

Handling email on LibAnswers

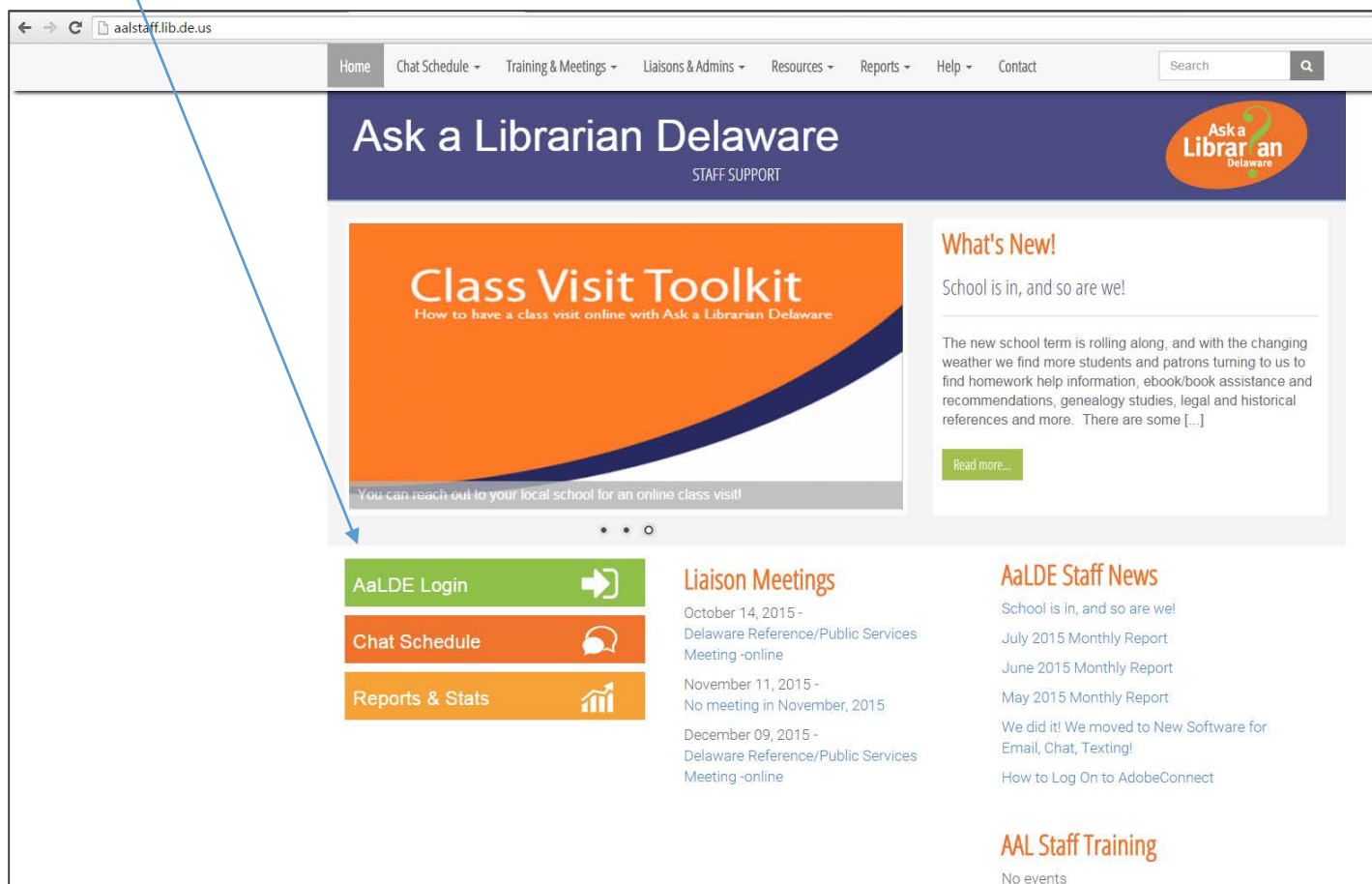
Ask a Librarian Delaware



for Delaware Libraries Reference Services

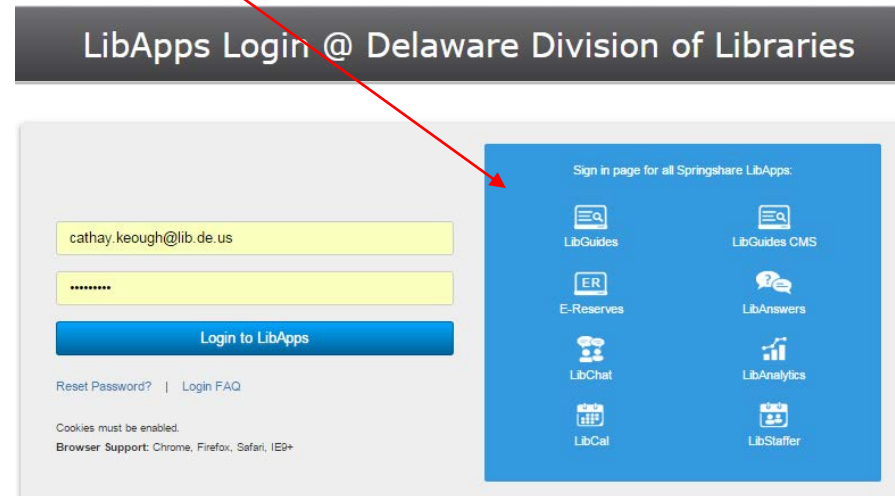
1. Log into LibAnswers.

- *An easy way to do this:* Go to the log in screen using the green “AaLDE Login” button on [the Ask a Librarian Delaware Staff Support Site](http://aalsupport.lib.de.us) (as shown below).
- Or you can go to: <http://answers.delawarelibraries.org/home.php>



Log in with your username (your email address) and password. If you forget your password, you can reset it through your email.

As this screenshot shows, you are logging into LibApps which brings you directly to your LibAnswers Dashboard. Springshare has many products as shown in the blue box.



You should now be on the Dashboard.

If you find that you are not on the Dashboard/LibAnswers, select “LibAnswers” from the blue drop down list of options. Your screen should look similar to the one shown here.

The Dashboard shows Delaware patrons’ questions that have come in through the webform (email) and through texts from Delaware library websites and the main patron portal page (<http://answers.delawarelibraries.org>).

Chat sessions that have been turned into tickets for follow up are also in email form and show up on this page.

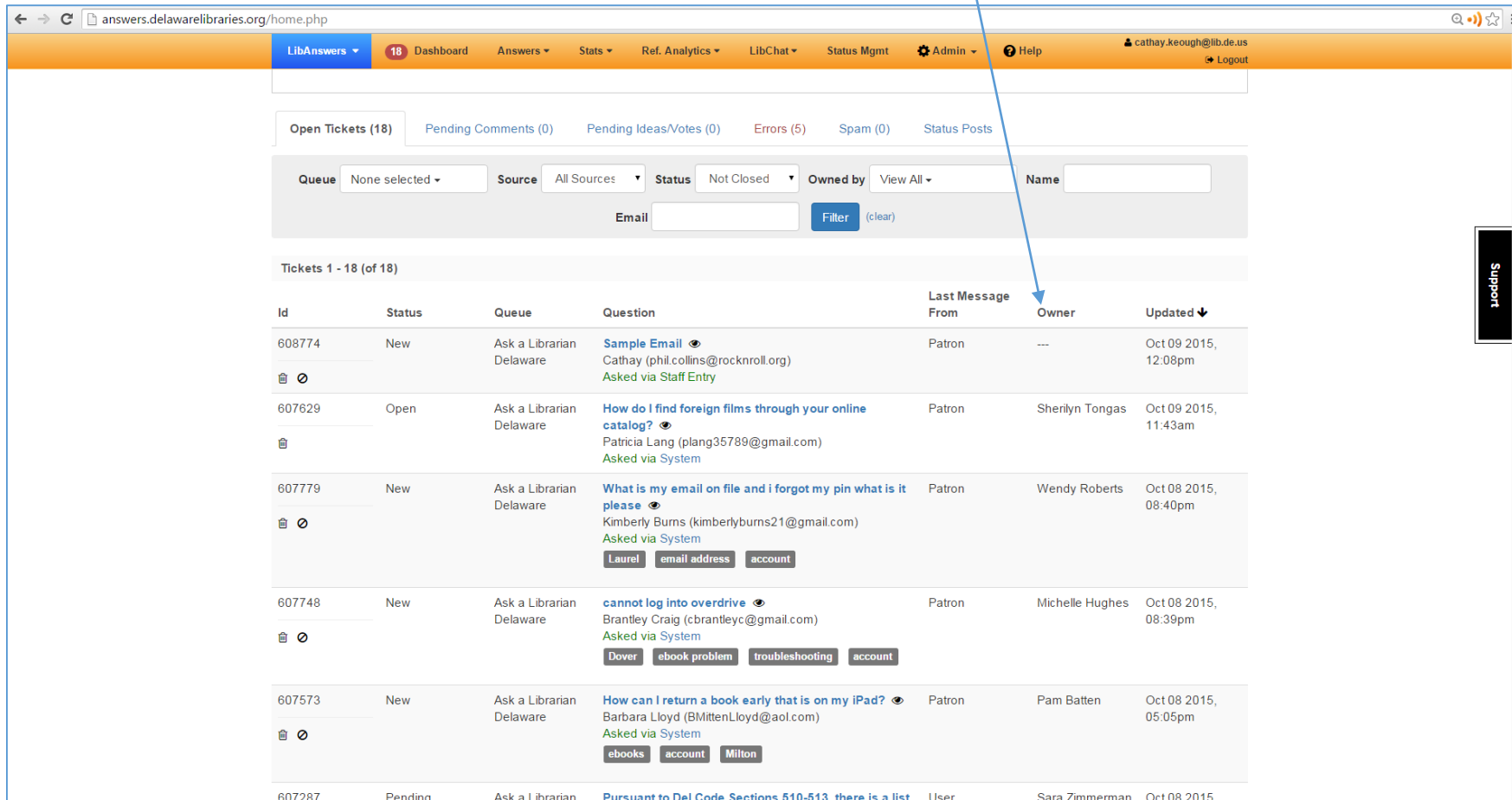
Now, let’s walk through some basics of what to look for.

The screenshot shows the LibAnswers dashboard interface. At the top, there's a navigation bar with a blue 'LibAnswers' dropdown menu. Below the navigation bar, a greeting 'Hello Cathay.' is displayed. To the right of the greeting, there are buttons for 'LibChat is Offline: Go Online', 'Stand-By Alerts Enabled', and 'Send an SMS'. A light blue banner for 'October Training Schedule' is visible. Below this, an 'Administrative Announcement' section contains a welcome message and contact information for Cathay Keough. A filter bar allows users to refine ticket views by queue, source, status, and ownership. The main section displays a table of tickets, with the first ticket being a question about an overdue book.

Id	Status	Queue	Question	Last Message From	Owner	Updated
608358	New	Ask a Librarian Delaware	I cannot understand how I have an overdue book when it was returned yesterday (the due date) at 1:15 p.m. at the drop box in Wilmington Library downt Anon Asked via SMS	Patron	Renee O'Donnell	Oct 09 2015, 08:56am

2. Finding and claiming your library's questions: Main areas

- First, scroll down to the list of Tickets (questions). In this screenshot, there are 18 active tickets.
- Look for ones that have not been claimed (they do not have an owner) and also be sure to review those that are owned by you, or if you are the library's liaison, by someone on your library's team.



The screenshot shows the LibAnswers interface for Delaware libraries. The top navigation bar includes links for Dashboard, Answers, Stats, Ref. Analytics, LibChat, Status Mgmt, Admin, and Help. The user is logged in as cathay.keough@lib.de.us. Below the navigation bar, there are tabs for Open Tickets (18), Pending Comments (0), Pending Ideas/Votes (0), Errors (5), Spam (0), and Status Posts. A filter section allows users to select a Queue, Source, Status, and Owned by, with a Filter button. The main content area displays a table of tickets, with the first 18 shown. A blue arrow points from the instruction 'Look for ones that have not been claimed' to the 'Owner' column of the first ticket, which is empty.

Id	Status	Queue	Question	Last Message From	Owner	Updated
608774	New	Ask a Librarian Delaware	Sample Email Cathay (phil.collins@rocknroll.org) Asked via Staff Entry	Patron	---	Oct 09 2015, 12:08pm
607629	Open	Ask a Librarian Delaware	How do I find foreign films through your online catalog? Patricia Lang (plang35789@gmail.com) Asked via System	Patron	Sherilyn Tongas	Oct 09 2015, 11:43am
607779	New	Ask a Librarian Delaware	What is my email on file and i forgot my pin what is it please Kimberly Burns (kimberlyburns21@gmail.com) Asked via System Laurel email address account	Patron	Wendy Roberts	Oct 08 2015, 08:40pm
607748	New	Ask a Librarian Delaware	cannot log into overdrive Brantley Craig (cbrantley@gmail.com) Asked via System Dover ebook problem troubleshooting account	Patron	Michelle Hughes	Oct 08 2015, 08:39pm
607573	New	Ask a Librarian Delaware	How can I return a book early that is on my iPad? Barbara Lloyd (BMittenLloyd@aol.com) Asked via System ebooks account Milton	Patron	Pam Batten	Oct 08 2015, 05:05pm
607287	Pending	Ask a Librarian	Pursuant to Del Code Sections 510-513, there is a list	User	Sara Zimmerman	Oct 08 2015

Note these areas:


- Question ID number
- Is the question's status "New"? "Open"? "Pending"? (If it is Open, is is a clue that the patron has responded.)
- How did the Question come in – through staff entry, the system, SMS text, a widget?
- Is there keyword tagging already added?

The screenshot shows the LibAnswers web application interface. At the top is an orange navigation bar with links for LibAnswers, Dashboard (18), Answers, Stats, Ref. Analytics, LibChat, Status Mgmt, Admin, and Help. The user is logged in as cathay.keough@lib.de.us. Below the navigation bar, there are tabs for Open Tickets (18), Pending Comments (0), Pending Ideas/Votes (0), Errors (5), Spam (0), and Status Posts. A filter section allows users to select a Queue (None selected), Source (All Sources), Status (Not Closed), Owned by (View All), and Name. There is also an Email field and a Filter button. The main content area displays a table of tickets, showing the first 18 of 18 tickets. The table has columns for Id, Status, Queue, Question, Last Message From, Owner, and Updated. The tickets listed are:

Id	Status	Queue	Question	Last Message From	Owner	Updated
608774	New	Ask a Librarian Delaware	Sample Email Cathay (phil.collins@rocknroll.org) Asked via Staff Entry	Patron	---	Oct 09 2015, 12:08pm
607629	Open	Ask a Librarian Delaware	How do I find foreign films through your online catalog? Patricia Lang (plang35789@gmail.com) Asked via System	Patron	Sherilyn Tongas	Oct 09 2015, 11:43am
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607287	Pending	Ask a Librarian	Pursuant to Del Code Sections 510-513, there is a list	User	Sara Zimmerman	Oct 08 2015,

A vertical 'Support' button is located on the right side of the interface.

c. Look for **your** library's questions by clicking on the 'eyeball' icon.

Id	Status	Queue	Question	Quick Look		Last Message From	Owner	Updated ↓
608774	New	Ask a Librarian Delaware	Sample Email Cathay (phil.collins@rocknroll.org) Asked via Staff Entry			Patron	---	Oct 09 2015, 12:08pm

Look for the information about which library the patron normally uses, asked on the webform. Patrons are required to answer this before submitting their question. Does it name your library? If so, click on "Go to ticket page" to claim it (or if you are the liaison and intend to assign it to someone within your library).

answers.delawarelibraries.org/home.php

LibAnswers Dashboard Answers Stats Ref. Analytics LibChat Status Mgmt Admin Help

18 Open Tickets (18) Pending Comments

Queue: None selected

Quick Look #608774

Original Question
Oct 09, 2015 via Staff Entry
Sample Email
This is a sample for demonstration purposes.

Questioner Information:
Name: Cathay
Contact: phil.collins@rocknroll.org
Which library do you normally use? (Scroll to the end for academic, school and special libraries.): Other public library
Your library card number: No Response

Go to ticket page Close

Id	Status	Queue	Question	Owner	Updated
608774	New	Ask a Librarian Delaware	Sample Email Cathay (phil.collins@rocknroll.org) Asked via Staff Entry	---	Oct 09 2015, 12:08pm
607629	Open	Ask a Librarian Delaware	Patricia Lang (plang35789@gmail.com) Asked via System	Sherilyn Tongas	Oct 09 2015, 11:43am
607779	New	Ask a Librarian Delaware	What is my email on file and i forgot my pin what is it please Kimberly Burns (kimberlyburns21@gmail.com) Asked via System	Wendy Roberts	Oct 08 2015, 08:40pm
607748	New	Ask a Librarian Delaware	cannot log into overdrive Brantley Craig (cbrantleyc@gmail.com) Asked via System	Michelle Hughes	Oct 08 2015, 08:39pm
607573	New	Ask a Librarian Delaware	How can I return a book early that is on my iPad? Barbara Lloyd (BMittenLloyd@aol.com) Asked via System	Pam Batten	Oct 08 2015, 05:05pm
607287	Pending	Ask a Librarian	Pursuant to Del Code Sections 510-513, there is a list	User	Oct 08 2015

Support

a. The first tab is “Create a reply” – this is where you respond to the patron. Always use Best Practices for answering.

b. The text box (where you create the response to the patron) provides many options for crafting your email. Below the text box are additional features, such as to add links, document articles, and to “cc” anyone on this response.

LibAnswers ▾

Dashboard

Answers ▾

Stats ▾

Ref. Analytics ▾

LibChat ▾

Status Mgmt

Admin ▾

Help

cathay.keough@lib.de.us
Logout

You have claimed this question.

QID: 608774 Status: New Queue: Ask a Librarian Delaware Owned by: Cathay Keough Unclaim

Asked By: Cathay (phil.collins@rocknroll.org) Asked On: Oct 09 2015, 12:07pm Last Updated: Oct 09, 2015 Turnaround: 00:00:00

Sample Email

This is a sample for demonstration purposes.

Asked By: Cathay ⓘ

Tip: You can see the patron's webform information, like their library name, by clicking on the blue hyperlinked "Asked By" patron info.

⚙️

No replies to this ticket.

Create a Reply | Post an Internal Note | Assign/Transfer

Styles ▾ Format ▾ Font ▾ Size ▾ A- A+ B I S Ix ✂️ 📄 🗑️ 🔄 ⬅️ ➡️

☰ ☶ ☳ ☱ ¶ 🔍 [P] 🖼️ 🏠 Ω ABC ↕️ 📄 Source

Dear Cathay,

Thank you for contacting us regarding your sample question...

Add Links

▼ Tags

Add Tag

Add

► Reuse Answers

▼ Helpful Tools

Search in LibAnswers (pub ▾)

for

Search

(Results open in a new window)

c. Add any keyword tagging that fits the question. This helps link questions to others for staff to reuse answers. If a tag has been used, such as a library name or common tag (“account”, for example), it will show up. Press enter to add it. If you want to use a tag that is not already added, simply type it in and press “Add”.

d. You may reuse answers from other AaLDE providers and/or FAQs, as appropriate. Just click on “Reuse Answers” to see what is linked. You will have the opportunity to edit any of these before sending to the patron, and it’s recommended to do that since a personalized response is always preferred.

4. Add Reference Analytics

There are three areas for Reference Analytics:

- Dewey Delaware (select from the drop down menu the most prominent choice)
- Contact Method (the original way the patron contacted you for help)
- Library (separated by county – use the drop down menu for the county in which the patron's library resides)

LibAnswers ▾

Dashboard

Answers ▾

Stats ▾

Ref. Analytics ▾

LibChat ▾

Status Mgmt

⚙ Admin ▾

🔍 Help

cathay.keough@lib.de.us

Logout

for

Search

(Results open in a new window)

Add Links

Files (0)

CC Answer to

Add Email

Emails in the list will receive notifications of replies and be allowed to post replies. Emails removed from the list will no longer be able to add replies to the ticket.

Add to FAQ Group

Do not add to FAQ Group ▾

Add to Analytics

Reference Analytics ▾

Do not add to Analytics Dataset

Reference Analytics

Dewey Delaware

Select One ▾

Contact Method

Select One ▾

NCCo Libraries

Select One ▾

Kent Co Libraries

Select One ▾

Sussex Co Libraries

Select One ▾

Internal Note:

Submit as New ▾

Save Draft

Preview Email

Cancel

▼ Web Shortcuts

- Delaware Libraries eBooks, Flipster magazines, streaming videos
- Delaware Libraries Help
- Delaware Libraries Resource Guides (LibGuides)
- Delaware Library Access Services
- eMagazines & More - Find articles, read magazines
- Salesianum School Library
- Wilmington Univ Library Website

(Results open in a new window)

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Support

5. Ready to send your response? You have four options, but will primarily use one of two: Pending or Closed.

- “New” questions have not had any interaction with the patron yet. Use this if you are assigning the ticket to someone in your library.
- “Open” questions indicate that the patron responded.

Note that if you leave worked-on questions as “new” – it looks like no one has helped the patron!

Submit as *New*

Tickets that have not been replied to.

Submit as *Open*

Tickets where you need to get back to the patron.

Submit as *Pending*

Tickets where the patron is going to get back to you.

Submit as *Closed*

Tickets where no further interactions are expected.

If the question is closed and the patron responds, it will reactivate the ticket.

6. Post an Internal Note

The second tab allow you to send a note to other library staff who provide this statewide service. Internal notes do not go to the patron. They help us share important information in order to provide excellent customer service.

Type your note and then select your recipient(s) using the dropdown selection in “Email Note to”. Choose the appropriate “submit” category to send it.

The screenshot displays the LibAnswers web application interface. At the top is an orange navigation bar with links: LibAnswers, Dashboard, Answers, Stats, Ref. Analytics, LibChat, Status Mgmt, Admin, and Help. The user is logged in as cathay.keough@lib.de.us. The main content area shows a question titled 'Sample Email' with the text 'This is a sample for demonstration purposes.' and 'Asked By: Cathay'. Below this is a note from Cathay Keough dated Oct 09 2015, 01:46pm, with the status 'Closed'. Three tabs are visible: 'Create a Reply', 'Post an Internal Note' (which is active), and 'Assign/Transfer'. The 'Post an Internal Note' tab contains three sections: 'Internal Note' with a text area containing 'Hi Katie, Just wanted you to know about this patron's question in case she comes into the library soon and asks.', 'Email Note to' with a dropdown menu currently showing 'Select recipients...', and 'Add to Analytics' with a dropdown menu showing 'Do not add to Analytics Dataset'. At the bottom of this section are two buttons: 'Submit as Closed' and 'Cancel'. On the right side of the interface, there are several utility panels: 'Tags' with an 'Add Tag' input and an 'Add' button; 'Reuse Answers'; 'Helpful Tools' with a search section labeled 'Search in' (set to 'LibAnswers (pub)') and 'for' (empty), with a 'Search' button and a note '(Results open in a new window)'; and 'Web Shortcuts' with a link to 'Delaware Libraries eBooks, Flipster magazines, streaming videos'. A vertical 'Support' button is located on the far right edge of the page.

7. Assign/Transfer

The third tab allows a question to be assigned to another provider of the Ask a Librarian Delaware service.

If you are a liaison for a Delaware library, you may assign questions to library staff within your library for follow up. For example, there might be someone at your library who handles the ILLs, or is a subject specialist for certain types of questions.

Use the “Select the user to own this ticket” drop down menu to choose from the list of options. You can cc others and/or add an internal note here, to keep others informed if desired.

LibAnswers Dashboard Answers Stats Ref. Analytics LibChat Status Mgmt Admin Help

Sample Email
This is a sample for demonstration purposes.
Asked By: Cathay

Note from Cathay Keough (Oct 09 2015, 01:46pm):
[Status changed to Closed.]

Create a Reply Post an Internal Note **Assign/Transfer**

Transfer to User

Select the user to own this ticket

Internal Note

Select the user to own this ticket

CC Note to Select (optional) recipients...

Add to Analytics Do not add to Analytics Dataset

Submit as Closed Cancel

8. Finding your library's closed tickets

Questions that are closed do not show up on the Dashboard.

To see questions that have been closed, go to "Answers".

Then click on "Tickets" from the drop down menu.

The screenshot shows the LibAnswers dashboard for user cathay.keough@lib.de.us. The top navigation bar includes links for LibAnswers, Dashboard (17), Answers, Stats, Ref. Analytics, LibChat, Status Mgmt, Admin, and Help. A dropdown menu for 'Answers' is open, showing options: FAQ Entries, Create FAQ Entry, Tickets, and Create Ticket. A blue banner for 'October Training Schedule' is visible. Below it is an 'Administrative Announcement' from 'Ask a Librarian Delaware'. The dashboard also shows counts for Open Tickets (17), Pending Comments (0), Pending Ideas/Votes (0), Errors (5), Spam (0), and Status Posts. A filter section allows searching by Queue, Source, Status, Owned by, Name, and Email. The main content area displays a list of tickets, with the first ticket (Id: 607328) shown in detail.

LibAnswers 17 Dashboard Answers Stats Ref. Analytics LibChat Status Mgmt Admin Help cathay.keough@lib.de.us Logout

FAQ Entries
Create FAQ Entry
Tickets
Create Ticket

Hello Cathay.

LibChat is Offline: Go Online Stand-By Alerts Enabled Send an SMS

October Training Schedule

Curious about the Systems & Services Management Tool? Need to brush up on how queues & groups work? Need a LibChat refresher? Check out the newest series of LibAnswers Training Sessions starting October 26th.

Administrative Announcement

Welcome to Ask a Librarian Delaware, Delaware's Reference Service!

We are helping with homework, in-depth research, account and ebook questions everyday! Thank you for your great work in providing the best reference service ever; our team is strengthened by your participation.

If you have training needs, have questions or problems, please contact Cathay Keough, Statewide Coordinator at 302-257-3014 or email cathay.keough@lib.de.us

Open Tickets (17) Pending Comments (0) Pending Ideas/Votes (0) Errors (5) Spam (0) Status Posts

Queue None selected Source All Sources Status Not Closed Owned by View All Name

Email Filter (clear)

Tickets 1 - 17 (of 17)

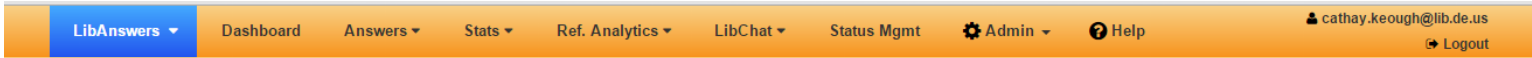
Id	Status	Queue	Question	Last Message From	Owner	Updated ↓
607328	New	Ask a Librarian Delaware	Book on Hold thru kindle has not come in yet. Terri Hunter (thunter13@verizon.com) Asked via System Dover ebooks holds	Patron	Michelle Hughes	Oct 09 2015, 02:16pm

The Knowledge Base Explorer offers options for finding your library's tickets:

- Question ID and text of the question
- By status
- Date, day of week, time of day
- Library
- Tags
- Owner of the ticket (library staff)
- Patron's email address

You can also see monthly reports showing patron use by library in the Ask a Librarian Delaware Staff Support Site:

<http://aalstaff.lib.de.us/liaisons/reports/>



Knowledge Base Explorer: Tickets

Tickets | Dates & Times | Source & Form Fields | Answerer & Turnaround | Referrer | Export Tickets

ID Full Text Source All Sources Status All Asked from 2014-10-09 to

Updated between and Owner View All Ask a Librarian Dela... Tag Select tags...

Which library do you normally use? (Scroll to the end for academic, school and special libraries.): All Limit by Day All Days

Limit by Time between 00 h and 24 h Turnaround (hours) <= Name

Email Filter (Clear filter)

Tickets 1 - 50 (of 1601)						
Id	Question	Name	Status	Owner	Asked	Last Update ↓
607328	Book on Hold thru kindle has not come in yet. Asked via System Queue: Ask a Librarian Delaware Which library do you normally use? (Scroll to the end for academic, school and special libraries.): Dover Your library card number: 23316800061825 Dover ebooks holds	Terri Hunter (thunter13@verizon.com)	New	Michelle Hughes	Oct 08, 2015	Oct 09 2015, 02:16pm
608774	Sample Email Asked via Staff Entry Queue: Ask a Librarian Delaware Which library do you normally use? (Scroll to the end for academic, school and special libraries.): Other public library Your library card number: No Response	Cathay (phil.collins@rocknroll.org)	Closed	Cathay Keough	Oct 09, 2015	Oct 09 2015, 01:46pm
608356	Overdue book?	Ann Mills	Closed	Renee	Oct 09, 2015	Oct 09 2015,

Thank you!

For other resources, see the Ask a Librarian Delaware staff Support site at:

<http://aalstaff.lib.de.us>



Cathay Keough
Delaware Reference Services Coordinator
Delaware Division of Libraries
Ask a Librarian Delaware
Cathay.keough@lib.de.us
<http://answers.delawarelibraries.org>