

Chat Reference Demonstration Checklist

Please address the following features/functionality within your presentation. Include information about the differences between a local instance and the consortium instance.

Basic Functionality – Does your system:

- Allow anonymous patrons or customization of library-defined patron information (define local vs consortium)
- Provide usage statistics (define local vs consortium)
- Permit the email of transcripts to users
- Allow the creation of canned messages (define local options vs consortium options)
- Provide the ability to block abusive users
- Provide the option to refer user to email when offline (define local options vs consortium options)
- Allow for the creation of a knowledgebase or question bank (define local vs consortium)
- Maintain an archive of transcripts (restricted to individual institutions)
- Provide visual and audio notifications when chat is initiated
- Provide options for queue management (define local vs consortium options)
- Address staffing functionality - can the software support operators simultaneously serving both a local system and a consortium

Advanced Functionality: Does your system:

- Provide a proactive chat feature
- Allow creation of pre- and/or post-chat surveys
- Provide patron satisfaction rating of the chat system
- Allow co-browsing
- Provide the ability to create widgets to embed in different web pages
- Allow file sharing between operators and patrons
- Allow for private chat between operators (define local options vs consortium options)

Administrators/Operators: Does your system:

- Provide spell check
- Provide for link check
- Provide customization options for colors/branding/etc. (define local. vs consortium options)
- Provide training for operators
- Provide 3rd party or supplemental staffing (describe hours of availability and how the system works)

IT/Technical: Does your system:

- Require patrons to download any software/plugin
- Require libraries to locally host
- Require operators to download any software/plugin
- Meet ADA compliance standards (e.g., work with assistive technology)
- Support all devices and operating systems (including mobile devices)
- Allow for patron authentication (define local vs consortium)
- Integrate with other vendors/platforms (e.g., catalog, website, discovery tools, etc.)
- Provide technical support 24/7 (please provide hours of technical support)

- Include text reference service - if so, how does it work (define local vs consortium)