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The University of Manitoba Libraries began using LibraryHelp software for virtual reference service in February 2010. LibraryH3lp was originally developed for a collaborative chat and instant messaging (IM) service at Duke University, North Carolina State University and University of North Carolina Chapel Hill. It now serves over 600 libraries and non-profit organizations.

This manual will walk you through the online LibraryH3lp webchat interface (https://libraryh3lp.com/webchat/) explaining some of the features available to you as an operator. The advantage of using the online login allows for the ability to monitor virtual reference easily from any computer with a web browser and internet connection without having to download additional software.
2.0 Accounts

2.1 Creating an Account

New staff members assigned to monitor the UML virtual reference service will need to have an account set up for them in LibraryH3lp. Please contact the VR manager to set this up for you.

2.2 Removing an Account

If you have a staff member who will no longer be providing virtual reference service or is on leave, please alert the VR manager so the operator list can be kept up to date.

2.3 Problems with Accounts

If you ever have a problem with your libraryh3lp account or have forgotten your password, please contact the VR manager.
3.0 LibraryH3lp

3.1 Web Login

The UML’s virtual reference service can be monitored from any computer with an internet connection by going to LibraryH3lp’s webchat login page (Fig. 3.1.1). To find the login page, either conduct an internet search for “LibraryH3lp login” or go to https://libraryh3lp.com/webchat/.

Fig. 3.1.1 LibraryH3lp login screen.
3.0 LibraryH3lp

3.2 LibraryH3lp Chat Interface

The LibraryH3lp “Chat” interface (Fig. 3.2.1) will allow you to receive chats, answer chats, and view online and offline buddies.

3.3 Queues

When monitoring the UML virtual reference service you will need to have the “ask-a-librarian-general” queue selected. Every time you log into libraryh3lp you will by default be asked to select a queue; however, you should not have to change this setting - just click “OK” in the pop-up window (Fig. 3.3.1).

Fig. 3.2.1 LibraryH3lp chat interface

Fig. 3.3.1 Select Queues
3.0 LibraryH3lp

3.4 Chat Status

When you login to your libraryh3lp account you will see your current chat status in the upper left-hand corner. If you click on the arrow beside your status the chat status menu (Fig. 3.4.1) will appear and allow you to control whether you are online or offline while logged into LibraryH3lp. The “Available” or “Free for Chat” status is required to receive a new chat from the queue. The “Busy” status allows an operator to continue with an active chat but not receive new chats. While the “Away” status will re-route active chats to another operator with “Available” status.

![Chat Status Menu](image1)

**Fig. 3.4.1 LibraryH3lp chat status menu.**

**NOTE** Sometimes at busy times it can be tempting to switch to a busy status. However, it is recommended to keep your status as available while working your scheduled shift. This will ensure we have accurate statistics and are better equipped to determine the correct staffing levels required for the service.

3.5 Actions Tab

The “Actions” tab on the upper right-hand corner of the screen (Fig. 3.5.1) allows you to select your queue, change your password, or logout of the system.

![Actions Menu](image2)

**Fig. 3.5.1 LibraryH3lp Actions menu.**
3.6 Buddies

The “Contacts” menu (Fig. 3.6.1) allows you to see all online and offline operators. When an operator comes online you will see their username appear in the “Buddies” folder and a status indicator. To chat with another operator double click on their name under “Buddies” and a chat window will pop up (Fig. 3.6.2).

![Fig. 3.6.1 LibraryH3lp Contacts menu.](image)

![Fig. 3.6.2 Buddy chat window.](image)
3.7 Activity

To view transcripts and see virtual reference statistics move to the “Activity” page by clicking on “Activity” in the lower left corner of the libraryh3lp interface (Fig 3.7.1). By default, the current day's transcripts will be listed (Fig. 3.7.2).

![Fig. 3.7.1 Lower left corner of the libraryh3lp interface.](image)

![Fig. 3.7.2 LibraryH3lp Activity page.](image)
3.8 Transcripts

You can view all virtual reference transcripts from the activity page change the date by using the date controller in the upper right-hand corner of the screen (Fig. 3.8.1). Choose a date by clicking on the calendar beside the “Show Date” box and a list of chats for that particular day will appear in the window. To view monthly and yearly statistics click the drop down box on the left hand side of “Show Date” labeled “Daily” and choose either monthly, or yearly, from the list (Fig. 3.8.1).

![Activity page date controller.](image)

To view a transcript click on a chat listed in the upper half of the screen (Fig. 3.8.2). The full transcript will then be displayed in the section labeled “Select a conversation above” (Fig. 3.8.2).

![Activity page with transcript display.](image)
3.0 LibraryH3lp

3.9 Patron Chat Interface

We have two different widgets found on the libraries’ webpages. One is simply a link (Fig. 3.9.1) that causes the Patron Chat interface (Fig. 3.9.2) to pop-up. The other widget is the Patron Chat Interface (Fig. 3.9.2) embedded right into the webpage.

The advantage to the “askalibrarian” link (Fig. 3.9.1) is the patron chat interface opens in its own window and the user does not loose their chat session if they click on a link provided by an operator.

When a patron uses the embedded chat interface they can become disconnected from their chat session if they click on a link provided by an operator. The solution to this is to have the patron click on the green arrow (Fig. 3.9.3) to have the patron chat interface pop out from the webpage.

The patron chat interface also gives the option to have a transcript of the chat session emailed by clicking on the envelope (Fig. 3.9.4).
3.10 Receiving Chats

To receive a chat, make sure you are on the libraryh3lp “Chat” page (Fig. 3.10.1). Your status should be “Available”, and if you go to the libraries homepage (http://umanitoba.ca/libraries/) the chat widget should now say “Online”.

When a patron enters a question into the widget on a library webpage and hits enter you will receive a pop-up window with their question (Fig. 3.11.2). To respond, type into the lower portion of the box and hit enter. Note: the box indicates the patron’s IP address and a link to the page they were referred from.

Tip:
You can click on the referring link to get to the webpage where the user accessed the virtual reference widget. This can be helpful when a patron asks a questions about accessing an article. Instead of having to ask for the citation often you can click on the referring link to get to the SFX page with the complete citation information.
3.11 Chat Options

Along the top of the pop-up chat window are the options “Email Transcript”, “Tag for Follow-up”, “Transfer Chat”, “Send File” and “Block” (Fig. 3.11.1).

3.11.1 Email Transcript

This link gives you the ability to send a chat transcript by email (Fig. 3.11.1). If a lot of information is included in a chat transaction the patron (or operator) may like a copy of the transcript. Clicking on Email Transcript will prompt you to enter an email address (Fig. 3.12.1.1).
3.0 LibraryH3lp

3.11.2 Tag for Followup
Tag for Followup sends an email transcript, and optional note, for a specific chat to email addresses provided in the admin interface, facilitating follow-up on questions that can't be answered during the chat session (http://libraryh3lp.blogspot.com/ Wed. Jan 23, 2013).

3.11.3 Transfer Chat
Any chat can be transferred to another online operator. This may be necessary due to a shift change, because of an overload of questions, or to send the question to a subject specialist.

NOTE:
When you transfer a chat the patron sees a message indicating their chat is being transferred. To avoid confusion the best practice is to first inform patrons of your intention to transfer.

3.11.4 Send File
Due to copyright issues we do not use this option. You may send a patron the SFX Permalink if their link does not work.

3.11.5 Block
If at any point you feel uncomfortable with a chat due to inappropriate comments or questions, you may block that IP address. The IP address will then be blocked for a 24 hour period. If a chat ever becomes threatening, either a threat toward you or anyone else, contact campus security immediately (555 on campus).
The virtual reference email listserv is a way to communicate with all VR operators at once (lib-virt@lists.umanitoba.ca). By signing up to the listserv you will receive all emails sent out to VR operators and you can also send emails to the listserv.

All University of Manitoba listservs are located on IST’s Mailing lists page. Click on the Webmail link on the top right hand corner of any UofM webpage (Fig. 4.0.1). On the Webmail login page choose Mailing Lists from the left hand menu under Email (Fig. 4.0.2). At the bottom of the page select http://lists.umanitoba.ca/mailman/listinfo/ (Fig. 4.0.3). Scroll down to “L” and select Lib-virt (Fig. 4.0.4).
5.0 Mobile Apps

You can use an app to allow you to monitor virtual reference from your mobile device. This isn’t necessarily an ideal situation, but it allows you to monitor virtual reference on the go in an emergency.

There are a number of apps you can use IM+, OneTeam, BeeJive, and Trillian as discussed on the libraryh3lp blog (https://docs.libraryh3lp.com/clients-mobile.html).

To set up the mobile app you will need to enter:

- Service or protocol = Jabber or XMPP
- login = your_username@libraryh3lp.com (just replace your_username with your actual LibraryH3lp username)
- password is your LibraryH3lp password
- host = libraryh3lp.com
- port = 5222
- use old-style SSL = off

NOTE:
It is very important to make sure you sign out of your mobile web app when you’re done your shift. It can be easy to forget and, if you don’t log out, the chat service will continue to stay online.
6.0 Common Questions

6.1 Do I have to sit and watch my screen for chats to pop up?
No, there is an audio alert that will let you know when you receive a new chat. You can work on other things leaving the chat window open behind another window or on another screen while you wait for a question. When you receive a new chat you will hear a beep. To ensure you don’t miss a chat just make sure your volume is turned on and working.

6.2 I can’t see any buddies in my buddy list.
If you can’t see any buddies when you know someone else is online, contact the VR Manager. The reason you can’t see other operators is because your account settings need to be adjusted.

6.3 I was kicked off of Libraryh3lp what should I do?
This doesn’t happen often but occasionally the libraryh3lp system might log you off if there is a server problem. First, try to log back into the system and most of the time you will be able to get everything back online. If for some reason this doesn’t work, please contact the VR Manager. If you want you can also check LibraryH3lp’s twitter page. They will regularly update it if they are experiencing technical difficulties or problems with their server (@LibraryH3lp).
LibraryH3lp also has a blog (libraryh3lp.blogspot.ca) which they regularly update and you can sign-up for email notifications if you want the latest news from libraryh3lp.
7.0 UML Statistics

7.1 Virtual Reference Questions by Year

7.2 Virtual Reference by Month
7.0 UML Statistics

7.3 Face to Face Reference Compared to VR

*Statistics retrieved March 2013 and include all unanswered chats.