Local Coordinator's Manual [1]

Thanks for agreeing to be a Local Coordinator at your library! This manual describes basic local coordinator functions.

All local coordinators should be subscribed to the coordinators@askaway.org [2] listserv. This mailing list is the main communication tool used by local coordinators to send and receive critical information. If you don't think you're subscribed, please contact the Admin Centre.

Have a question? Contact us [3].

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1. Prepare for a New Term

AskAway closes for intersession in December, April and August. At the beginning of every new AskAway term, please review the Checklist for the Beginning of the Term [4].

2. Access your QuestionPoint Administrator Account

Each AskAway institution has only ONE 9-digit QuestionPoint Administrator account. If the local coordinator changes, the name and email address on the Administrator account must also be changed.

If you are a service provider (in addition to being an Administrator), you will likely have two QuestionPoint accounts – one with 6 digits, used for staffing AskAway, and one with 9 digits, for administration.

Trouble logging in? Contact the Admin Centre [3].

Change Administrator Contact Information

Change the contact information for your QP Admin account:

1. Login using the 9-digit login.
2. Click My Settings.
3. Change the name and email address of the QP Admin.
4. Click Save.

Change Institution Name

Change your Institution Name in QP:

1. Login using the 9-digit login.
2. From the Select Service drop-down menu in the top left-hand corner, choose Profile.
3. On the Administration tab, under Administration Functions, click on My Institution to edit the profile.
4. Near the bottom, under Institution Services, click on Institution Information.
5. Change the Institution Name, and then click Save.

3. Manage Service Provider Accounts in QuestionPoint

Create New Service Provider Accounts

1. Login to your 9 digit QP administrator account.
2. From the Select Service drop-down menu, choose Administration.
3. By default you should now be on the Create New Librarian Account page.
4. Enter the service provider's full name and email address.
5. For Screen Name, use the format: FirstnameLastinitial@AskAway [5] -- e.g. CristenP@AskAway [6]
6. Profile: Choose View profile
7. Ask A Librarian: Choose **Ask Administrator** (Ask Administrator role does not grant admin functions, and should be assigned to all service providers as it will allow service providers to review transcripts)
8. Leave all other settings at default.
9. Click Submit.

The service provider's User ID (6 digit) will appear at the top of the completed form. They will use this to login. By default the password is the email address entered on the form – the service provider will be prompted to change it upon logging in for the first time.

Edit an Existing Service Provider Account

1. Login to your 9 digit QP administrator account.
2. From the Select Service drop-down menu, choose Administration.
3. Click on the View/Update Accounts tab.
4. Find the service provider's name and click Edit.
5. You can now change the service provider's Name, Screen Name, or Email address.
6. Click Save.

Delete Service Provider Accounts

1. Login to your 9 digit QP administrator account.
2. From the Select Service drop-down menu, choose Administration.
3. Click on the View/Update Accounts tab.
4. Find the service provider's name and click Remove.

Email or Reset Service Provider Passwords

1. Login to your 9 digit QP administrator account.
2. From the Select Service drop-down menu, choose Administration.
3. Click on Passwords in the navigation bar.
4. Choose whether you are going to Email the service provider their existing password, or reset their password to the email address listed in their account.
5. Use the drop-down Authorization, Name, or Email lists to find the service provider.
6. Once you have found the service provider in the list, click on the corresponding Authorization, Name, or Email button to perform the action (emailing or resetting the password).

4. Manage Service Provider Accounts on the AskAway Staff Portal

Create and Edit Service Provider Accounts

New service providers will require an account on the AskAway staff website. This account will allow them to access Guest Logins and will also subscribe them to the appropriate mailing lists [7]:

1. Login to the AskAway staff website [8] with your local coordinator account
2. At the top of the page, click the "My service providers" shortcut
3. This brings you to a page listing all your service providers and their roles, with a link to edit each one
4. To add a new service provider, scroll to the bottom and click the link "add a new service provider"
   - Select Yes or No for mailing lists you would like them to be subscribed to
     - If they are not a local coordinator, select "No" for the Local Coordinators' list
   - Enter the required information and select "Notify user of new account"
   - Under Roles, select the appropriate roles:
     - ALL service providers have the service provider role.
     - Evening and weekend service providers ALSO have the service provider - evenings/weekends role.
   - Select your institution from the Institution drop-down
   - Enter the new service provider's QuestionPoint ID
   - Click "Create new account"

Removing a Role

If you remove a role from a service provider account (for example, if you un-check the service provider - evenings/weekends role), please also update their subscription to the corresponding mailing list. To remove them from the list, select "No mail (temporarily disable delivery)" from the list at the top of their edit account page.

Delete Service Provider Accounts

Please keep your list of service providers up to date. To delete a service provider account, follow these steps (**NOTE**: Do NOT delete local coordinator accounts or accounts that may have belonged to a local coordinator. Instead, contact the Admin Centre):

1. Login to the AskAway staff website with your local coordinator account
2. At the top of the page, click the "My service providers" shortcut
3. Find the service provider in the list and click "edit" to edit their account
4. Scroll to the bottom of their profile and click "Cancel account"
5. Select "Delete the account and makes its content belong to the *Anonymous* user"
   - If you think the service provider may have created content on the website, select "Disable the account and keep its content"
   - **NOTE**: **Do NOT delete local coordinator accounts** or accounts that may have belonged to a local coordinator. Instead, contact the Admin Centre.
6. Click "Cancel account"

5. Maintain your Library's AskAway Qwidget

- Creating/Updating a Qwidget [9]
- C [9]hange Qwidget Message When Closed Between Terms [10]

6. Gather AskAway Statistics

How many of my learners have been helped by my own library staff vs. staff from other libraries? How many

questions have my library staff handled?

Find this information in the monthly reports on the AskAway Statistics [11] page.

- Columns under "Sessions with Our Learners" give data about how many of your learners used AskAway, and how many were helped by staff from your own library or by staff from other libraries.
- "Sessions with Other Institutions' Learners" gives data about how many sessions your library staff handled with learners from other institutions.
- "Total Sessions Handled per Institution" gives data about how many questions your library staff have handled, with their own learners and those from other libraries.

This data is also available in your QuestionPoint account (although not as nicely formatted):

1. Login to your QP account (9 digit administrator login or 6 digit librarian login).
2. Click on Reports.
3. Click Institution and then choose Reports of Sessions.
4. Choose the date range you wish to view (*note: this information is only accurate for the past 90 days).
5. Numbers for your institution will be linked to the corresponding transcripts - e.g. if you click on the number in the Library column under Sessions with Our Patrons, you'll see a list of transcripts from your patrons handled by your service providers.

How many calls have been made by my patrons? When are they calling?

1. Login to your QP account (9 digit administrator login or 6 digit librarian login).
2. Click on Reports.
3. Cick Institution and then choose Institution Report.
4. Choose Monthly to view a list of monthly totals for January - December
   OR
   Choose Daily to see hourly breakdown for a single month – this will tell you when your patrons are calling. (Remember that all times are in EST)
5. Choose Year and Month
6. Choose to Generate Report for Chat
7. Click Submit
8. This report can be copied and pasted into an Excel spreadsheet.

How many of my patrons have been helped by my service providers vs. service providers from other institutions, beyond the last 90 days?

1. Go to the Statistics and Surveys [12] page.
2. Click on Monthly Statistics, and open the spreadsheet for the particular month or term you wish to view.
3. Reading the spreadsheets:
   - "Sessions with Our Learners: Handled by Us" are your patrons helped by your service providers.
   - "Sessions with Our Learners: Handled by Others" are your patrons helped by service providers from other institutions.
   - "Sessions with Other Institution's Learners" are patrons from other libraries that your service providers have helped.

I want to know which of my patrons are asking questions on AskAway (i.e. undergraduate, grad student, faculty, etc.).

1. Go to the Statistics and Surveys [12] page.
2. Click on Form Fields.
3. Open the spreadsheet for the particular month or term you wish to view.

4. The Patron Type column will tell you how your patrons are self-identifying from the following options: 1st-2nd year, 3rd-4th year, college, grad/post grad, faculty/staff, or other.

*Note: Only a small proportion of transcripts contain this data. The Qwidget, which is the interface of choice for the majority of students, does not ask for this information.

Where are my patrons logging in from (the library, from home, etc.)?

1. Go to the Statistics and Surveys [12] page.
2. Click on Form Fields.
3. Open the spreadsheet for the particular month or term you wish to view.
4. The Location worksheet will tell you where your patrons identify themselves as logging in from (i.e. home, library, off-campus, etc.).

Where can I see my patron responses to the patron exit survey?

1. Go to the Statistics and Surveys [12] page.
2. Click on Surveys.
3. Patron responses to the survey are available in monthly spreadsheets.

Can't find the answer to your questions?

- Contact the Administrative Centre [3]
- Additional information about QuestionPoint statistics can be found on their Documentation [13] page.

Qwidget Statistical Reports

To get monthly statistics for your Qwidget:

1. Go to the Statistics and Surveys [12] page.
2. Click on Monthly Statistics, and open the spreadsheet for the particular month or term you wish to view.
3. "Sessions with Our Learners: via Qwidget" are your patrons who came in via the Qwidget.

Daily/hourly statistics for your Qwidget are available from QuestionPoint. To get daily/hourly statistics for your Qwidget:

1. Log into the AskAway Admin account (9 digit login).
2. Click on Reports.
3. Click on Institution in the navigation bar.
4. Click on Institution Report under Activity Statistics.
5. Choose the monthly or daily report: the monthly report will give you summary statistics for a whole year; daily report will give you daily statistics for a single month.
6. Choose the Year and Month (if running a Daily report) and choose Chat from the Generate Report For drop-down menu.
7. Click Submit.
8. Copy the resulting report and paste (as plain text) into an Excel spreadsheet to save and manipulate.
   - "Number (Total) of Chat Sessions Requested" is the total number of sessions requested by your patrons, INCLUDING those requested via the Qwidget.
   - "Number of Chat Sessions Requested via Qwidget" is the subset of your total patron calls that came in via the Qwidget.

7. Review Service Provider Transcripts

Review Your Library Transcripts

1. Login to your QP account (9 digit administrator login or 6 digit librarian login).
2. Click on Reports.
3. Click Institution in the navigation bar and choose Reports of Sessions.
4. Choose the date range you wish to view, but please note: this information is only accurate for the past 90 days.
5. Numbers for your institution will be hot-linked to the corresponding transcripts.
    - e.g. if you click on the number in the Library column under Sessions with Our Patrons, you'll see a list of transcripts from your patrons handled by your service providers.

Search for Your Library Transcripts by Librarian or Date

1. Login to your 9 digit QP admin account.
2. From the Select Service drop-down menu, choose Ask.
3. Click on Review Transcripts.
4. Search for the desired transcripts by name, date etc.
    - **Note**: only transcripts from the last 90 days will appear here. Earlier transcripts can be accessed in the Service History tab.
5. To view the full transcript, click on the ID number.
6. Transcripts can be printed using the Print View link in the top right-hand corner.

Please note: BC ELN does not undertake review of service provider transcripts. We encourage institutions to undertake transcript review of their own transcripts, as it provides a great opportunity for improving chat reference skills.

Bulk Download of Transcripts

If you are interested in downloading a large number of transcripts from a certain time period, contact the Admin Centre for instructions or assistance.

8. Create Institutional Scripts

You can create institutional [scripts](#) [14] that service providers can use with your library's patrons.

Steps to create / edit / remove institutional scripts:

1. Login to your 9 digit QuestionPoint administrator account.
2. From the Select Service drop-down menu, choose Ask.
3. Click on Settings in the navigation bar.
4. Click Institution's Scripts:
    - ?These scripts will only appear in the chat monitor to service providers at your institution or service providers helping your patrons.
    - **Note:** When adding hyperlinks in the body of your script, generate the hyperlink in another program (e.g. Drupal) and copy and paste the link into the text editor in QuestionPoint. If possible, set the HTML Target attribute to _blank to open the link in a new window, otherwise the link will not open correctly in the Qwidget.
    - **Note**: We recommend adding an institutional script called Local – Authentication that describes to a patron how they can authenticate into your databases.
5. Click Add when you've finished typing in the script. They will appear alphabetically by Script Name in the chat monitor.
6. To edit a script, click the Edit button beside the script and edit in the text box. Click Save to save changes.
7. To delete a script, click the Remove button beside the script.

9. Train Service Providers

New Service Providers

Whenever possible, the AskAway Coordinator will train new service providers in-person or online. At the beginning of every term, the Admin Centre sends a call-out to the coordinators listserv to find out if any training is required. In-person or online sessions are then scheduled as needed. If you require training for any service providers outside of these times, please let the Admin Centre know.

It is possible for training to be undertaken locally by experienced AskAwayers.

AskAway training materials [15] are available for both new and experienced service providers to further strengthen their skills.

Always let the Admin Centre know if you have new service providers.

Refresher Training

Refresher training sessions are also available for service providers who have already taken the basic training. Contact the AskAway Admin Centre for details.

10. Troubleshoot for your Service Providers

To help service providers troubleshoot issues they may experience on their shifts, please see the service provider FAQs [16].

11. Market AskAway at your Institution

Information about marketing AskAway can be found on the Marketing Materials [17] page.

If you have anything to add to this list of marketing tips, please contact the Admin Centre.

Source URL: https://askaway.org/staff/local-coordinators-manual

Links
[1] https://askaway.org/staff/local-coordinators-manual
[2] mailto:coordinators@askaway.org
[3] https://askaway.org/staff/contacts
[4] https://askaway.org/staff/checklist-beginning-term
[5] mailto:FirstnameLastinitial@AskAway
[6] mailto:CristenP@AskAway
[7] https://askaway.org/staff/listservs
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