Transferring Instant Messages
Policy and Procedures - March 2009

To Transfer an IM:

You may need to transfer an IM to another library staff member. To do this:

1. First, tell the user that you’re going to transfer them.

2. Within the chat, click on the link “for transfers/etc see:”

3. On the Web page you’re directed to, log in to library3lp, if needed:
   a. id= your name with an underscore, e.g. andrea_horne  password = cmhsl8

4. Click on transfer link at the top of the page:
Hi - can I ask a question?

Sure!

How do I set up my laptop for wireless in the library?

We can help you with that - let me transfer you to a member of our TEC (technology) team.

Thanks!

Please hold on while I transfer you.

OK!
5. You’ll see a transfer to queue option. Use the drop-down box to pick cmhsltec (TEC) or hs_librarian (Reference) to transfer, and click Transfer button.

![Transfer options](image1.png)

Note: if you do not see these options available, it means no one in that queue is available.

6. You will now see call transferred:

![Call transferred](image2.png)

7. Return to your chat queue, where you will see that you are no longer connected to the patron:

![Chat conversation](image3.png)
8. Close the chat window.

To Answer a Transfer:

1. When a chat is transferred from one queue (e.g. TEC) to another (Ref or an individual) in Pidgin you will see the thread of the previous conversation and who was chatting:

   ![Chat Window](image)

   (8:22:11 AM) guest150531@chat.library3lp.com: this is a transfer, please see: https://library3lp.com/queues/cmhilete/calls/guest150531/library3lp.com/77072
   (8:22:11 AM) guest150531@library3lp.com: Hi, I have a question!
   (8:22:11 AM) stephanie_fielding@library3lp.com: How can I help you?
   (8:22:11 AM) guest150531@library3lp.com: I need help with a CINAHL search.
   (8:22:11 AM) stephanie_fielding@library3lp.com: I am going to forward your chat to a Reference Librarian that will be glad to help you with this. Thanks.
   (8:22:11 AM) guest150531@library3lp.com: OK, thanks!

2. Start typing in the Pidgin window to pick up the chat. Be sure to introduce yourself so the patron knows they are now chatting with a new person. Transcript of a complete sample chat, from initiation to transfer to conclusion, is below.
14:38 guest148815@library3ip.com Hi - can I ask a question?
14:38 andrea_home@library3ip.com Sure!
14:38 guest148815@library3ip.com How do I set up my laptop for wireless in the library?
14:38 andrea_home@library3ip.com We can help you with that - let me transfer you to a member of our TEC (technology) team.
14:39 guest148815@library3ip.com Thanks!
14:39 andrea_home@library3ip.com Please hold on while I transfer you
14:39 guest148815@library3ip.com OK!
14:39 guest148815@library3ip.com this is a transfer, please see: https://library3ip.com/queues/hs_librarian/calls/guest148815@library3ip.com/75135
2:40 ellen_ramsey@library3ip.com Hi, Ellen from the TEC Team here. I understand you need help with wireless setup?
2:40 guest148815@library3ip.com Hi Ellen, yes I do - I have a new Windows laptop.
2:40 ellen_ramsey@library3ip.com Great. Are you here in the library? I can come to you, just tell me where.
2:41 guest148815@library3ip.com Yes, I'm in Room 1331. That would be great, thanks!
2:41 ellen_ramsey@library3ip.com Be right there.
2:41 guest148815@library3ip.com Thanks! Bye!

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