

KnowItNow24x7 SparkRef Cheat Sheet

This document will provide you with the basic operations of the SparkRef client used to provide virtual reference services on KnowItNow24x7. For detailed information, please see the *SparkRef Virtual Reference Software Training & Reference Manual* available at <http://provider.knowitnow.org/node/5>. Relevant sections of the *Manual* are referenced below.

I. Logging On

(Sections 4. and 5. of *Manual*)

- A. Click on the SparkRef icon on your desktop
- B. Fill in **username**, **password**, and **server** (chat.knowitnow.org)
- C. Click **Login**



II. Changing Your Screen Name

(Section 8.1.2. of *Manual*)

- A. Click on **SparkRef > Edit My Profile**
- B. Type in new display name under **Nickname**
- C. Click **Save**
- D. NOTE: This does *NOT* change the login username, only the name that displays in chats.




III. Changing Your Password

(Section 8.1.1.1.1. of *Manual*)

- A. Click on **SparkRef > Preferences > Chat**
- B. Type new password in **Change Password To:** and **Confirm Password:** fields.
- C. Click **Close**.

IV. Being Ready to Take Patron Questions

(Sections 6., 9., and 15. of *Manual*)

- A. Verify Fastpath tab is showing  **Contacts** |  **Conferences** |  **Fastpath** at bottom of client.
- B. Verify that you have joined your workgroup in the Fastpath tab.
- C. Verify that your status is *Online*.


V. Minimizing SparkRef Client

(Sections 8.1.6. of *Manual*)

- A. Clicking **X** in upper right corner of client will minimize it and place it in your startup tray.
- B. Maximize client by clicking SparkRef flame icon in your startup tray.

VI. Accepting Incoming Questions from Patrons


(Section 16 of *Manual*)

- A. Click  **Accept** in pop-up window of incoming chats from patrons.
- B. This will open up the chat window to interact with the patron.

VII. Sharing Resources with Patrons

(Sections 23. and 26.1. of *Manual*)

- A. To share online resources:
 1. Use your own browser (IE, Firefox, etc.) to search databases, web sites, etc.
 2. Copy-and-paste URLs directly into chat.

B. Clicking the  icon in the chat window allows you to send files on your computer (e.g., Word documents, PDFs, etc.) to the patrons. Browse your computer and proceed as if you were attaching a file to an email.

VIII. Using and Editing Canned Responses

(Section 19 of *Manual*)

A. Canned responses are accessed in the chat session by clicking **Canned Responses** >:

1. > **Global Canned Responses** > **KnowItNow24x7** > (everyone has access to these)

2. > **Personal** (only your specific account has access to these)

a. *TIP for Using Personal Canned Responses:* If you have a commonly asked question about a specific topic, consider creating a canned response of actual URLs to send to patrons. For example, a common class project is holiday customs and traditions. Put a list of resources in a canned response. After the holiday, delete that and/or store it in a text document for next year.

B. Edit Personal Canned Responses by clicking the **Fastpath** tab > **Macros** (in the middle right of the client)

IX. Asking for Assistance (procedural questions, reference stumpers, etc.)

(Sections 8.3.1, 8.3.2, and 10.4. of *Manual*)

A. IM individual librarians directly from SparkRef client by double-clicking their username.

B. Conference with other librarians within SparkRef.

B. Send Broadcast message to multiple librarians.

X. Transferring

(Sections 24. and 25. of *Manual*)

A. Click on  icon in the chat window.

B. Choose *Transfer* as the resolution code.

C. Choose correct queue to send to.

1. If queues are not displayed, click *Queues* and + to expand list.

B. Stay connected with patron until your screen "grays out" then click **X** on patron's tab in chat.

XI. Ending a Chat

(Section 27. of *Manual*)

A. Click on  icon.

B. Assign the proper resolution code.

XII. Accessing Transcripts

(Section 28. of *Manual*)

A. Click the **Fastpath** tab > **History** (in the middle left of the SparkRef client)

B. Alternative: Go to KIN24x7 Provider Site under **Transcripts**

1. Transcripts are available the following day using this method.

XIII. Exiting or Logging Off SparkRef

(Sections 8.1.4. and 8.1.6. of *Manual*)

A. Click on **SparkRef** in upper left corner of client

B. Click on **Log out** or **Exit**