



## Logging In

- Go to info.askalibrarian.org & click Librarian Toolbox (pw: toolbox).
- Click 'Login as a Librarian'
- Enter 6212, username, & password

Account ID:

User Name:

Password:

- Select Department(s) you will be covering
- Click 'Agent Console' in top right corner
- Set availability in bottom right corner

## To Begin a Chat

To preview patron's details, right-click on patron bar.  
To take patron, double-click or click once to highlight & then 'Take selected.'

## To End a Chat

- Click "End" to end chat for you & patron, or 'Dismiss' to end chat for patron & add notes (email address, etc.).
- Choose closing status category

**Response Library**  
Scripts; URL bookmarks

**Queue/KnowledgeBase**  
Chat/Email patrons; KnowledgeBase

The screenshot shows the InstantService agent console interface. It is divided into several sections:

- Top Left:** A 'Text Library' pane with a 'Select' button. An arrow points from the 'Response Library' label to this area.
- Top Right:** A 'Queue/KnowledgeBase' pane showing a table of chat queue items. An arrow points from the 'Queue/KnowledgeBase' label to this area.
- Bottom Left:** An 'Agent Room' chat window. An arrow points from the 'Transcript Area/Agent Room' label to this area.
- Bottom Right:** An 'Agents' list showing staff availability. An arrow points from the 'Patron Details/Agent List' label to this area.

Name	Time In Queue /	Department
TampaJoe1220	01 min 21 sec	Training Room

  

Agents (3) /	Availability (2)
Traci A (Ask a Librarian)	available
Riva W (Hodges University)	available
Jeanine B (Hodges University)	unavailable (Unavailable)

**Transcript Area/Agent Room**  
Chat/Email sessions; staff group chat

**Patron Details/Agent List**  
Patron information; current staff list

## KnowledgeBase

## Send Scripted Replies

- Click 'KnowledgeBase' tab in upper right corner & then 'KnowledgeBase' sub-tab
- Select library system from list & click 'Go'
- To return to library list, click 'Back' or on back arrow

- Under 'Text' tab (upper left corner), choose a script from one of the category folders. (e.g., Greetings).
- Double-click to send script into text box

The screenshot shows the Agent Console interface for Tampa Bay Library Consortium. It is divided into several sections:

- Scripts/URLs:** A tree view on the left containing folders like 'A Greeting', 'A OCLS', 'Circ Questions', etc., and sub-items like 'General Greeting', 'GoodBye - Completed', etc.
- Queue/KnowledgeBase:** A panel on the top right with tabs for 'Chat Queue', 'Mail Queue', 'Mail Follow-Up', 'Mail Sent', and 'Knowledge Base'. Below these is a table with columns for 'Name', 'Time In Queue', and 'Department'.
- Chat transcript area:** A large text area at the bottom left showing a chat history with timestamps and messages.
- Patron Details/ScreenSharing:** A panel on the bottom right titled 'Customer Details' and 'ScreenSharing' containing fields for 'First Name', 'Last Name', 'E-mail', 'Phone', 'Customer ID', 'Incident Number', 'Department', 'Category', 'Time in Session', 'IP Address', 'Optional Data', and 'Question'.

Arrows point from the labels below to their respective sections in the screenshot.

## Pushing Web Pages

## ScreenSharing

- Type URL into box above chat transcript area, or double-click a page from the 'URLs' tab
- Click **'View'** to preview page or **'Push'** to send to patron
- If pop-up blockers or other settings prevent it from opening, tell patron to click on hyperlink in transcript

- Under 'Text' tab (upper left corner), send scripts from ScreenSharing folder. Script #1 asks patrons if they'd like to try it; script #2 tells them to click 'Share My Screen' & 'Run'
- Click 'ScreenShare' tab
- Change cobrowse state (in gold bar) to 'keyboard/mouse/pointer'