.

## **LibChat - Widgets**

LibChat conversations are triggered via widgets. Widgets are embedded in the library webpage, LibGuides, databases, and other library resources. This section of the training only applies to instructional librarians, who are actively creating LibGuides.

A default widget has been created for use in your LibGuides. You should always copy the LibChat Widget from this page, so if changes are made to the default widget, they will automatically update in your LibGuides. Every LibGuide should have this default LibChat widget embedded in it. Please copy down the link to the LibGuide below for your future reference - <http://berkeleycollege.libguides.com/LibWidgets>.

When adding the LibChat Widget to your LibGuides, you will reuse an existing box, rather than creating a new box. Make sure you select the “reuse existing box” tab before continuing.

Select the “LibChat & LibAnswers Version 2 Widgets” guide from the dropdown list. You will find this guide by searching through the alphabetic list of all currently published LibGuides.

Next, select the content box labeled “Chat with a Librarian” from the dropdown list. This should be the first box listed here.

Make sure you don’t check the option to copy the box, rather than mapping to the original. If you select this option, if changes are made to the default widget, you would need to update every LibGuide with the changes.

Once you click “reuse box” the default LibChat Widget will be added to your LibGuide. It will automatically resize to the column width where it is placed.

## **Training Conclusion**

Thanks for taking the time to view this training. We hope you now feel comfortable with the LibAnswers Version 2 Platform. We look forward to working collaboratively to provide the Berkeley Community with the best possible Virtual Reference experience.