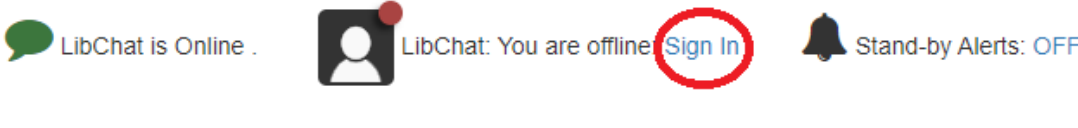


LibChat Guide 2023

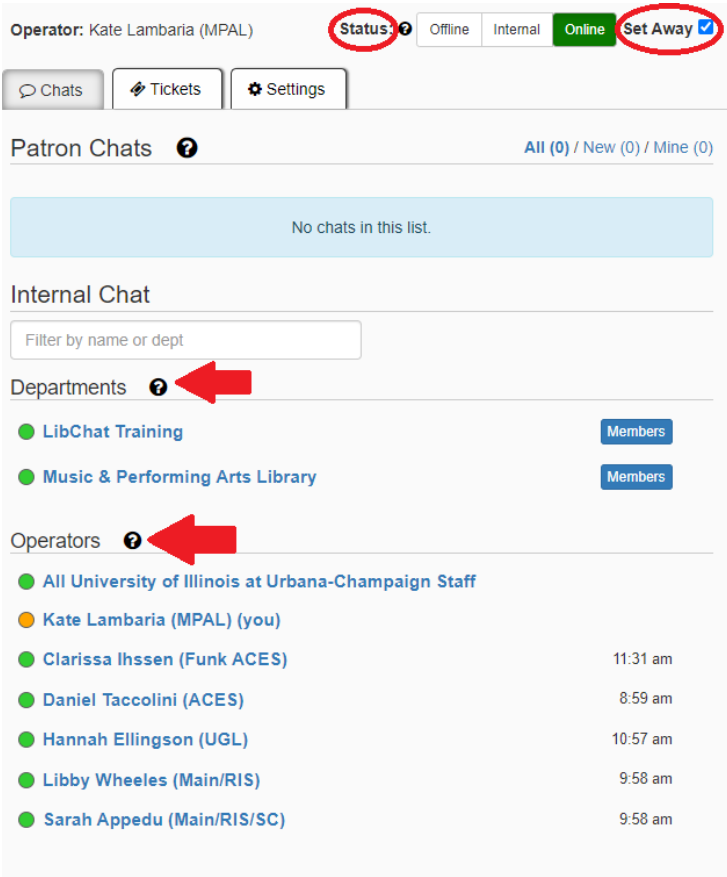
Login to LibChat

1. Login to LibApps (<https://illinois.libapps.com/libapps/login.php>) with your personal LibApps account.
2. Select **FAQ and Chat** under **My LibApps**.
3. Click **Sign In** to open the LibChat Dashboard in a new tab and begin chatting.



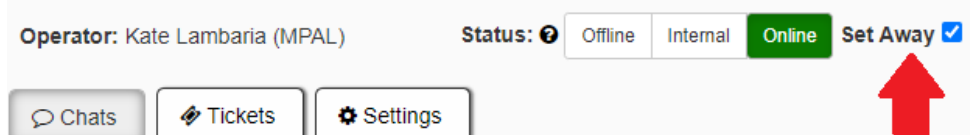
Dashboard Overview

The Dashboard will show your status, active chats, Departments you're monitoring, and other staff logged in to LibChat. For more details, see: <https://ask.springshare.com/springboards/fag/1882>.



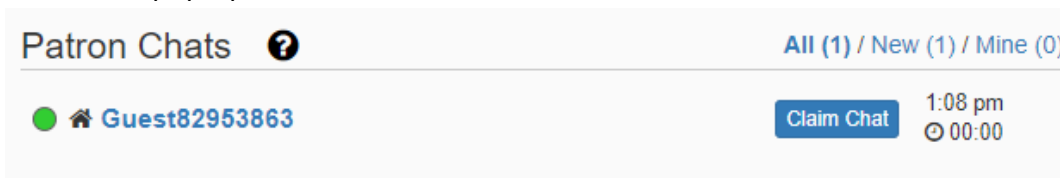
Away from Chat

If you need to briefly leave your computer while on chat, check the **Set Away** option at the top of the LibChat Dashboard. This sets your status to yellow and lets other operators know you will not be able to pick up chats or transfers. Once you return, uncheck the **Set Away** option.

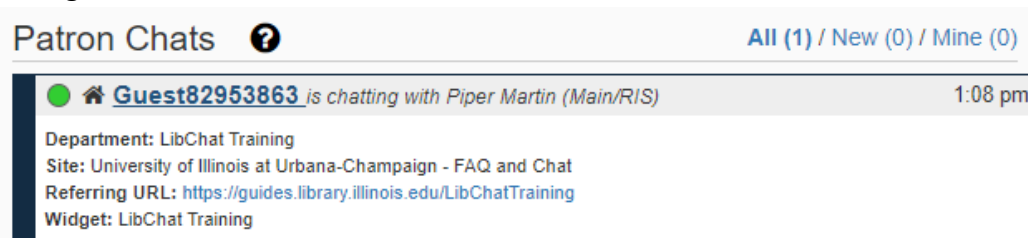


Claiming a Chat

1. New chats pop-up in the **Patron Chats** section.



2. When a new chat appears, preview the question first by clicking on the Patron's name. This will also show what webpage the patron is chatting from, the Department the chat is assigned to, and more.



3. Click the **Claim this Chat** button to claim the chat if you are the most appropriate individual online to answer the question or if the question has been sitting in the queue for 60 seconds.

Ending Chats

1. Chats should be ended once the patron disconnects or the patron has been inactive and your shift has ended. Be sure to let the patron know you are ending the chat if the window is still green/active.
2. Click the **End Chat** button in the upper right of the chat window. The chat's status indicator will turn red. To close this chat and remove it from the dashboard, click the **Close Chat** button.



Chatting with Other Operators

1. Click on the staff person's name in the **Operators** section to start a chat with another individual.
2. Click on the **All University of Illinois at Urbana-Champaign Staff** option to start a group chat with all the staff online. Please use the group chat ask questions of all your colleagues who are logged in if you need assistance with a chat that you have claimed. It's also a great place to say hello and goodbye to everyone as you come on and leave your chat shifts.



NOTE: LibChat does save previous operator chat history, so you can see what you last discussed with someone or what was discussed in the All Staff chat before you logged on. All Staff chat history is visible to anyone with a LibChat account.

Adding Another Operator/Transferring a Chat

You might need to transfer a chat if you claim one but realize that one of the other people logged into chat is better able to answer a question (e.g., if it is an engineering question you should transfer to the Grainger person). It's also common to transfer a chat if your shift is ending and you're still in the middle of a chat.

1. Send a chat directly to the other operator to verify they are available. If the individual does not respond, you can also use the All Staff chat to see if someone else is available to assist and/or pick up the chat. You could also message on Teams in the Reference Team or call.
2. Click the **Transfer Chat to another Department/User** icon from the options at the top right of the chat window.



3. Select the online individual you would like to add to the chat. To return the chat to the general queue, select **University Library**. Always inform the patron that you are adding another operator or transferring a chat since they will be able to see that it is happening.

Transfer Chat



Transfer this chat to any department or operator. To chat with an operator prior to transferring the chat, click the talk bubble icon.

Filter by name

Departments

- [University Library](#)
- [Scholarly Commons](#)
- [Social Sciences, Health, and Education Library](#)
- [LibChat Training](#)

Staff

- [Clarissa Ihssen \(Funk ACES\)](#) Active Chats: 0
- [Zoe Nepolello \(SSHEL\)](#) Active Chats: 0
- [Piper Martin \(Main/RIS\)](#) Active Chats: 1
- [Maurissa O'Connor \(UGL\)](#) Active Chats: 1
- [Michael Steffen \(SC\)](#) Active Chats: 0

4. The operator will see the chat appear in the **Patron Chats** section and will have the option to Claim the transfer.

A transfer has been requested.

[Claim this Transfer](#)

5. Once the other operator has joined the chat, you can leave the chat.

Managing Multiple Chats

1. Under the **Patron Chats** section of the **Chats** tab, you'll see a list of all active chats in the departments you're monitoring.
 - a. To show all active chats, click on the **All** filter (this is the default view).
 - b. To show only unclaimed chats, click on the **New** filter.
 - c. To show only chats that you've claimed, click on the **Mine** filter.
2. Toggle between chats by clicking on the patron's name.

The screenshot shows the 'Patron Chats' section of a chat interface. At the top, there are three tabs: 'Chats', 'Tickets', and 'Settings'. Below the tabs, the 'Patron Chats' section is displayed with a search icon and a filter summary: 'All (2) / New (0) / Mine (2)'. The list contains two chat entries:

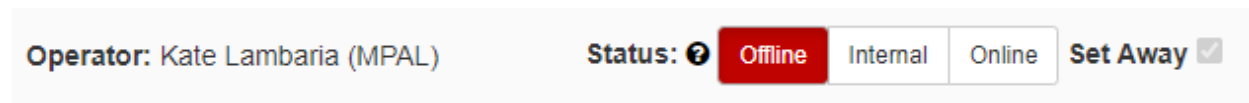
- Guest68452988** is chatting with *Kate Lambaria (MPAL)* at 1:24 pm. Department: LibChat Training. Site: University of Illinois at Urbana-Champaign - FAQ and Chat. Referring URL: <https://guides.library.illinois.edu/LibChatTraining>. Widget: LibChat Training.
- Guest82953863** is chatting with *Kate Lambaria (MPAL)* at 1:08 pm.

Logging Off LibChat

If you want to completely sign out of LibChat and exit the dashboard:

1. Set your Status to Offline.
2. Close the browser tab/window.

If you attempt to sign out while your status is set to Online or Internal, you will first be prompted to confirm. This is to help you avoid signing out of LibChat accidentally.



Emailing Transcripts

Patrons have the ability to email the transcript to themselves during their chat, but they may also request it, or you may want to email a copy to yourself.

To send a transcript while the chat window is still open:

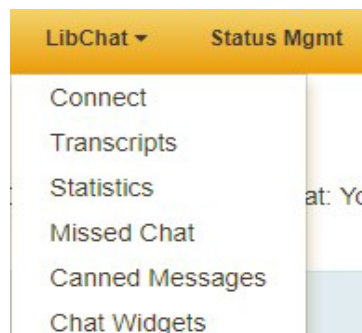
1. Click the **Email chat Transcript** icon from the options at the top right of the chat window.



2. Enter the patron's email or your own and click **Send Transcript**. The chat transcript will reflect what the patron sees and will display the operator's nickname.

To send a transcript after the chat has been closed:

1. Open the LibApps window.
2. Click on the **LibChat** tab at the top of the page and then **Transcripts**. This will take you to a list of all the chat transcripts.



3. Find the transcript you want to send and click on the Email icon next the transcript.
4. Fill out the form that appears and click **Email Transcript**.

Email the chat transcript to an account holder or email address.

Choose the type of transcript you'd like to send.

Patron Transcript: This version of the transcript is intended to share with patrons, & will not include system messages or internal notes, and the chatting librarian's name will display as their nickname.

Librarian Transcript: This version of the transcript is intended to share with librarians & staff. It will include system messages and internal notes, and the chatting librarian's name will display as their real name (not their nickname).

Transcript Type

Patron Transcript Librarian Transcript

Recipient

Select the user to email

or Email Address (space separated for multiple addresses)

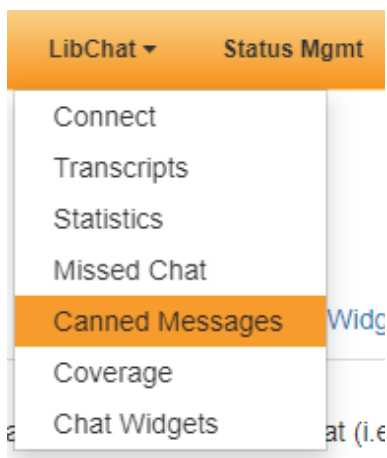
Add a Note

Email Transcript

Cancel

Canned Messages

1. To create canned messages:
 - a. From the **LibChat** dropdown choose **Canned Messages**.

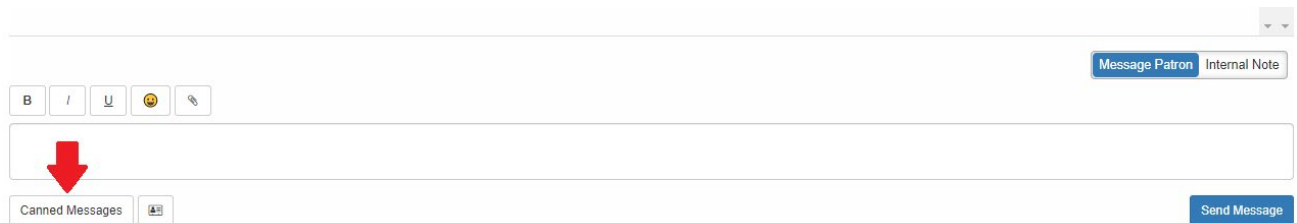


- b. Click the **Add Canned Message** button to add a Canned Message only viewable by you.
 - LibChat Admins will create standard messages (like the Welcome message" which everyone will see when in a chat).
 - Check with your supervisor to see if your department has any canned messages you should use.

+ Add Canned Message

Reorder Canned Messages

2. To send canned messages:
 - a. Click the **Canned Message** button at the bottom of the chat window.



- b. Select the canned message you wish to send.
 - c. You will have the chance to edit the message in the text box before pressing **Enter** or the **Send Message** button to send it.

Available Functions We Don't Use and Why

1. **Create a Ticket:** LibAnswers provides an internal ticket system for unanswered reference questions, but you will not use this. You should be referring questions to specialists directly and not all specialists will be using LibAnswers.
2. **Ban Users IP address:** This is a “permanent” ban with no time limit. An admin will have to reset in order to undo the ban.
3. **Add to Analytics:** We use LibInsight for this purpose.



Ticketing in LibChat

- Very occasionally a patron's chat will disconnect and they will be prompted by Springshare to enter a text message, which is not sent to or seen by any active operators in the system. These messages appear as a “Ticket” FAQ & Chat page in LibApps.
- Please do not click on any of the tickets. They will be handled by LibChat admins. If you click on a ticket by mistake, click the **Unclaim** button at the top of the page.

Owned by: David Ward (UGL) [Unclaim](#)