



SparkRef
Virtual Reference Software
Training & Reference Manual

Edition 6.1
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Part I

Introduction

• *Section 1. Introduction*

The software you are using grew out of a collaboration between Ohio's KnowItNow24x7 virtual reference service and L-Net, the Oregon Libraries Network online reference service. In 2007, both Ohio and Oregon saw the need for new virtual reference software but were unable to find any one product meeting all their needs. In consultation with the State Librarians of Ohio and Oregon (Jo Budler and Jim Scheppke, respectively), Cleveland Public Library (the administrative center for Ohio's KnowItNow24x7) and Multnomah County Library (the home base of Oregon's L-Net) began collaborating on bringing the needed software to fruition.

The present software is the result of that joint project and is based on the open source Spark cross-platform real-time collaboration client from Jive of Portland, OR. The Spark client incorporated an instant messaging platform known as Fastpath. Not being specifically designed to handle a virtual reference service, Spark was enhanced by Source(N), a software developer in San Jose, California, for this purpose.

The new software was implemented on September 1, 2008, and is being utilized by both Ohio and Oregon with servers located at Cleveland Public Library in Ohio.

In mid-2009, a new round of development was initiated to add some features to the Spark client as well as to update the Openfire server. At that time, a versioning system was installed in Spark and the client has been renamed **SparkRefRef** for the use of KnowItNow24x7 and L-net.

• *Section 2. Definitions*

Some terms used in this manual are new to library staff who previously provided service on KnowItNow24x7 and L-Net. This short glossary gives basic definitions of these words and how they are used in the text.

2.1. Agent

The library staff member who logs in, answers questions, etc. The **agent** is contrasted with the **user/customer**.

2.2. Client

The SparkRef software residing on agent's computer.

2.3. Co-Browser

The Internet browser within Fastpath. Agents should **NOT** use this feature but rather cut-and-paste URLs directly into the chat with the user (See **Section 26**)

2.4. Customer

Another name for **user**.

2.5. Fastpath

The aspect of the SparkRef software through which users' questions are answered. In a hierarchical relationship, Fastpath is dependent on SparkRef; however, many SparkRef functions can work independently of Fastpath.

2.6. Idle

When an agent is idle, he or she cannot receive any incoming messages which is not desirable. The default in SparkRef is for this option to be unchecked. See Section 8.1.1.2.3 for more on being Idle.

2.7. Macro

A series of commands and procedures identified by a single name. In this software, macros are used to manage the **Canned Responses** (See Section 19. Using and Editing Canned Responses).

2.8. Queue

A sub-group of a **workgroup**. The agent can be part of more than one queue. This is set up when accounts are created by administrators.

2.9. Resolution Code

One of the options displayed after an **agent** ends a **conversation** showing the final outcome of the transaction. See Section 27.3.

2.10. SparkRef

SparkRef is the name of the virtual reference software which is based on an open source software product called Spark. It was originally developed by Jive and is part of Ignite Realtime, the community site for the users and developers of Jive Software's open source Real Time Communications projects.

2.11. Toast Popup

A small window which "pops up" in the lower right of your monitor screen (see Section 8.1.1.6.1.)

2.12. User

The person asking questions through the service; the patron. Also referred to as a **customer**.

2.13. Workgroup

The primary group to which an **agent** belongs in Fastpath. The **agent** can only be *logged into* one **workgroup** at a time but can belong to several **workgroups**. One **workgroup** can include multiple **queues**.

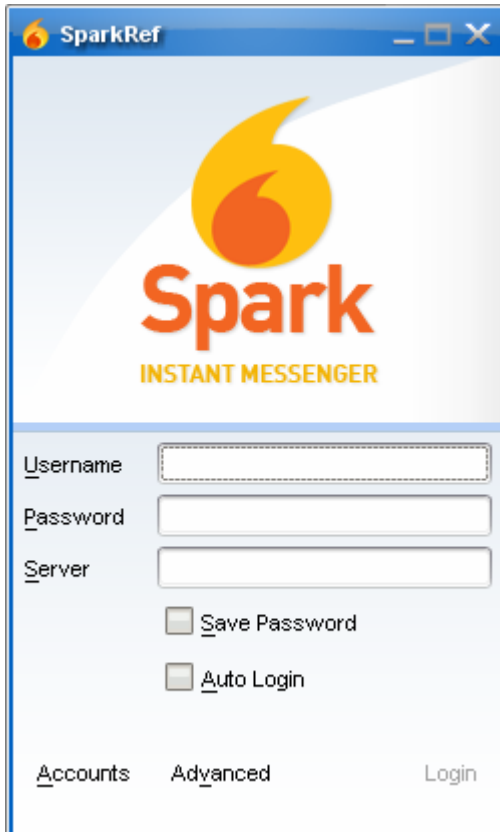
Part II

Installing and Accessing the Software

• Section 3. Downloading the Software

3.1. The most up-to-date downloading instructions for SparkRef are posted on the KnowItNow24x7 Provider page at <http://provider.knowitnow.org/node/314>.

3.2. Instructions for Windows, Mac, and Linux are available. If you have any questions on this process, contact support@knowitnow.org.



• Section 4. Logging into SparkRef

The image at the left shows an example of the login window that will be used to login to SparkRef. This is the screen where the agent's Username, Password, and Server information will be input or stored. The password can be saved once the information is entered. This window will "disappear" after you log in.

4.1. Login

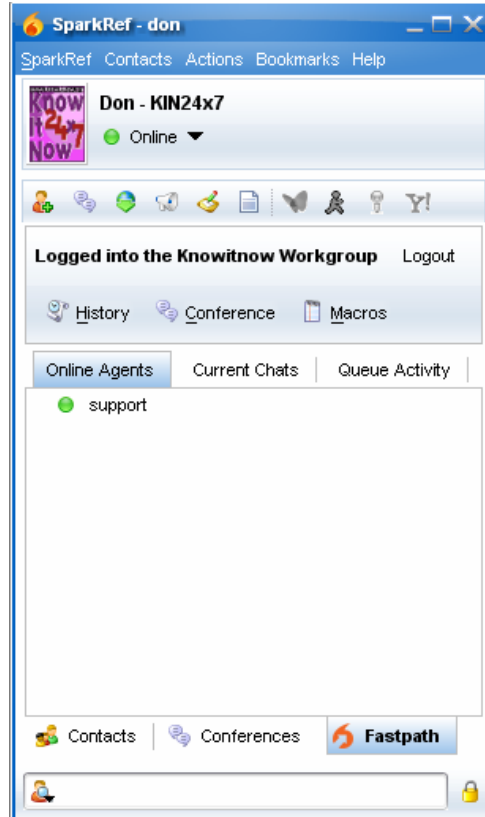
When the Username and Password are entered correctly (or displayed), simply click the **Login** button at the bottom right of the window to login to the system.

4.1.2. Auto Login

Another option will be to have the SparkRef software automatically login when the computer is turned on. Simply check the "Auto Login" option.

· **Section 5. The SparkRef Client: Your "Control Panel"**

Below is an example of what the Client looks like after logging into SparkRef by following instructions in **Section 4** above. A detailed look at all the functions of this "control panel" are given in **Part III** of this manual (**Getting the Most out of the SparkRef Client**).

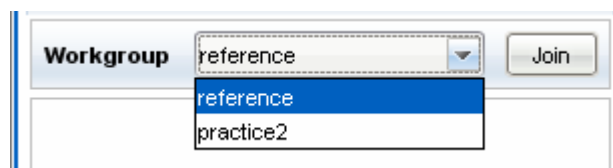


· **Section 6. Logging into Fastpath**

6.1. As a final step to receive incoming KnowItNow24x7 chat messages from users, the agent must login to Fastpath. You can use the SparkRef IM functions and some other aspects of the client without logging into Fastpath (as well as receive IM from other services (see **Part V** of this manual)), but the agent **MUST BE LOGGED INTO FASTPATH** for his or her virtual reference shift.

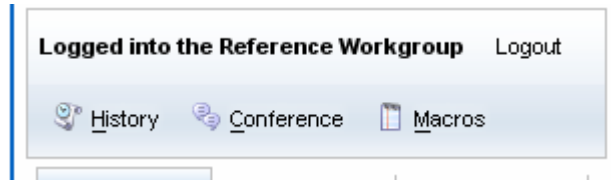
6.1.1. Click the Fastpath tab at the bottom of the SparkRef client (see highlighted tab in image above in **Section 5**).

6.1.2. Choose the correct Workgroup to join from the pull-down menu (in middle of SparkRef client):



6.1.2.1. Note that not all agents will be a part of multiple workgroups.

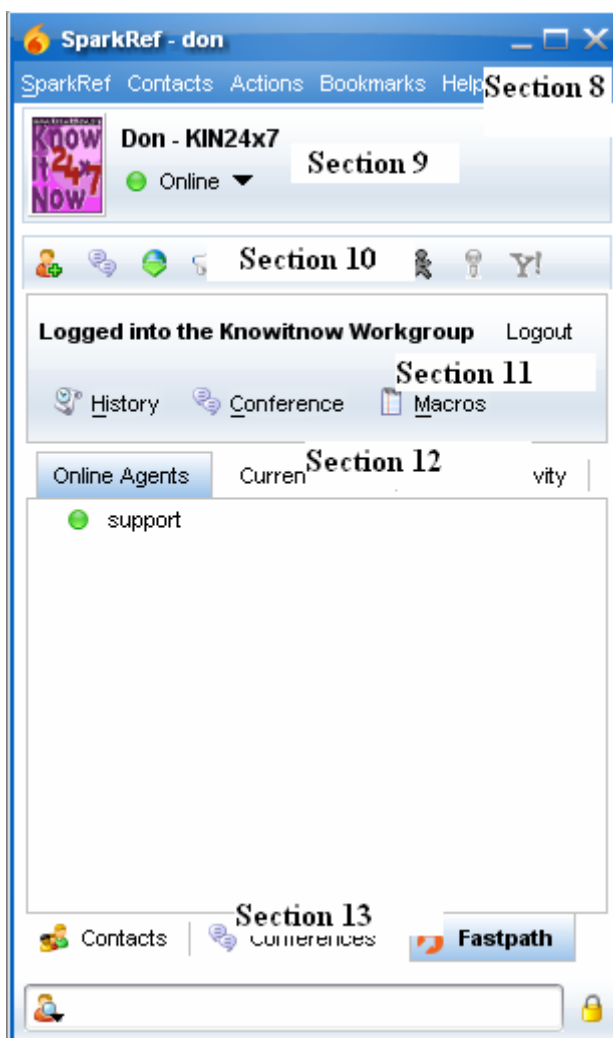
6.1.3. Click **Join**. You are now logged into Fastpath and the SparkRef client will display the message "Logged into the ----- Workgroup" (with ----- replaced by the name of the workgroup chosen).



6.1.4. If the Auto Login is checked (under Save Password on the SparkRef Client), the agent may see that he or she automatically joins the workgroup when the "control panel" loads. If it does not happen to be time for your library's virtual reference shift, simply click Logout next to the workgroup name. This will disconnect the agent from Fastpath but still keep the agent able to IM other agents, to be IM'd by other agents, and otherwise take advantage of SparkRef's other functions.

Part III

Getting the Most out of the SparkRef Client



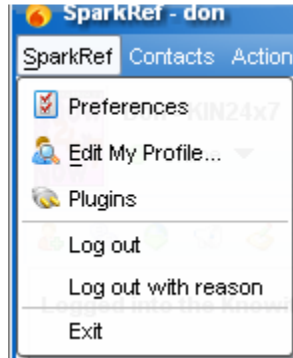
• *Section 7. Using SparkRef Client Functions*

As mentioned in **Sections 6 and 15. Logging into Fastpath**, you can take advantage of many of the functions of SparkRef without logging into Fastpath (i.e., before or after your virtual reference shift). You can IM another agent to ask for help on a follow-up question, to ask about shift changes, to share ideas on how to navigate a particular resource more effectively, etc. However, keep in mind that the software should not be used for messages outside the purview of professional duties. This section will outline the many functions of the SparkRef client itself. Subsequent parts of this manual (**Parts IV-VI**) outline how to use SparkRef to provide virtual reference service.


· Section 8. Options Along the Top of SparkRef Client



8.1. SparkRef (Top Left Corner of Client Screen)



8.1.1. Preferences

The first option under **SparkRef** ( Preferences) allows the agent to change a number of settings on the client. Many of these should remain in the default setting, but several are customizable and may make using the software a better experience for the agent and customer.

8.1.1.1. Chat: General Chat Settings

8.1.1.1.1. General Information: Change/Confirm Password

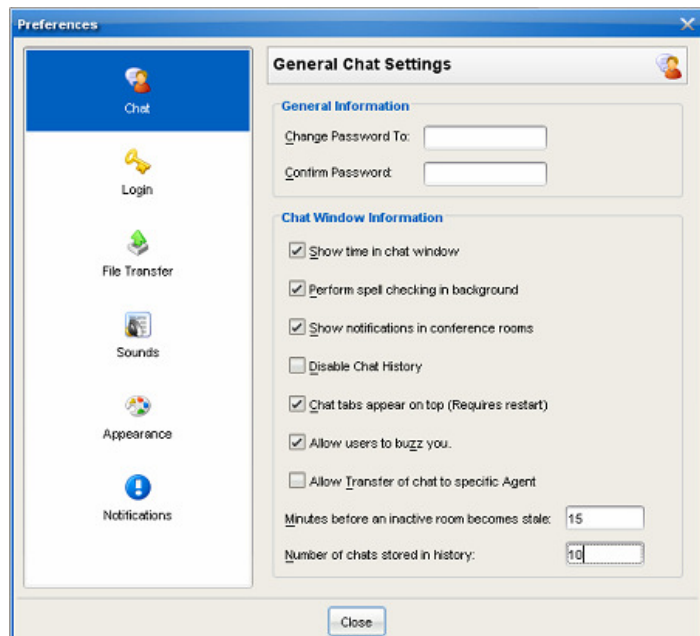
This will allow agents to change their own passwords. If an agent forgets a password, it can be reset by the KnowItNow24x7 Web Site Coordinator, but it cannot be retrieved. The agent would need a new password if the current one is forgotten or misplaced.

8.1.1.1.2. Chat Window Information: Show time in chat window

8.1.1.1.3. Chat Window Information: Perform spell checking in background

If this option is checked, SparkRef will automatically spell check your chat messages as you type them (see **Section**

20.1). If not checked, you must click  to spell check your message.




8.1.1.1.4. Chat Window Information: Disable Chat History

Do NOT disable chat history. This is where user transcripts will be accessible by the agent. See also **Section 28. Accessing Transcripts.**

8.1.1.1.5. Chat Window Information: Chat tabs appear on top (Requires restart)

This requires a restart if changed, so it is recommended to **NOT** change this setting.

8.1.1.1.6. Chat Window Information: Allow users to buzz you

Check this option to allow other agents to use the Bell icon () to **BUZZ** you when IM'ing through SparkRef. This also appears in the window when an IM to another agent is initiated. When clicked, this "shakes" the other agent's IM window. Note that this only applies to IM'ing other agents through SparkRef, not customers. See also **24.2.1.1. Alternative to Sending an Initial Message to the Contact Through IM**


8.1.1.1.7. Chat Window Information: Allow Transfer of Chat to Specific Agent

It is highly recommended to **NOT** transfer to a specific agent since this kind of transfer does not send the customer's metadata. See **Section 25** for transferring.

8.1.1.1.. Chat Window Information: Minutes before an inactive room becomes stale

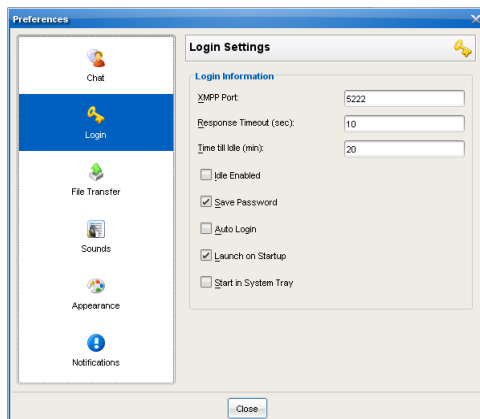
The preferred alternative to allowing an inactive room to become stale is to disable the **Time till Idle** option (See **Section 8.1.1.2.3.** below)

8.1.1.1.. Chat Window Information: Number of chats stored in history

This setting is customizable for each agent's account. The number entered is the number of conversations stored in the  **History** link on the **SparkRef** client. ALL transcripts are accessible by other means (**Section 28**), but this option allows a certain number of transcripts to be readily available directly from the **SparkRef** client. Fifty is the default; however, a lower number will allow for a quicker retrieval from the server. Using a number between 5 and 15 is recommended.

8.1.1.2. Login Settings

Most of these settings are set by the Administrator and should **NOT** be changed. The options for individual agents are outlined below.



8.1.1.2.1. XMPP Port: **DO NOT CHANGE!**

8.1.1.2.2. Response Timeout (sec)

It is recommended to **NOT** change this setting.

8.1.1.2.3. Time till Idle (min) and Idle Enabled

The default in SparkRef is for this box to be **unchecked**. This will keep agents online and ready to take questions from the queue during their entire shift.


8.1.1.3. File Transfer

This option does not currently need to be changed by the agent.

8.1.1.4. Sound Preferences

This gives the agent the option of when a sound is played, alerting him or her to a change in status of some aspect of the service.

8.1.1.4.1. Adding new sounds

By clicking on the  button to the right of each **Sound** option, new sounds can be downloaded. Agents may modify sound files; however, any unauthorized file changes may have detrimental effects on the software and should be avoided unless absolutely necessary. Please check with the Administrator before attempting.

8.1.1.4.2. Play sound when new message arrives

This option refers to incoming IM messages, NOT webchat messages from patrons.

8.1.1.4.3. Play sound when message is sent

This is somewhat redundant (since the agent will see the message appear in the chat box), but it is an option.

8.1.1.4.4. Play sound when user goes offline

This chime-like sound alerts the agent when the user has gone offline. Also somewhat redundant, but in an environment in which the agent is working with several users at a time, this may be useful. Turn on or off. The sound will also play when the agent ends the session as well.

8.1.1.4.5. Play sound conversation is transferred to Queue/Workgroup

Software development in 2009 added a new option to the **Sounds** menu:

Play sound when conversation is transferred to Queue /Workgroup

This option (when checked) plays the same sound for incoming transfers as the sound for original customer sessions submitted to the service. The default is for this to be **checked**. If you are not getting a sound on transfers, verify that this box was not **unchecked**.

8.1.1.5. Appearance

Can be used to change appearance of agent's chat screen.

8.1.1.5.1. Emoticons

Emoticons are available, but their use is not necessarily encouraged in the virtual reference interview. Some browsers may or may not display them, and their use can sometimes be seen by the user as encouraging conversation not directly associated with his or her information needs.

8.1.1.5.1. Chat Room Font Size


This will change the font size in the agent's chat screen (on the next session). It cannot be changed when the agent is within a chat session. This does **NOT** change the user's screen.

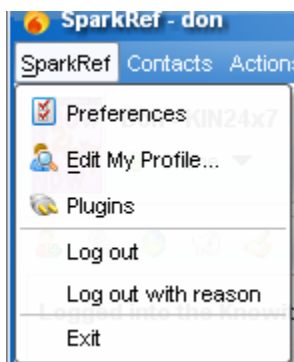
8.1.1.6. Notifications

8.1.1.6.1. Show a Toast Popup

When enabled, this pops up a small window with the user's (or other agent's) messages as they are sent (alerting agent to a new message). This is useful when working with more than one chat at a time. Not only will the tabs on the chat interface alert the agent to new messages (See **Section 22. Typing/Connection Indicators**), but a small pop-up window will also serve to alert the agent to messages from the user that the agent is not currently working with.

8.1.2. Edit My Profile

This is where the agent will enter information to be displayed when someone "mouses over" their name in the SparkRef client contacts list (accessible by clicking  **Contacts** tab at the bottom of the SparkRef client, see **Section 13.1**) When doing so, remember that you are filling it out as a KnowItNow24x7 agent and NOT as your individual library (although you should include this information under Business as this will be helpful in other agents contacting a specific library).



8.1.3. Plugins: ***DO NOT CHANGE!***

8.1.4. Log out

Log out allows an agent to shut down their Spark; however, the client will then reappear as it did on login. If the agent wishes to log in with a different username (or if a new agent is taking over a shift), Log out would be the most efficient option (see image to the left of **Section 4** above).


8.1.5. Log out with a reason

You can simply log out or choose to log out and leave a reason for your absence for others to see. Remember, this does **NOT** close SparkRef; it simply lets others know your status.

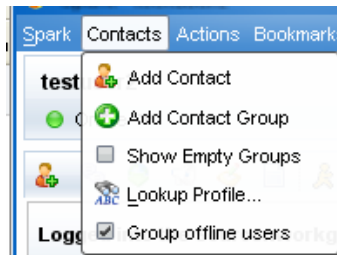
8.1.5.1. Log out with a reason

Remember that everyone will see your reason when your account name is displayed in the contacts list. Keep these professional.

8.1.6. Exit

This will close down all SparkRef functions and the client will not reappear (as opposed to 8.1.4. above). To completely log out and close your SparkRef client, the agent **MUST** use this option. Clicking the **X** in the upper right of the SparkRef Client will merely close the window and place it in the startup menu (the SparkRef icon  will appear in the bottom right of the screen, for example, if your computer is running Windows).

8.2. Contacts



8.2.1. Add Contact

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

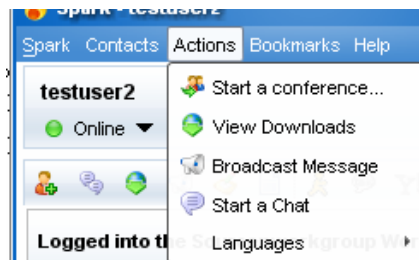
8.2.2. Show Empty Groups

Contact groups which have no one logged into SparkRef will remain visible when clicking on this option. Clicking on this option will toggle it on and off.

8.2.3. Group offline users

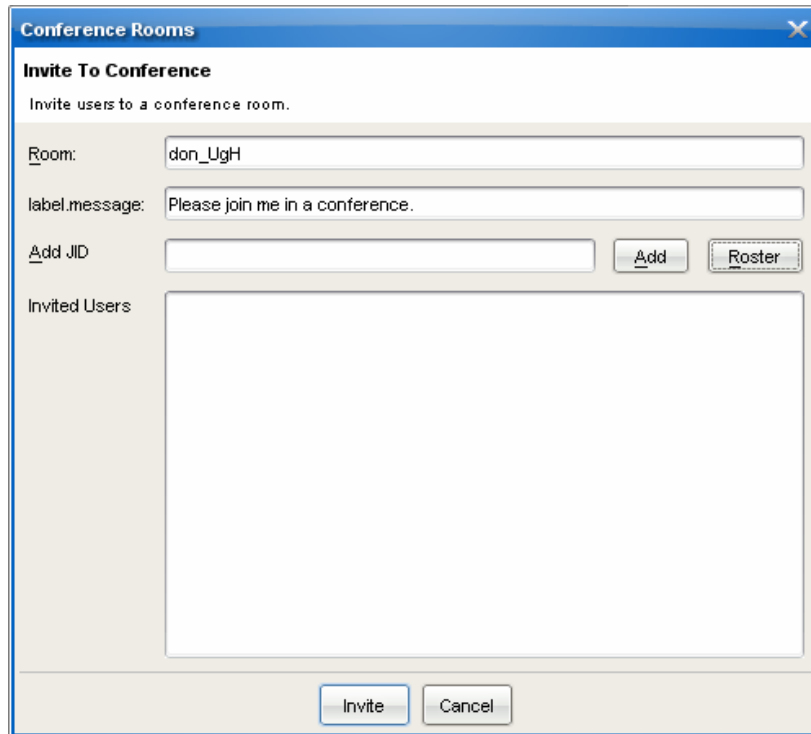
Clicking on this option groups agents who are offline into one "Offline Group". Clicking on this option will toggle it on and off.

8.3. Actions



8.3.1. Start a conference...

This option allows agents to invite one or more other agents to a common chat room online. This is a good way to have an impromptu group chat with other agents via SparkRef.



8.3.1.1. To initiate a conference, first click on the 🗨️ **Start a conference...** icon. This will pop-up the window displayed directly above. Then click on **Roster** and choose the agents to be invited to the conference.

8.3.1.1.1. Multiple agents can be selected by holding down the **Ctrl** key on your keyboard and clicking each agent individually.

8.3.1.2. Agents can rename their "Room" to reflect the topic of discussion or simply leave the default as assigned by SparkRef. For example, the default in the graphic above is don_UgH.

8.3.1.3. Finally, click **Invite** to initiate the conference "room" in which the chat occurs.

8.3.2. Broadcast Message 🗨️

This sends a message to other agents. Be aware that EVERYONE you choose to send to will receive the message you send.

8.3.2.1. Broadcast options

There are two ways to send a broadcast message: Regular IM or Alert. The regular IM will simply send an instant message to each agent. The Alert will make a Toast Popup (See **Section 2.14. Toast Popup**) appear for a short time and then disappear.

8.3.2.2. When sending a Broadcast, the agent must specify whether it is a Normal Message (comes to other agents as a regular IM message and stays until read and/or responded to) or Alert Notification (this message will arrive as a Toast Popup which will “popup” then disappear). The **PREFERRED** method of Broadcasting is the Normal Message since it allows for a longer

reading time. The agent must also decide which group or individual agents to which to send the message. This is done by using the check-boxes on the right side of the Broadcast Message window (which appears after the Broadcast icon is clicked). To send, click OK.

8.3.3. Start a Chat

This can be used to start a chat with another agent; however, it is simpler to click on their name in one's **Contacts** list.

8.4. Bookmarks

These are the bookmarks loaded into Fastpath via the Co-Browser. These cannot be changed from this option. Agents are discouraged from using this feature but rather to cut-and-paste URLs directly into the chat with the user and to use their preferred browser's own bookmarks. (See **Section 26**)

8.5. Help

Options under this heading link directly to Ignite Realtime's online user guides and forums. This provides information on the open source Spark client. Agents are encouraged to use this SparkRef manual as their primary source of information.

8.5.1. View Logs

This option may be used when attempting to diagnose a problem with SparkRef.

· **Section 9. Agent Status Indicator**

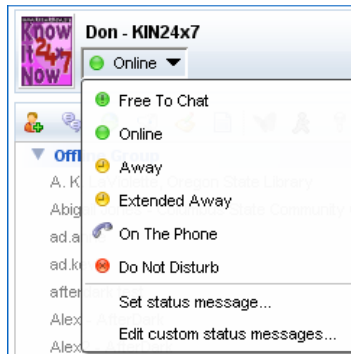
This appears under the Agent's Login Name (upper left of SparkRef Client screen):



9.1. The text which appears here as the agent's name (i.e., **Don - KIN24x7**, in this case) is edited under **Edit My Profile** (see **Section 8.1.2**).

9.2 Available Agent Statuses

By clicking the displayed status, the available options are displayed: **Free to Chat, Online, Away, Extended Away, On the Phone, Do Not Disturb**. Status should be set to **Online** when agent is available for receiving questions; **Away** if momentarily away from the desk. **BE SURE TO RESET MESSAGE WHEN RETURNING!**



9.1.1. Set status message...

This is another way of choosing the agent's status.

9.1.1.1. Note that changing the Status to **Away** during a chat or IM will NOT affect the session(s) in progress. It will simply preclude receiving new messages.

9.1.2. Edit custom status messages...

Keep these professional as these will be seen by all agents and administrators.

9.1.3. Primary difference in agent statuses is whether the "dot" is green ● or not. If it is green, the agent is available and incoming customer questions will be received. If it is not green, the agent is **NOT** available and incoming customer questions will **NOT** be received.

· Section 10. Icons (Below Agent Status Indicator)

Description appear when the agent mouse-overs.



10.1. Add a contact

(See also **Section 13.1. Contacts**) This option allows you to add a contact to your Friends list.

10.2. Join Conference Room

Allows agent to join an active conference room.

10.3. View Downloads

(See also **Section 8.3.1. Actions**)

10.4. Send a broadcast

This sends a message to everyone listed in your Friends list. Use this with caution as EVERYONE will receive the message you send. (See also **Section 8.3.2.**)

10.4.1. Broadcast options

There are two ways to send a broadcast message: Regular IM or Alert. The regular IM will simply send an instant message to each agent. The Alert will make a Toast Popup (See **Section 2.14. Toast Popup**) appear for a short time and then disappear. It is preferable to send a regular IM so as to give everyone sufficient time to read the message.

10.4.2. When sending a Broadcast, the agent must specify whether it is a Normal Message (comes to other agents as a regular IM message and stays until read and/or responded to) or Alert Notification (this message will arrive as a Toast Popup which will “popup” then disappear). The PREFERRED method of Broadcasting is the Normal Message since it allows for a longer reading time. The agent must also decide which group to which to send the message. This is done by using the check-boxes on the right side of the Broadcast Message window (which appears after the Broadcast icon is clicked). To send, click OK.

10.5. View Tasklist

Although not specific to virtual reference work, this is an option for keeping track of job tasks. The agent can enter specific tasks and dates and the SparkRef client will alert you when he or she logs on with a **Toast Popup** (See **Section 2.14. Toast Popup**). This can also be useful for alerting someone coming in the next day to follow-up on a reference question left unresolved from the previous day or other similar tasks.

10.6. View Notes

10.7. IM Icons

Commercial Instant Messaging (IM) Icons that have been loaded onto SparkRef appear at the end of this line. For example, in the graphic above, we see MSN, AIM, XMPP, and Yahoo! Messenger, respectively. This is where the agent can login to a commercial IM service and receive messages from these services through Fastpath. Please refer to **Part V (Section 29, etc.)** of this manual for KnowItNow24x7's IM procedures.

· **Section 11. History | Conference | Macros**

This line of functions lies directly below the "Logged into..." message when the Fastpath tab is selected on the SparkRef client **and** when agent is logged into Fastpath.

11.1. History

This is where transcripts ("Previous Chats") will be accessed. See also **Section 28. Accessing Transcripts**. KnowItNow24x7 transcripts are now available online to agents through the KIN24x7 Provider site (with a username and password).

11.2. Conference

This allows chat among **Workgroup** members.

11.3. Macros

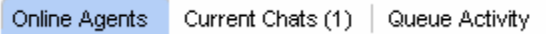
This allows the agent to edit Canned Responses without being connected to a user.

11.3.1. Editing Canned Responses in Macros

Click on **Macros**. This will bring up a screen displaying "Personal Macros." There is an "Initial Response" that is sent automatically to all users logging into the service. Below that are the individual "Canned Responses." You will see a "Response Name" and "Response Text." The "Response Name" will be what is displayed within the chat session selection. The "Response

Text" will be what is actually sent to the user. (see **Section 19. Using and Editing Canned Responses** for more information)

· **Section 12. Online Agents | Current Chats | Queue Activity**



12.1. Online Agents

(Below History/Conference/Macros) This shows all available agents logged onto Fastpath.

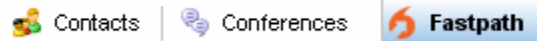
12.2. Current Chats

This displays online agents and their chats currently being conducted. The agent viewing this will **NOT** see her or his 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).

12.3. Queue Activity

Shows Name, # in Queue, Average Wait Time, Last Queue Activity.

· **Section 13. Contacts | Conferences | Fastpath**



13.1. Contacts

Highlighting this tab will display all your available contacts. These can be contacted via SparkRef's instant messaging function without being logged into Fastpath. (See **Section 24.1.** on how to send instant messages to Contacts.)

13.2. Conferences

Highlighting this tab will display all current conferences.

13.3. Fastpath

From this tab, agents will access all Fastpath functions including logging in to their virtual reference shifts.

· **Section 14. Search Bar**



The search bar at the bottom of SparkRef client can be used to search for Contacts using keywords

Part IV

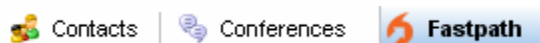
Working with Customers: Part One

Using Fastpath for Virtual Reference

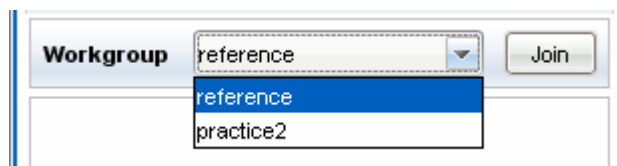
· *Section 15. Logging into Fastpath*

15.1. The agent must log into Fastpath to begin his or her virtual reference shift. Fastpath is utilized for agents' access to users' questions coming in through the web chat portal. Subsequent Parts of this manual will address other ways for the user to access the virtual reference librarian.

15.1.1. As outlined in **Section 6.1.1**, first click the Fastpath tab at the bottom of the SparkRef client:

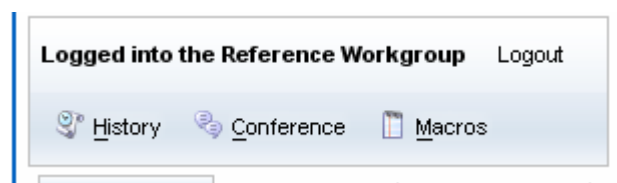


15.1.2. If you are assigned to more than one workgroup (see **15.1.3.2** and **.3** below), choose the correct Workgroup to join from the pull-down menu (in middle of SparkRef client):



15.1.3. Click **Join**. You are now logged into Fastpath and the SparkRef client will display the message "Logged into the ----- Workgroup" (with ----- replaced by the name of the workgroup chosen).

15.1.3.1. When logged into Fastpath, the "Join" button will change to Logout. Click this button to logout of your KnowItNow24x7 shift and still stay logged into SparkRef.



15.1.3.2 If the Auto Login is checked (under **Save Password** on the SparkRef Client (see image at **Section 4**), the agent may see that he or she automatically joins the workgroup when the "control panel" loads. If it does not happen to be time for your library's virtual reference shift, simply click Logout next to the workgroup name. This will disconnect the agent from Fastpath but still keep the agent able to IM other agents, to be IM'd by other agents, and otherwise take advantage of SparkRef's other functions.

15.1.4. For agents assigned to only one workgroup, they will automatically be logged into their workgroup when they log into SparkRef.

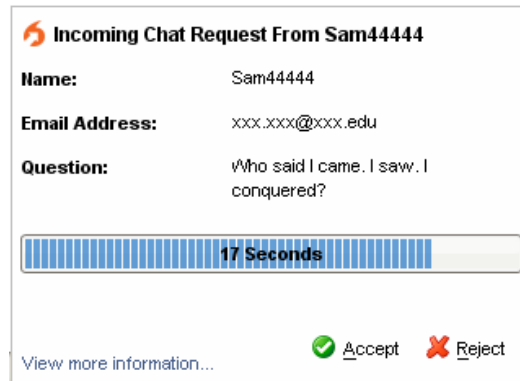
15.1.4.1. For agents assigned to more than one workgroup, they must choose which one they wish to log into at the beginning of their shift.

15.1.4.2. Workgroups can be logged into and out of during a shift if necessary.

· **Section 16. Accepting Questions on Fastpath**


16.1. Customer Waiting Alert

When a question is in the queue, a pop-up window and sound will alert the agent that there is an "Incoming Chat Request From [User's Screen Name]." This window has options for "Accept" and "Reject." The incoming user's Name, Email Address, and Question are listed on the pop-up window.





16.1.1. The user will also see his or her own status in the queue. Both their position in the queue as well as their estimated "wait time" will be available to the user after they connect to the service and are waiting for an agent to accept the question.

16.2. Accepting Customers

Click  **A**cept. The user is then automatically connected to you.

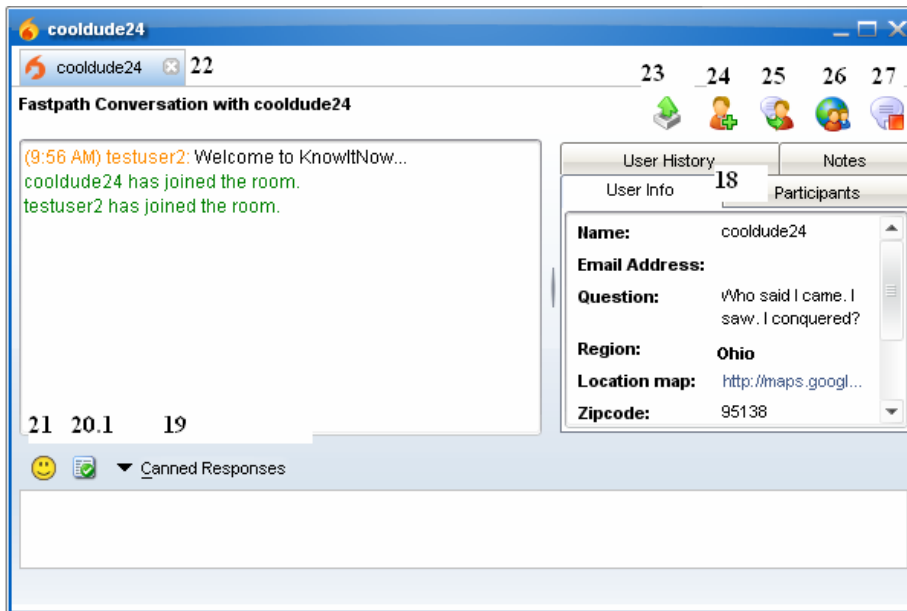
16.3. Rejecting Customers

This does **NOT** eject the user from the queue or cancel their request. Clicking  **R**eject releases the user from *the individual agent's* Fastpath interface and puts them back into the queue for the next available agent to pick up. This will also automatically happen after a pre-determined number of seconds without hitting the  **R**eject option.

16.4. View more information...

To view the customer's complete question and metadata, click on **View more information...** in the left bottom corner of the **Incoming Chat Request** box.

• Section 17. Fastpath Chat Window



Numbers at the left correspond to sections where these portions of the chat window are covered in this Manual.

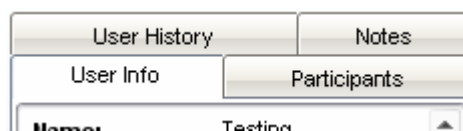
17.1. After accepting the user, a new window will open (similar to the image above).

The chat window directly above is the window through which your interaction with the user will happen. The following sections will explain the various functions and uses of the different areas of this window and allow you to take full advantage of the Fastpath software.

17.2. "Accepting" IM messages

It should be noted that instant messages (IM) are also displayed in the chat window. These appear without the agent "accepting" them so be aware of extra tabs that appear in this window. You will be able to tell the difference from the different option icons along the right top of the IM's tab window. This applies to both SparkRef IMs from other agents as well as commercial IMs from patrons (See **Section 29**).

• Section 18. 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 users being served.

18.1. User Info Tab

This tab contains the basic user information: Name, Email Address, Question, Zip Code, Local Library, etc.

18.1.1. Note that the user's question also appears as the first message in the actual chat.

18.2. User History Tab

This tab allows agents to see previous chats with the same username. By clicking on the tab, a list of previous sessions is retrieved. Double-clicking on any one session listed will retrieve the full transcript.

18.3. Participants Tab

This tab shows the participants in the current session.

18.4. Notes Tab

· Section 19. Using and Editing Canned Responses

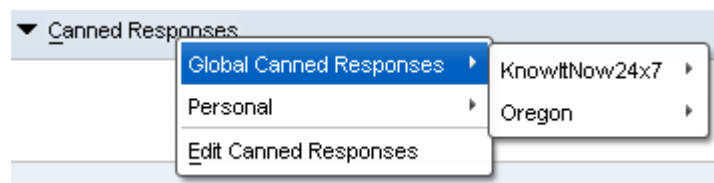
Canned Responses are a quick way of sending pre-scripted messages to the user to facilitate the reference transaction. In Fastpath, there are several ways of editing these. One message can be set as the automatic "Welcome" message.

19.1. Accessing Canned Responses

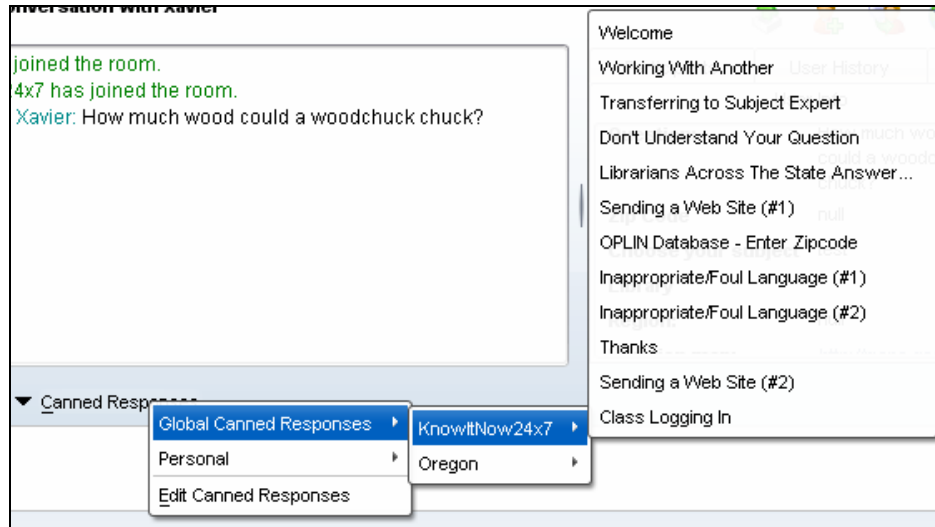
The Canned Responses are accessed using the menu below where the chat transcript is displayed within the Chat Window. Click on **▼ Canned Responses** and three options will appear: "Global Canned Responses," "Personal" and "Edit Canned Responses."

19.2. Global Canned Responses

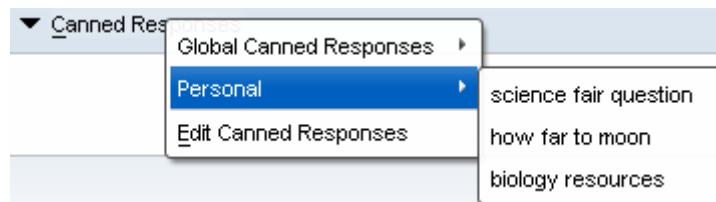
These canned responses are those which will be entered by Administrators and will be available to all agents. Clicking "Global Canned Responses" under "Canned Responses" will display a list of Response Names. These are the short titles assigned to each canned response. Choose the appropriate "name" and the full text of the response will be displayed in the chat window, and can then be sent to the user by simply hitting Enter on the agent's keyboard.



19.2.1. Agents will notice two sets of Global Canned Responses, one from KnowItNow24x7 and one from Oregon. It is recommended (unless you are an AfterDark provider) to stay with the specific global messages for the service for which you monitor (see image at top of next page).



19.3. Personal Canned Responses



These canned responses are those which each individual agent adds to his or her Fastpath client. These should be kept professional. Clicking "Personal" 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 user.

19.3.1. Personal canned messages can be used for a variety of purposes; however, one of the more useful can be to respond quickly to a large number of similar questions. In the example image above, the agent has added Personal Canned messages for topics like "science fair question," "how far to moon," and "biology resources." The actual message for each of these can include a small amount of text and web links. After a science fair season or school topic has run its course, these kinds of canned messages can then be deleted and new messages added to client.

19.4. Editing Canned Responses

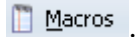
There are two ways of editing canned responses using the SparkRef software.

19.4.1. Editing Canned Responses inside a Fastpath Session

You can edit canned responses inside 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**.

19.4.2. Editing Canned Responses in SparkRef Client


As outlined in **11.3.1. Editing Canned Responses in Macros**, the canned responses can also be edited without being connected to a user directly through the SparkRef client by clicking **Macros**



• *Section 20. Chatting with User*

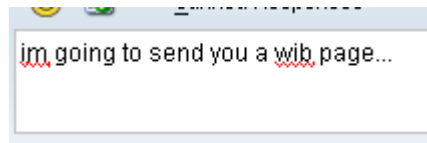
To send a message to the user, the agent types his or her text into the space directly below where the conversation appears. Simply type in your message and hit the "Enter" key on your keyboard.

20.1. 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.


20.1.1. Automatic Spell Checking

If the agent has enabled the **Spell Check in background** option under **Preference** in the **SparkRef** client, (see **Section 8.1.1.1.3.**), a wavy red underline will appear under words that Fastpath sees as incorrect:



This alerts the agent to a possible misspelling (again, similar to what appears in many word processing documents).

• *Section 21. Emoticons*

Emoticons are available on Fastpath, accessed by clicking the smiley face to the left of the Spell Check icon . Use of emoticons is not encouraged, but agents are certainly permitted to use them within the chat environment. Remember that some browsers may also not display the images correctly for the user, leading to unnecessary confusion and the need for the agent to explain what is appearing on the user's screen.

• *Section 22. Typing/Connection Indicators*

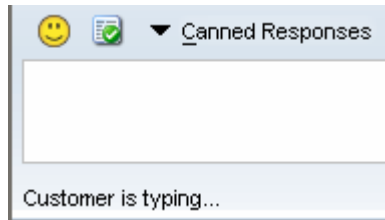
One very useful feature of Fastpath is the two-way indicators of the agent's and user's continued presence within the chat session. This alleviates much of the need for either party to wonder "Are you still online?"

22.1. "User Typing" Indicators

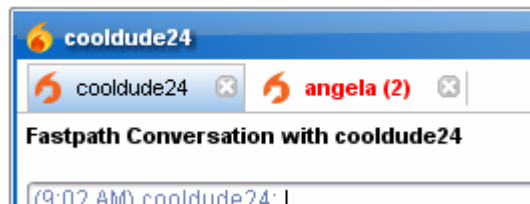
When a user (e.g., **cooldude24**) is first typing in his chat window, the icon on the agent's screen will change from the Fastpath icon to a cartoon balloon with a pencil over it. For example, see **cooldude24**'s tab in the image below:



The agent will also see "Customer is typing..." appear in the bottom left corner of the window.



Next, when another user (e.g., **angela**) sends a message to the agent while that agent is interacting with **cooldude24**, **angela**'s tab text will turn red. If **angela** sends multiple messages before the agent responds, the tab will show how many messages have been sent by **angela** since she was last answered:



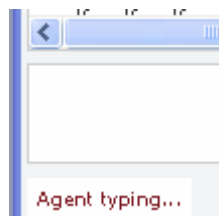
(in this case, two messages have been sent). If the agent switches back to answer **angela**'s questions, the text color will change back to black (**angela**) and **cooldude24**'s tab will change if he sends a message (i.e., **cooldude24**). In this way, the agent is kept apprised of the status of all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

22.1.1. "User Typing" Indicators When Window is Minimized

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

22.2. "Agent Typing" Indicator

When the agent is in the process of typing a message to the user, the user's screen will display "Agent typing..." at the bottom of his or her screen:



In this way, both **cooldude24** and **angela** (to use the examples above) are kept apprised of the agent's status.


22.3. "User Typing" and "Agent Typing" indicators are only displayed, as might be expected, when the user or agent is actually typing. If the agent is searching a web page or other activity, the user will not see any indicator that the agent is doing anything. It is always very important to keep the user updated on the agent's status ("I'm still searching...", "Thank you for waiting. I'm still looking for information...", etc.).

22.4. Use of Toast Popups as a Typing/Connection Indicator

If the **Show a Toast Popup** is enabled in the agent's SparkRef preferences (See **8.1.1.6.1. Show a Toast Popup**), the messages that an inactive patron sends (i.e., the one not currently being viewed and/or worked with by the agent) will display as Toast Popups. This will allow the agent to monitor the inactive patrons messages without physically opening that patron's tab in the Chat window.

• Section 23. Sharing Files


Sharing files with users is simple and similar to attaching a file to an email. To begin, click the



"Send files to this user" icon . This will bring up a window where you can browse the files on your computer. Double-click on the desired file. This will send a link to the user: [The Agent has Shared a File. Click here to download it.](#) Let the user know that they have to click this link to view the file. When the user clicks the link, it will initiate the download. The user can then decide to view the file or to save it at that point.

23.1. Allowable Files to be Shared

A wide range of file types can be shared through Fastpath including MS Word, MS Excel, RTF, PDF, etc.

• Section 24. Conferencing with Other Agents

This option is available if the agent wishes to consult with another librarian on a question within the conversation itself. Click on the **Invite Someone to Join Conversation**  icon. The invitation will go out to all agents chosen in a queue or to a specific agent chosen from the available list. This option keeps ALL participants (user and agents) connected. **REMEMBER:** The customer will see **ALL messages** relayed back and forth between agents if this option is chosen. Keep messages succinct, on-topic, and professional! Everyone's messages will be visible to everyone else participating in the call (and in the subsequent transcript).

24.1. Inviting Someone to Join Conversation works **similar** to a transfer which may confuse some agents. The MAJOR difference is that a choice of Resolution Codes is **NOT** displayed when choosing , i.e., the queues are available directly upon clicking the icon. If a Transfer is needed and  is clicked, the Resolution Codes will be displayed, **Transferred** is chosen, THEN the available queues are displayed. When the next agent picks up a Transfer, the first

agent is automatically disconnected and his or her chat screen “grays out”. In an “Invited Session” everyone stays connected until the last agent Ends the Conversation and assigns a Resolution Code.

24.1.1. If you want to simply TRANSFER a conversation, see **Section 25. Transferring a Conversation**. If you wish to confer outside of a user's conversation, see **Section 24.2.** directly below.


24.2. Conferring outside Conversation

If an agent would like some help with a particular questions, an alternative is to send a SparkRef IM message to an available agent. A listing of available (i.e., online) agents can be seen in your SparkRef "control panel" **Contacts** tab (**Section 13.1**). This will be a separate interaction from the user conversation and will leave that conversation intact while you chat with the other librarian. Be *efficient* and *professional* in these interactions with other agents as to return to your user as quickly as possible.

24.2.1. Initiating A SparkRef IM Session With A Contact

Simply bring up the list of contacts using either the **Contacts** tab or **Fastpath** tab and double-click on the desired name. If the agent mouses-over the names, the identifiers for each will be displayed. This will help the agent in determining who to contact.

24.2.1.1. Alternative to Sending an Initial Message to the Contact Through IM

An alternative to typing in a message after double-clicking is to simply click on the Bell icon  in the chat window. This will display the message BUZZ in your contact's chat window. She or he can then ask what assistance is needed.


24.2.2. Possible uses of this procedure include, but are not limited to: checking with another library about a particular title's presence on the shelf, a policy or procedure NOT found on the library's web site, or particulars about a specific program or speaker, etc. By copying and pasting the agent's reply into your conversation with the user, these kinds of questions can be handled. Alternatively, the other agent may encourage you to provide contact information for a specific librarian at the remote location to give to the user.

24.2.3. If this procedure is used, be sure to keep your user updated on what you are doing. This will keep them online and alleviate any anxiety he or she might have in getting their question resolved.

24.2.4. Another option for requesting help on a question from colleagues is to use the Conference (see **Section 8.3.1.**) or Broadcast (see **Section 8.3.2.**) options.

· Section 25. Transferring a Conversation

Sometimes it becomes necessary to transfer a user to a different agent. This is initiated in

Fastpath by first clicking the "Transfer this conversation to another agent" icon . When the icon is first clicked, a Session Survey is opened. Choose "Transferred" as a Resolution Code when transferring. You can then choose the correct queue to which to transfer the call, and you

can also add a message to the agent. This message can be used to alert the new agent as to the nature of the question being asked or other pertinent information. The text input is displayed when the conversation is transferred as the first thing the new agent will see before even accepting the call.

• **Section 26. Co-Browsing**

Agents should **NOT** use the SparkRef Co-Browser. Agents are encouraged to use their own web browser (IE, Firefox, etc.), utilize their own bookmarks, and copy-and-paste URLs directly into the chat window to share with users.

26.1. Copying and Pasting URL's

Using the agent's regular browser window, URL's can be copied and pasted directly into the chat conversation. These will show up as live links in both the agent's and user's conversations. The user can then choose to click on the link to open it. If she does, then the resource can be bookmarked, browsed, etc., by the patron herself.


• **Section 27. Ending Conversations**

There are two ways that a conversation can end in Fastpath: either the user initiates it or the agent does.

27.1. User Ends a Conversation

The user always reserves the right to end a conversation when she feels that her question has been adequately answered by the agent. When this happens, the agent will get a message in their conversation that "[Username] has left the room." This will alert the agent that no messages sent will be received by the user in real time; however, see **Section 27.2.** for how to add more information to an "user-ended" conversation.

27.1.1. Notification to Agent of Customer's Ending of a Conversation

If the customer clicks the  button on his or her screen, the agent will receive an instant notification that the customer has "left the room". If the customer instead simply closes their browser window or tab in which the conversation is taking place, there will be a slight delay. The software checks for the presence of the patron periodically and, if there is no customer, the chat message "[blank] has left the room" will display. This usually takes **one minute**, so an agent must give **at least one full minute** before logging out if there has been no activity from the customer. Use of this feature along with the typing/connection indicators (see **Section 22**) should give both the agent and the customer a good indication of each other's activity and continued presence within the conversation.


27.2. Continuing After a Customer Disconnects

Fastpath allows the agent to add to a conversation even after the user has disconnected. This allows any extra resources or other helpful comments to be added to the transcript to answer the user's question. This must be done BEFORE the agent ends the conversation (as outlined directly below in **Section 27.3**).

27.2.1. Tips on Continuing After a Customer Disconnects

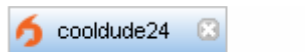
The fact that an agent can add to or continue with a conversation does **NOT** mean that he or she must add to a conversation after the customer disconnects. This feature should be seen as a helpful tool if the patron gets disconnected or as an alternative to an offline follow-up if something is found immediately after the customer leaves the room. (This latter one would assume that the patron has entered their email when logging in. Otherwise, an offline follow-up would be necessary. Remember to use your KnowItNow24x7 email account instead of your local or personal account.)

27.3. Agent Ends a Conversation

First, click the "End Conversation" icon . This will bring up a choice of Resolution Codes (see **Section III.G.** of *KnowItNow24x7 Provider Handbook* for uses of Resolution Codes). After choosing the most appropriate one, the session will end, and the window will close.



27.3.1. Closing Tabs in Fastpath

If the agent clicks on the **x** in the right section of the tab...



or on the **x** in the upper right corner of the chat window...



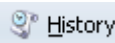
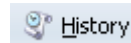
...this will also close a conversation with the user. With the 2009 development, these **x**'s work in the same manner as the "End Conversation" icon . When clicking the **x**'s, agents will be prompted as to whether or not they want to leave the session. It is recommended to click **No** and to use the "End Conversation" icon .

27.3.2. Importance of Using Resolution Codes

The sessions with Resolution Codes assigned are the official sessions used to compile usage statistics for KnowItNow24x7. It is very important to assign Resolution Codes so that each and every session that an agent handles is part of the official statistics. (See **Section 3.G.** of the *KnowItNow24x7 Provider Handbook* for more on Resolution Codes)

27.4. Note that with the 2009 development, users can stay connected after the agent ends the conversation. The user cannot send any further messages; however, they will have access to their conversation (along with URLs sent) as long as they feel is necessary.

• *Section 28. Accessing Transcripts*

Transcripts of conversations are directly accessible through the  History tab in the middle of the SparkRef Client (see **Section 11.1**). The default number of transcripts is *fifty* (see **Section 8.1.1.1.8.** on changing this default to a smaller recommended level). Simply click on 

and then double-click on the desired transcript to display it in full. These can be printed or saved directly from this window.

28.1. Requesting Older Transcripts

Transcripts falling outside the agents History tab default are always accessible by contacting administrators.

28.2. Transcript Formatting

The conversation is displayed in full (including live web links within the context of the conversation) on the transcript. With the 2009 development, the patron's question will also display at the beginning of the transcript itself in addition to the metadata fields.

28.3. Online Access of Transcripts

KnowItNow24x7 transcripts from Sept. 2, 2008, to present are available online at the KnowItNow24x7 Provider site at <http://provider.knowitnow.org/node/339>. A Provider site account is needed, but KnowItNow24x7 agents can sign up for one simply by clicking *Create New Account* under *User Login*.

Part V

Working with Customers: Part Two

Monitoring Commercial Instant Messaging (IM) Services via SparkRef for Virtual Reference

· *Section 29. Using Instant Messaging (IM) for Virtual Reference*

29.0. What Does IM Offer?

Beginning in 2009, select KnowItNow24x7 libraries began to provide reference service through commercial IM services via the SparkRef client. Some of the benefits of providing reference service by IM in general and via KIN24x7 SparkRef specifically are the ability for:

- providing live online reference service to the visually-impaired community.
- serving local library patrons through an alternative contact method.
- contacting other KIN24x7 agents seamlessly through SparkRef's own IM feature.

It should be emphasized that the commercial IM gateways are separate from the built-in SparkRef IM component. Agents can still IM colleagues in their **Contacts** list independent of any commercial IM service.

29.1. Commercial IM Plugins Supported

KnowItNow24x7 libraries will be supporting the three main players in the IM service field. Their icons can be seen directly below the status indicator (**See Section 10**):



The three icons, from left to right, represent **MSN** (Microsoft Network Messenger), **AIM** (America Online (AOL) Instant Messenger), **Yahoo** (Yahoo! Instant Messenger). Each of the designations will appear if each icon is moused-over. In the example above, the icons are to the right of the line, with AIM in yellow.

29.1.1. Additional IM gateways may be added in the future, but these three are the current ones available.

29.2. Signing-up for IM Accounts

Libraries monitoring IM traffic through a commercial service need to have an account with that specific service. Libraries can have multiple accounts with any one service (although each SparkRef client can only be logged into one at a time) as well as sign-up for one, two, or all three of the available IM gateways. Libraries have two options for obtaining IM account(s).

29.2.1. Libraries may sign-up on their own for an account with MSN, AIM, and Yahoo, or any combination of those.

29.2.2. Libraries may request administrators to sign them up and notify them of their account information. Libraries should provide preferred usernames, passwords, and emails in this case.

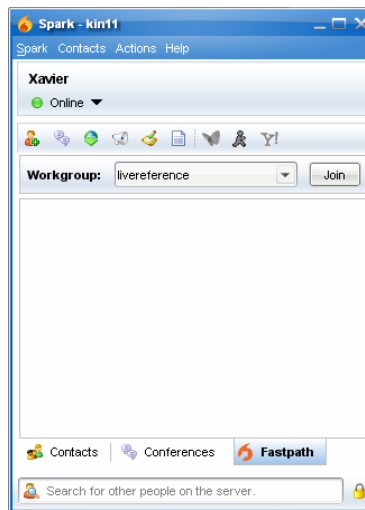
29.2.3. In either case (**29.2.1.** or **29.2.2.**), libraries monitoring commercial IM through SparkRef should notify **support@KnowItNow.org** with their screen names.

29.2.4. Even if libraries are only monitoring IM and not Fastpath, these libraries will also need logins for the SparkRef client itself. These accounts are created by administrators. Libraries are encouraged to provide preferred SparkRef usernames and passwords.

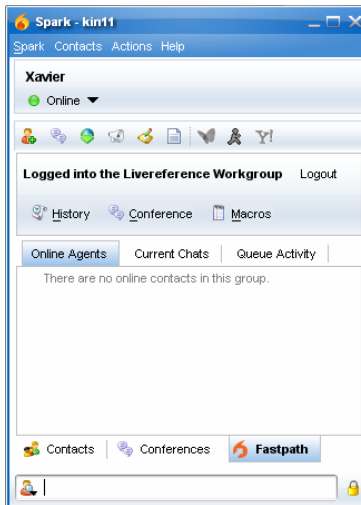
29.2.5. KnowItNow24x7 libraries monitoring commercial IM services via SparkRef can be seen at <http://www.knowitnow.org/im.php>

29.3. Fastpath and Commercial IM Gateways

As can be seen from the image below, the commercial IM icons are above the area visible when the Fastpath tab is logged on:



Here the "Join" button is visible, showing that Fastpath is not currently active. This demonstrates that commercial IM traffic can be monitored outside of a library's designated KnowItNow24x7 Fastpath/Webchat shift. When the "Join" button is clicked to initiate a Fastpath session, the screen changes to the following:

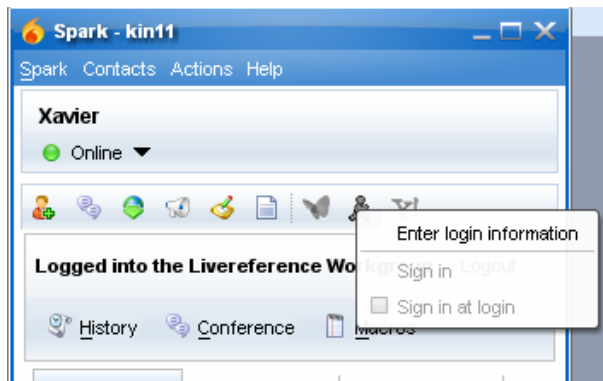


Also notice that the IM icons are "greyed out" to indicate that they have not been logged into.

29.3.1. If you are only a KIN24x7 IM library, you will not see the Fastpath tab at the bottom of your SparkRef client. See **Sections 2.8** and **6** above for information on Fastpath.

29.4. Logging into IM Account on SparkRef

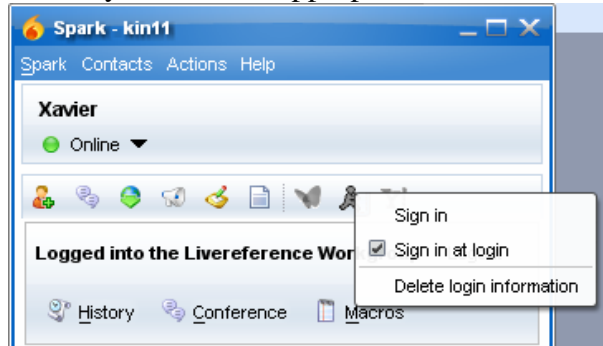
29.4.1. Click on the IM icon for the service you wish to log into. The first time you login, the screen will look like this.



29.4.2. Click on **Enter login information**. This screen will display:

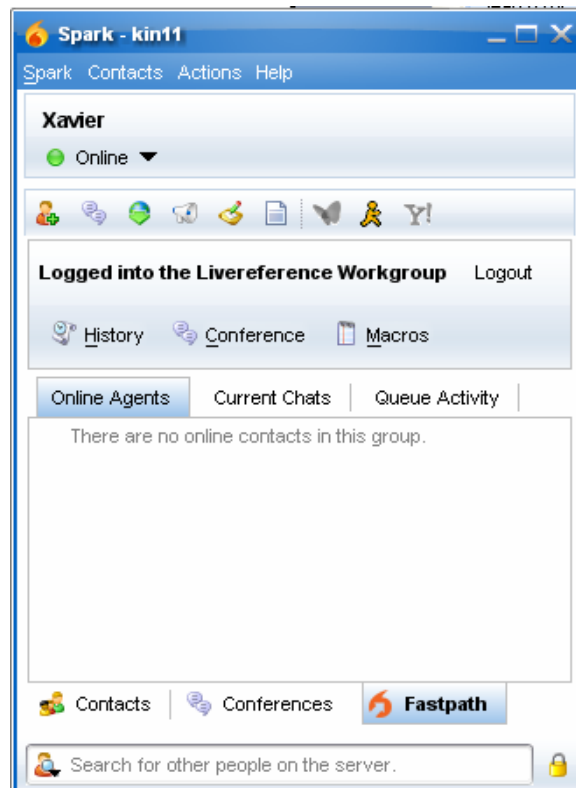
Enter your **Username** and **Password** for (in the case displayed above) AIM and click "Save."

29.4.3. On subsequent logins (now that your User information has been saved), the screen will look like the image below when you click the appropriate icon.

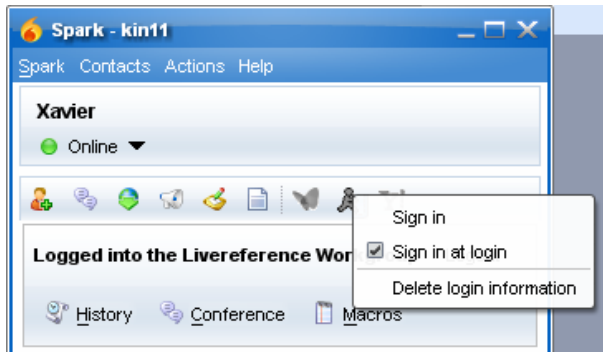


In other words, the box marked **Sign in at login** will automatically be checked since your information is saved.

29.4.4. Once you are logged into the account(s) of your choice, the icon on the SparkRef client will take on its characteristic color (i.e., it will no longer be "greyed-out"). Note the *yellow* AIM logo below:



29.4.5. If another agent wants to login to the same SparkRef client previously logged into by another IM librarian with a different IM account, the second person can delete the previous agent's login by clicking **Delete login information**:

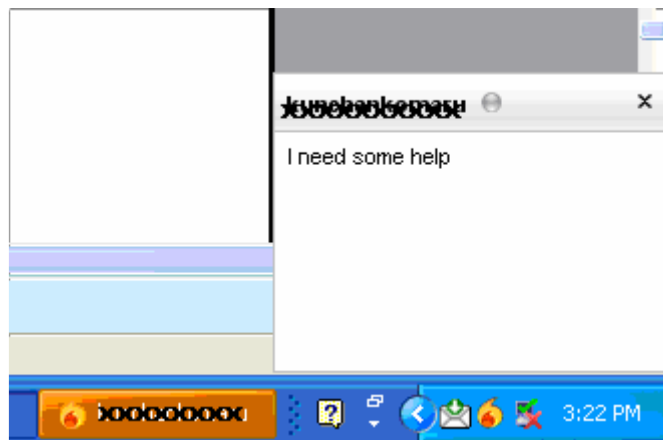


The screen will then default to the one seen in **Section 29.4.1.** and **.2.**

29.5. Accepting Incoming IMs

As opposed to the option to **Accept** or **Reject** incoming Fastpath web chat invitations from patrons (**Section 16.1**), agents will simply receive IMs from patrons (similar to IMs through SparkRef from colleagues).

29.5.1. If the agent has Toast Popups enabled, he or she will see both the pop-up window in the lower right of the display screen as well as a flashing tab on their taskbar:



Flashing Tab on Taskbar (above)

Toast Pop-up (above taskbar)

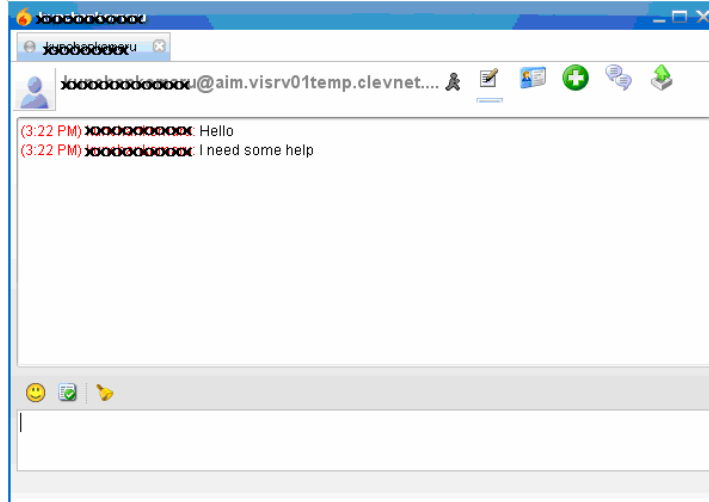
29.5.2. To open an incoming session, simply click on the flashing tab.

29.5.3. NOTE: *To protect the privacy of the "test subject" for the images in this section, their screen name has been xxx'd out in the image above and those in subsequent sections.*

29.5.4. If the agent is already chatting with a patron, incoming IMs will open a separate tab in the same chat window.

29.6. IM Chat Window

After opening the chat, the agent will see something like this:



29.6.1. Note that some elements are similar to the **Fastpath Chat Window** (See **Section 17**). In fact, both Fastpath and IM chats will appear in the same window under separate tabs. You will be able to tell the difference between an IM chat tab and a Fastpath chat tab since the distinctive Fastpath "flame and arrow" icon will display on the tab for the Fastpath chats (See **Jennifer's** tab below:



29.6.2. Grey vs. Green Dot

Note that the dot next to the IM patron name is grey. This does not mean that the user is unavailable. AOL, for example, has a feature to make oneself "invisible." If the user has set this option on their settings on their computer, they will appear as a grey dot. If the user has simply set himself or herself as "Available" on the computer being used, they will appear to the agent as a green dot. Neither the grey nor green dots will interfere with the supplying of reference service to the patron.

29.6.3. Implications of Resizing Agent's Chat Winow

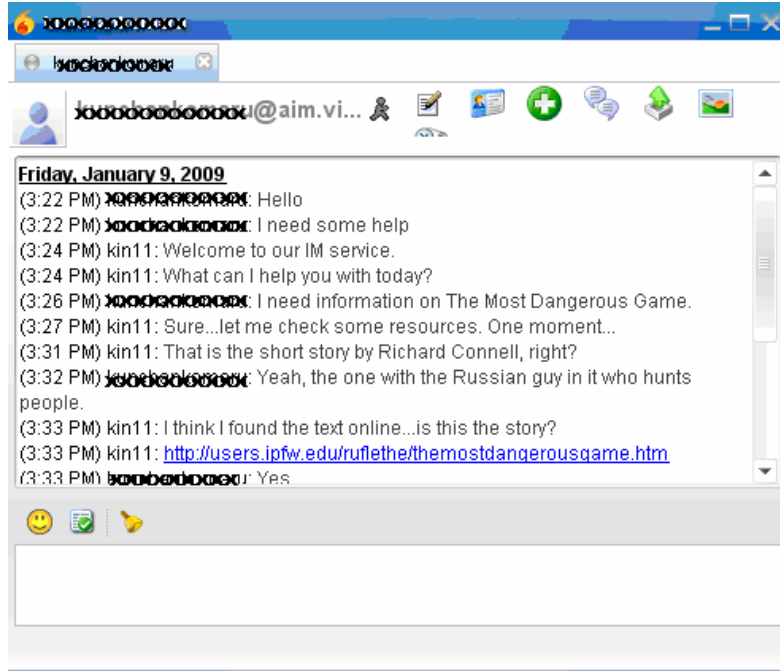
Notice that the window image above in **Section 29.6.** shows five (5) icons to the right of the AOL "walking man" icon...



...with one icon partially showing in the second row. If the window itself is resized, the icons will display in one row. In other words, the icons "wrap" similar to text in a document when the line is not long enough for them to be displayed on one.


29.6.4. Chatting with Patron

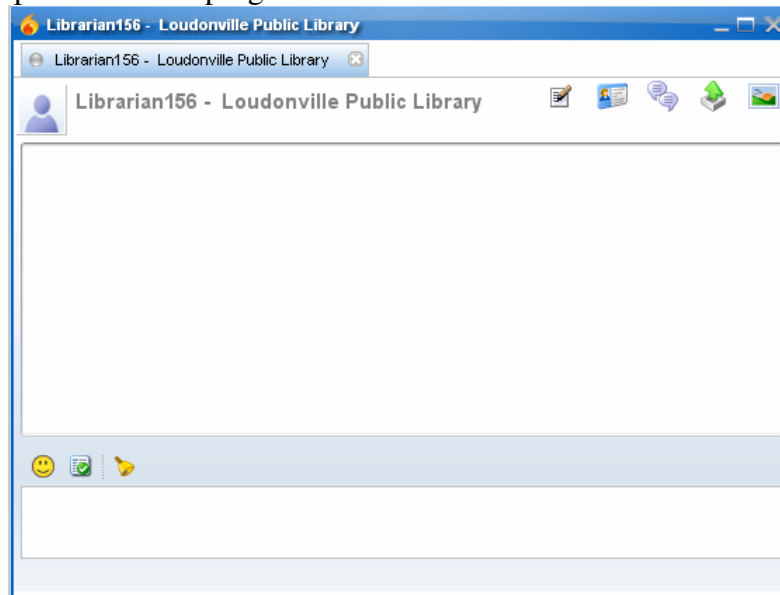
As a chat progresses within IM, it will look very similar to other chat reference sessions...



29.6.5. SparkRef IM versus AIM/Yahoo!/MSN

Agents will notice that similar windows/tabs display when either a SparkRef IM from a KIN24x7 colleague is received or one from a patron through a commercial IM service. The only

difference is that SparkRef IM's lack one icon:  " Add this user to your Buddy List." Here is a window with a SparkRef IM in progress:



Notice the lack of the "Buddy List" icon. Otherwise, the windows act the same way. This will be useful from a "learning curve" aspect: If agents are familiar with using the SparkRef IM, they will be able to serve patrons via the commercial IM gateways.

29.6.6. No Canned Responses in IM

Agents will also notice there are no Canned Responses in either the SparkRef IM or the commercial IM windows. Agents may use their own saved document of canned messages or make use of the *KIN24x7 Pre-Scripted Messages for Email Replies* at provider.knowitnow.org/?q=/node/302.

29.7. Icons in IM Chat Window

From left to right, there are seven icons potentially displayed in the SparkRef IM Chat Window.

29.7.1. Add a Resolution Code for this user



Clicking on this icon brings up the Resolution Code screen for the current IM chat. Agents should **NOT** use Resolution Codes in IM and do not need to use this icon.

29.7.2. View information about this user



Clicking on this icon will display information about the patron if they have a profile. It does NOT display metadata like the Fastpath **User Info** tab (See **Section 18.1**)

29.7.3. Add this user to your Buddy List



Clicking this icon will add the current user to the agents IM *Buddy List* (not necessarily recommended for patron conversations but an option).

29.7.4. Invite to conference (SPARKREF IM ONLY)



This option will not work with the commercial IM gateways.

29.7.5. Send files to this user (SPARKREF IM ONLY)



This option will not work with the commercial IM gateways. If agents need to send a file to a patron who has contacted them via MSN, AIM, or Yahoo!, they should ask for an email address and use the **Resolution Code** of *Follow-up* for the IM chat.

29.7.5.1. In SparkRef IM chat, this function works the same as it does in the Fastpath chat (**Section 23**).

29.7.6. Capture and send anything you see on your screen (SPARKREF IM ONLY)



This option will not work with the commercial IM gateways. After clicking this icon, the agent can select and capture any image currently on their computer.

29.7.7. View conversation history



This function is somewhat superfluous in that previous IMs with the same user are displayed automatically within the chat window. See **Section 29.9.** for more information on this.

29.7.8. Icons Along the Bottom of the Chat Window



29.7.8.1. Emoticons

Emoticons work the same in IM chat as in Fastpath Chat (**Section 21**).

29.7.8.2. Spell Check

Emoticons work the same in IM chat as in Fastpath Chat (**Section 20.1**).

29.7.8.3. Bell (SPARKREF IM ONLY)



This option will not work with the commercial IM gateways. Clicking the Bell will send an alert to the other agent in SparkRef IM to ring or "rattle" his or her chat window. This can be used to get the other agent's attention.

29.7.8.4. NO Canned Messages in IM

Agents will also notice there are no Canned Responses in either the SparkRef IM or the commercial IM windows. Agents may use their own saved document of canned messages or make use of the *KIN24x7 Pre-Scripted Messages for Email Replies* at provider.knowitnow.org/?q=/node/302.

29.8. Chatting with User

Chatting with users within the IM window tab is very similar to chatting with them in the Fastpath tab or any other chat environment. Messages are typed in the lower portion of the window and sent via the **Enter** key on the agent's keyboard. URL's should be copied and pasted into the chat the same as for Fastpath patrons (**26.1**). A web link pasted into that portion of the chat window will display as a live link for the patron:

(3:33 PM) kin11: <http://users.ipfw.edu/ruflethe/themostdangerousgame.htm>

29.8.1. As mentioned above (**Section 29.6.8**), agents have access to spell check and emoticons in IM chat.

29.8.2. Similar to Fastpath chat, the agent has the typing/presence indicators in the IM chat environment. See **Section 22**.

29.9. Ending a Conversation

When a conversation is completed, the agent can simply close the IM chat window.

29.10. Adding Contacts

Just as agents can add Contacts to their SparkRef Contacts list, one can also add contacts to your specific IM account's "Buddy List" when logged into those services on SparkRef. If you click on



, the following window will appear:

The image shows a dialog box titled "Add Contact" with a close button (X) in the top right corner. The dialog has a title bar and a main content area. The main content area is titled "Add Contact" and contains the instruction "Add a user to your contact list". Below this, there are several input fields: "Username:" with an empty text box, "Nickname:" with an empty text box, "Group:" with a dropdown menu showing "Friends" and a "New" button to its right, and "Network:" with a dropdown menu showing a person icon and "AIM". There is also a checkbox labeled "User is on a public network" which is currently unchecked. At the bottom of the dialog, there are two buttons: "Add" and "Cancel".

The agent can then add the appropriate information and choose which network the contact should be added to. These contacts will show up when the person logs into their IM icons. Otherwise, they will be unavailable.

Appendix Contact Information

KnowItNow24x7

See Section VII. Technical Support of the KnowItNow24x7 Provider Handbook for guidelines on how and when to contact KIN24x7 Technical Support.

KnowItNow24x7 Technical Support (Web Services Coordinator)

By phone: Monday - Friday 7:30 am - 3:30 pm 216-623-2987
Otherwise 216-973-2972 (cell)

NOTE: Leave a voice mail message for the Web Services Coordinator if you are not connected live. If you do not receive a call-back within the hour, call the Statewide Coordinator (below).

By email: support@knowitnow.org

KnowItNow24x7 Statewide Coordinator (training, scheduling, marketing, etc.)

By phone: Monday - Friday 8:30 am - 4:30 pm 216-623-2960
Otherwise 216-903-9023 (cell)

By email: support@knowitnow.org

KnowItNow24x7 is provided as an online resource free-of-charge to all Ohioans through a federal Library Services and Technology Act (LSTA) grant awarded by the State Library of Ohio.

