training materials for LIBCHAT & SMS
At the Research Help Desk, use the link listed on the RHD guide and then use your LibApps login information (same login information for LibGuides and LibCal) to log in to LibChat & SMS messaging.

To turn LibChat and SMS online, click on “you are signed out” box.

The LibChat dashboard will open in a new tab. Be sure to click on the sound and desktop toggles for new chat and SMS notifications.
Once LibChat and SMS are turned on, this is what the Patron will see on the Ask Us webpage:

**Answering LibChat Messages**

A sound and desktop notification will alert you that a new chat message is waiting to be answered, so go to the LibChat dashboard and click on “answer.”

Once you click on “answer” a green chat window will appear on the dashboard page.
If you do not want to use your name for public chats, then you need to email Magen (magen.bednar@ou.edu), and she will set you up with a nickname, such as Research Help Desk.

Here is the patron view of a chat using a public nickname:

Back to the green chat window, there are some helpful tools to use during and after a chat session.

- The tool that looks like a movie ticket, is for you to create a ticket within LibAnswers so you can follow up with the patron
- The tool that looks like this 🔒 is for you to ban inappropriate users
- The bar graph tool is for you to add the chat to Ref. Analytics
- The paperclip tool is for you to send files to the patron
When a patron ends a chat, this is what they will see. They have the option to rate and comment on their chat session as well as to email themselves a transcript of the chat session.

If the patron chooses to email themselves a copy of the chat transcript, this is what the transcript will look like (your public nickname will be used).

This is what the chat window will look like when a chat session ends (changes from green to red).

There are two ways to add a chat session to Ref. Analytics:
1. clicking on the bar graph icon or
2. by clicking on the “X” to exit out of the chat window, which will automatically pull up an “Add to Ref. Analytics” prompt.
BEFORE you exit out of the chat window, click on the movie ticket icon to view the patron’s OU status (this is an optional field for patrons to fill out, so if its left black just select “Other” for OU Status on the Ref. Analytics prompt.

Here is what the Ref. Analytics prompt looks like:

**Answering SMS Messages**

When a new SMS message comes in, it will appear in blue on the LibChat Dashboard. Click “Answer” to respond to the patron.
Here is what the patron will see on their end:

![Image of SMS window](image)

**Anon:** Do you have the textbook “Microeconomics” by Besanko in the 5th edition?

**Magen Bednar:** Thanks for contacting us! Hold on just a moment while I check the catalog.

Similar to the chat window, the SMS window also has a toolbar for you to use.

- The [icon](image) will open the ticket page for the SMS message in a new tab.
- The [icon](image) will open all tickets the tickets submitted from the SMS number.
- The bar graph icon, will add the SMS message to Ref. Analytics

Here is what a librarian/GA will see in the LibChat Dashboard:

![Image of LibChat Dashboard](image)

Here is what the Ref. Analytics prompt will look like for SMS:

![Image of Ref. Analytics prompt](image)

1. You will have to change the “Add to Analytics” dataset from Chat to SMS
2. The prompt does not have an OU Status field because the SMS messages are completely anonymous
IMPORTANT: clicking on the “X” will not add the SMS message to Ref. Analytics!! You have to click on the bar graph icon or go back and search for the ticket under the “Answers” tab in the LibAnswers Dashboard.

If SMS messages come in when LibChat is offline, the patron will receive an automated response that tell them they will receive an answer when the Research Help Desk opens the next day.

For SMS tickets that come in when LibChat is offline, they will appear in the LibAnswers Dashboard with the EAL tickets that have been submitted.
To respond back to the patron, click on the blue hyperlink, which will open the ticket page.

Once you’ve written your reply, select the appropriate Ref. Analytics options, and then submit the ticket as closed. Remember, you are responding back to an SMS message, so be sure to write short and sweet.