

The not-so secret tools, tips and tricks of the Ask a Librarian interns.

**How to provide assistance to statewide
customers with grace and ease.**

Focus: Local library questions

First Contact:

When a patron enters the queue:

Right-click on the patron ID to review the question and patron library information

Agent Console - Tampa Bay Library Consortium (6212) - Renee P (Alachua County) (renee.p)

Customer Chat - ROMY

Standard | Notes | Category | Address Book

Below are the details for this chat customer. Some details can be changed when you are in a chat session with this customer.

Data Field	Value
Customer ID:	97798825
Incident Number:	182909555
Department:	Collaborative Desk
First Name:	ROMY
Last Name:	
E-mail:	
Phone:	
IP Address:	c-71-196-60-212.hsd1.fl.comcast.net
Language:	(not specified)
Optional Data:	
Question:	
Zip Code:	33166
Email:	maldonadoromy@hotmail.com
PatronType:	
Entry Point:	Miami-Dade Public Library
Browser & OS:	Mozilla/4.0 (compatible; MSIE 8.0; Windows NT 6.0; Trident/4.0; GTB6.5; SLCC1; .NET CLR 2.0.50727; Media Center PC 6.0; .NET CLR 3.5.30729; .NET CLR 3.0.30618; InfoPath.2; msn OptimizedIE8;ENUS; AskTB5.6)
IP Address:	71.196.60.212
Optional Data 8:	Standard

OK Cancel Apply

InstantService™ atg

My Availability: available

Adobe Updater
Updates are ready to be installed.

start | AIM | Inbox ... | SirsiD... | Bloglin... | Micros... | AAL o... | rpatte... | 3 Int... | 2 Ja... | 2:40 PM

Evaluating the questions

1. Local

‘internal’

can only be answered by home library

‘online’

can be answered on library website

‘online with login’

can be answered on library website
if patron has login ID

2. General Reference

- Accept Patron
- Send greeting script
- While the patron is reading your greeting script, go to the **knowledge base** to access patron's local library information.

Scripts are your friend – know them, create them, use them.

Scripts can be a good way to keep the patron engaged while you are 'away' hunting the answer to their question.

Which library do you use?

Have you used the online catalog before?

Where is the Knowledge Base?

The screenshot displays the 'Agent Console' for the Tampa Bay Library Consortium. The main window is titled 'Agent Console - Tampa Bay Library Consortium (6212) - Renee P (Alachua County) (renee)'. The interface includes a navigation bar with tabs for 'Chat Queue (1)', 'Mail Queue (0/0)', 'Mail Follow-Up (0)', 'Mail Sent (0)', and 'Knowledge Base'. The 'Knowledge Base' section is active, showing a search interface with the heading 'Ask a Librarian Knowledge Base'. Below this, there are tabs for 'Help', 'Blog', 'Search Knowledge Base', 'Library Email Addresses', and 'Nominate Exemplary Transcript'. The search area contains a text box with the instruction 'Enter the start of a library name in the text box to search the Knowledge Base.' and a 'Start again' button. A list of library names is displayed, including 'Alachua County Library District', 'American InterContinental University', 'Barry University', 'Bartow Public Library', 'Bay County/Northwest Regional', 'Bethune-Cookman College', 'Brevard Community College', 'Brevard County Libraries', and 'Broward College'. A red box highlights the search area, and red arrows point to the search box and the list. To the right of the search area, there is a 'KNOWLEDGE BASE' section with the text 'Find information about participating library's locations, hours, URLs, passwords, etc.' and an image of a person using a laptop with the text 'ASK a Librarian Real People. Real Help. Real Fast!'. The bottom of the screen shows the 'Agent Room' section with a list of agents and their availability. The Windows taskbar at the bottom shows the 'start' button and several open applications, including 'AIM', 'Dorothy...', 'rpatterso...', 'Microsoft...', 'SirsIDyni...', 'CNN.com...', '2 Inter...', and 'Agent Co...'. The system clock shows '2:38 PM'.

Agent Console - Tampa Bay Library Consortium (6212) - Renee P (Alachua County) (renee)

Text Library
Renee P (Alachua County)
<account default>

Chat Queue (1) Mail Queue (0/0) Mail Follow-Up (0) Mail Sent (0) Knowledge Base

year: 006 month: 07 day: 23 hour: 18 min: 21 sec: 49

Restore Down

Ask a Librarian Knowledge Base

Help Blog Search Knowledge Base Library Email Addresses Nominate Exemplary Transcript

Enter the start of a library name in the text box to search the Knowledge Base.

Start again

Alachua County Library District
American InterContinental University
Barry University
Bartow Public Library
Bay County/Northwest Regional
Bethune-Cookman College
Brevard Community College
Brevard County Libraries
Broward College

KNOWLEDGE BASE

Find information about participating library's locations, hours, URLs, passwords, etc.

ASK a Librarian
Real People. Real Help. Real Fast!

Agents WhenToWork

View: All agents

Agents (25) /	Availability (20)
UF-Paul McD (UF)	available
Timothy G (Miami Dade College)	unavailable (Unavailable)
Tiger S (FAMU)	available
Tatiana A (St. Petersburg Public)	available
SEC Reference Librarian?	available

My Availability: unavailable (Unavailable)

InstantService™ atg

start AIM Dorothy... rpatterso... Microsoft... SirsiDyni... CNN.com... 2 Inter... Agent Co... 2:38 PM

Information found in the Knowledge Base

Console - Tampa Bay Library Consortium (6212) - Renee P (Alachua County) (reeneep)

Chat Queue (0) Mail Queue (0/0) Mail Follow-Up (0) Mail Sent (0) Knowledge Base

Ask a Librarian Knowledge Base

Help | Blog | Search Knowledge Base | Library Email Addresses | Nominate Exemplary Transcript

Enter the start of a library name in the text box to search the Knowledge Base:

Start again

- Goldstein Library (FSU)
- Gulf Coast Community College
- Gulfport Public Library
- Hernando County Public Library
- Hialeah Public Library
- High-Tech Institute
- Hillsborough Community College
- Hodges University
- Indian River State College

Library Website: www.ocls.info

Locations/Address/Phone: <http://www.ocls.info/Locations/default.asp>

Catalog URL: <http://iii.ocls.info/>

Circulation Policy: <http://www.ocls.info/Card/makingMost.asp>; http://www.ocls.info/Card/card_materials.asp

Reserves URL and Policy: <http://www.ocls.info/locations/Home%20Delivery/homedelivery.asp>

ILL URL and Policy: <http://www.ocls.info/Card/interlibraryloan.asp>

Genealogy Policy and Information: <http://www.ocls.info/Locations/MainLibrary/DRI/genealogy.asp>; <http://www.ocls.info/Virtual/tutorials/eGuides/Genealogy/default.asp>; <http://www.ocls.info/Virtual/AskaQuestion/default.asp>

Password Problems: <https://iii.ocls.info/patroninfo~S1>

Access to Electronic Resources: <http://www.ocls.info/Virtual/OnlineDatabases/default.asp>; <http://www.ocls.info/Virtual/default.asp>

Database Title List: http://www.ocls.info/Virtual/OnlineDatabases/db_alphabetical.asp

Dummy Login Information: <https://iii.ocls.info/patroninfo~S1> Enter the following information: Last Name: Chat; Card #: p020483087; PIN: 1234

Wireless Policy: <http://www.ocls.info/Virtual/WiFi/default.asp>

Printing Policy: <http://www.ocls.info/Card/fines.asp> - scroll down to see "What Are Other Fees?"

Hours: <http://www.ocls.info/Locations/default.asp>

Site Coordinator Contact Information: Donna Bachowski, bachowski.donna@ocls.info (407) 835-7370

InstantService

AIM | ***** | Inbox ... | Micros... | SirsiDy... | 2 Int... | Agent ... | Fall 2010 | Micros... | 3:11 PM

Internal Questions

Patron will need to contact their library directly

Examples: “I returned an item and it is still on my account.”
“I need to update my address.”

Scripts are available in the ‘Circ’ or ‘Referring’ folder

“Although I am unable to access that information, your library's staff should be able to help you. Would you like the phone number for your local branch?”

“Although I am unable to access that information, your library's staff should be able to help you. Would you like me to forward this chat to them?”

In the Referring folder: “[%CUSTFIRSTNAME%], for an issue like this, it is better for you to speak with someone at your local library. I can get a phone number for you, or I can forward this chat to the library staff. Which would you prefer?”

Or you can customize your own script for this situation.

Check **Knowledge Base** for library contact information

Internal or no?

Before sending the patron to their local library, try troubleshooting as you would with your own patrons, and check the knowledge base for posted links or answers.

“What is my ID and password/PIN?”

Check **knowledge base** for login information.

If not listed there, check library website.

“I can’t log in!”

“Have you logged in successfully before?”

“Did you try retyping the number?”

“Have you changed your PIN?”

“I forgot my PIN!” or “I need a new PIN!”

Check **knowledge base** and website to see if PIN information is listed.

Some libraries have an option to request a new PIN online.

For example: Miami Dade County Library Knowledge Base

Chat Queue (0) Mail Queue (0/0) Mail Follow-Up (0) Mail Sent (0) Knowledge Base

Ask a Librarian Knowledge Base

Help Blog Search Knowledge Base Library Email Addresses Nominate Exemplary Transcript

Enter the start of a library name in the text box to search the Knowledge Base.

Start again

- Miami Dade College
- Miami-Dade Public Library

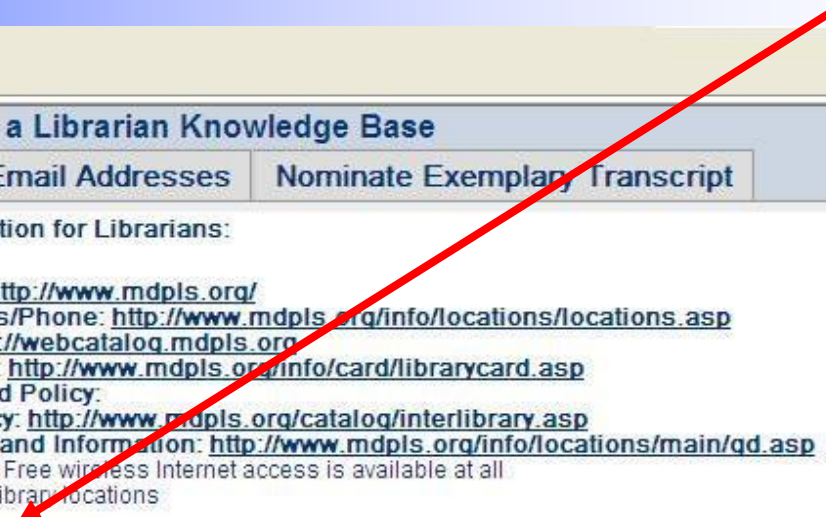
Important Information for Librarians:

Library Website: <http://www.mdpls.org/>
Locations/Address/Phone: <http://www.mdpls.org/info/locations/locations.asp>
Catalog URL: <http://webcatalog.mdpls.org>
Circulation Policy: <http://www.mdpls.org/info/card/librarycard.asp>
Reserves URL and Policy:
ILL URL and Policy: <http://www.mdpls.org/catalog/interlibrary.asp>
Genealogy Policy and Information: <http://www.mdpls.org/info/locations/main/qd.asp>
Special Features: Free wireless Internet access is available at all Miami-Dade Public Library locations

Password Problems: PINs are 4 digits chosen by patron. A picture identification must be presented at a library to add a PIN to the patron's account.

Access to Electronic Resources: <http://www.mdpls.org/databases/databases.asp>
Database Title List: <http://www.mdpls.org/databases/databases.asp>
Dummy Login Information: 29081029452601 (Do not share with users)

Wireless Policy: <http://www.mdpls.org/info/wireless/wireless.asp>
Printing Policy: <http://www.mdpls.org/info/policies/internet.asp>
Hours: <http://www.mdpls.org/info/locations/locations.asp>
Site Coordinator Contact Information:
Sue Cvejnovich --cvejnovichs@mdpls.org;
Jennifer Shipley --dewsnap-shipleyj@mdpls.org



Online Questions

can usually be answered on the library website

Do you have this item?

What are fines?

I'm looking for a book...

Downloadable media

How to use databases

How to sign up for a class

How to get a library card

Some Knowledge Base entries will have links directly to the location of the requested information

“How do I get a library card?”



Ask a Librarian Knowledge Base

Base **Library Email Addresses** Nominate Exemplary Transcript

Important Information for Librarians:

Library Website: <http://www.mdpls.org/>
Locations/Address/Phone: <http://www.mdpls.org/info/locations/locations.asp>
Catalog URL: <http://webcatalog.mdpls.org>
Circulation Policy: <http://www.mdpls.org/info/card/librarycard.asp>
Reserves URL and Policy:
ILL URL and Policy: <http://www.mdpls.org/catalog/interlibrary.asp>
Genealogy Policy and Information: <http://www.mdpls.org/info/locations/main/qd.asp>
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Dummy Login Information: 29081029452601 (Do not share with users)

Wireless Policy: <http://www.mdpls.org/info/wireless/wireless.asp>
Printing Policy: <http://www.mdpls.org/info/policies/internet.asp>
Hours: <http://www.mdpls.org/info/locations/locations.asp>
Site Coordinator Contact Information:
Sue Cvejanovich --cvejanovichs@mdpls.org;
Jennifer Shipley --dewsnap-shipleyj@mdpls.org

Sometimes you'll have to search the library site to find the answer.

“How do I sign up to volunteer?”

“I want to apply for a job at the library.”

If the library does not have a **site search** on their website, you can use Google to search the site.



The image shows a Google search interface. The search bar contains the text "fines site:www.thpl.org/". To the right of the search bar is a "Search" button. Below the search bar, it indicates "10 results (0.34 seconds)" and a link to "Advanced search". On the left side, there are navigation options: "Everything", "Images", and "More". The search results list a PDF document titled "[PDF] Your Library Card" with a star icon. Below the title, it says "File Format: PDF/Adobe Acrobat - Quick View". The snippet of the document reads: "A parent or guardian is responsible for all **fines**, ... notice does not excuse **fines**. Libraryelf.org is ... accrue a minimum **fine** of 20¢ per day. ...". The URL for the document is "www.thpl.org/hcplc/dw/userguides/ayl/libcarduse.pdf".

‘Online with Login’ Questions

can usually be answered on the library website
if the patron has login information

- I want to request an item
- I want to renew
- What is overdue? What are my bills?

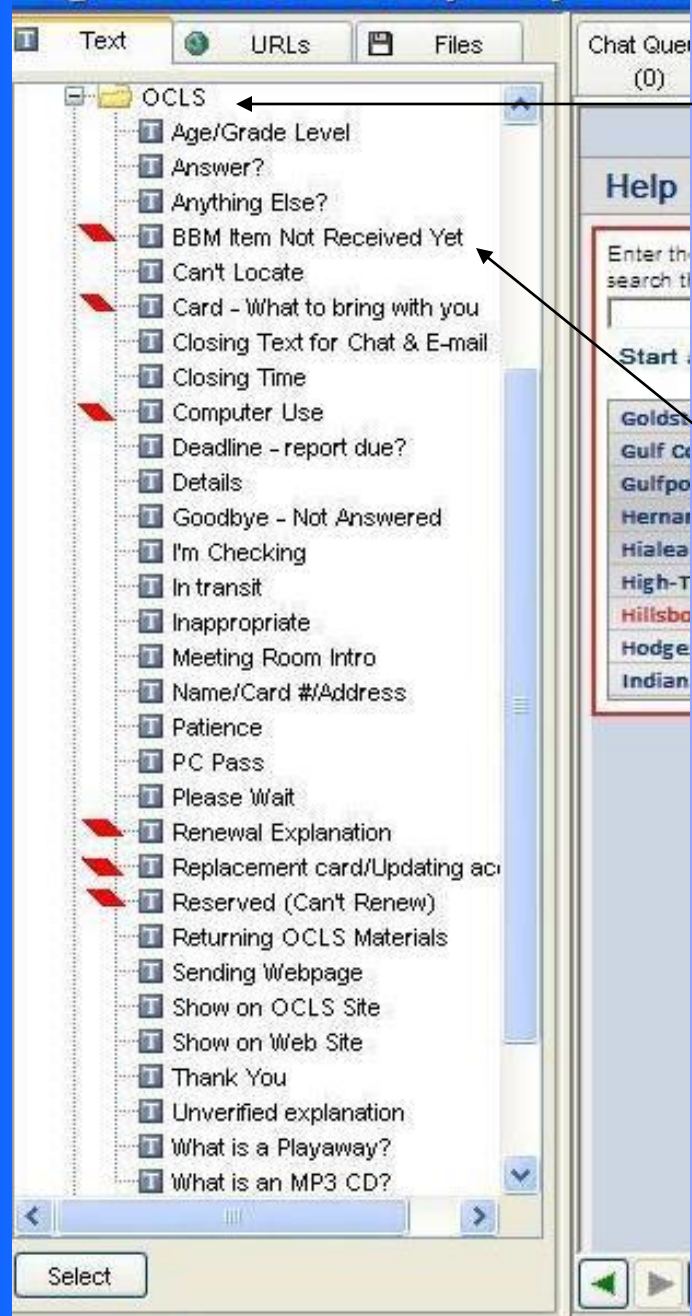
For this type of question, ask the patron:

Do you have your library card? Do you know your PIN/password?

(This is a good one to save as a script)

If the patron has login information, show them how to use the catalog to request the item or access ‘my account.’

If the patron does not have login information, refer the patron to the local library.



Library specific scripts

The Orange County Library has a folder of scripts available to address common question from their patrons.

For instance, next time you get a patron from Orange County who wants to know why books are checked out on their account but haven't arrived in the mail yet –

“BBM Item Not Received Yet:” It takes about 3 - 5 business days (Mon. - Fri.) for an item that is checked out to you to be delivered. If you have not yet received an item that has been on your account for 5 business days, please call the library at 407-835-7323 before 4 p.m. to speak to the delivery department.

There are also scripts for Computer use, Meeting Room information, and more. These are great timesavers when helping patrons from this library.

General Reference

For local library reference resources, check **knowledge base** for the URL to library research pages/databases and dummy login information.

The **Florida Electronic Library** (<http://flelibrary.org>) is accessible to all Florida residents.

No login is required if the patron is using a computer in Florida.

a couple last tips....

Use language when chatting to let the patron know you are not from their library.

- In your greeting script, you can include where you are from - “North Florida” “Orange County” “Tampa”

- When chatting with the patron use phrases like “your library” instead of “the library” to reinforce.

Currently, any resident of the State of Florida can obtain a card from the **Alachua County Library District**. If you have a patron looking for downloadable media or other online resources unavailable at their home library; let them know they can apply online for a card from ACLD. <http://www.aclib.us/my-account/ecard>