



L-net librarian resources handbook

Version 4.1 - Updated 2/14/10

www.oregonlibraries.net

Getting ready for your shift - a checklist

Use this checklist to get ready for your L-net shift.

- It is a good idea to start getting ready 5 minutes before your shift.
- If you have them, make sure your speakers are loud enough to hear the doorbell when a new patron arrives.
- Log in to Spark.
- If you're unsure of the time of your shift or whether your shift is an Oregon or Ohio shift, you can check the schedule at <http://www.oregonlibraries.net/staff/schedule>
- Have a browser window ready to search with.
- Close down other extra windows and programs that may clutter your screen or slow down your computer.
- If you don't have a call to work on right away, check our staff information blog (www.oregonlibraries.net/blog/) to find out the latest news or look for email questions to answer (<http://www.oregonlibraries.net/ask/answer/open>).
- Don't forget to have fun.

Support

If you are having trouble during your shift, you may contact the partner support librarian, Emily Papagni (503) 988-5433, or the service coordinator, Caleb Tucker-Raymond (503) 988-5438, calebt@multcolib.org.

For emergencies during your shift, if Caleb and Emily are not available, you can also use the L-net mailing list (<http://listsmart.osl.state.or.us/mailman/listinfo/l-net>) or IM librarians logged into Spark for help.

Note: this manual is online at <http://www.oregonlibraries.net/staff/handbook>

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Computer Requirements

Spark will run on Mac OS X, Windows 2000, Windows XP or Windows Vista. Librarians should have 256 MB of RAM and Java version 6.

Please note: most Macintosh users do **not** come with Java version 6.

Logging into Spark

The image at the right shows an example of the login window that is used to login and use all the functions of Spark including all the virtual reference features.

The server is chat.knowitnow.org

If you have difficulty logging in, click on “Advanced”. You should see these settings:

Host: the box for host should be empty

Port: 5222

Admin console port: 9090



When you first log in, L-net librarians will display in the Contacts list under “Oregon”.

You may also use this software to monitor your personal AIM, MSN, or Yahoo IM account.

Logging into Fastpath

To monitor L-net’s chat service, click on the Fastpath tab. To help Oregon patrons, use the drop-down menu to select the Oregon workgroup. To help Ohio patrons, select the Reference workgroup.



When logged into Fastpath, the "Join" button will change to "Logout". Click this button to log out of your L-net shift. You may stay logged into Spark if you would like to be available to L-net librarians who might want to IM you.

Don't feel that you have to wait until your scheduled L-net shift to log into the software. You can log in every day. That way if a patron from your library logs in and asks a question that requires your local expertise, the librarian who is chatting with your patron can send you a quick IM asking for an answer to a question or can refer the question back into the Oregon queue so that you can pick up your patron.

In addition to asking you to help with your local patrons, you may occasionally get a request to pick up a patron or two when the service is very busy (such as when we get a class visit). There's no obligation to help out, but your help will always be appreciated.

Practicing with Spark

Log into spark

Username: the first part of your email address up to the @ symbol

Password: the first time you log in the password is lnet. After you log in, you can change your password in preferences. If you can't remember what you changed your password to, we don't know what it is, but we can reset your password if you need for us to.

Server: chat.knowitnow.org

Click on the fastpath tab

Select the practice2 workgroup and click on the join button.

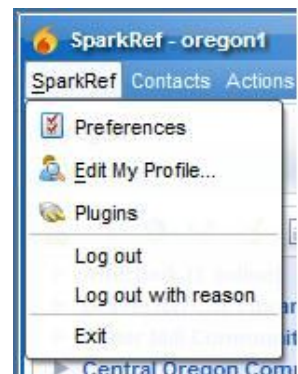
To submit a practice question, fill out the form at

<http://www.oregonlibraries.net/chat/practice>

You may practice using the software with another librarian or by being both a librarian and a patron on one computer.

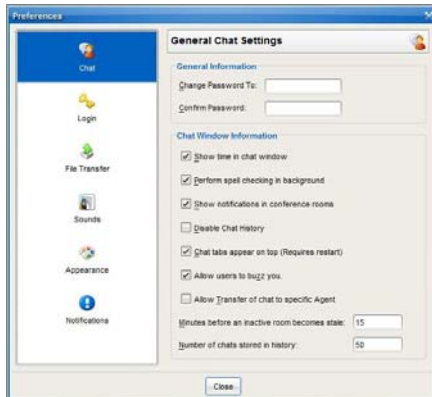
Preferences

The first option under **Spark** allows you to change a number of settings on the software. Many of these should remain in the default setting, but several are customizable and may make using the software a better experience for you.



Feel free to make adjustments to the preferences described below on your computer. If you ever staff L-net at a different computer, your preferences won't be saved and will need to be set again.

Chat: General Chat Settings



General Information: Change/Confirm Password

This will allow you to change your password. The password that you select can be anything that you want it to be. If a librarian forgets a password, it can be reset, but it cannot be retrieved. The librarian would need a new password if the current one is forgotten or misplaced.

Login Settings

Most of these settings are set and should not be changed. The settings that can be changed for individual librarians are outlined below.


Idle Enabled

The Idle setting should remain disabled. If Idle Enabled is checked and you have a slow L-net shift, your login status will change to idle and you won't be notified of new patrons.

Sound Preferences

This gives you the option of when a sound is played, alerting you to a change in status of some aspect of the service. Be sure that "play sound when new message arrives" is checked and adjust the other sound settings if you'd like to.

Adding new sounds

By clicking on the  button to the right of each **Sound** option, new sounds can be downloaded. However, until otherwise notified, librarians should not add new sound files. It's possible that file changes may have detrimental effects on the software and should be avoided at this time.

Appearance

Text size may be adjusted by changing the number in Chat Room Font Size. This will not affect the font size on the patron's screen. Keep in mind that the font size won't change until you start a new chat.

Notifications: Show a Toast Popup


When enabled, this pops up a small window with the patron's messages as they are sent (alerting librarian to a new message).

Edit my profile

Select a nickname that you would like patrons to see. Your nickname should include a first name (this doesn't have to be your real first name) and your location (the name of your library or city). Feel free to abbreviate if the name of your library is very long. Your nickname is the name that patrons will see while chatting with you.

This is also the place that you can add an avatar. Other librarians will be able to see your avatar, but patrons will not.

Exit

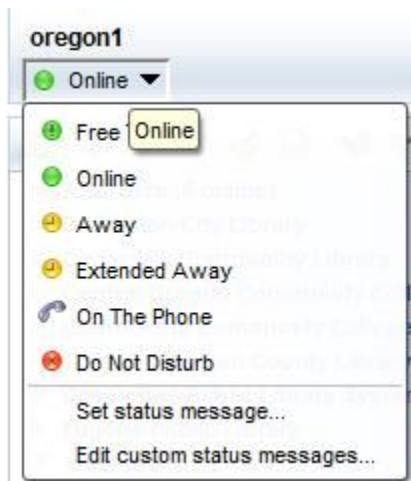
This will close down all Spark functions. To completely log out of Spark Fastpath, the librarian must use this option. Clicking the **X** in the upper right of the Spark Client will merely close the window and place it in the startup menu (the Spark icon  will appear in the bottom right of the screen if your computer is running Windows).

Help

Options under this heading link directly to online patron guides and forums.

Set status message...

This is a way of choosing the librarian's status. There does not appear to be any difference between Free to Chat and Online.



If the service is very busy and you're already working with one patron and the pop-ups of new patrons are driving you crazy, there's an easy way to get rid of the pop-ups. Set your status to "away". You can continue chatting with the patron you're already helping, but you won't be notified of other patrons until you change your status back to "online".

Icons (Below Librarian Status Indicator)

You may identify any of these by mousing-over them.



From left to right, the above icons are:

Add a contact

This option allows you to add a contact to your Friends list.

Join a conference room

We don't have plans to use this, but may some day. Feel free to play with it.

View Downloads

For sharing files.

Send a broadcast

You may use this to send a message to everyone or to just a few librarians. This may be useful during class visits if you'd like to call upon other L-net librarians to log in and help take questions from students.

Click on the broadcast icon

Put a check mark next to the librarian or group of librarians that you would like to send a message to.

Type your message in the box on the left and click "ok"

You may use either "normal message" or "alert notification"

An alternative way of sending a broadcast is to click on a name in the Contacts list (or several names by using the shift key) and then clicking on the broadcast icon.

View Task List

Do you need one more place to keep track of everything you have to do? Here it is.

View Notes

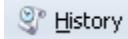
A place to keep notes. Viewable only by you.

IM Logins

MSN, AIM, YAHOO account logins

Fastpath *History / Conference / Macros*

History



This is where transcripts ("Previous Chats") will be accessed. Transcripts older than 7 days will be deleted from the server every night (or for questions in follow up, 7 days after an email answer has been sent).

Transcripts will be loaded into the Buzz (www.oregonlibraries.net/buzz) every 5 minutes and continue to be available in the Buzz after they are deleted from Spark. In some cases there may be an hour delay before new transcripts appear in the Buzz.

Canned Responses (scripted messages)

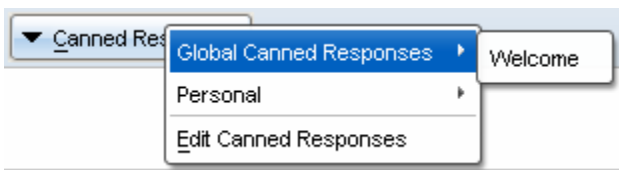
Click on **Macros** . This will bring up a screen displaying "Personal Macros." There is an "Initial Response" that can be set to automatically go to each new patron, but we're not using that setting.

Below that are the individual "Canned Responses." You will see a "Response Name" and "Response Text." The "Response Name" is the name that you give a script. It will display to you during the chat session. The "Response Text" will be what is actually sent to the patron.

It's also possible to add scripted messages while chatting with a patron by selecting "edit canned response" under canned responses.

Accessing Canned Responses

While chatting with a patron, the Canned Responses are accessed below the chat transcript. Click on and three options will appear: "Global Canned Responses," "Personal" and "Edit Canned Responses."



Global Canned Responses

These canned responses are those which will be entered by Administrators in Oregon and Ohio and will be available to all librarians. Clicking "Global Canned Responses" under "Canned Responses" will display a list of Response Names. These are the short titles assigned to each canned response. Choose the appropriate "name" and the full text of the response will be displayed in the chat window and can then be sent to the patron.

Personal Canned Responses

These canned responses are those which each individual librarian adds. Clicking "Personal" under "Canned Responses" will display a list of Response Names.

Editing Canned Responses inside a Fastpath Session

You can edit canned responses during a chat session. Click "Canned Responses," then "Edit Canned Responses." This will bring up a screen allowing you to **Add** new canned responses as well as **Delete** canned responses. You will see current canned responses listed by Name with the accompanying full text. If you want to delete, simply highlight the response and click **Delete**.

Research has shown that patrons do not respond well to scripted messages (<http://www.oclc.org/research/projects/synchronicity/>). These messages often make us sound like machines so it's best to use them as little as possible.

Using Fastpath for Virtual Reference

Online Librarians / Current Chats / Queue Activity

Online Agents | Current Chats (1) | Queue Activity |

Online Agents

This shows all available librarians logged on and monitoring the service. Some librarians may be with a chat patron and unavailable to take additional patrons.

Current Chats

This displays online librarians and their active chats. The librarian viewing this will not see her own current chats, only those of others in the Workgroup. The number of chats currently taking place will be displayed in parentheses (i.e., (1)) after "Current Chats" (as in the example above).

Queue Activity

Shows Name, Number in Queue, Average Wait Time, and Last Queue Activity.

Accepting Questions on Fastpath

Customer Waiting Alert

When a question is in the queue, a pop-up window and sound will alert the librarian that there is an "Incoming Chat Request From [Patron's Screen Name]." This window has options for "Accept" and "Reject." The incoming patron's Name, Email Address, Question, Name of Library, and Queue are listed on the pop-up window. The patron is only required to enter a question and a zip code when submitting a question.



The screenshot shows a pop-up window titled "Incoming Chat Request From hepzibah". It contains the following information:

Name:	hepzibah
Question	I'm looking for the book "click, clack, moo: cows that type".



Below the question is a progress bar showing "17 Seconds". At the bottom, there are two buttons: a green checkmark icon labeled "Accept" and a red X icon labeled "Reject". A link "View more information..." is also present.

The patron will also see his own status in the queue. Both his position in the queue as well as his estimated "wait time" will be available to the patron after he connects to the service. If the patron can't wait long, he has an option for leaving his question in our e-mail service.

Accepting Customers

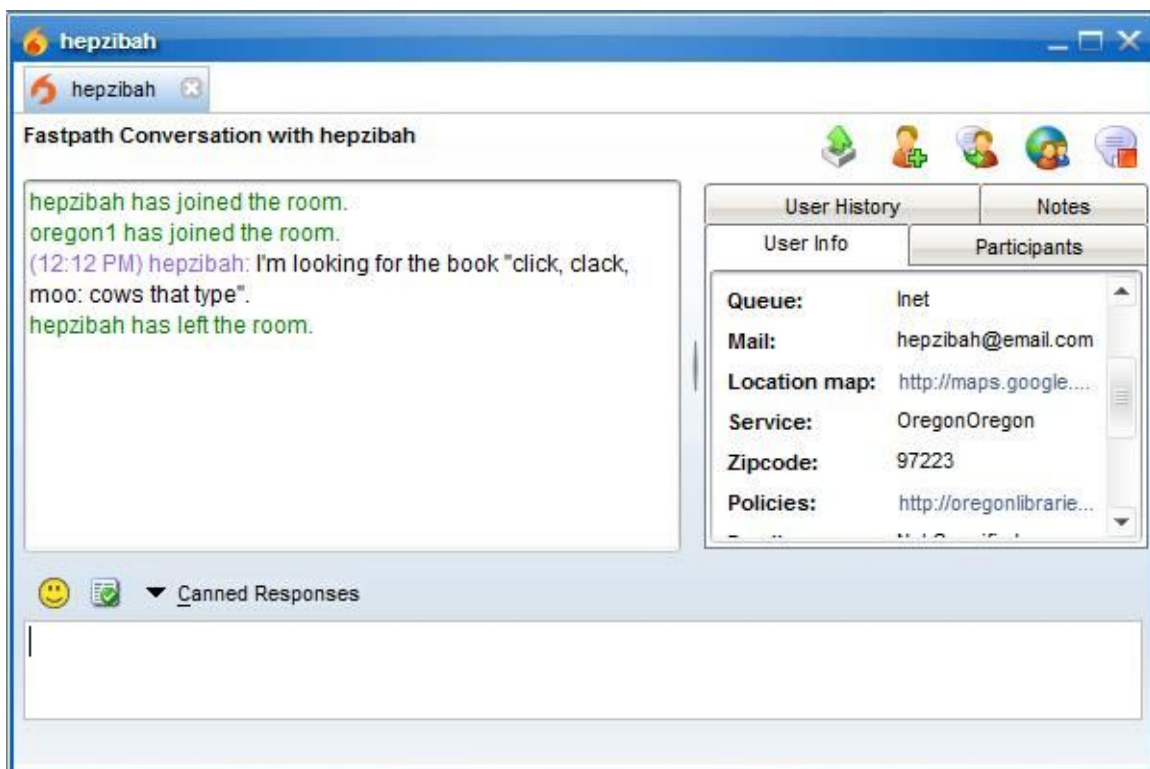
Click  Acept. The patron is then automatically connected to you.

Rejecting Customers

This does not eject the patron from the queue or cancel their request; it passes the patron on to the next available librarian. Clicking  Reject releases the patron from *the individual librarian's* Fastpath interface and puts them back into the queue for the next available librarian to pick up. This will also automatically happen after 20 seconds without hitting the  Reject option. If there are no other librarians staffing the service or other librarians are already busy helping patrons, the question will return to you.

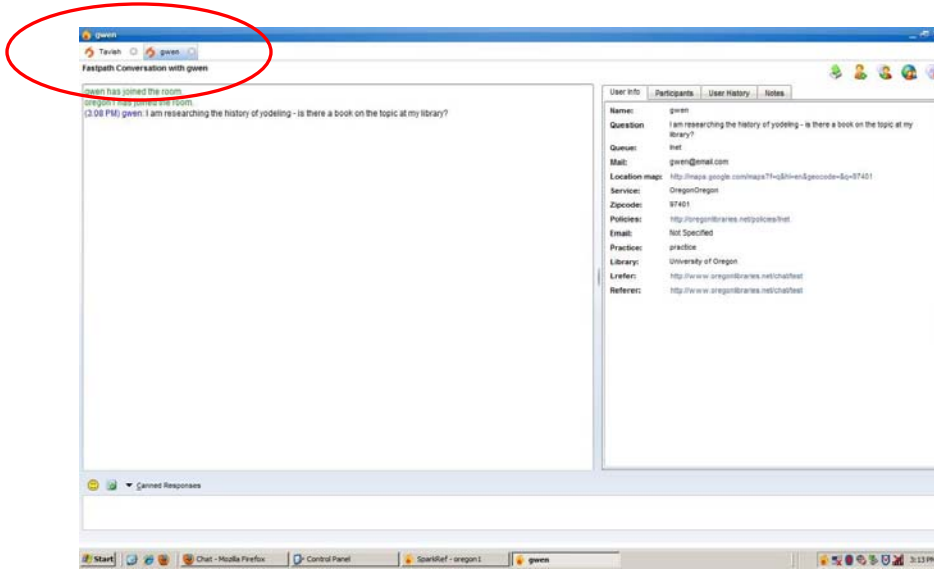
Fastpath Chat Window

After accepting the patron, a new window will open (similar to the image below). This is the window through which your interaction with the patron will happen.

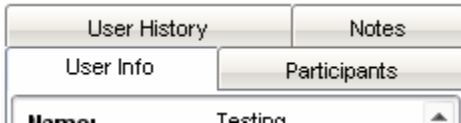


Multiple Conversations

Librarians are encouraged to work with one patron at a time, but if you would like to chat with 2 patrons at a time (and also chat with other librarians) you can do so by using the tabs at the top of your window.



Chat Session Tabs



Within the chat session box, there are four tabs in the upper right area that can be useful for managing the questions and patrons being served.

User Info Tab

This tab contains the basic patron information: Name, Email Address, Question, and Library.

A link to Policies is available. The link will open the policy page of the patron's home library. It includes links to library web sites, catalogs, databases, and information regarding local patron services that may not be available elsewhere.

Some libraries include barcodes for librarian use only. Librarians may use these to access library databases.

The Schools policy page includes a file with all of the logins and passwords for Oregon schools to access databases through OSLIS.

Individual policy pages are also available at

<http://www.oregonlibraries.net/policies>

User History Tab

This tab allows librarians to see previous chats with the same patron from the last 7 days. By clicking on the tab, a list of previous sessions is retrieved. Double-clicking on any one session listed will retrieve the full transcript.

Participants Tab

This tab shows the participants in the current session.


Notes Tab

Any notes you leave here will be attached to the transcript that librarians can access, but will not be visible to the patron.

Chatting with Patron

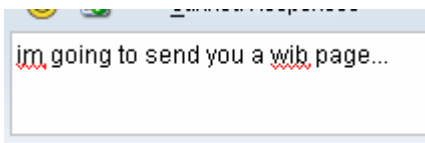
To send a message to the patron, the librarian types his or her text into the space directly below where the conversation appears. Simply type in your message and hit the "Enter" key on your keyboard.

Spell Check

Fastpath provides a spell check feature similar to what is found in many word processing software programs. It can be accessed by clicking on the **Spell Check icon** . A message can easily be spell checked before sending it to the patron.

Automatic Spell Checking

If the librarian has enabled the **Spell Check in background** option under **Preference** in the **Spark** client a wavy red underline will appear under words that Fastpath sees as incorrect:



This alerts the librarian to a possible misspelling.

Typing/Connection Indicators

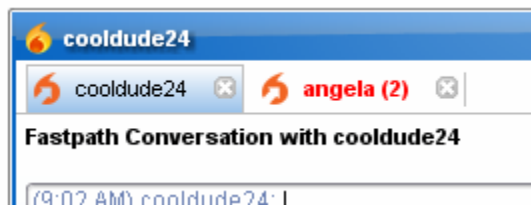
One very useful feature of Fastpath is the two-way indicators of the librarian's and patron's continued presence within the chat session. This alleviates much of the need for either party to wonder "Are you still online?"

"Patron Typing" Indicators

First, when a patron, let's say **cooldude24**, is typing in his chat window, the icon in **cooldude24's tab** on the librarian's screen will change from the Fastpath icon to a cartoon balloon with a pencil over it:



The librarian will also see "**Customer is typing...**" appear in the bottom left corner of the window. Next, when another patron (for example, **angela**) sends a message to the librarian while that librarian is interacting with **cooldude24**, **angela's tab** text will turn red. If **angela** sends multiple messages before the librarian responds, the tab will show how many messages have been sent since she was last answered:



In this case, two messages have been sent. If the librarian switches back to answer **angela's** questions, the text color will change back to black and **cooldude24's** tab will change to red if he sends a message. In this way, the librarian is kept apprised of the status of all the patrons with which he or she is currently working.

"Patron Typing" Indicators When Window is Minimized


If the chat window is minimized, the tab at the bottom of the librarian's screen will flash to indicate activity.

"Librarian Typing" Indicator

When the librarian is in the process of typing a message to the patron, the patron's screen will display "**The Librarian is typing...**" at the bottom of his or her screen.

Inviting Someone to Join Conversation

This option is available if the librarian wishes to consult with another librarian on a

question within the conversation itself. Click on the  icon. The invitation will go out to all librarians chosen in a queue or to a specific librarian chosen from the available list.


This option keeps ALL participants (patron and librarians) connected. REMEMBER: The customer will see all messages relayed back and forth between librarians if this option is chosen.

An alternative is to send a Spark IM message to an available librarian. A listing of available (i.e., online) librarians can be seen in your Spark **Contacts** tab. This will be a separate interaction from the patron conversation and will leave that conversation intact while you chat with the other librarian.

You may also simply TRANSFER a conversation. This is preferable if you want to leave the conversation and have another librarian take over the chat session.

Transferring a Conversation

Sometimes it becomes necessary to transfer a patron to a different librarian.

Send an IM to the other librarian asking permission to transfer the call. Once you receive permission, click on the "Transfer this conversation to another librarian" icon . When the icon is first clicked, the resolution code window is opened. Choose "forwarded" when transferring. You can then transfer the call to a queue (unfortunately, we're not able to transfer calls to a specific librarian at this time).

Co-Browsing and Sharing Web Sites

Spark's version of cobrowsing does not function as a simultaneous viewing of web pages, but instead works as a form of page-pushing. Because it does not work like true cobrowsing and it often causes technical problems, we're asking librarians not to use cobrowsing.

If you'd like to send a web site to a patron, give the patron the web address using the box for sending messages to your patron. The web address will appear in the patron's window as a link. Be sure to include <http://> so that the url will appear in the patron's window as a link.

When the patron clicks on the link, the web site may open as a new window or a new tab depending on the browser the patron is using.


Ending Conversations

Continuing After a Customer Disconnects

Fastpath allows the librarian to add to a conversation even after the patron has ended the conversation. This allows any extra resources or other helpful comments to be added to the transcript to answer the patron's question. If the patron entered an email address

when he first submitted his question, he will receive a full transcript of the conversation, including information added after he left the conversation.

Librarian Ends a Conversation

First, click the "End Conversation" icon . This will bring up a choice of Resolution Codes. After choosing the most appropriate one, the session will end, and the window will close.

Available resolution codes are:

Completed - no additional information is needed by patron

Followup - In most cases, use this code anytime follow up is needed. The question will be answered either by the patron's home library or another appropriate library

Transferred – you were the original chat librarian, but transferred the live call to another librarian

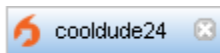
Disconnected – If the patron never responds and has not given us an email address. Do not use Disconnected if the patron left an email address; instead, use Followup.

Prank – patron had no information need

Test – for use when a librarian is practicing using the software

Closing Tabs in Fastpath

If the librarian clicks on the X in the right section of the tab...



...this will also close a conversation with the patron. However, it is not recommended to do this, since this will prevent the librarian from choosing a Resolution Code.

L-net Local

L-net's software is available to any Oregon library that would like to use it to provide a chat service to its local community. Details are at

<http://www.oregonlibraries.net/local>

In 2006 L-net created an IM report that gives a general overview of IM in libraries and includes practical strategies for addressing concerns that library administrators and IT departments might have. The report is available at

<http://www.oregonlibraries.net/staff/instantmessaging>

Ohio's KnowItNow service

Our partners in Ohio answer chat questions from Oregon patrons during the early morning hours on weekdays.

We return the favor by helping Ohio patrons at times when we have at least three Oregon librarians scheduled to cover Oregon's chat service.

You can see if you're scheduled to help Oregon patrons or Ohio patrons by looking at the schedule:

<http://www.oregonlibraries.net/staff/schedule>

Ohio shifts will have a green background and will be marked 'Ohio'.

When you log into spark, you'll get to choose from the 'reference' and 'oregon' workgroups.

To staff L-net, choose 'Oregon'. To staff Ohio's KnowItNow service, choose 'reference'.

Each 'ohio' shift should only be an hour long, so if your library is used to staffing more than one hour at a time, be sure to switch back to the 'Oregon' group when you are done.

Rules for answering questions:

- * Pick up the first question you get.
- * Introduce yourself as someone from Oregon who helps to answer questions when the library in Ohio is busy. Some things you can say are:

I'm not at your library, but I can still help.

My library and your library help answer questions for one another when things get busy. I'm in Oregon but can still help answer your question.

* It is okay to take one question at a time even though you will see those poor Ohio librarians taking 4. After you pick up a question, set yourself to 'Away' to prevent pop-ups of new patrons from annoying you.

* KnowItNow does not have policy pages. Use your favorite search engine to find the patron's library website and help them from there.

* KnowItNow does not do follow-up the way we do. We're working with our partners in Ohio to find a way to manage Ohio questions that need follow up.

* If there is a broadcast message that the Oregon workgroup is very busy and needs help, it's ok for you to leave the Ohio workgroup and log into the Oregon workgroup.

* Ohio's public libraries use OPLIN (<http://kin.oplin.org>) for databases. You can use the zip code 44114 to log in, and patrons can use www.ohioweblibrary.org to access the databases. You are free to find articles and then use the file sharing button to send them to patrons.

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L-net E-mail Service Guidelines

- Give the patron the same quality service as you would if they had walked into your library.
- Respond to the patron within 2 working days, even if you can't fully answer the question.
- If the question is unclear, ask the patron for clarification using the **Request Clarification** action.
- Tag the question if you are unable to find an answer to the question. You can always tag the question "L-net" to alert Caleb and Emily that the question needs an answer.
- If a question looks like homework help and you aren't comfortable simply giving answers, suggest resources where they can find the answer.
- If you get a "question" in E-mail that is obviously a pitch from a bookseller, answer the question with a message such as:

L-net is a collaborative reference service of Oregon's libraries. We try to help Oregon citizens with their information needs, but do not have any funding to purchase library materials.

It's also appropriate to let the bookseller know how to contact individual libraries.

E-mail and follow-up questions on www.oregonlibraries.net

Our system for answering e-mail and follow-up aims to give patrons and librarians an easy, asynchronous way to communicate with each other. Patrons can:

- Submit questions by sending e-mail to ask@oregonlibraries.net
- Submit questions by filling out our form at www.oregonlibraries.net/ask

Librarians can:

- Organize questions by tagging questions with any word or phrase
- Communicate with each other by leaving comments on questions
- Communicate with patrons by sending answers and requests for clarification

Still, our system is not complete. We have a working [to-do list](#) that you are welcome to comment on and add to.

All about tags

Tags are metadata without labels. Imagine online library catalogs, if instead of keeping separate indexes for authors, titles and subjects, we could only access these bits of information through one general index. We're calling this 'tags', but in a library catalog, we called it a keyword index, and in the days of yore we called it a card catalog.

In the context of reference, it is likely that we will use most tags to describe questions. Most tags will be subjects, descriptors, labels, etc. We can also use them to claim questions or refer them to one another, by tagging a question with the name of a library or librarian. And we can use them for whatever else we want.

This is an experiment, but I think tags will be useful for us.

Best Practices

- Keep answers within the L-net software rather than using your own library's email account to answer questions.

This is partly because it is good for us to have a record in the software of the answer the patron receives. Also, the patron's home library has access to the question record and may want to be able to read the answer to know that its patron was well-served.

But the main reason that it's better to use the software to communicate with patrons is because it provides better privacy for our patrons.

In Oregon, email of public employees is public record. Library records are not. By sending patron information over a public employee's email account, the library records become public records. In order to protect our patrons' privacy, we try to keep our reference questions out of our email whenever possible.

- For complicated questions, give the patron the option of calling the library or receiving an answer via email follow up.

Librarians sometimes tell the patron to call the library for a quick answer, especially when questions involve circulation records that many of us may not have access to.

Since the patron contacted the library through the chat or email service, the patron may be indicating a preference for electronic-based communication with the librarian. The downside of asking the patron to make a call is that it asks him to repeat his question all over again on the phone. The goal is to move the question, not the patron.

How questions get into the system

Questions get into our system in three ways:

Patrons send e-mail to ask@oregonlibraries.net

www.oregonlibraries.net checks for new mail every 5 minutes. New messages are treated as new questions and are given an *open* tag, with a few exceptions:

Messages containing hyperlinks are considered spam and are marked *unpublished*. Administrators (Emily and Caleb) review spam throughout the day, *publish* any real questions and delete the rest.

If the message's subject header identifies it as a reply to one we sent to them, the message is added to the question transcript.

Patrons fill out our form at www.oregonlibraries.net/ask

All questions sent through our form are given an *open* tag.



Chat sessions set with the resolution code "Followup"

All chat sessions are tagged with their resolution codes, but if a question is marked 'Followup' it is also given an *open* tag.

Patrons waiting for their chat click 'leave a message'

Patrons using live chat are told how long they have to wait and are given the option to leave a message. The form sends the question to ask@oregonlibraries.net. Once

patrons click submit, they are sent a confirmation of their question, using the template at www.oregonlibraries.net/templates/new.

Questions that originated as chat questions have a balloon icon . Questions sent to L-net as email questions have an envelope icon .

How to find out about new questions

You can find out about new questions by visiting our list of open questions, www.oregonlibraries.net/ask/answer/open. You can also go to www.oregonlibraries.net/ask/answer/my to see a list of all the questions that are included in your "Good Morning from L-net email".

Questions are sorted by their last updated time. The questions that have been worked on least recently are shown first. This reflects L-net's priority of answering questions in the order they arrive.


At the top of the page a tag list shows the tags on all of the currently open questions. Click on any of the tags to limit the list to questions that have that tag.

It is easy to check a website, but it may not be easy to remember to do it, so you have a few other options.

You may **sign up for e-mail notifications** by editing your preferences. Click "My account", then "Edit" and then "Notifications".

[Home](#) > [My account](#) >

emily

 Login successful.

[View](#) [Edit](#) [History](#) [Notifications](#) [Contact](#) [Track page visits](#)

[Account](#) [Notifications](#) [Personal information](#)

Notifications

Yes, please send me notifications of new questions

The content of this field is kept private and will not be shown publicly.

Send me notifications of new questions when:

either tags or words

The content of this field is kept private and will not be shown publicly.

Match one of these words or phrases:

emily, l-net, lnet

Not case sensitive. Separate words or phrases with commas. The content of this field is kept private and will not be shown publicly.

To turn notifications on or off, check or uncheck the box labeled "Yes, please send me notifications of new questions".

Set whether you want to receive notifications of questions based on their tags, the words in the question, or both.

Finally, choose a few tags or words to match against. Separate them by commas.

Different librarians may tag a question for your library using a variety of different tags. It's a good idea to set up your alerts so that you will receive notifications for all the variations of your library's name that you can think of. So Beaverton City librarians may set up their notifications for Beaverton, Beaverton City Library, BCL.

Some librarians are also setting up their accounts to be alerted to subject words, such as history, art, biology, etc.

The notifications that you set up for yourself will generate a "Good morning from L-net" email message every morning alerting you to questions you may need to answer.

If you'd prefer, you can get alerts of activity on your question by IM instead of e-mail.

This is helpful if you are on Spark all day anyway and like to respond to patrons right away. Log into the website, and click 'my account' and then 'edit'. Scroll down to 'Messaging and Notifications settings' and set 'Default send method' to 'XMPP'. Alerts for new questions will come over IM instead of e-mail. Alerts for old questions and the daily 'good morning' messages will continue to arrive by e-mail.

If you don't already have an account, follow these steps to create an account.

1. Visit www.oregonlibraries.net/user/register to create an account.
2. Wait for Caleb or Emily to confirm your account.
3. Log in to your account at <http://www.oregonlibraries.net/user/login>.
4. Click 'Edit' and follow the steps above to set up notifications.
5. In the 'account settings' section, you can upload a picture of yourself (or whoever you want to be online). Be sure to submit any changes by scrolling to the bottom and clicking the button there.
6. In the 'personal information' section, tell us about yourself. You don't have to fill out every field. If there's something you'd like to say that doesn't seem like it has a place, just let Caleb know and he'll add it in. Be sure to click submit at the bottom.
7. Your profile will be available at www.oregonlibraries.net/librarians. Someday we hope to make it easy for patrons to see this page.
8. If several librarians at a library would like to access a shared email account, we can set up a profile for the library rather than individual profiles.

You may also subscribe to an **RSS feed** for any tag in the system. You may want to subscribe to multiple feeds. The URL for a feed is the same as the URL for a list of questions, only replace 'answer' with 'feed'.

For example: List of questions tagged 'Deschutes':
<http://oregonlibraries.net/ask/answer/deschutes>

RSS feed for questions tagged 'Deschutes':

<http://oregonlibraries.net/ask/feed/deschutes>

Feeds contain only the time a question was sent, a link to the question, and any additional tags. They do not contain the text of the questions themselves or information about the patron.

Question statuses

Questions may have one of two statuses:

Open questions are new or have recently received a reply from a patron or a referred librarian.

Closed questions are completed or are recent chat sessions not coded for follow-up.

You may open or close a question by using the button to change the status.

These statuses work like tags for generating question lists and feeds, but are controlled by the system.

Searching e-mail and followup questions

You can search e-mail and followup questions. Question lists by tag can also be searched. The **Search this site** search box, above the left-hand sidebar, searches the entire contents of www.oregonlibraries.net.

To search transcripts only, use the advanced search and limit to L-net questions.

A word of warning: only words in the original question or chat transcript are currently indexed. Words in your answers, requests for clarifications, comments and other notes are excluded.

You can use the **Tag cloud**, <http://www.oregonlibraries.net/ask/cloud>, to find questions with specific tags.

Subject Experts and Referrals

These are experts who will help us with questions that can't be answered by any of our partner libraries. Use the Message type "Referral" to send a question to one of these subject experts.

Education

[Education Northwest](#), previously the Northwest Regional Educational Laboratory.

- Access to PSU online catalog and databases.
- In house library consisting of over 5000 education book titles and over 200 educational journal titles.
- Access to different statistical databases, both federal and state.
- Entire ERIC microfiche collection.
- We can answer questions concerning: K-12 education research, parent involvement, mentoring in schools and communities, volunteer learning, Native American education, equity issues in education, school improvement, evaluation in education, rural education, education statistics, and federal education policy.
- Our email for our library group is: Library@educationnorthwest.org

In addition to questions that require a subject expert, we sometimes get follow up/e-mail questions that need to be answered by a local library that is not an L-net partner library.

Here are some of the libraries that we frequently refer questions to along with the preferred e-mail contact for each library.

Albany Public Library
Diane Moody
Diane.moody@cityofalbany.net

Baker County Library District
Diana Pearson
dpearson@bakerlib.org

Hood River County Library
gorge.link@co.hood-river.or.us

Jackson County Library Services
medref@jcls.org

Lake Oswego Public Library
loref@ci.oswego.or.us

The Dalles-Wasco County Library
WascoCountyLibrarySD@gmail.com

Tillamook County Library
Luke Kralik
luke@beachbooks.org

West Linn Public Library
wlref@lincc.org

Wilsonville Public Library
wvref@lincc.lib.or.us

A directory of Oregon libraries is available at

<http://libdir.osl.state.or.us/>

Working with a question

When you work on a question, notice the information about the patron and the transcript history so far. Any information the patron submitted with the question and the transcript of the conversation so far will be included.

Look for comments from other librarians at the bottom of the record. Does someone say they are working on it already? If so, you should contribute by adding comments, not by sending an answer yourself.

Look also for tags with people's names in them. These may also indicate that a particular person is working on the question.


Add lots of comments and tags yourself to avoid confusion.

Organize questions by adding tags to them. Scroll down to the sections labeled All Tags and My tags.

All tags:

[oregon state library](#)

My tags:

 oregon state library

To add a tag, enter words in the 'My tags' box, separated by commas, and either hit 'return' or click 'Add'.

Tags may only be removed by the person that created them.

A tag cloud is at <http://www.oregonlibraries.net/ask/cloud> and includes all tags given to questions, open and closed.

You are free to tag questions with whatever terms you see fit - subjects, sources, libraries, or whatever you want.

One convention we've discussed so far is that you may tag a question with your name to indicate that you are working on it. Tag a question with the name of a library to indicate that you think that library should work on it.

A good way to contribute to answers without doing the answering is to leave comments on questions.

[here's my comment](#)

Submitted by [emily](#) ([Remove](#)) on Wed, 2008-09-03 15:38.

here's my comment

>>

[delete](#) | [edit](#) | [reply](#) | [mark as spam](#) | [mark as not spam](#) | [report spam](#)

Post new comment

Your name:

[caleb](#)

Comment: *

→ [Input format](#)

Notify me of follow-up comments posted here.

For example, if you start to work on a question, you might just comment what sources you checked. If you are working on something but are stumped, other librarians can suggest sources or methods.

To **send an answer** or **request clarification** from the patron, enter your answer in the big text box and choose either 'Answer' or 'Request Clarification'.

Message type: *

- Answer
- Clarification
- Note
- Referral
- Staff comment
- Draft

Message: *



You may also save a partial answer by selecting **Draft**. If the text box is not empty, someone else has saved a draft of an answer already.

If you choose **Answer**, drafts will be deleted, the answer will be sent, and the question's status will be set to 'closed'.

The message to the patron will use a template based on www.oregonlibraries.net/templates/answer.

If you choose **Request clarification**, a message will be sent to the patron but the question's status will remain open.

The message to the patron will use a template based on www.oregonlibraries.net/templates/clarification.

If you choose **Draft**, nothing is sent to the patron and the question's status isn't changed. It doesn't hurt to save drafts often while you are working on an involved question.

If more than one person is working on a question at the same time, both answers or clarifications are sent. However, only the most recent draft will display in the text box.

If you choose '**Referral**', an e-mail will be sent to the e-mail address you specify with the text of the original question and your message in the 'Answer' field. The recipient of the referral will not receive a copy of the chat transcript or see the patron's email address.

The referral will use a template based on www.oregonlibraries.net/templates/referral.

When that person replies, you will need to copy and paste the answer into the answer box. You may also need to edit the response since librarians often phrase answers differently when they are speaking to one another than they do when they are speaking to a patron. When your answer is ready to go, click 'Send message' to send the answer to the patron.

By default, you will be **notified when the patron or referee replies** to your clarification, answer, note or referral. You may unsubscribe from a question if you would not like to receive this notification.

If you choose '**Note**' you can send a message to the patron while leaving the status of the question open. You might want to send a note if you have a very difficult question that would take more than a day or two to research. In that case, you might just want to drop the patron a note saying that you're working on the question, but that there may be a slight delay before the patron receives an answer. You might also use this if you just want to tell the patron that you're consulting with other librarians or referring the question to another library. That might also involve a delay in getting the patron an answer.

If you click on the '**Set to Closed**' button the status of the question will change to closed. You may want to just close a question if it is a duplicate question or if it appears that the question was answered in chat and it was given a followup resolution code in error.

If you click on the '**Mark as spam**', the question status will change to closed and will be deleted soon after being marked as spam. Most spam gets trapped before it gets into the e-mail software, but use this anytime you see a question that is clearly spam.

If you choose '**Open this question**' a closed question's status will change to open and the question will appear in the list of open questions.

If you choose '**Update patron's email address**', copy the patron's address from its location in the transcript and paste it into the box. Click on the change button. The

patron's email address will display at the top of the record right where it is supposed to be.

Attachments

You can add an attachment to send to a patron if you are sending an **Answer**, **Request for clarification**, **Note to the patron**, or if you are **Referring the Question outside of L-net**. You can attach as many files as you want, and each one can be up to 5 megabytes.

To attach a file, scroll to the *File Attachments* link, and click it to reveal the attachment form. Click the **Browse...** button to find your file and **Attach** to attach it.

▼ **File attachments**

Changes made to the attachments are not permanent until you save this post. The first "listed" file will be included in RSS feeds.

Attach new file:

The maximum upload size is *5 MB*. Only files with the following extensions may be uploaded: *jpg jpeg gif png txt doc xls pdf ppt pps odt ods odp m4v html*

Enter your message to the patron in the 'Message' box and choose what action to take as usual. If you need to send more than one attachment, just do this again with the second file.

Message type: *

▼

Message: *

According to the Wikipedia, the moon is made of Gorgonzola. Please see the attached file.

Click 'Send Message'. Your attachment will appear as part of your message in the transcript. The attachment has been sent to the patron.

question 191708



- Your message has been sent.
- Question Answer Message *message* has been created.

Answer by [oregon](#) on Tue, 2010-01-26 15:03

According to the Wikipedia, the moon is made of Gorgonzola. Please see the attached file.

Attachment Size

[attach-1.png](#) 10.81 KB

Patron Privacy

It is important that as much as possible, we answer questions from patrons within the software, rather than by using our own library email accounts.

This is in part because it is good for us to have a record in the software of the answer the patron receives. Also, the patron's home library has access to the question record and may want to be able to read the answer to know that their patron was well-served.

But the main reason that it's better to use the software to communicate with patrons is because it provides better privacy for our patrons.

In Oregon, email of public employees is public record. Library records are not. By sending patron information over a public employee's email account, the library records become public records. In order to protect our patrons' privacy, we try to keep our reference questions out of our email whenever possible.

How to let everyone know you are unavailable for e-mail questions

If no one at your library is available to take e-mail questions, let Caleb or Emily know. They will make arrangements to answer any questions that are tagged with the name of your library.

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L-net Core Competencies for Digital Reference

The following critical skills, abilities and aptitudes for staff providing virtual reference were adapted by the L-net Training Team from the Washington Statewide VRS Training Committee's Core Competencies for Virtual Reference, <http://vrstrain.spl.org/textdocs/vrscompetencies.pdf>.

1. Ability to derive professional satisfaction from virtual reference transactions.
2. Keyboarding proficiency.
3. Ability to use all necessary software. Example for L-net:
 - logging in and using Spark software
 - knowing how to find help for the above
4. Ability to effectively conduct a collaborative browsing session with a patron.
5. Multi-tasking and managing multiple windows.
6. Ability to conduct an effective reference transaction in online environments, including the creation and use of pre-scripted messages.
7. Online communication skills and etiquette, for chat, e-mail, and other online communication.
8. Excellent online searching skills.
9. Ability to effectively search, and demonstrate searching of library databases. Knowledge of licensing guidelines connected with use of library databases. Ability to lead the patron to home library databases. Understanding of L-net's guidelines for working with licensed resources.
10. Ability to assist online users in applying critical thinking skills in locating, using, and evaluating information.
11. Technical troubleshooting skills and ability to explain technical problems to facilitate diagnosis and solution.
12. Ability to apply reference transaction policies in an online environment.
13. Evaluation of online reference transactions, and identification of improvement strategies.
14. Commitment to continuous learning and motivation to improve skills in all areas of reference services.
15. Awareness of privacy issues and the L-net Privacy Policy.

Chat abbreviations

Abbreviations - Used to save time when typing but can seem like a different language when new to chat! Here are some of the most popular.

ASL = Age/sex/location
BF = Boyfriend
BBL = Be back later
BBS = Be back soon
BFN = Bye for now
BRB = Be right back
BTW = By the way
FYI = For your information
GF = Girlfriend
GTG = Got to go
IMHO = In my humble opinion
IMO = In my opinion
J/K = Just kidding
K = Okay
LOL = Laughing out loud
NP = No problem
OMG = Oh my God
ROFL = Rolling on the floor laughing
TX or THX = Thanks
WB = Welcome back
WTG = Way to go
YW = You are welcome

Emoticons - Turn your head to the side and with a little imagination, 'emoticons' show basic pictures showing a face of emotion.

:) or :-) = smile
;-) = wink
: - / = confused
:- D = big smile
:- (= sad
;- (= crying
:- 0 = surprised or shock

Reference Interview Clutch Questions

These are successful reference interview questions collected by Multnomah County Library

Listening/Inquiry:

"Is there something specific that you are trying to find?" or "Do you have a particular title in mind?"

"Wow, that subject is really interesting! Can you tell me a little bit more about it?" or "Tell me a little more about what you were hoping to find."

"Is there a particular aspect of _____ that you're interested in? What do you want to find out about _____?"

"Can you spell that for me?" works when you didn't catch what a patron said, you don't know the topic very well, or it's the first time you heard of something (fiction series, American Idol contestant, medical procedure, whatever).

"How much information do you need?"

"What if we could find the absolutely perfect information about your topic, can you describe that for me?"

"Are you looking for facts about that subject or do you want just stories?"

"Would you like a book, or would an article from a magazine or database help?"

"Do you want a book with more words and less pictures, or more pictures and less words?"

"Can you tell me where you've already looked?"

"Is this book for you or for someone else? How old are they/are they an adult or child/etc.?"

If a parent brings a child over with a question, I ask the child "Is this for you?" and then address the child as the patron as much as possible.

"Is this for a school report?" and if so: "Tell me a little more about your project." "What information do you need to include in your report?" "What sort of resources can you use?" (since teachers often tell their students 3 books and 1 Internet resource, for example).

"What kinds of things did your teacher mention he/she wanted you to include?" - & corollary, "Do you have a copy of your assignment with you?"

If I have that problem where open-ended questions just don't work -- when a patron comes up to me and says "I need Condoleezza Rice info" and when I ask what kind of thing they're looking for, they say something like "Information about Condoleezza Rice," I usually try something like: "Okay, well, you can find lots of different kinds of information about famous people, like for Ms. Rice maybe information about her childhood and education, her career as a professor, her role as a government official -- do any of those sound like what you're looking for or do you need something else?"

"Is there a specific title by that author that you're looking for? Which book in the series are you looking for?"

For readers' advisory questions such as "Do you have a good mystery or novel to recommend?", I like to say "What are you in the mood for?" or "What have you read recently that you liked?"

"For fiction/general reading questions (e.g. I need something interesting for a 10-year old boy who doesn't like to read): 'What kinds of things are you (is he) interested in?'"

Searching:

"Am I on the right track?"

When you are past the first set of questions with a patron, and have a few items up on the screen from a catalog search, show them what you have, and ask: "How do these look? Do you see something here that matches what you would like?" or say "exactly matches". If they say yes, but the item is checked out, take a look at the subject headings, since this can help focus a search.

"By when do you need this?" or "Do you need something today, or can I put you on a waiting list?"

I try to go to the shelf with the patron whenever I can. Being in the stacks also helps with following up with other patrons.

Especially if I'm working with kids, I grab one of the titles we've found, open it, show it to them and ask, "Does this look like the kind of thing you're looking for?" "Is this too much information, not enough or just right?" I will also sometimes show them the table of contents or index because so many kids don't know how to use them.

"If you don't like something I find, my feelings won't be hurt. Tell me when to stop."

I try to respond at the outset with some form of "yes". This assures the patron we're positive & disposed to be helpful, and dispels any tone of quizzing or interrogation or we-know-best. Example: A patron asks, "Where are the phone books?" I suspect it's extremely likely that a business database will be a better tool to answer the question, but say, "They're in the back of the room. I'll be happy to show you where they are. And if you need yellow-pages information, we have lots of online sources I can help you with." Or, a patron wants to browse the biographies; we can direct them to that section while also describing the online resources available.

If someone is really cagey and not giving me a straight answer about what they need-- "I just want to see your self-help section, okay?"-- I lead them to what I think is the right section and tell them that if they don't find what they need, be sure to come back and ask-- I'm here to help.

Followup:

"Is this what you were looking for?"

"Is this enough information?"

"What else do you need?"

Tell them to come back if they don't find what they need. And if you see them pass by, often they look in your direction, so you can ask, "Did you find what you wanted?"

"If you don't find what you need we can put some items on hold."

Patrons often don't know exactly what they want, to start; the matching of a felt need for information with the available references sources can proceed in stages. So I encourage patrons, especially students, to come back as often as they need to with followup questions.

Ready Reference Links

L-net has a homework resources portal. Both patrons and L-net librarians can use this page to find good websites for all sorts of subjects such as science, history, math and many others. You can find this page at

<http://www.oregonlibraries.net/homework>

More Information

- **The Virtual Reference Interview**

A powerpoint presentation from the Ohio Library Council on doing a reference interview in virtual reference.

<http://www.oregonlibraries.net/staff/docs/virtualreferenceinterview.ppt>

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Crisis Calls

Although they happen rarely, we occasionally receive crisis calls on L-net. These may be suicide calls or calls that indicate some sort of abuse or threat to personal safety involved.

Examples

"I am going to kill myself"

"My boyfriend punches me"

"There is a bomb in a locker"

"My father was touching me"

Some of these calls may be pranks, but we should **always assume that the call is real and take the situation seriously**. The following guidelines are intended to help prepare librarians for the possibility of a crisis call and provide appropriate steps to take in the event of a crisis call.

- Always report the call. Contact Caleb, calebt@multcolib.org (503) 988-5438, or Emily, emilyp@multcolib.org, (503) 988-5433. Tell us the Question ID, if possible, and if not about what time it happened and who was online. If the call originated in a school or library, we will pass information on to them so that they can follow up.
- Do a reference interview. It's possible that the call is coming from a student doing research. One or two clarifying questions will determine if the call is personal in nature or not.
- If the question is personal, refer the patron to an appropriate hotline. As librarians, we don't have the necessary training to assist a patron in crisis, but we can find resources that will help. Links for hotline resources are listed below.
- Strike a balance between professional behavior and supportive behavior. If the patron is in trouble, we want to be friendly, supportive, and approachable, as with all of our patrons. However, remain professional and give resources rather than advice.

Crisis resources

National hotlines

1-800-SUICIDE

1-800-784-2433

1-800-273-TALK

1-800-273-8255

Youth Crisis Hotline
1-800-448-4663

Suicide hotlines – includes links for local hotlines in the U.S.
<http://suicidehotlines.com>

Another listing of hotlines in the U.S.
<http://depression.about.com/cs/suicidecrisis/l/blus.htm>

Teen Hotlines
<http://www.ehealth4teens.org/info/hotlines.php>

Go Ask Alice
<http://www.goaskalice.columbia.edu>
A search of the word hotline brings up many subject specific hotlines (emergency contraception, self-mutilation, substance abuse, gay and lesbian are a few). The site is geared towards a college-age audience.

TeensHealth
http://kidshealth.org/teen/your_mind
Not a hotline, but many resources for teens on emotional health.

Childhelp National Child Abuse Hotline
1-800-4-A-CHILD
http://www.childhelpusa.org/get_help

National Domestic Violence Hotline
1-800-799-SAFE (7233)
<http://www.ndvh.org>

Prank call guidelines

Prank calls represent a very small percentage of the calls that we receive on L-net. The majority of the kids and teens who use the service are responsive and eager to learn from us. These guidelines are intended for working with those patrons who may test our boundaries and exhibit inappropriate behavior.

*Is the library a place
where teens can safely,
accurately and
anonymously learn
about sex?*

- Give the patron a second chance. If the question is a prank, a simple warning can often lead the patron to ask a real question, receive an answer, and results in a patron who feels good about the library. Librarians may want to use the script “If you have a question, please rephrase it with more appropriate language.”
- If it is unclear if a question is real or a prank, doing a reference interview may help.

- If it is still unclear, try sending the patron an informative web site. Suggested resources are listed below.
- If the patron persists in using inappropriate language, disconnect. Librarians may want to use the script “Your language is inappropriate for this situation. Goodbye.”

Teen Resources

Multnomah County Library’s Health, Sex and Your Body

<http://www.multcolib.org/teens/healthsex.html#birth>

Internet Public Library's teen space

<http://www.ipl.org/div/teen/browse/he0000>

Go Ask Alice

<http://www.goaskalice.columbia.edu>

iwannaknow

<http://www.iwannaknow.org>

L-net Service Philosophy

Consider this the short version. See the following pages for our full service guidelines.

1. Oregon citizens, students and workers are my patrons.
2. It is always better to conduct a reference interview.
3. I serve patrons with high quality resources.
4. If I don't have the answer, another librarian will.
5. I respond to the patron as soon as I can.
6. The words I write connote a friendly and helpful tone.

Guidelines for Oregon Statewide Digital Reference Service

Background

These guidelines were developed and adopted in August and September of 2003. Further guidelines have been authored by ALA's RUSA (<http://www.ala.org/ala/rusa/rusaourassoc/rusasections/mars/marssection/marscomm/draftvirtual.htm>), IFLA (<http://www.ifla.org/VII/s36/pubs/drg03.htm>), and the Library of Congress (http://www.loc.gov/rr/digiref/QP_best_practices.pdf).

These guidelines pertain mostly to live chat (synchronous) service, but should also be applied to email (asynchronous) service when possible.

Contributors to these guidelines were Michael Bowman (Portland State University), Barbara Jenkins (University of Oregon), Deborah Kaufman (Eugene Public Library) and Ann Zeidman-Karpinski (University of Oregon).

Initial Call Interaction

Calls should be answered as quickly as possible.

Librarians should send a welcome message immediately to the patron.

Librarians should quickly review the patron's question and location.

If the patron's question indicates that they believe they have contacted a local library, briefly explain that the service is staffed by librarians from all over Oregon.

Reference Interview

Librarians should engage in a brief reference interview if the question is not clear.

Librarians should use interpersonal communication practices that promote effective provision of reference service (See RUSA Guidelines for Behavioral Performance of Reference and Information Services, <http://www.ala.org/ala/rusa/rusaprotools/referenceguide/guidelinesbehavioral.htm>).

General Interaction

The librarian should frequently let the user know what she is doing. If the search takes time, keep the patron informed.

Answers for most quick factual information should be provided in approximately 15 minutes at the time of service.

Librarians should chat in a friendly and professional manner designed to make the patron feel at ease.

Librarians should strive for a hybrid combination of instruction and "giving answers".

Librarian should encourage the development of the patron's information seeking behavior by providing some instructional guidance.

Librarians should use chat communication techniques to keep the patron engaged.

Information should be sent in small pieces, not large paragraphs.

Librarians should be familiar with and use the bookmarked sites and pre-written scripts available to them whenever possible to facilitate an efficient transaction.

Appropriate use of spelling and grammar is expected while striking a balance between speed and professionalism.

Searching and Resources

Librarian should explain what they are planning to do before they execute a search or visit a link.

Responses should include an explanation of the librarian's search process or strategy for finding the information.

Librarian should conduct searches in a separate browser window in order to limit patron confusion.

Librarians should seek to answer questions with quality Web sources.

Librarian should use the patron's "home" library to answer library-specific questions or to acquaint the patron with local resources.

Resources quoted or used should be fully cited, unless the authority for the source is included in the resource. For example, if you copy text from a book or website and send it to the patron, the source should be cited. If you send the patron the website and explain the relevant text, the source does not need to be cited.

Legal, medical, and statistical information should not be interpreted. Librarians should indicate that they are unable to provide an interpretation.

Referrals

Questions about local library services that are unable to be answered using the library's web site should be referred to that library using the follow up system.

Questions requiring specialized knowledge or resources that are not available to the librarian should be referred to a specialist using the follow up system.

Complications and Problems

Librarians should keep the user informed about any technical problems.

During busy service times, librarians should indicate that there may be a delay in response and offer to respond to the question later.

During busy service times, librarians should seek help from other librarians in Oregon through instant messaging software.

Librarians should expect appropriate behavior from the patron and respond with the pre-written script provided for dealing with inappropriate behavior. The Librarian should then disconnect if the patron's behavior continues not to meet appropriate standards.

Best Practices for 24/7 Reference Cooperative Sessions

1. Picking up Patron

- Patrons should be picked up as quickly as possible.

2. Greet the Patron

- Send a personal greeting, identifying yourself and indicating your willingness to help. Identify the name of the library or group you are affiliated with, in order to set expectations with the patron.

Examples:

"Hello, my name is Mark, and I'm a reference librarian at xxx University. Your library and my library are part of a nationwide cooperative that staffs this chat service. I'm looking at your question right now."

OR

"Hi! Your call has been picked up by a librarian at the xxx service in [name of state]. Your library and my library are part of a nationwide group that provide backup for each other's service. I'm reading over your question and will be with you in just a moment."

3. Reference Interview/Resource Selection

- Conduct an adequate reference interview to understand the question and the patron's information need. Be sure to clarify patron's question before beginning the search.
- Choose resources at the appropriate level for the patron's research. In general, databases are preferable to Google or other general web sources when assisting students with research projects.
- Use the library policy page to find information using home library's resources (including OPAC, databases, and guides).
- Evaluate resources for authority, objectivity, and currency; share with patron.
- Answer questions accurately.

4. Provide professional level search assistance

- Provide context and instruction to the patron, rather than just sharing resources or merely sending web pages. Provide enough guidance so that patron can recreate the search if needed (include the name of links, which one patron should click on, as well as the "click path"). Merely providing links to resources often will not suffice – some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links.

- Recommend appropriate search terms and subject headings, in the context of a recommended search statement using Boolean operators. Provide examples of query constructions using basic and advanced Boolean operators.

NOT:

Patron: Need help finding books on the history of black businessmen in New York City.

Librarian: You should search the catalog with keywords like black, businesspeople, entrepreneurs, New York, African Americans, history

RECOMMENDED:

Patron: Need help finding books on the history of black businessmen in New York City.

Librarian: You should search the catalog by typing in things like this (exactly as I have them)...

Librarian: African Americans and business* and new york

Librarian: or using that last one, replace business* with the word entrepreneur*

- Help patron evaluate the sources for relevancy to topic
- Ask for feedback on resources sent

5. Interpersonal skills

- Create a welcoming atmosphere
- Chat frequently, so patron doesn't have long lags without chat from librarian (no more than 3 minutes should elapse without the librarian sending a message to each patron who is in session, even if it is a simple "I'm still working on your question", or even "Still searching...")
- Show interest in the patron's question through chat tone and choice of words
- Use positive phrasing ("We can..." instead of "We don't/can't/won't...")
- Use scripts appropriately, as needed
- Paste small excerpts of information; avoid pasting long blocks of text in the chat.
- If patron has trouble viewing a web page that you send in chat, try escorting the patron to that page
- Send chats to correct patrons when serving multiple patrons.

6. Concluding the session

- Before closing, ask the patron if their question has been answered ("Does this completely answer your question?") or if they need additional information.
- If the request cannot be adequately answered during the session, code the session for Follow Up (see Resolution Codes, below)
- Before coding for follow up, verify the patron's email address and deadline. It may take several days for the patron to get an answer back from the library.
- If the patron indicates that they need no additional information, thank them for using the service and encourage them to return if they have more questions.

Resolution Codes: It is important to use a resolution code to end the session.

Use the codes as follows:

Completed - no additional information is needed by patron

Followup - In most cases, use this code anytime Followup is needed. The question will be answered either by the patron's home library or another appropriate library

Transferred – you were the original chat librarian, but transferred the live call to another librarian

Disconnected – If the patron never responds and has not given us an email address. Do not use Lost Call if the patron left an email address; instead, use Follow Up by Patron Library.

Prank – patron had no information need

Test – for use when a librarian is practicing using the software

Transcript Peer Review

One of the best ways for librarians to improve their virtual reference skills is to read transcripts and give and receive feedback on the quality of the transcript.

All L-net libraries are encouraged to do peer review. Some libraries have begun incorporating a peer review exercise into regular reference department meetings at their libraries. Libraries that only have one or two librarians staffing L-net have also met with librarians from nearby libraries for peer review meetings.

It's helpful to have a facilitator and criteria, such as the L-net Quality Team's rubric (<http://www.oregonlibraries.net/notable>) for evaluating transcripts.

Librarians at the 2004 Virtual Reference Desk conference put together a guide for how to organize a peer review meeting. It's online at

http://web.archive.org/web/20060604053556/http://www.vrd2004.org/proceedings/Reichert_Handouts.pdf

Move the Question, Not the Patron

We sometimes receive questions on L-net that are not really reference questions. Circulation questions are pretty common. It's understandable how and why this happens. A patron sees a link on his library's web site to "contact us" and he doesn't know how to (nor should he need to) differentiate between different kinds of questions and where to direct them.

There have been sessions in which a librarian picks up the call from a patron who is not from her library. During the session, the librarian is unable to help the patron, and states: "you'll need to contact your library," then ends the session. In other words, the librarian

is moving the patron (forcing the patron to figure out another way to access services and repeat his query) rather than the question.

Remember, the patron has contacted his library by his preferred method: through the library's (or statewide service) web page. This patron made a conscious choice to ask his question via live chat. When you staff L-net, you are filling in for the patron's local library. By telling the patron to "contact your library," this sends a confusing message to the patron, and may discourage them from using the service.

Try these approaches to move the question, not the patron:

"I am not able to find anything at the moment. Would it be ok for us to do further looking and contact you by email?" (be sure and verify the patron's email, then code the question as "Followup")

Or

"The circulation department can best answer that question. I can alert them to contact you by email, or I can give you their phone number and you can call them directly. Which would you prefer?" (if patron wants you to alert the circ department, verify his email address and code the question as Followup).

In these examples, the librarian helps the patron receive additional information (coding as Followup) instead of needlessly recommending that the patron contact his library again and repeat the question. Remember, the patron has already taken the initial step of contacting his own library through L-net

One of the benefits of virtual reference is to provide a more convenient way for patrons to access library reference services. Forcing the patron to go back and "contact your local library" through a traditional method defeats the purpose of providing this Live Chat/Email Followup service option.

Ideas for staffing the Virtual Reference Desk

Where do you sit?

Sit in your office. If you are just getting used to your virtual reference software, you may find it helpful to be free of distractions. Sitting in your own workspace or office will help you concentrate on helping virtual patrons.

If there are long gaps in between patrons, you have the opportunity to spend your time working on something else, such as catching up on virtual-reference-related professional reading.

Librarians sitting at their own desks often feel like they are limited to answering questions with only online and web resources. Don't fall into that trap! Your experience with and knowledge of print reference sources is a necessary part of delivering great service. If you know you can answer a reference question with a print source that is across the room, building or campus, ask the patron to wait, or if it is busy at the virtual reference desk, ask if you can get back to them later. Use what you know.

Sit at the reference desk. Forget about *virtual reference* and just think of it as *reference*. Chat and e-mail are only another way you answer reference questions. The format is new, but the service is the same. Train everybody - whoever is on the desk is on the virtual desk.

Staffing your virtual reference service from your regular reference desk takes away a scheduling headache and ensures that all staff members develop the skills and experience to deliver fantastic online service.

You will also have access to your local print reference collection and everything else you are used to having for public service.

Sometimes we worry that an in-person patron won't understand we are busy with a virtual patron. All you have to do is smile and tell the person, "I'm working with another person online, please wait." If the in-person patron has an urgent need, you can say something similar to the virtual patron.

Sit at a telephone reference call center. If your library has a space (room, nook, closet) where staff answer telephone reference questions and have access to print reference sources, it might be the ideal place to staff the virtual reference desk.

You get the best of both worlds – access to print sources, integration with the regular routine, and the isolation to concentrate in the new environment.

L-net's collaborative reference model

With L-net, most of our partner libraries share coverage of the virtual reference desk 9am-6pm Monday-Friday. These libraries cover 1-8 hours per week and librarians from Ohio's AfterDark service cover our evening, night and weekend hours. Our partners in Ohio cover 6am-9am Monday-Friday. Additionally, library school students, part-time librarians and retired librarians volunteer their time to cover L-net.

Who staffs the desk?

All libraries share in answering our e-mail reference questions. New questions are assigned to any library on a rotating basis. Questions can be referred anywhere in or out of the system.

It is routine for a librarian to answer questions for patrons from other libraries. To help us do this, we maintain Policy Pages (<http://www.oregonlibraries.net/policies>) with local information to help serve each patron's library, including phone numbers, web pages, and quick links to specific policies.

Another model for collaborative chat reference

One clear advantage to our current model is that each library is online 2-8 hours per week in exchange for 168 hours of service. There are training sessions and meetings to attend, but it's a big return for a small contribution.

The model works well for general reference and the kinds of questions any librarian can answer. There will always be times when the patron really does need to talk to a staff person at their local library. The patron might need in-depth help with their library's resources, want to know about a local event, or have a circulation question. In L-net, we consult the policy page or refer the question.

L-net received over 4,000 chat reference requests in April 2009. That's enough to keep us busy, but what would we do if the number were closer to 10,000? One way to handle it would be to connect as many patrons as possible with their local librarians.

Each library would cover the virtual reference desk during all or most of its open hours. It's a greater staff commitment, but the patrons would get more out of it too, receiving local help when their library was open, and help from the general collaborative service when their library was closed.

Portland State University is taking this approach to staffing L-net. They cover their own "queue" Monday-Thursday 2pm-5pm. When their librarians are not online, PSU patrons get referred to L-net. See PSU's Reference Services page at <http://pdx.edu/library/askus.html>.

Libraries are also using L-net chat software to serve their own local patrons. Libraries that have launched local services using spark include Central Oregon Community College Library, Corvallis-Benton County Library, Oregon Health & Science University Library, and Southern Oregon University Library. Information about how to use the software is at <http://www.oregonlibraries.net/local>.

Who gets to be online?

Most libraries have more librarians interested in providing virtual reference service than they have shifts to let them staff.

For a while, the Multnomah County Library had 12 librarians on their virtual reference team, but only two shifts each week. The result was that everyone got a shift every six weeks, the librarians were rusty, and the schedulers confused.

Here are some of our own libraries' creative solutions to this problem:

Take long turns. At the Corvallis-Benton County Library, librarians take two-month rotations covering the library's L-net shift. Librarian skills are fresh and the scheduler only has to worry about one person at a time. Multnomah has now adopted this model as well.

Share the wealth. The Eugene Public Library divides their two-hour shifts in half, giving each librarian on their team at least an hour of service a week.

Double up. At Albany Public Library Services, two librarians staff each shift, so the online librarian has a backup during busy times, people can take breaks, and everyone gets to answer a question.

It's just a job. Oregon State University has solved the problem naturally by making their virtual reference shift the same as their regular reference shifts. They may not handle their shift with the collaborative service this way, but everybody has the chance to build their skills.

Identify key providers. Virtual reference may not be for everyone. Existing lists of core competencies for providing virtual reference service can serve as a basis for choosing who gets to be online.

Five strategies for working with multiple patrons

Our chat software will only allow librarians to work with a maximum of two patrons at a time. We generally recommend only working with one at a time.

If the service is very busy, you'll see additional patrons in "Queue Activity".

Why do patrons seem to come in packs of 2 or more? I don't know, but here are 5 strategies for working with two virtual patrons at the same time.

1. Ignore the second call.

Patrons have the option of leaving a message and receiving an answer via email while waiting for a librarian.

2. Talk to both patrons and jump back and forth between them.

This can be effective, especially if one of the questions seems to be relatively straightforward or easy. What is the capital of France?

Help the patron choose a resource that they can browse on their own. It's also good to remind them that they can click and search without your intervention. Be sure to check in on them both, even if they seem to be doing fine without you!

If you accidentally send the wrong message or web page to a patron, be sure to apologize.

3. Do reference interviews first with each patron, then start to answer.

Jana Smith Ronan, Chat Reference, p. 159.

"If working with more than one session simultaneously, greet each user, explain that you are working with more than one person right now, then move into reference interviewing the first user. Once you are confident you have the real question, arrange to deliver the answer to the first user later, verify that you have the correct contact information and the way that they prefer the answer to be delivered, and use closed questioning to end the encounter. It's helpful to take a few seconds to print the transcript of the session before moving on to the next person in line."

4. Greet the patron and send the patron a message saying that it is a busy time for L-net.

We are experiencing a very busy time right now. You may continue to wait, or if you prefer we can get back to you by email. Or you may wish to try back in a few minutes. Thanks for your patience.

You can deal with their response when you are done with the first patron.

5. Send a broadcast message to ask for help from your fellow librarians.

Working with licensed resources

Libraries license resources from electronic journal and database vendors for use by their own patrons only. How can we use licensed resources in a collaborative environment?

Licensing agreements will vary from library to library. In general, in order to comply with current licensing and copyright law, librarians should:

Lead the patron to the licensed resources available at their own library. Using the patron's local access point will make sure the patron has legal access to the resource and will also promote the resource locally.

Use the patron's policy page or on the quick links page (www.oregonlibraries.net/staff/docs/quick.shtml) to find the patron's local resources.

If the patron does not have a library card or pin number to access the resource, you can help them get one.

Lead the patron to the statewide database license products. Almost everyone in Oregon has legal access to Gale. It is best to access the resource through the patron's local library.

If you need to share the resource through your own library, turn off co-browsing while you enter your library card's barcode or pin-number.

Use your own resources to find answers, but do not share the resource with the patron. Share the answer and fully cite the resource.

Don't forget about print resources. A patron using L-net from inside of a library probably has a lot of great reference sources nearby. Use the patron's library catalog to help find them.

Refer the question. If you think the question requires a licensed resource that neither you nor the patron has access to, refer the question to a library that you think does.

For background, see the L-net Database Licensing report (http://www.oregonlibraries.net/files/Answerland_Database_Licensing.doc) prepared by Maureen Kelly (OSU-Cascades) and Janice Weide (Salem Public Library) in September, 2003.

Ohio. When you are staffing Ohio's chat service, you can access the databases used by Ohio public libraries at OPLIN (<http://kin.oplin.org>). You can use the zip code 44114 to log in, and patrons can use www.ohioweblibrary.org. You are free to find articles and then use the file sharing button to send them to patrons.

L-net and your privacy (L-net's privacy policy)

We take your privacy very seriously.

This statement explains our privacy policy and what we do with the personal information we collect from you. Please read it to understand our practices regarding personal information and how they affect you.

What information does L-net gather about me?

1. Your **name**, so we can be friendly. Feel free to use any name you like, within reason.
2. Your **email address**, if you want to receive a transcript of the session. We will not sell or share your email address with solicitors or send you any solicitations ourselves.
3. Your computer's **IP address** is automatically detected. Collecting it can help solve technical problems.

We keep this information for **7 days** in case you want to retrieve the transcript of your chat with the librarian. After this time, we delete this information.

If you would like us to not have your personal information at all, **you have the option to connect to us anonymously**.

L-net will disclose your personal information only to the extent necessary to fulfill your request for information, to comply with federal, state or other laws and to **ensure the physical safety of persons discussed in your communication with a librarian**.

What other information does L-net collect?

1. Your **zip code**, to verify that you are an Oregon resident.
2. Your **question** and our **answer**, to help train librarians and to ensure that we provide consistent and high-quality service.
3. Other information you tell us, such as the name of **your library** and your requested **response level** or **grade**. This information helps us provide better service to you by knowing what kinds of people use the service.
4. Information about your **web browser** is collected so that we may do our best to make sure everyone can use this service.

We may keep this information permanently for the purposes of **statistical reporting, research** and **training**. None of this information is related to any personal data about you.

Sharing questions and answers

You may be asked for permission for this website to share your question and answer.

If you choose to share your question and answer, your personal information will still be kept confidential, including when your name and e-mail address if they appear in the question, answer, or session transcript.

This website may choose not to share your transcript for any reason.

Cookies

This website, www.oregonlibraries.net may set a **cookie** to help us track which pages on this site you visit. The cookie does not contain any personal information about you.

Will you change this privacy policy?

L-net may make changes to this privacy statement at any time. Our site will be updated with the latest version of our policy.

What else should I know?

We do our best to protect your personal information, but cannot ensure the security of any information you transmit to us. Just like when you are visiting any other business in person or on the web, you must protect yourself. Please be careful and responsible whenever you're online.

Our librarians will routinely send you to other sites on the Web. If you follow these links from our site to theirs, you should be aware that other sites have their own distinct privacy and data collection practices. We can have no responsibility or liability for these independent policies. For more information regarding a site and its privacy policies, you will need to check that site.

Also, please note that linking to other sites does not imply L-net's endorsement of their products, services, or content.

If you have any questions about this policy, please [contact the service coordinators](#).

L-net Profiles

If you'd like to create an L-net profile...

1. Visit www.oregonlibraries.net/user/register to create an account.
2. Wait for Caleb or Emily to confirm your account.
3. Log in to your account at <http://www.oregonlibraries.net/user/login>
4. Click 'My Account' to view your profile.
5. Click 'edit' to edit your profile.
6. In the 'account settings' section, you can upload a picture of yourself (or whoever you want to be online). Be sure to submit any changes by scrolling to the bottom and clicking the button there.
7. In the 'personal information' section, tell us about yourself. You don't have to fill out every field. If there's something you'd like to say that doesn't seem like it has a place, just let Caleb know and he'll add it in. Be sure to click submit at the bottom.
8. Your profile will be available at www.oregonlibraries.net/librarians

In addition to using this login to create a profile, you may sign up for e-mail notifications by editing your preferences. Click "My account", then "Account Settings" and then "Notifications".

To turn notifications on or off, check or uncheck the box labeled "Yes, please send me notifications of new questions".

Set whether you want to receive notifications of questions based on their tags, the words in the question, or both.

Finally, choose a few tags or words to match against. Separate them by commas.

Marketing Materials

Help promote L-net with marketing materials. Place your order for bookmarks, pencils, posters, and brochures at

<http://www.oregonlibraries.net/promote/order>

Working Teams

L-net working teams always welcome new members. Current active teams are the Quality team and the Summit team. Information on the projects the teams are currently working on is at

L-net Quality Team

<http://www.oregonlibraries.net/staff/teams/quality>

L-net Summit Team

<http://www.oregonlibraries.net/staff/teams/summit2010>

Buzz

A database of L-net transcripts is available at <http://www.oregonlibraries.net/buzz>. Transcripts have been scrubbed of information that might identify a patron. If you need the password for the Buzz, contact Caleb or Emily.

Spanish

It happens rarely, but sometimes we have a patron log into L-net asking to chat with a Spanish-speaking librarian.

Most of us are not fluent enough in Spanish to be able to comfortably handle the reference question in chat, but we do have a couple of Spanish-speaking librarians who can answer questions via email.

We have a scripted message saying, in Spanish,

"Thank you for contacting us. I don't speak Spanish, but if you give us an email address, I will ask a Spanish speaking librarian to answer your question via email."

The translation is

"Gracias por contactarnos. No hablo español, pero si Ud. nos provee una dirección de correo electrónico, otro bibliotecario/a le contestará en español de esa manera."

Make sure that you do get an e-mail address from the patron and then say good-bye and give the question a resolution code of "followup".

These libraries have Spanish-speaking librarians on staff and are available to handle the follow up question.

Corvallis-Benton County Public Library
Eugene Public Library
Multnomah County Library

Getting Help

On technical problems, as first option and last resort

For emergencies during your shift,

Contact Caleb Tucker-Raymond – Monday-Friday
calebt@multcolib.org 503.988.5438

Contact Emily Papagni – Sunday-Thursday
emilyp@multcolib.org 503.988.5433

On ScheduleSource or the L-net schedule

View the L-net schedulesource help powerpoint
http://www.oregonlibraries.net/staff/docs/schedule_source_help.pps

On policy issues and best practices

Guidelines

Our Service Guidelines and Working with licensed resources in this manual

L-net staff documents page
<http://oregonlibraries.net/staff/docs/>

Ask the L-net email list
<http://listsmart.osl.state.or.us/mailman/listinfo/l-net>

Still stumped?

Contact Caleb Tucker-Raymond - Mondays-Fridays
calebt@multcolib.org (503) 988-5438

Contact Emily Papagni - Sundays-Thursdays
emilyp@multcolib.org (503) 988-5433

Ask the <http://listsmart.osl.state.or.us/mailman/listinfo/l-net>

Further Reading

There are hundreds of articles, books and blog posts about virtual reference and related topics. For an extensive bibliography, see the Virtual Reference Bibliography at Rutgers (<http://vrbib.rutgers.edu/>).

Here are our favorites (also online at <http://www.oregonlibraries.net/bibliography/>):

Articles and blog posts

**Recently Added*

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Peter Bromberg, "Is virtual reference successful?", in Library Garden (blog), July 12, 2006. <http://librarygarden.blogspot.com/2006/07/is-virtual-reference-successful-part-i.html>

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*Stephen Francoeur, "The IM Cometh: THE Future of Chat Reference" in Steiner + Madden, *The Desk and Beyond: Next Generation Reference Services*, 2008 ACRL.

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Paul Neuhaus, "Privacy and Confidentiality in Digital Reference", *Reference & User Services Quarterly*, vol. 43 no. 1, Fall 2003.

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Brent Roberts, "What librarians do best: Bringing Warmth to Virtual Reference", *PNLA Quarterly*; Spring 2004, Vol 68 no. 3.
http://www.pnla.org/quarterly/Spring2004/PNLA_Spr04.pdf

Aaron K. Shrimplin and Susan Hurst, "[A Virtual Standoff - A Q Analysis of Virtual Reference](#)", *Evidence Based Library and Information Practice* Vol 2, No 4 (2007).

Books

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*Kathleen Kern, *Virtual Reference Best Practices: Tailoring Services to Your Library*, American Library Association, Chicago 2009

Buff Hirko and Mary Bucher Ross, *Virtual Reference Training: The complete guide to providign anytime anywhere answers*, American Library Association, Chicago, 2004