# 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. We want to make sure our customer support is accurate, friendly, and timely. Professionalism in our responses are crucial. The goal is to answer a patron in the most efficient way possible with the highest level of accuracy. We want to close every interaction with a positive experience. These standards are expected whether the person providing the customer service is a public patron or OU faculty member.

Claiming Tickets

When a new email comes into the Learning Lab and the Computer Lab Queues, the ticket (what LibAnswers calls email messages) will show up in the LibAnswers Dashboard and a notification email will be sent to your OU email address.
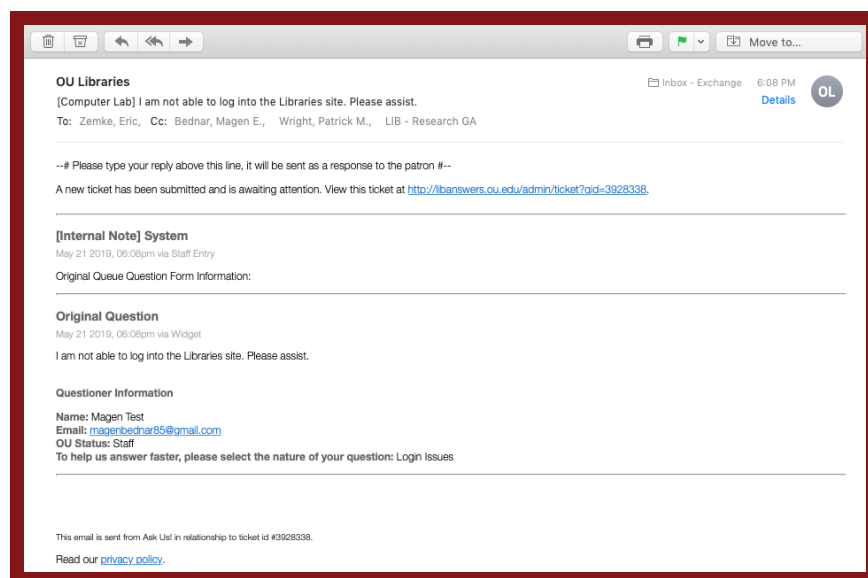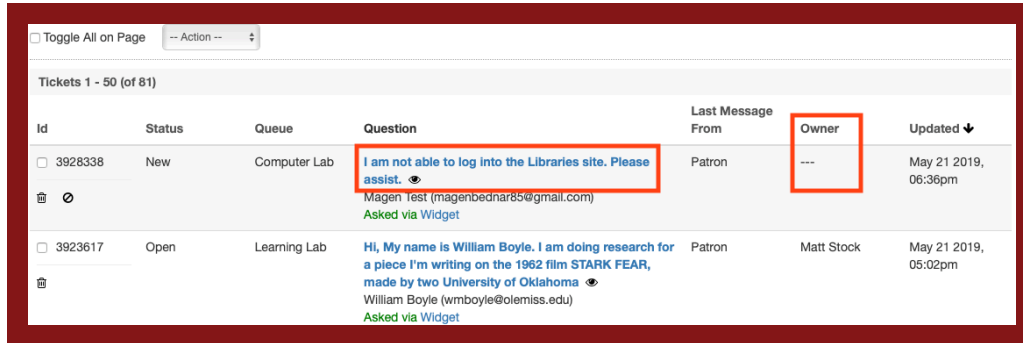

The Graduate Research Assistant staffing the Learning Lab is responsible for new email tickets that come into the Learning Lab Queue and the Computer Lab Queue during their shift as well as the tickets that have come in since the last point a GA was staffing the Learning Lab.

- For example, if you open the Learning Lab at 1:00 pm on a Sunday, you'll be responsible for all the email tickets that arrived after 6:00 pm on Saturday, when the last GA got off work.
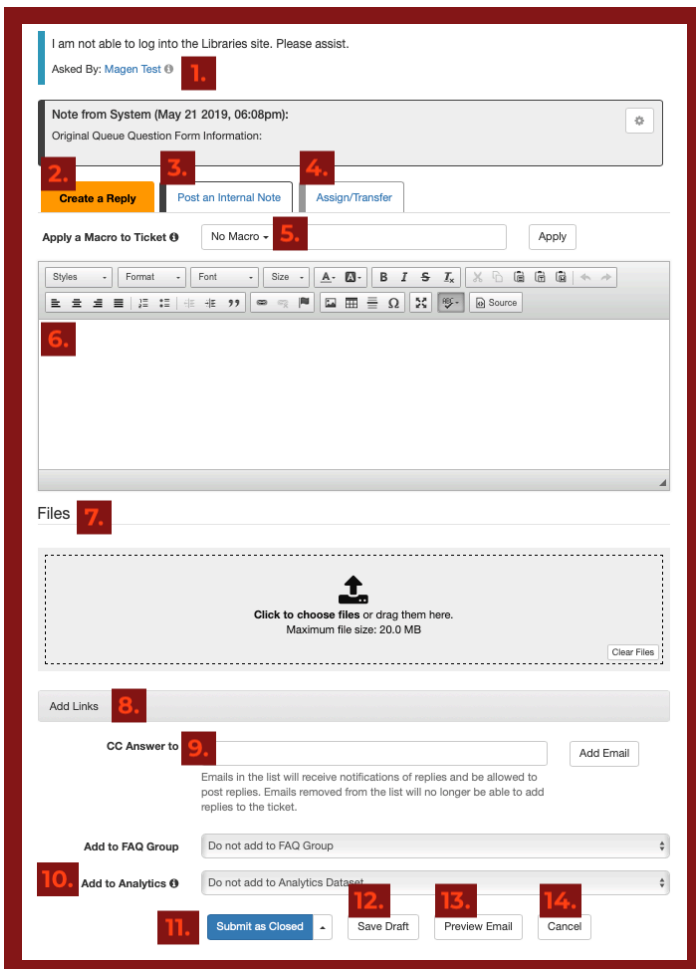- These would be all the messages that do not have an owner listed in the LibAnswers Dashboard.

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Since you will be logged into LibAnswers while staffing the Learning Lab to monitor LibChat, to claim unanswered email tickets, click on the blue hyperlinked question.

Once you click on the blue hyperlinked question, the LibAnswers system will take you to the ticket answer page.
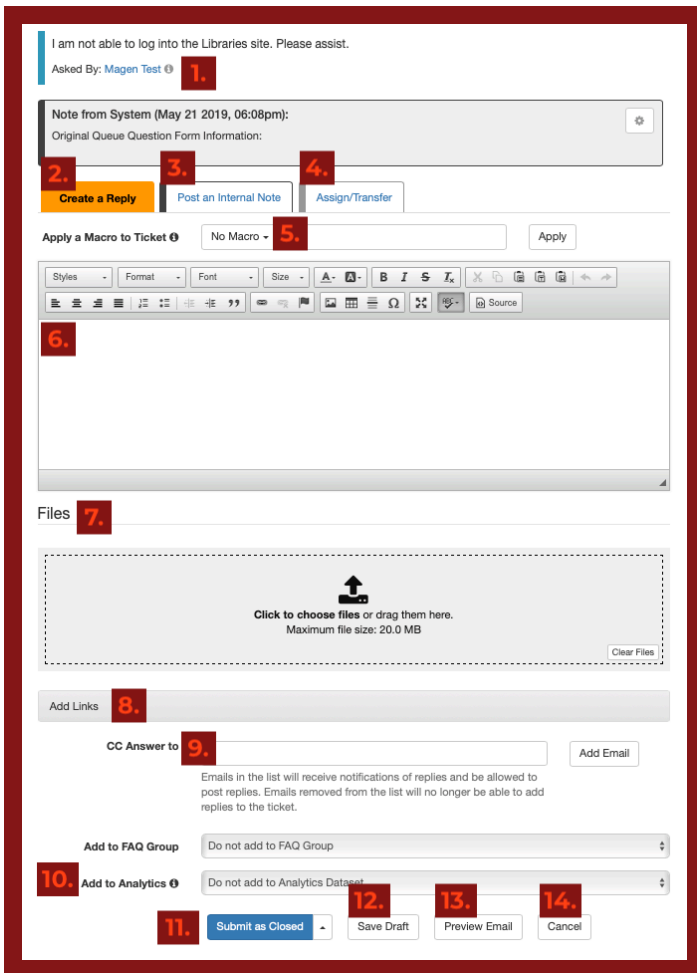
1. Patron information: Click on the (i) icon to see more information about the asker, including the patron's OU status.

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: more information below!

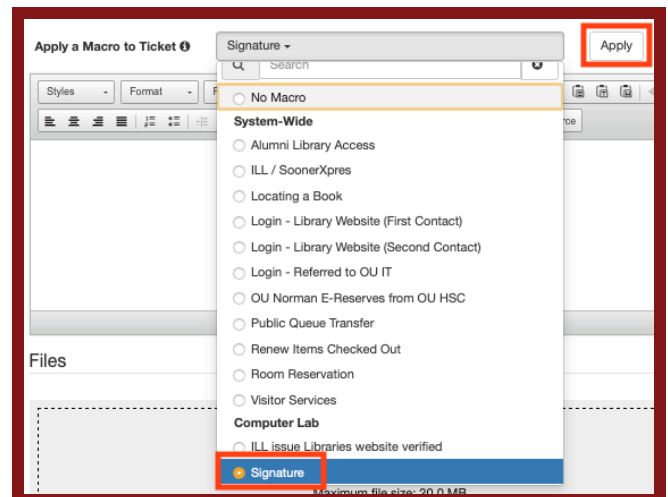**11. Submit the Ticket:** When you submit the ticket, this will send your answer to the patron's email.

> **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.

Replying Back to Patron Yourself

Open the Macro dropdown menu (number 5. from the ticket diagram) and select the Signature Macro or another Macro option that best fits the patron's question and then click on "Apply."

We've created a standard signature that all Learning Lab staff and student workers are required to use when replying back to patrons, so at the very least, you must select the Signature Macro if the other Macro options do not work for the question.

If the Macro needs to be edited, then you will be able to edit it in the text box (see number 6.) to fit the exact needs of the patron's question.
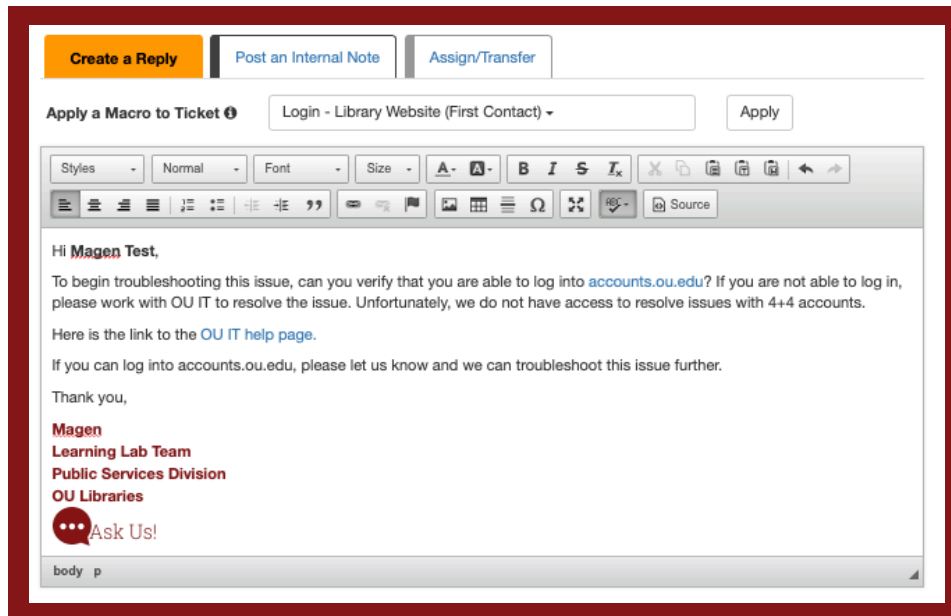
Once you type out your reply, add any extra links or files (see numbers 7. and 8.). At this point, you can preview the email prior to sending to see if you need to make any changes (see number 13).
If you are satisfied with your answer, you need to add the question and your answer to Ref. Analytics.

Learning Lab Queue Ref. Analytics

1. Click on the "Add to Analytics" drop-down menu and select "Email A Librarian."
2. Then select the options for OU Status (see number 1. to find the patron's OU Status), Type of Question, Resource Used, and READ Scale that best fits the patron's question and your answer.

Computer Lab Queue Ref. Analytics

1. Click on the "Add to Analytics" drop-down menu and select "Computer Lab."
2. Then select the options for OU Status (see number 1. to find the patron's OU Status), Type of Question, Priority, and READ Scale that best fits the patron's question and your answer.

Once you've selected the Ref. Analytics options, you are ready to submit the ticket to the patron. If you do not expect a response back from the patron (which will be the case 99% of the time), then submit your ticket as closed. If you do expect a response back from the patron (i.e. when you need to find out if they were off campus of on campus when trying to access an e-resource), then submit the ticket as pending.
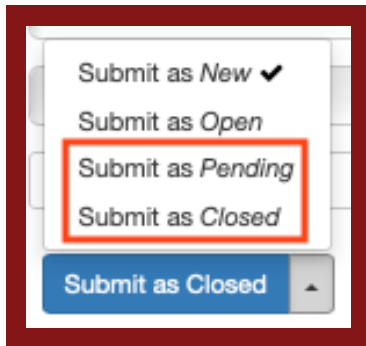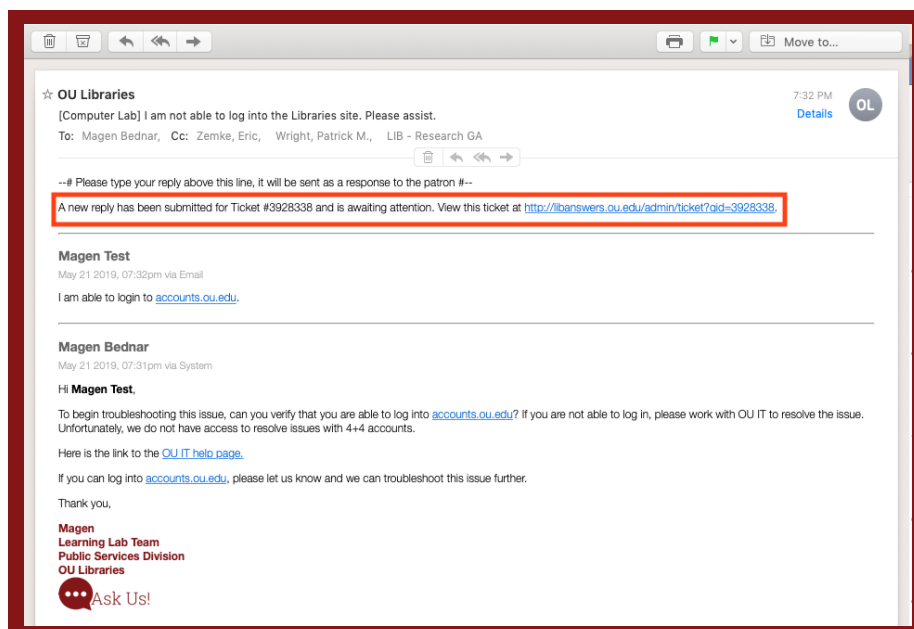

Note about Submit as Closed: this is the best option because it removes the ticket from the dashboard. If a patron replies back to a closed ticket, the LibAnswers system will re-open that ticket and it will show up in the dashboard once again.

Note about Submit as Pending: only use this option if you know that you will be receiving a reply back from the patron. We don't want a lot tickets sitting in the dashboard.

Additional Replies to Patrons

If a patron responds back to your answer, a notification email will be sent to your OU email address. Since you are the owner of the ticket, the notification email will be sent only to you. So if you set up a rule in your inbox to send LibAnswers emails to a specific folder, you need to check that folder for new reply notification emails or you need to update the rule to not include new reply notification emails.
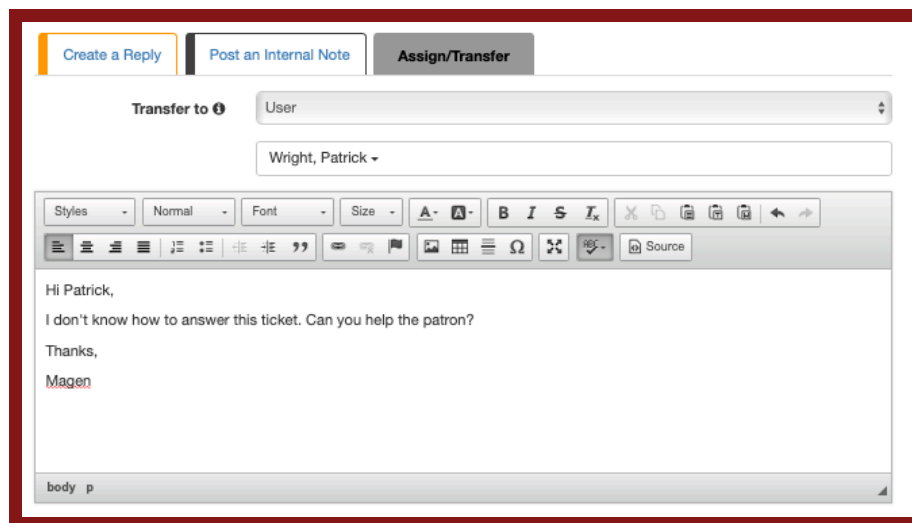
To reply back to patron, click on the link in the notification email, which will take you directly to the ticket page (although, it might take you to the login page if you aren't logged in to LibAnswers). The patron's new reply will be outlined in blue and listed underneath your first reply. Type out 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.

Asking for Help When You do not Know How to Answer a Question
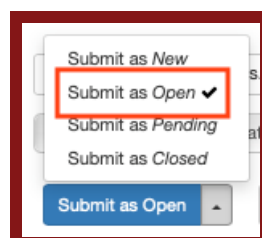
If you don't know the answer to a question or don't know who you should assign the ticket to, you'll need to transfer the ticket to Magen or Patrick.

Within the ticket page, click on the grey "Assign/Transfer" tab (see number 4.). Leave the "Transfer to" option as User, then select Magen Bednar or Patrick Wright from the "Select the user to own this ticket" drop-down menu.

Input your message to the assignee, and then click on "Open." **Keep "Do not add to Analytics Dataset" as the option for "Add to Analytics."**
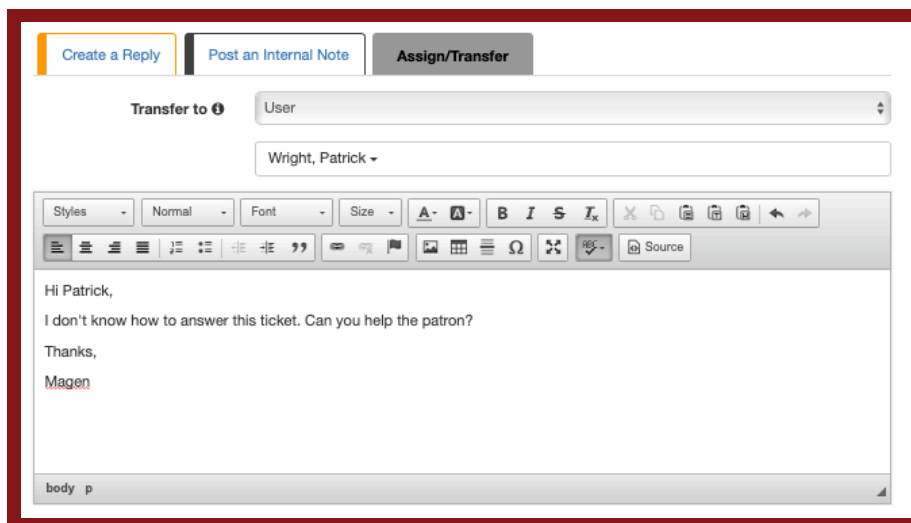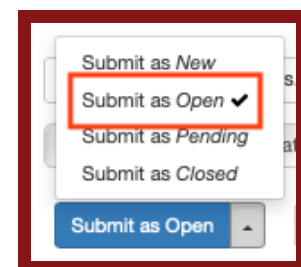
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Assigning Tickets to Other Queues & Users

When you are unable to answer a patron's question, you will need to assign/transfer the ticket to the appropriate Queue or User. On the User Services Guide under the Emails Tab in the <u>Learning Lab Policies, Procedures, & Duties Box</u>, there is a contact list for transferring tickets. This list is by no means the most comprehensive contact list, however, it will give you a good idea of when to transfer to a queue and when to transfer to a user.

Assigning Tickets to Other Users

Within the ticket page, click on the grey "Assign/Transfer" tab (see number 4.). Leave the "Transfer to" option as User, and then select the appropriate library personnel from the "Select the user to own this ticket" drop-down menu.

Input your message to the assignee, and then click on "Submit as Open." Do not change the "Add to Analytics" option from "Do not add to Analytics Dataset."
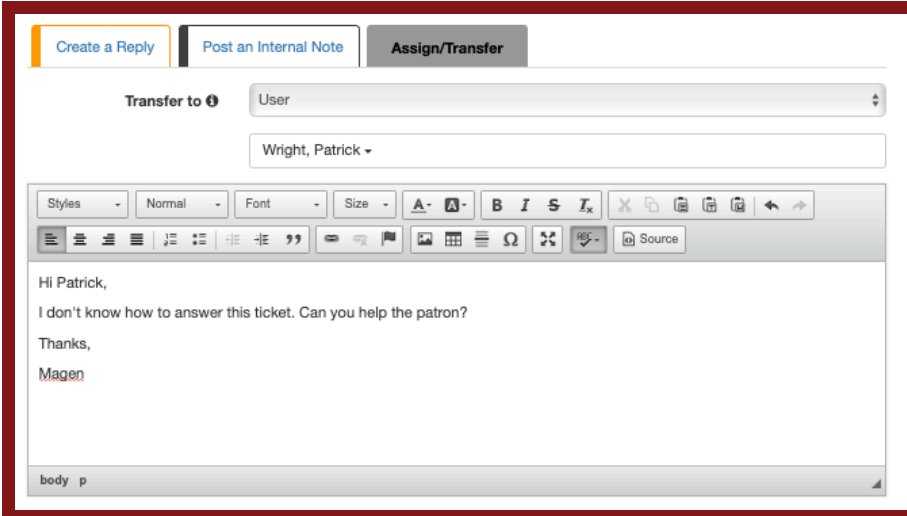

At this point your responsibility for the ticket is done. It will be the assignee's responsibility to add the ticket to Ref. Analytics.
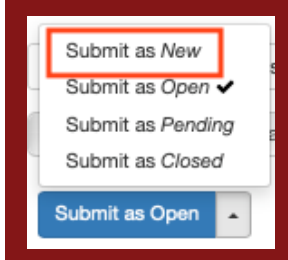
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Assigning Tickets to Other Queues

Within the ticket page, click on the grey "Assign/Transfer" tab (see number 4.). Open the "Transfer to" dropdown menu and select "Queue." After you selected the appropriate queue, leave "Do no assign to a specific user" as it is (this will be the default selection, the other Queue monitors will select the appropriate user themselves).

Input your message to the assignee, and then click on "Submit as New." Do not change the "Add to Analytics" option from "Do not add to Analytics Dataset."

At this point your responsibility for the ticket is done. It will be the assignee's responsibility to add the ticket to Ref. Analytics.

Questions?

email magen.bednar@ou.edu

Ask Magen!