A. LOGGING IN

1. Log in to LibChat using the following web address: https://drexel.libanswers.com/admin/dashboard

   Use your Drexel username and password to log in:

   You will get directed to the LibAnswers page. Click on LibChat on the orange menu bar and click on Connect:

   2. The Chat Dashboard will set your status to Online. You will be auto-assigned to the Library Assistance under Departments to answer chats from clients using the chat widget on the library homepage. Other staff logged in to LibChat will appear under Operators.
B. ADJUSTING SETTINGS

1. Clicking on the Settings tab will bring up the following options:
   a. The **department** you are assigned to (example: Library Assistance) and your **Online** or **Offline status** for that department. If you choose to use LibChat for internal chats when not covering the Library Assistance department, you can set the Library Assistance department to **Offline**.

   *Don’t forget to set the department to online when you are covering a LibChat shift*

   ![Status Messages and Alerts](image)

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   b. The **Queues** option will be automatically set to notify you if a chat gets transferred to your queue. It is best to leave this option as **Notify always**.

   *For example, the subject librarians will get notified when a chat gets transferred to the Liaisons queue.*

   ![Status Messages and Alerts](image)
c. The **Notifications** section allows you turn **Sound Off/On** so you can hear when a new chat appears. You may also set up **Desktop Notifications**:

Desktop notifications enable you to receive chat activity notifications (e.g. new chats) on your desktop. You must keep the chat dashboard window open or minimized for this to work – closing the browser window containing the chat dashboard will end the alerts. This feature only works on browsers which support HTML5 – we recommend using the latest Chrome or FireFox. You also need to adjust your browser settings for notifications to work properly. [More Help.]

![Status Messages and Alerts](image)

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d. The **Multi Chat Overlay** option allows chat to show in a “popped out” view.

**Individual vs. multi-chat overlay view**

- When you click on a chat under Patron **Chats**, it will pop out into a window on the dashboard.
- To hide a chat without ending it, click on its Minimize () button. To display it again, simply click on it under Patron **Chats**.
- Learn more about enabling the **multi chat overlay view**.

You may choose your preference by using Desktop Notifications and/or using the multi-chat overlay. If you choose neither, all chats will display under Patron Chats.
C. ANSWERING INCOMING CHATS

1. When a client begins a chat, you will hear a **notification** and the client will be listed a Guest##### under **Patron Chats**. Click on **Claim Chat** to answer.

2. After claiming, you will see the chat on the right side of the screen. Under **Patron Chats**, your name will be listed as the person chatting with the client. Type your response in the dialog box towards the bottom of the screen and click **Send Message**.
3. Your response will show up under the client’s initial question.

4. The client’s response will appear under your response.
5. Continue responding until the client ends the chat or you decide to end the chat.

6. The example below shows the client ending the chat. Notice the circle next to Guest#### is red. You may click the Close Chat button as the chat has ended.
D. TRANSFERRING A CHAT TO THE LIAISON QUEUE

1. When chatting with a client and their question requires reference help, you will need to transfer the chat to the liaison queue.

2. Always let the client know you are transferring them to a librarian on duty.
3. Click on the icon to the left of **End Chat** to transfer the chat.

4. A **Transfer Chat** window will appear. Click on **Liaisons** under **Departments** to transfer to the librarian on duty.
5. A system message will display: “You transferred the chat to Liaisons. Please wait until the new Department answers before closing this chat.”

6. Once the librarian on duty responds to the client, you can click on the Leave Chat button.
E. LOGGING OUT

1. When your LibChat shift has finished you will need to log out by going **Offline** OR changing the **Library Assistance department to Offline** if you wish to continue using LibChat for internal chats.

   *Take note: Closing your browser WILL NOT take you offline. ALWAYS click on the **OFFLINE** button.*

To log out, click on the **Offline** button:

The button will change to **RED**. You are now **Offline** and can close your browser tab or window.
2. If you wish to stay **Online for internal chat**, but go **Offline for the Library Assistance department**, click on the **Settings** tab and click on the **Offline** button:

![Status Messages and Alerts](image1)

3. The **Offline** button will change to **RED**.

![Status Messages and Alerts](image2)

4. When you go back to the **Chat tab**, the circle next to **Library Assistance** will change to **RED**, but you can still send/receive chats to staff logged in.

![Status Messages and Alerts](image3)

*Take note: If you go Offline and come back Online later, the Library Assistance department will default to Online status*