OCLC and DA Information Services are pleased to submit this QuestionPoint consortium proposal to CEIRC for consideration.

**Product Description**

QuestionPoint is a virtual reference desk collaborative service that provides libraries with the tools to offer reference services to their patrons when and where they need it. QuestionPoint, a joint project of the Library of Congress and OCLC enables a worldwide network of reference professionals to work co-operatively to meet patron needs. This new global co-operative network of reference librarians interacts with library patrons and shares questions and answers. Through this service, librarians also build a shared knowledge base of completed questions. QuestionPoint is a hosted service at OCLC. It requires only a Web browser for the patron and librarian to use the patron web-form and chat service. QuestionPoint offers libraries and library groups a powerful, yet inexpensive and easy-to-use resource to provide and manage their virtual reference services.

QuestionPoint will enable libraries to:

- Respond to, track and manage, reference questions from patrons
- Provide libraries with tools to add links from any page in their library portal to support a locally branded and customisable question-asking service including: Web-based submission forms, email-based interaction, and live chat for their patrons.
- Route reference questions as needed to other members in the library's group collaborative, based on availability and expertise
- Further refer submitted questions for a best-fit match, based on availability and expertise, in the global collaborative network.
- Integrate QuestionPoint's global reference network, with alternative service providers the library might be using, to address their local needs, such as 24/7 Ref, and Library Systems and Services (LSSI) by connecting through a standards-based Application Programming Interface.
QuestionPoint will provide participating libraries with the tools to enable their patrons to:

- Ask questions and receive answers from their local library via the Web and to draw on the resources of a global network of expert reference professionals.
- View their question history and the current status of submitted questions via a password-protected and secure interface.

The global reference network component combines the power of local collections and staff strengths with the diversity and availability of libraries and librarians throughout the world. The library will be able to answer questions locally or refer them to other participating institutions. A participating library can raise questions to the QuestionPoint global network of participating institutions. Automatic routing software will assign the question to an appropriate library in the network, using a "best-fit" system that works with a database of participant profiles. Completed questions and answers are subsequently included in a "knowledge base," which can be used to help answer user questions. The”knowledge base” resides on the OCLC server.

**Benefits of QuestionPoint**

QuestionPoint is first and foremost a global library membership collaborative effort. This collaborative provides libraries and library groups with access to a global network of institutions leveraging the network's collective reference expertise, and a low-cost toolset for managing their virtual reference desk. Through the collaborative, libraries can take an active role with the Library of Congress and OCLC to shape the service and global knowledge base to meet their needs in a worldwide online reference environment. Therefore, the users of the resulting services and databases are the same people that built and shaped them. Like WorldCat, the service is collaboratively built by librarians and has the potential of being offered as an integrated part of the OCLC FirstSearch service.

QuestionPoint can assist libraries to remain relevant to their patrons. Participation in the QuestionPoint collaborative offers libraries the following benefits:

- Reduces costs, improves efficiency, and provides tools to track utilization
- Serves patrons at their point of need anytime, anywhere
- Reaches new patrons via the Web
- Highlights the role of librarians as quality information providers and reference guides
- Provides better service and global access to valuable knowledge resources
- Makes it easy to implement digital reference
- Provides more equitable access to expert resources
- Assures continuity with trusted, stable organizations
- Enables the global data exchange with other local virtual reference solutions
Pricing

QuestionPoint’s pricing is based on “per profile”. This is a flat-fee per institution for unlimited simultaneous users, unlike other similar services where the price is based on the number of seats each institution requires. Each institution is required to have at least one profile.

The price of each profile will depend on the type of package each institution choses.

Package A: Includes local reference network tools and global network participation.

This allows a library or institution to submit questions to, and receive questions from the global knowledge database. It includes patron web-forms and local live online chat facility.

US$2,000 per year - if your institution searches for information in the QuestionPoint knowledge base, and also contributes at least one "question and answer" to the QuestionPoint knowledge base itself.

US$2,400 per year - if your institution searches for information in the QuestionPoint knowledge base only, but does not wish to contribute any "question and answer" into the QuestionPoint knowledge base.

Package B: QuestionPoint Enhanced Package (to be released at the end of August 2002)

Includes Package A, plus the enhanced Convey Systems functionality that includes voice chat, co-browsing the web with a patron, pushing web pages to a patron during a live chat session. With Convey, the librarian can carry out full two-way interaction sharing control and watching the other person work (cursors, typing, etc.) in real time.

US$4,000 per year - if your institution searches for information in the QuestionPoint knowledge base, and also contribute at least one "question and answer" into the QuestionPoint knowledge base.

US$4,800 per year - if your institution searches for information in the QuestionPoint knowledge base only, but does not wish to contribute any "question and answer" into the QuestionPoint knowledge base.

This price includes QuestionPoint with web-forms, chat facility, PLUS enhanced Convey functionality.
CEIRC Discount Pricing

6-10 institutions  10% discount
11-20 institutions  15% discount
More than 20 institutions  20% discount

Trials

Due to the nature of the service, a trial to QuestionPoint is not available.

Closing Date:

This CEIRC offer closes on Friday, 4th October 2002.

For further information, please contact DA:

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Attachment A

List of CEIRC members included in the above offer.

CAUL:
- University of Adelaide
- Australian Catholic University
- Australian National University
- Bond University
- Central Queensland University
- Charles Sturt University
- Curtin University of Technology
- Deakin University
- Edith Cowan University
- Flinders University
- Griffith University
- James Cook University
- La Trobe University
- Macquarie University
- Monash University
- Murdoch University
- Northern Territory University
- Queensland University of Technology
- RMIT University
- Southern Cross University
- Swinburne University of Technology
- University of Ballarat
- University of Canberra
- The University of Melbourne
- University of New England
- University of New South Wales
- The University of Newcastle
- University of Queensland

University of South Australia
University of Southern Queensland
University of Sydney
University of Tasmania
University of Technology, Sydney
University of the Sunshine Coast
The University of Western Australia
University of Western Sydney
University of Wollongong
Victoria University of Technology

CONZUL:
- Auckland University of Technology
- Lincoln University
- Massey University
- University of Auckland
- University of Canterbury
- University of Otago
- University of Waikato
- Victoria University of Wellington

Other institutions:
- CSIRO
- Campuses of CSIRO throughout Australia.
FAQ and Features Table:

Patron/Librarian Interactions

1) Can more than one librarian open the "monitor chat sessions" window at the same time? If so, which librarian will be beeped to answer a patron's question? If there is more than one patron online at the same time, which librarian will chat with which patron? How does the QP system arrange the chat sessions, in what sequence?

ANSWER: Yes, you may open more than one monitor at a time within QuestionPoint so that multiple librarians are chatting simultaneously. Any librarian who has an active monitor receives the audible and visible prompt that a new chat user has logged onto the service. Who chats with a new patron depends on who clicks on the patron's name or e-mail address first (both of these are hot linked to the librarian chat window). The decision about who chats with a patron is up to the individual institution, which first needs to decide how chat sessions are to be distributed among reference staff. The best advice is for the institution to ask several test librarians to log onto chat and ask several test patrons to open chat sessions in order to experiment with this component of the service. Chat sessions are listed in the monitor according to the time they began.

2) Can web pages be pushed to a patron during live chat?
ANSWER: With the Enhanced Communications Option (Convey), you can do full two-way interaction sharing control and watching the other person work (cursors, typing, etc.) in real time. The basic package allows for only hot-linked URLs.

3) Can documents be pushed?
ANSWER: Yes - with the Enhanced Communications Option (Convey). We are evaluating attachments as an option in the local group reference network offering as well. We can do attachments in asynchronous communications.

4) Does chat allow for co-browsing the web with a patron?
ANSWER: With the Enhanced Communication package it does. The basic QP package has a limited two-way hot-linked feature.

5) Is there operator-to-operator chat (librarian using chat to contact another librarian)?
ANSWER: You can use the software for one librarian to contact another, but it’s not an automated process. For example, they cannot send an automated
e-mail or pop-up a chat window for another librarian. A librarian can monitor which other librarians are in sessions.

6) Can the chat box be customized?
ANSWER: At present, other than the usual display of whatever logo they choose to display everywhere, and text they want to appear on the “logon” page, the fields and general look of it are static. The “box” where the chatting is actually happening cannot be customized.

7) Is there multilingual support within the chat feature?
ANSWER: The patron to librarian can be customized for multilingual usage by customizing your chat and Web forms.

8) Why does the most recent comment by a patron appear at the top in the chat box? Is this something that an individual institution can change locally?
ANSWER: The last response is put on top because this prevents the patron and the librarian from having to scroll down an entire transcript during a chat session to see the last message. When a chat session ends, the transcript is converted to a sequential format.

9) Is voice chat available (or being explored)?
ANSWER: Yes. With the Enhanced Communications Option, you can do this. It does, however, require that the speaking user have a microphone and the receiving user have speakers. Both users must have this equipment if two-way voice communication is desired.

10) Do patrons need to download a plug-in to use live service?
ANSWER: Yes and no. With the QP basic chat, no downloads are needed. If you want to use the enhanced communications option, there is a small download. At a little under one MB file size, it is about 1/7 the size of the Adobe download.

11) Will QuestionPoint require any special instalments from the patrons?
ANSWER: Upgrades to the service will be available from OCLC, and will not require any special instalments from the patron.

12) Does the librarian know the total number of patrons waiting for chat answers?
ANSWER: The Library will know the total number of patrons already chatting and the number in the queue waiting for answers, the patron will not know what position they are in that line. OCLC suggests writing a Java script thanking the patron for waiting and let them know you will be with them shortly. Queuing pages are also available to notify patrons of additional options or expected wait time.

13) Does QuestionPoint offer scripts?
ANSWER: Yes. Each librarian may create up to ten scripts, and each institution may create up to ten scripts. We are increasing this.
14) Will there be an audio alert for the Librarian in chat?
ANSWER: Yes. There is an audible alert when a new chat session is opened. You need to have a sound card and/or speakers to hear it.

15) Will QP be able to show a PowerPoint or Acrobat slide show?
ANSWER: With the Enhanced Communication package, yes.

16) Is the chat session private on the user's end?
ANSWER: Yes, the chat occurs in a one to one interaction with reference staff. No other users can see the discussion through the software.

17) When sharing a page, can they add it to their favourites menu?
ANSWER: We are adding more functionality for this in the basic version. Currently, you can store frequently used URLs in your scripts. The enhanced piece includes scripting for both text and URLs. We can't add anything to the patron's browser; however, he/she can add it to his/her favourites, after he/she opens the page.

18) Is it possible to co-browse in a database that normally requires remote users to authenticate by typing in a library card number?
ANSWER: Yes, with the Enhanced Communications package.

Authentication

19) Is there online authentication for a patron (or can a library add an authentication screen)?
ANSWER: Authentication is a function of where you put the link for your patron to contact the library. When using the enhanced communications option, you can register URLs within your site where you want an "ask a librarian" button to appear. QP doesn’t connect to your current authentication systems; however, on the web form, where patrons can submit questions, you can add a field to require a patron’s ID.

20) How is user authentication handled?
ANSWER: If a library has existing processes and tools to handle authentication to resources on the web, they can limit access to the reference service by providing links to the service via pages that have already been authenticated. Through the Enhanced Communications package, a librarian looking at a users web browser can ask the user to enter their authorization information for resources and proceed to assist them. If it is a resource the librarian wants to show a user, but can’t provide them with access beyond the session, the librarian can share an application from their desktop. At the conclusion of the session, the librarian’s application will no longer be viewable via the patron’s machine.

21) What plans do we have for authentication in the future? (Will we have IP only; will it work with OPAC systems? Will there be a way to have it just for an institution's students or library patrons?)
ANSWER: See notes above related to how authentication is handled. We are working with OPAC and IPAC providers to allow links to access by patrons to library reference services powered by QuestionPoint from within the OPAC.
and IPAC. They will be able to access various OPACs and IPACs as described above.

22) Can you opt not to use the chat functionality?
ANSWER: Yes, you can opt not to use it. In fact, in order to use it, you have to implement a chat form by making it available to your patrons from your website. So the simple solution here is to simply not implement the form.

System Requirements

23) Are there any platforms that don’t support QuestionPoint? (PC, MAC, Unix, etc.)?
ANSWER: It can be used with anything. The Convey piece is currently going through testing on Macintosh OS X, with a scheduled release this summer, prior to its integration into QuestionPoint. The Enhanced Communications option also adds requirements for a sound card, microphone, camera, and speakers.

24) What browsers (including specific versions) are supported?
ANSWER: QP basic can work with any standard browser 4+. Obviously, we do have to test with new versions of any browser, but we are current at this point.

25) What server hosts the software (at QP or at local libraries)?
OCLC hosts the service.

26) Are there any firewall issues?
ANSWER: No.

27) Are there any proxy issues?
ANSWER: No.

28) Do cookies need to be enabled to use?
ANSWER: No.

29) What kind of software are you using for the local system?
ANSWER: The service is written in Java and hosted on a UNIX platform using Apache Web servers.

30) Is QuestionPoint platform independent for both the librarian and the user? Can a Mac or Window user be either a librarian or a user?
ANSWER: Because QuestionPoint uses standard 4.0 (or higher) browsers and does not require the installation of any client software; it runs on any system with an Internet connection.

31) What is the lag time due to different connection speeds between the librarian and patron when sharing pages?
ANSWER: There may indeed be a time lag between what the librarian and patron see, depending on connection speeds. This primarily occurs when pages are shared in the Enhanced Communications option of QuestionPoint.
Librarians might want to ask patrons if they can see shared pages before proceeding. In the enhancement, the librarian is also able to view a patron’s browser, if the patron gives permission to the librarian. The librarian is able to see the speed of a connection and use that as a judgment call when sharing, using video, voice, etc. As far as chat, there should be very little lag time between it and loading a standard web page.

32) If a library buys one profile, how many librarians are able to use QuestionPoint at a time?
ANSWER: They can have as many librarians on it as they want. It's unlimited; although, we do not recommend more than 25 due to system/bandwidth overloads and congested workflows.

33) How long do questions stay online?
ANSWER: 90 days. However, if you wish to keep the question “in perpetuity”, you can send the questions to the knowledge base hosted at OCLC.

34) Is the Knowledge Base rated by age levels?
ANSWER: Yes. Records contain a specific metadata field related to age.

35) Is there a spell checker?
ANSWER: No. It is being investigated.

36) What types of data are collected in the usage reports? What measures does OCLC use to protect the privacy of the client/library patron?
ANSWER: Reports can be generated and exported by institution, group (collection of institutions), and librarian at daily, monthly, and hourly increments. Reports currently available include:
- ANSWERS SENT
- AVG NUMBER OF CONCURRENT OPEN SESSIONS
- AVG LENGTH OF CHAT SESSIONS
- AVG CHAT RESPONSE TIME
- PAGE SHARING USED
- NUMBER OF CHAT SESSIONS OPENED
- NUMBER OF PATRONS LOGON
- MAX NUMBER OF CONCURRENT OPEN SESSIONS
- MAX CHAT RESPONSE TIME
- QUESTIONS RECEIVED VIA PATRON FORM
- QUESTIONS RECEIVED VIA REFERRAL
- QUESTIONS RECEIVED VIA DIRECT ENTRY
- QUESTIONS RECEIVED VIA GLOBAL NETWORK
- QUESTIONS RECEIVED (TOTAL)
- QUESTIONS ASSIGNED TO LIBRARIAN
- QUESTIONS REDIRECTED
- QUESTIONS REDIRECTED TO GLOBAL NETWORK
- QUESTIONS REJECTED
- RECORDS DELETED FROM kb (LOCAL AND GLOBAL)
- RECORDS ACTIVATED (GLOBAL AND LOCAL)
- SEARCHES AGAINST KB (LOCAL AND GLOBAL)
- RECORDS ADDED TO DATABASE MANUALLY (GLOBAL AND LOCAL)
- Records added to database automatically (global and local)
  - No patron information is collected in the statistics.

37) Do you have plans to allow patrons of our library to engage in chat reference with librarians in other institutions when our library is closed (at night, for example)?
   ANSWER: At the local level, 24 X 7 coverage is an implementation decision. Institutions within a group or consortium decide how they are going to cover after hour requests. Currently, there is no automated function within QuestionPoint to enable this to happen without human intervention.

   At the global level, the automatic request manager looks at hours of operation as one of its criteria for routing a question to an institution.

38) How would a librarian use the local KB opposed to the global KB?
   ANSWER: We have heard that librarians like the fact that they haven't written a reference question down on a piece of paper since the service was released. The "Add a Question" feature allows staff to input questions received via email, in person or over the phone. These questions can then become part of the knowledge base, and also allow the reference librarians to view all questions on equal footing, not just those received via the service or routed through the global system.

   The local knowledge base is useful for tracking questions, often repetitive, that are specific to a certain library segment or environment that the rest of the world wouldn't care about.

39) How many users can send questions at the same time?
   ANSWER: When using the Web form, the number is unlimited. When chatting with a patron several patrons may the link simultaneously or sequentially within a few minutes of each other. Each patron session shows up in the Chat Monitor. The reference librarian, according to best practice, would pick up each session based on the time that it was initiated by its patron. So if one patron signed on at 1:00 PM and a second patron signed on at 1:05 PM, then the reference librarian should chat first with the patron who signed on at 1:00. Related to this issue, QuestionPoint allows more than one reference librarian to be logged onto a single chat session with a patron, but only one patron can be logged onto a single chat session. Another patron cannot join a chat session that is in progress. So, while you can have more than one patron logged on to chat at a time, patrons cannot share a single chat session.

40) When the librarian is not available, would the questions automatically be routed to another library that is available to answer the questions?
   ANSWER: Yes, in the global component. In the local, we're working on it.

41) Can a library belong to more than one group?
   ANSWER: Currently, no; however, that is high on our evolution list for the service.
42) Are the editors of the Global component real people?
ANSWER: Yes, these are real people recommended by the global membership and approved by the QuestionPoint Editorial Board.

43) Does OCLC or LC assist libraries in setting up the local/regional interface?
ANSWER: Templates for the question and chat forms are available for download on QuestionPoint.org. Also there, you find sets of detailed instructions for implementing and modifying the forms.

44) What marketing materials should I expect?
ANSWER: We send a packet of marketing resources and ideas to libraries to help them market the service. Items in the packet include templates for press releases, table tents for cafeterias or local restaurants, posters, sample letters requesting links from your site to other local sites, etc.

45) Who owns transcript data?
ANSWER: Once transcript data has been committed to the Knowledge Base, OCLC owns the copyright to that database. But OCLC neither owns nor will store transcript data that is not saved by the library.

46) Do libraries have a way to ask certain questions on a Web or chat form and then retain that user information for their library? (Year, major, etc)
ANSWER: No, patron information can’t be stored. Librarians can customize the forms and require whatever fields they want, which are stored but not searchable.

47) Do we have instant messaging for librarians to librarians?
ANSWER: Not yet.

48) If you are subscribed as part of a group, does this mean that Local questions are answered by your group, rather than your local library? I am unclear about how consortia are handled within this model.
ANSWER: Questions are always sent to an individual institution. To route a question to another institution within a partner group or to an institution with the global network, the institution must decide to do this and perform specific profile actions within QuestionPoint.

49) Is there a limit to the number of questions a library can escalate to the global network (per year)?
ANSWER: No.

50) Will we have increased reference source access to electronic databases?
ANSWER: QuestionPoint does not provide access to or prevent access to subscription databases. How you access these resources will stay the same.
51) Who "creates" metadata about each question? Is this done automatically?
ANSWER: A reference librarian supplies metadata for a question when he/she sends a question to the Global Network. The Global KB Editor supplies even more when she prepares the question and its answer for the Global KB.

52) When questions are referred what is the assurance of quality control?
ANSWER: This is addressed in a couple of ways: The KB editor reviews the question before making it an active record in the Global KB. And as part of the metadata surrounding the Q/A pair, there are fields such as “review date.” For example, you might set the update period for a question about the President of the United States to four years, since this information changes every four years.

Internationalisation Issues

53) If I wanted to create a user interface in another language such as Dutch, how much time would that require? Can I do it or could you do it for me?
ANSWER: Currently, to do the translation, we have everything we need in the system architecture to support multilingual interfaces. To do the translation, we would provide a series of .ini files to a development partner specializing in the language. Together, we would then code the various administrative preferences and access points for selecting a specific language.

54) Does QP support multi-language in building the global knowledge base?
ANSWER: QuestionPoint can support multiple languages within the Knowledge Base. Issues like indexing and capturing special characters may require some special settings by the development team. Likewise, the subscriber may have to follow a certain workflow to index, store and retrieve their records (as they would with any database product). We will work a subscriber to understand his/her needs and ensure that the system met them.
## Features Table:

<table>
<thead>
<tr>
<th>FEATURES</th>
<th>QuestionPoint Basic</th>
<th>QuestionPoint Enhanced Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package A: Includes local reference network tools and global network participation. This allows a library or institution to submit questions to and receive questions from the global knowledge database. Includes patron web-forms and local live online chat facility.</td>
<td>Package B: (Available 8/02) Developed in partnership with Convey Systems, this will offer fuller functionality.</td>
<td></td>
</tr>
<tr>
<td>Web Site</td>
<td><a href="http://www.questionpoint.org/">http://www.questionpoint.org/</a></td>
<td></td>
</tr>
<tr>
<td>In business since</td>
<td>Release: June 2002</td>
<td></td>
</tr>
<tr>
<td>Push web pages</td>
<td>No. Can exchange hot links during a chat session.</td>
<td>Yes. Can do full two-way interaction sharing control and watching the other work (cursors typing etc.) real time.</td>
</tr>
<tr>
<td>Support</td>
<td>24/7 via OCLC User Network Support</td>
<td>24/7 via OCLC User Network Support</td>
</tr>
<tr>
<td>Canned responses (scripts)</td>
<td>Yes.</td>
<td>Yes.</td>
</tr>
<tr>
<td>Co-browsing (A librarian can take a patron to a web site and both can interact with the site.)</td>
<td>No.</td>
<td>Yes.</td>
</tr>
<tr>
<td>Push documents</td>
<td>A librarian can type a URL in a chat session and the URL will be hot-linked as part of the transcript.</td>
<td>Yes. Ability to send items from the librarians desktop to the patrons or if the patron gives permission - the librarian can take control of the patrons interface.</td>
</tr>
<tr>
<td>Multilingual support</td>
<td>By customizing library chat and web forms, the patron to librarian interaction can be customized for multilingual usage. The knowledge base is multi-lingual compliant.</td>
<td>Yes. Same as basic</td>
</tr>
<tr>
<td>Reports/transcripts</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Digital Video</td>
<td>No.</td>
<td>Yes. Able to view patron or librarian digital photo or set it up for streaming video.</td>
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<tr>
<td>Persistent button</td>
<td>No.</td>
<td>Yes. Can provide service with a call button on any URL.</td>
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<tr>
<td>Application sharing</td>
<td>No.</td>
<td>Yes. Able to send items from the librarians desktop to the patrons or if patron gives permission- the librarian can take control of the patrons interface.</td>
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<tr>
<td>Must patrons download plug-in to use?</td>
<td>No.</td>
<td>Yes. (&lt;1MB)</td>
</tr>
<tr>
<td>Online authentication</td>
<td>Authentication is a function of where the library places the link for patrons to contact the library. When using the Enhanced Communications Option, you can register URLs within your site where you want an &quot;ask a librarian&quot; button to appear. QP doesn't connect to current authentication systems; however, on the patron web question forms. The library can add a field requiring a patron id.</td>
<td></td>
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<tr>
<td>Platforms supported</td>
<td>QP Basic – works with all.</td>
<td>Option is still being tested with Mac OS X- but will be.</td>
</tr>
<tr>
<td>Browsers supported</td>
<td>Standard browsers 4+</td>
<td>Netscape and IE</td>
</tr>
<tr>
<td>Server hosting</td>
<td>OCLC hosts the service. Can make arrangements for portions of the service to be hosted at the library. This applies to the Enhanced Communications Option and will improve communications speeds because the relay points are closer to the QP users.</td>
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<tr>
<td>Issue</td>
<td>Available</td>
<td>Required</td>
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<tr>
<td>Firewall issues</td>
<td>No</td>
<td>No</td>
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<tr>
<td>Proxy issues</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Cookies must be enabled</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

*relay points are closer to the QP users.*