

Live Chat Training: Part Two

For this part of the training users will need their username and password and access to a working chat widget.

Web Browsers

I would suggest that you use two web browsers – one for the chat service LibGuide, and another for staffing the webchat client.

I would recommend:

- Use Chrome for the staff client
- Use Firefox for the webchat LibGuide

The Tasks

Task 1: Initial Chat

You'll be paired-up with someone throughout the session, with one person taking the role of a user and the other a member of Library staff. You'll swap roles throughout the session.

User: Choose one of the suggested topics (at the end of this document), or use one of your own, and ask a relatively straightforward question. *For the purposes of this session only*, start your initial question with the name of your partner.

Lib Staff: Wait for a question directed at you to be asked – then respond.

In this first task, try to keep it simple – for those of you new to webchat, this is great for getting comfortable with the basics of sending and receiving webchat messages. If your conversation runs its course quite quickly, start a new chat.

Task 2: Chatting to Colleagues

At the bottom of the Staff Client screen is the Conference Room section. This is visible to all staff who are logged into the new staff chat client. Try writing some messages and having a conversation with others in the training session.

Now go to the list of colleagues. Click on the name of someone else in this session – you'll open up a new chat window, and can chat directly with them.

Task 3: Transferring a Chat

In this task it is important that you **wait until everyone is ready** – we will give clear instructions about what to do, and when.

We will start another basic chat, but this time each person in the Library Staff role will be assigned a colleague to transfer the chat to.

When the User asks the question, tell them that you cannot answer it yourself and that you need to transfer them to someone else.

Task 4: Exploring Your Options: Part 1

In the staff client, try altering your availability. Use the pre-set statuses, and also try adding your own custom status. Finish by reverting to “Available”.

Click on the “Staffing” tab to see how you can switch which Queues you’re staffing – then click on the “Guests & Contacts” tab to return to seeing your list of colleagues and Users.

Edit the name of the Guest (User) you are chatting with.

Task 5: Chatting With Others

Leave your current chat window in place in the staff client, and open Internet Explorer. When it is your turn to be the User, we’ll assign you a new Staff member to chat with – start a new chat in Internet Explorer, beginning with their name.

Task 6: Exploring Your Options: Part 2

Use the yellow star icon to highlight a chat.

Minimise a chat to the side – then click on the User’s (Guest’s) name to recall it.

Click on the “Settings” link:

- Inspect the different alert sounds.
- See the difference “Show chat bubbles” has
- Inspect the option for “Enable desktop notifications”
- Ensure “Enable canned messages” is checked

Click on “Messages” at the top of the screen

- Inspect the list of system-wide canned messages
- Write some of your own canned messages
- Return to “Chats”
- Start typing any word that features in one of your canned messages

Suggestions for Chat Topics

- I'd like help with literature searching...
- I'd like help with using EndNote...
- I need help with referencing in my work...
- I'm after a journal article, but it doesn't seem to be in the library...
- I'm trying to find a journal article
- I can't find my book on the catalogue
- Can I renew my book?
- I really need this book for my assignment, but it's on loan...
- Could you tell me how to use the Discovery system?
- I've forgotten my username – can you help me?
- Could I book a group study room...



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