LibAnswers: Email Tickets

LibAnswers ticketing system is the platform OU Libraries uses to monitor and reply to Email-A-Librarian questions from the Ask Us page and customer questions from the Contact page. Graduate assistants will monitor email tickets that come into the Computer Lab Queue and the Learning Lab Queue while staffing the Learning Lab Desk. When questions come in about your disciplines or areas of expertise, GA's will assign those tickets to your LibAnswers account.

Tickets Assigned to You

When a GA assigns/transfers an email ticket to you, a notification email will be sent to your OU email.

There are two ways you can respond back to a patron:
1. By replying back to notification email within your OU email
2. Or by clicking on the link within the notification email.

BOTH of these options will track the email ticket thread within the LibAnswers system!
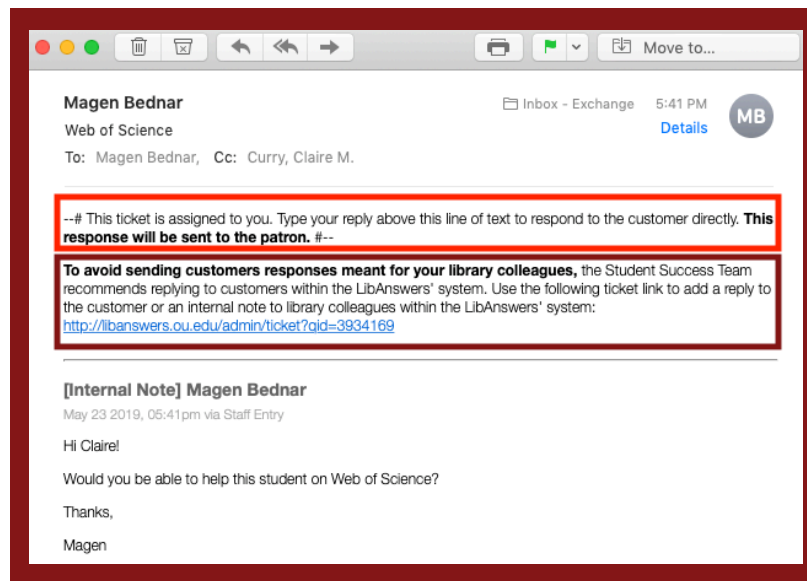
Answering the Email Ticket Within Your OU Email

If you choose to reply back within your OU email address, please be sure you are replying back to the LibAnswers email! Otherwise the ticket thread will not be tracked within LibAnswers.

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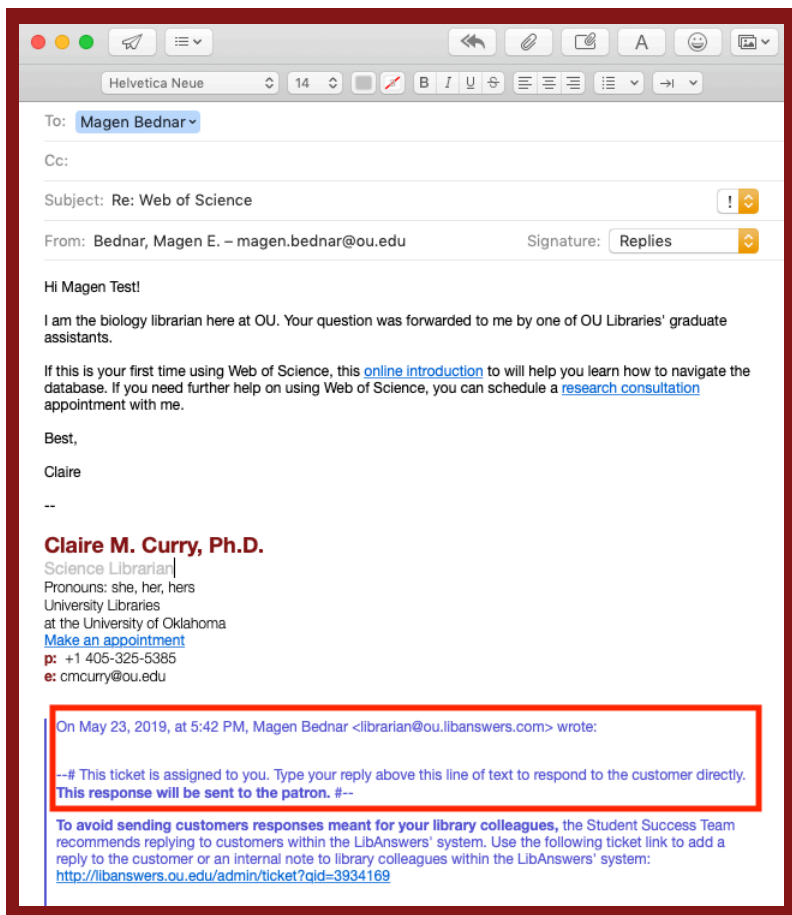
Start typing your reply above the line of text from transfer notification email.

Also, do not delete any of the text from the notification email or the original question.

Your replies will not be sent to the patron if you start deleting text from the notification email and and the original question.

Adding Transactions to Email-A-Librarian Ref. Analytics Dataset

Once you've sent your reply to the patron, you need to add the email ticket to the Email-A-Librarian Ref. Analytics Dataset.

Open your reply in your email's sent folder, and then open an internet browser and go to http://libanswers.ou.edu. Click on "Login to LibApps" at the bottom of the page, and then use the same login information as LibGuides.

After you've logged in, click on "Ref. Analytics" in the orange menu bar, and then click on "Add Transaction."
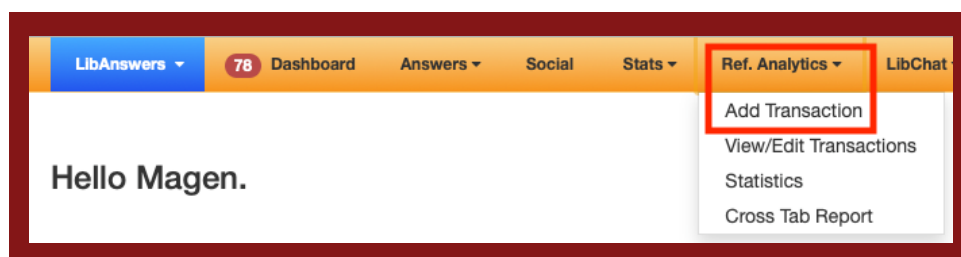
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On the Add Transaction page, your default dataset should be Email-A-Librarian. **If it's not, open the "Dataset" dropdown menu and select "Email-A-Librarian."**

Copy the Original Question from your reply in your email and then paste it into the Question box
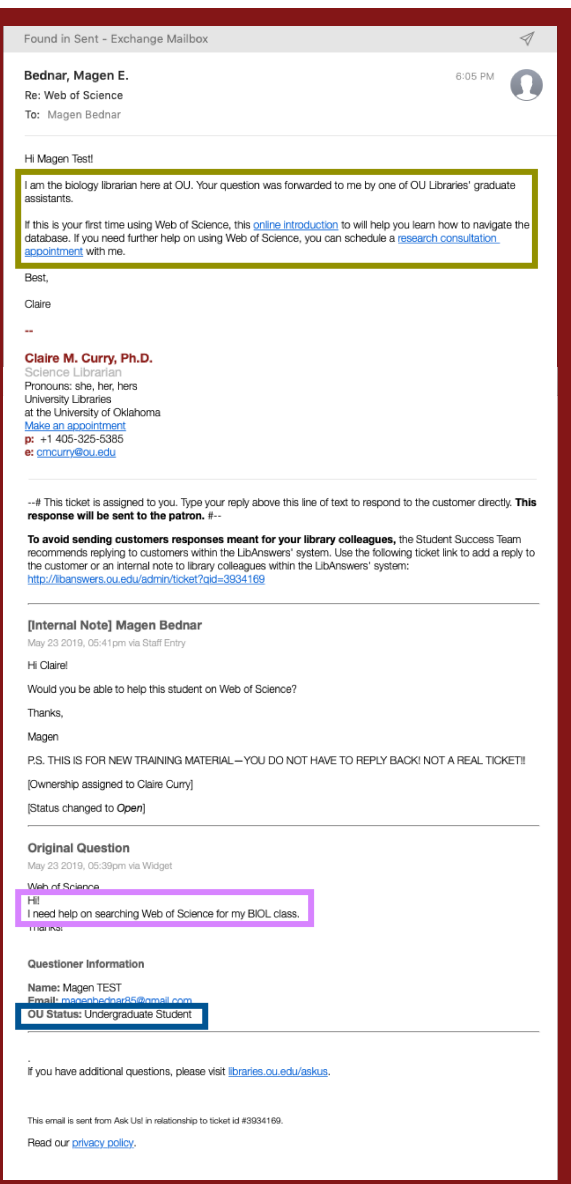
In the Answer box, copy and paste your reply.

Make sure your name appears in the "Answered By" box.

In the OU Status box, select the appropriate status listed under Questioner Information in your email.

In Type of Question and Resource Used boxes, select the appropriate options (you will only be able to select one option in each box. If you need to select multiple options, use the internal note box and type out the additional options).

Do not select the box next to "Include this transaction in the public knowledge base"!

Finally, click on "Submit & Clear."

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Answering the Email Ticket Within the LibAnswers System

Ticket Page Within LibAnswers

This diagram explains the features and functions on the ticket page.

1. Patron information: Click on the (i) icon to see more information about the asker, including the patron's OU status.

2. Create a Reply: This is the tab to use for replying back to patrons.

3. Post an Internal Note: If you don't know the answer to a question or don't know who to assign the ticket to, post an internal note to discuss the ticket with colleagues. Patrons cannot see internal notes.

4. Assign/Transfer: If a question can be answered better by a subject liaison, library department, or special collection, assign the ticket to the appropriate contact person.

5. Macros: Are standardized responses to frequently asked EAL questions. Macros are created by an Admin. user—can be edited once added to a Reply and customized to fit that exact patron's needs.

6. Text Box: Type your reply back to the patron in the WYSIWYG (What You See Is What You Get) editor. This allows you to format text with things like, lists, embedded links, images and tables.

7. Add Files: Attach PDFs, Word files, etc. in this section. 5MB limit per file. Important: files are available for three months after they are uploaded.

8. Add Links: Links added in this section will appear at the end of the email to the patron.

9. CC Answer to: 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.

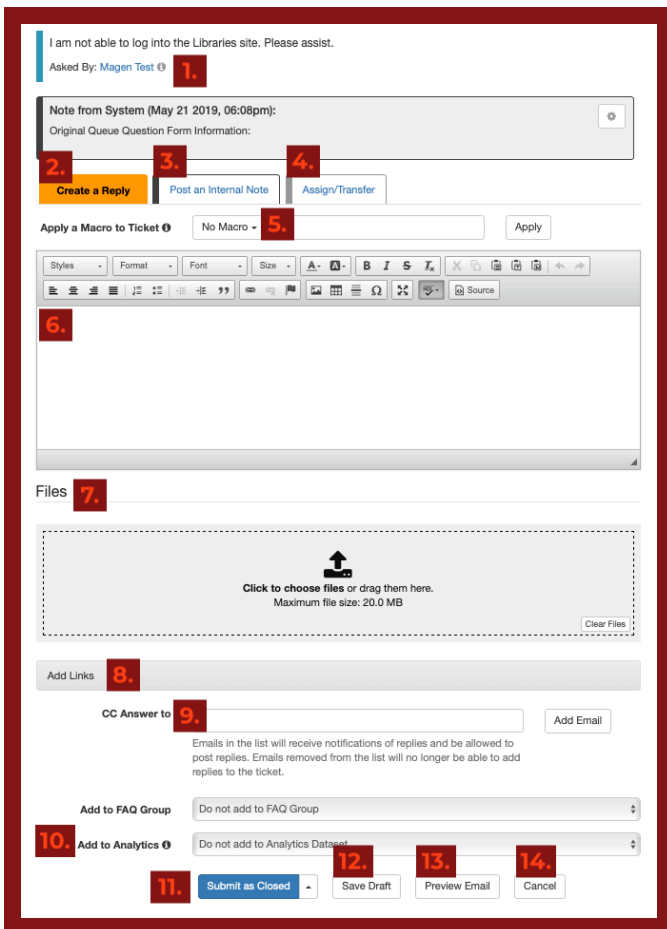**10. Add to Analytics:** how to add transaction to Ref. Analytics

11. Submit the Ticket: When you submit the ticket, this will send your answer to the patron's email.

Submit as New: Use this status if you accidentally claimed a ticket and want to un-claim it

Submit as Open: Ticket has been claimed but you still need to reply to the patron

Submit as Pending: Indicates that you're waiting for or expecting a response from the patron

**Submit as Closed:** Indicates that the question has been answered

12. Save Draft: Started working on a reply, but need to step away? Save your draft and come back to it later.

13. Preview Email: Use this option if you're done with your response and want to make sure it looks okay before sending.

**14. Cancel:** Just like it sounds, clicking on this will delete anything you have added above.

If you you chose to reply back to the patron by clicking on the link within the notification email, you will be asked to log in to LibApps and then the ticket thread will pull up.
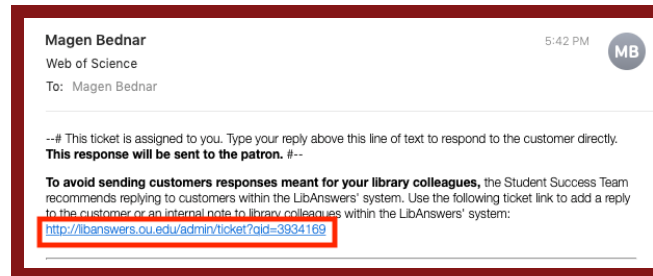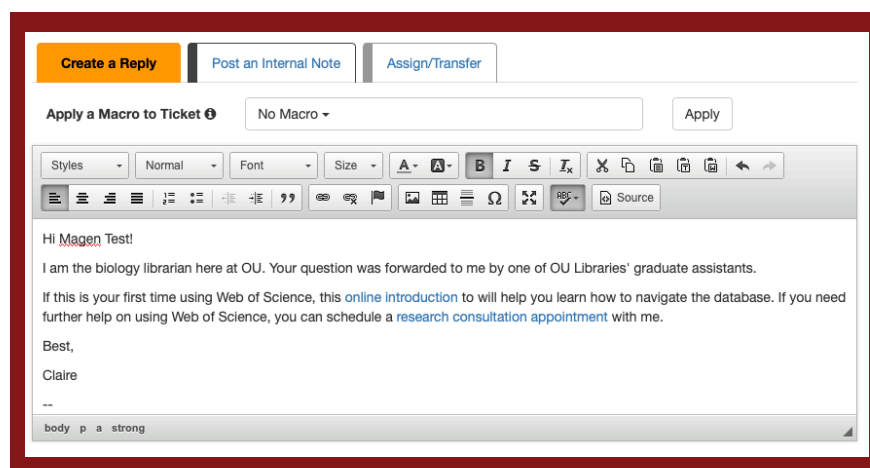

The replies are color coded within the ticket thread:

blue is patron replies,
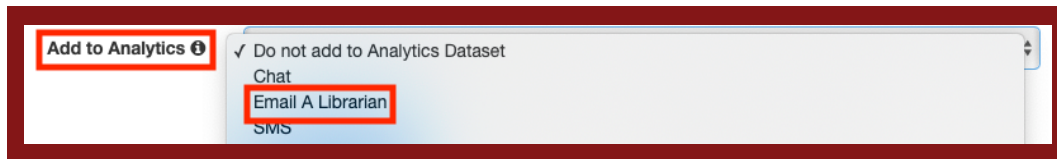**black** is internal notes,
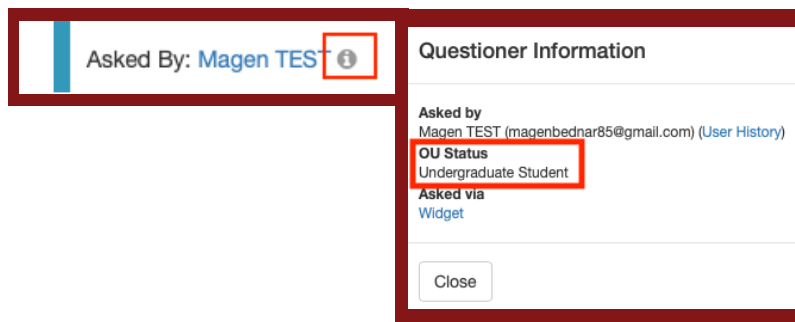and **orange** is librarian/GA replies.
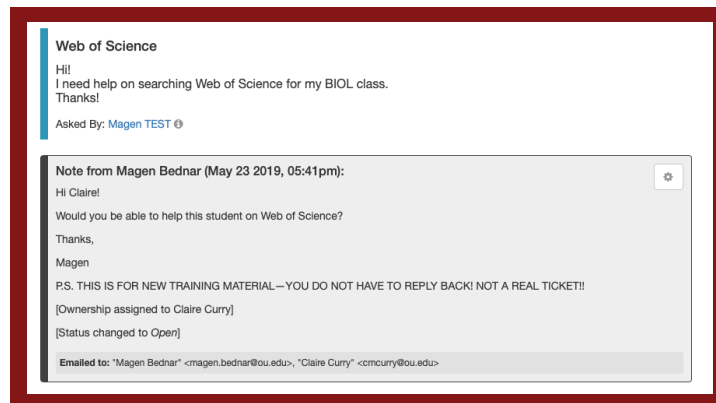
Type your reply in the text box.

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After you type out your reply and BEFORE you send your reply to the patron, click on the "Add to Analytics" drop-down menu, and select "Email A Librarian."

To find the patron's OU status, scroll up and click on the information icon next to the patron's name.
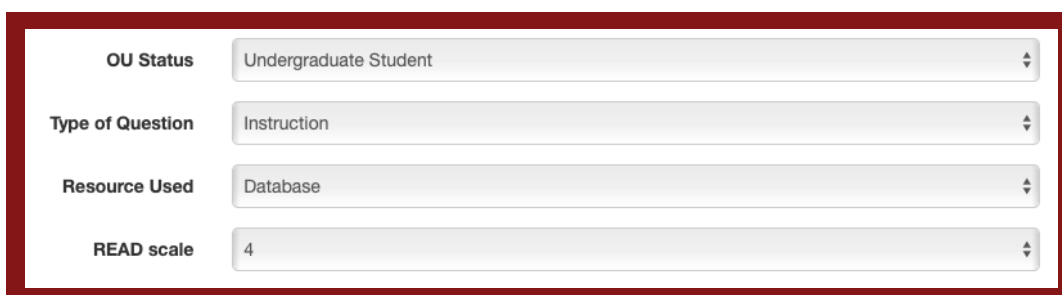

Then open the "OU Status" dropdown menu, and select the appropriate response. If the patron did not list their OU Status, then select "Other."

Then open the "Type of Question" dropdown menu, and select the type of information the patron is asking for (i.e. reference, technology, location/direction, etc.).

Then, open the "Resource Used" dropdown menu, and select what resources you used to find the answer to the patron's question.

Finally, open the "READ scale" dropdown menu, and select the appropriate level for the patron's question.

Since you will be able to select only one option from each dropdown menu, use the "Internal Notes" section to include other options.

Once you are done selecting the Ref. Analytics options, you will need to select your "Submit As" options. If you are expecting a reply back from the patron, select **"Submit as Pending."** If you've answered the question completely and are not expecting a reply back from the patron, then select **"Submit as Closed."**
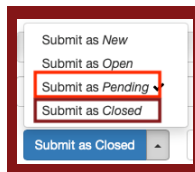
When you select the "Submit As" options, this will send your reply to the patron, so be sure your reply is ready to be sent.

You'll know that your reply was successfully sent to the patron when an orange box with your reply message pulls up on the page. *You will probably have to refresh your browser.*

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## New Patron Replies from Previously Transferred Email Tickets

If a patron responds back to you, a notification email will be sent your OU email address. Again, you can either reply back to the patron directly within your email or you can click on the link to answer within LibAnswers.
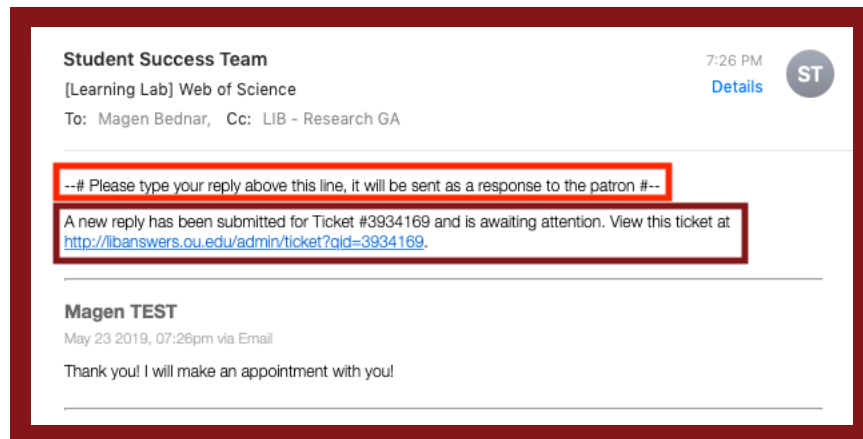
If you reply back within your email, remember to reply back to the LibAnswers' email address not the patrons.

To reply back within LibAnswers, click on the link listed in the notification email, which will take you to the ticket page.

On the ticket page, type out your reply in the "Create a Reply" text box, add files or links if you need to, **leave the "Add to Analytics" selection as "Do not add to Analytics Dataset,"** and then select the appropriate "Submit As" option to send your new reply to the patron.
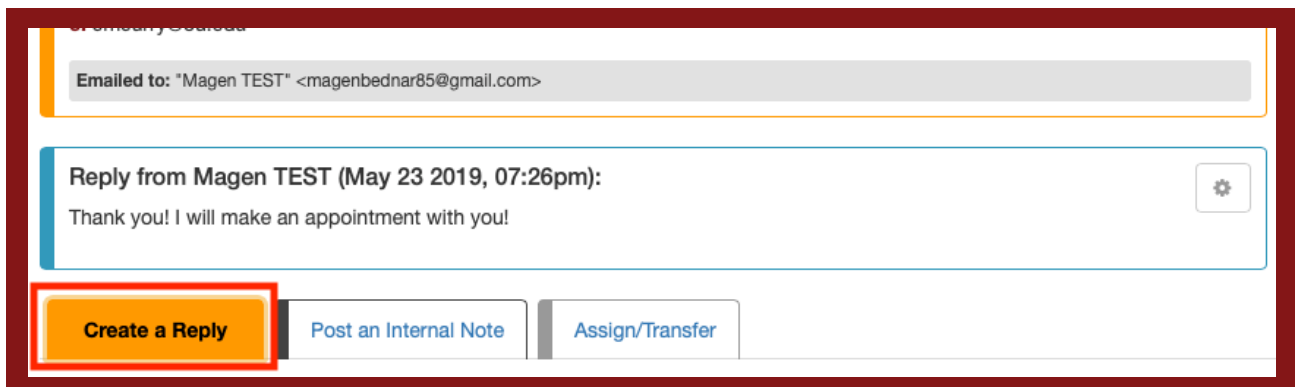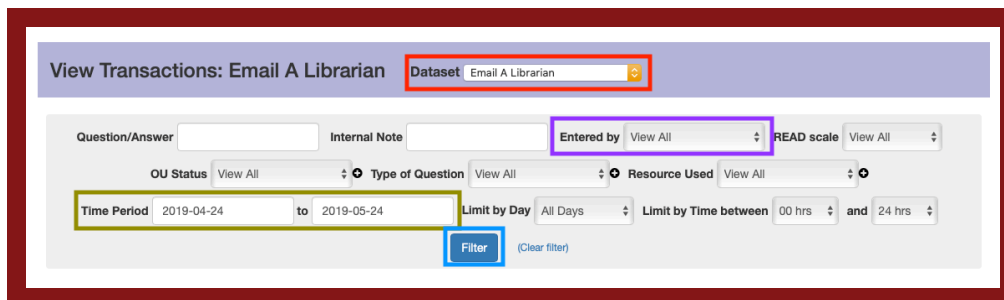
Editing Ref. Analytics Transactions

If you've made a mistake when selecting the options to add your ticket to the analytics, you can edit your Ref. Analytics transaction by opening the "Ref. Analytics" dropdown menu and then clicking on "View/Edit Transactions."
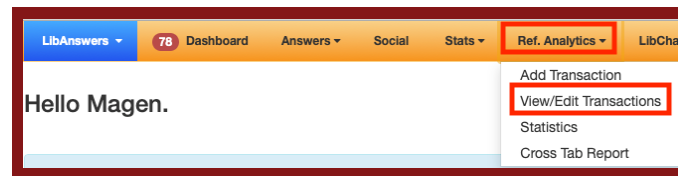
It should default to the Email-a-Librarian Dataset. However, if it doesn't, then open the Dataset dropdown menu and select **"Email-a-Librarian."**

On the View Transaction page, you can either scroll down the list to find your original entry, or you can **Filter** the transaction by **"Time Period"** or by **"Entered by."**
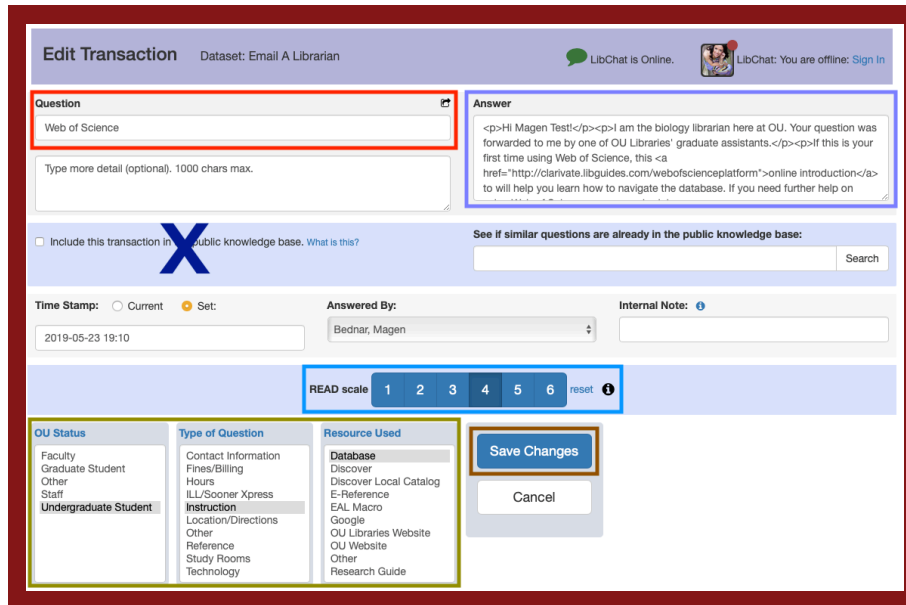
When you find the transaction you need to edit, click on the edit icon.

On the Edit Transaction page, make your necessary changes to **"Question," "Answer," "READ scale,"** and/or **"OU Status, Type of Question, and Resource Used."** Be sure to leave **"Include this transaction in the public knowledge base"** unchecked, and then click on **"Save Changes."**

Analyzing Ref. Analytics Transactions

If you want to pull statistics on the email tickets you've answered, click on "statistics" in the Ref. Analytics dropdown menu.

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It should default to the Email-a-Librarian Dataset. However, if it doesn't, then open the Dataset dropdown menu and select **"Email-a-Librarian."**

On the Transaction Statistics page, you can **Filter** the transaction by **"Time Period"** or by **"Entered by."**

To view how many questions you've answered during a specific time frame, click on **"Date/Time Stats."**

For more in-depth data analysis, click on **"Analyze Metadata."**

Questions?

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Ask Magen!