



---

# Implementing Reliable Instant Messaging at Your Library

Karen McCoy

Adult Services Librarian

Farmington Public Library, NM

# Some background...

---

- More libraries are communicating with patrons in real time over the internet

“Online real-time chat reference services have become increasingly prevalent in many types and sizes of libraries” (1).

- BUT...

“Because no IM technology standard has been approved by all the major players, IM has long been problematic to libraries... **but newer IM products can help resolve these dilemmas.**” (2).

1. Kwon, Nahyun, & Gregory, Vicki L. (2007). The effects of librarians' behavioral performance on user satisfaction in chat reference services. *Reference & User Services Quarterly*. 47, 137-148, 137.
2. Rethlefsen, Melissa L. (Summer 2007). Product Pipeline. *Netconnect*, 14-16

# Instant Messaging vs. Chat Software

---

## □ What's the difference?

- **Chat Software:** fee-based, usually only used in businesses and libraries (**usually part of a consortium to reduce cost**) also referred to as “virtual reference” or “chat reference.”
- **Instant Messaging: FREE to libraries and patrons**, more often used by people in their daily lives, generally not platform dependent (1), more compatible in a Web 2.0 environment

## □ A recent trend in reference service seems to be a move from use of chat reference software to use of IM (2).

1. Johnson, Kris. “Pros & Cons of IM/SMS Virtual Reference.” NMLA/MPLA Presentation. March, 2007
2. Naylor, Sharon, Stoffel, Bruce, & Van Der Laan, Sharon (2008). Why isn't our chat reference used more? Reference & User Services Quarterly. 47.4, 342-354, 352.

# Instant Messaging vs. SMS

---

- SMS = Short Message Service
- In other words, **SMS** = text messaging
- Some main differences:
  - Instant Messaging uses a PC to communicate while SMS uses a cell phone
  - SMS has a 140 character limit

# Instant Messaging: So many options!

---

- ❑ AIM - America Online's Instant Messenger  
<http://www.aim.com>
- ❑ Windows Live - Microsoft's Instant Messenger  
<http://download.live.com/?sku=messenger>
- ❑ Yahoo Messenger  
<http://messenger.yahoo.com/>
- ❑ GTalk - Google's Instant Messenger  
<http://www.google.com/talk/>

...and we've barely scratched the surface!

# The good news: free aggregators

---

- **Pidgin** <http://www.pidgin.im/>
  - AIM, Yahoo, MSN, G-Talk, Myspace
- **Trillian Astra** <http://www.trillian.im/>
  - All the above, plus Facebook, Twitter, and Skype
- **Meebo** <http://www.meebo.com>
  - Like the above, but completely web-based
  - No downloads needed!
- **Digsby** <http://www.digsby.com>
  - Compatible with different platforms (Mac and PC)
  - Website includes a video tutorial to help get you started

# Instant Messaging @ Your Library

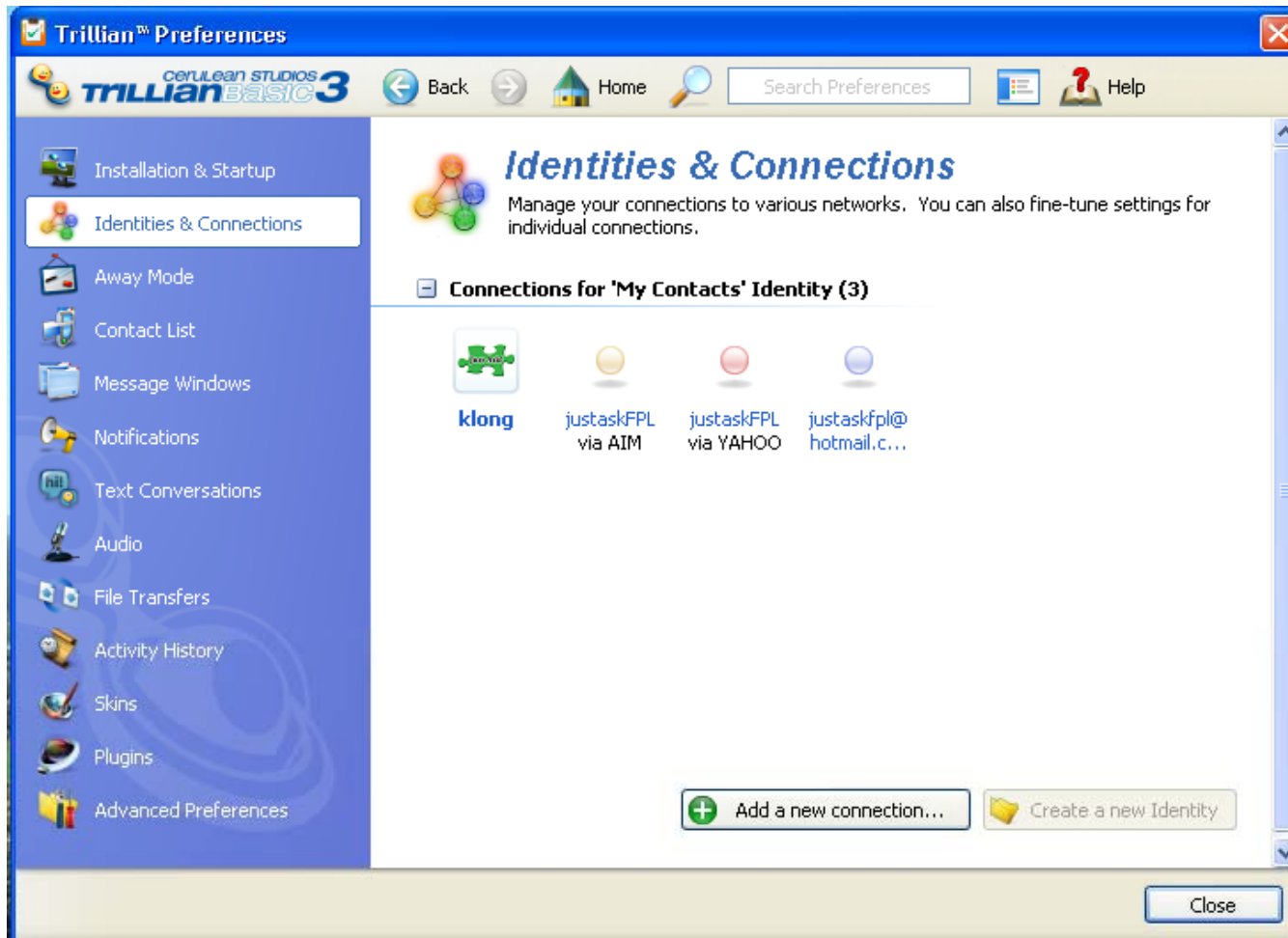
## Option 1: Bronze

---

- ❑ The integration of one of the four aggregators at your library
- ❑ Choose the aggregator of your choice
- ❑ Download is free
- ❑ Register accounts through AIM, MSN, Yahoo, Gmail, Facebook, etc.

# Instant Messaging @ Your Library

## Option 1: Bronze





# Instant Messaging @ Your Library

## Option 1: Bronze



# Instant Messaging @ Your Library

## The Upside of Bronze

---

- FREE!
- Minimum technical expertise required
- More aggregators are making themselves Web 2.0 compatible
- Can chat with different patrons via one interface
- Aggregators pose no problems for SMS
  - SMS is available through AIM and Google!
    - Example: Users send message to 265010 and enter the text of the library's AIM address and then the question

# Instant Messaging @ Your Library

## The Downside of Bronze

---

- ❑ Sometimes difficult for patron buy-in
  - Requires more work on the part of the patron
  - Might not want the library as their “buddy”
- ❑ Low visibility
- ❑ Each aggregator has its own learning curve
  - Updates, new downloads and regular maintenance required
- ❑ Little to no tech support from the software manufacturers
- ❑ Difficult to manage long buddy lists

# Instant Messaging @ Your Library

## Option 2: Silver

---

- Add a widget to your aggregator
  - An internet based chat window that allows patrons to chat instantly via the library's web page
- Types of widgets
  - Embedded – within the web page, most suitable for “Ask a Librarian” sites (1)
  - Pop-up – external from the web page
  - Follow-Me – floating chat window can be dragged around and resized while staying part of the larger page (1)
- Widgets that have been used in libraries
  - MeeboMe
  - Digsby
  - Plugoo

1. Sessoms, Pam. “Widget Style: Embedded, Pop Up, or Follow-Me?” Accessed January, 2010. <http://libraryh3lp.com/docs/which-widget.html>

# Instant Messaging @ Your Library

## Option 2: Silver



Just Ask



[Be our Buddy!](#) Chat with us online

Need advice on search strategies, online resources, or other online choices? Ask us anything!

Just Ask by



[Have a more in-depth question?](#)

Our goal is to answer within 24 hours.

Just Ask by



(505) 599-1272.

Chat Box

Just Ask!  
Temporary technical troubles.  
Please email us.

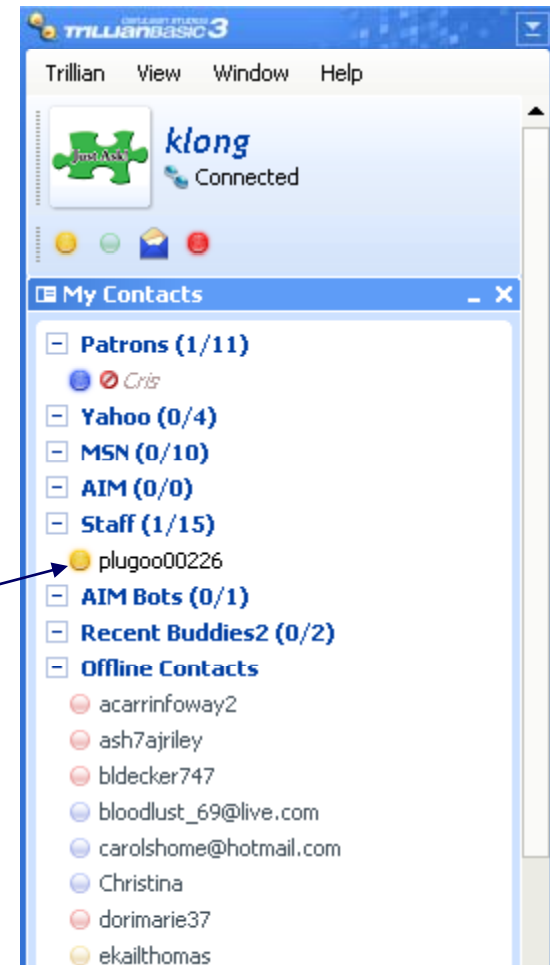
Your email address

Message title

Your message

> ok

get your **plugoo**



# Instant Messaging @ Your Library

## Option 2: Silver

The image displays the Plugoo interface for instant messaging. At the top, there are tabs for "my profile", "my widgets", and "my settings". A "My Plugoo" button is visible. The main chat window, titled "Just Ask!", shows a conversation where the user says "Hello!". Below the chat is a form with "Your message" and "Your email address" fields, and a "get your plugoo" button. A "Skin" editor is overlaid on the bottom right, showing a "HTML" field with the code `="transparent" /> </object>` and a "URL" field with `http://`. A settings panel is also visible, with tabs for "style", "text", and "options". The "text" tab is active, showing various message templates like "ONLINE WELCOME MESSAGE" and "OFFLINE WELCOME MESSAGE". The "options" tab shows fields for "MY TITLE" (set to "Just Ask!"), "VISITOR OFFLINE MESSAGE TOPIC", "MESSAGE FIELD", "NICKNAME FIELD", and "Your email address".

# Instant Messaging @ Your Library

## The Upside of Silver

---

- No extra IM software downloads required, for you or your patrons
- High visibility
- No need to juggle between two chat programs
- Customizable
- Transcripts possible

# Instant Messaging @ Your Library

## The Downside of Silver

---

- ❑ Most widgets require flash software, not feasible for rural library users
- ❑ Accessing chat transcripts can be tricky
- ❑ Chat box text is often small and hard to read
- ❑ Embedded widgets make for “wandering patrons”
- ❑ Requires a lot more technical expertise, and a basic knowledge of web design and code
- ❑ Resistant to firewalls, appears “offline”
  - Digsby works better than Plugoo and Meebo in this regard
  - Former Just Ask page:  
<http://www.infoway.org/reference/justaskold.asp>



# Instant Messaging @ Your Library

## Option 3: Gold

---

- **LibraryH3lp**: a useful aggregator/widget alternative
  - Created by Pam and Eric Sessoms
- Great alternative for a multi-branch or multi-library system
- **XMPP add-ons** through **Pidgin** or **Meebo**
  - Translation: much better widgets
- How to initiate: <http://libraryh3lp.com/admin>
  - Register

# Instant Messaging @ Your Library

## Option 3: Gold

□ This is what we use now

- Clicking on icon produces pop-out widget

The image shows a screenshot of a library website with a 'Just Ask!' widget. The widget is a green puzzle piece with a white question mark inside. To its right, the text reads: 'Need advice on search strategies, online resources, or other online choices? Just Ask! Ask us anything!'. Below the widget, the text says 'Just Ask! Online (click here)'. Further down, it says 'If we are online, click the "just ask online" or [Add us as a Buddy!](#)'. A blue arrow points from the 'Just Ask! Online (click here)' text to a pop-out chat window. The chat window is titled 'Just Ask - Windows Int...' and has a URL bar showing 'http://libraryh3lp.com/chat/fpreferencecode:'. The chat window has a large text area and a text input field at the bottom. The background of the website shows a landscape with green trees and a field.

# Instant Messaging @ Your Library

## Option 3: Gold

The screenshot displays the Pidgin instant messaging client interface. It features several windows:

- Queues:** A window with a list containing one item:  fplreferencedesk.
- Users:** A window with a list containing two items:  farmingtonlibrary and  farmingtonlibrary2.
- Accounts:** A window showing a table of accounts with columns for Enabled, Username, and Protocol. The table contains one entry:  farmingtonlibrary@libraryh3lp.com/Home XMPP. Below the table are buttons for Add..., Modify..., Delete, and Close.
- Buddy List:** A window with a menu bar (Buddies, Accounts, Tools, Help) and a status bar at the bottom showing a green circle and the text "Available".

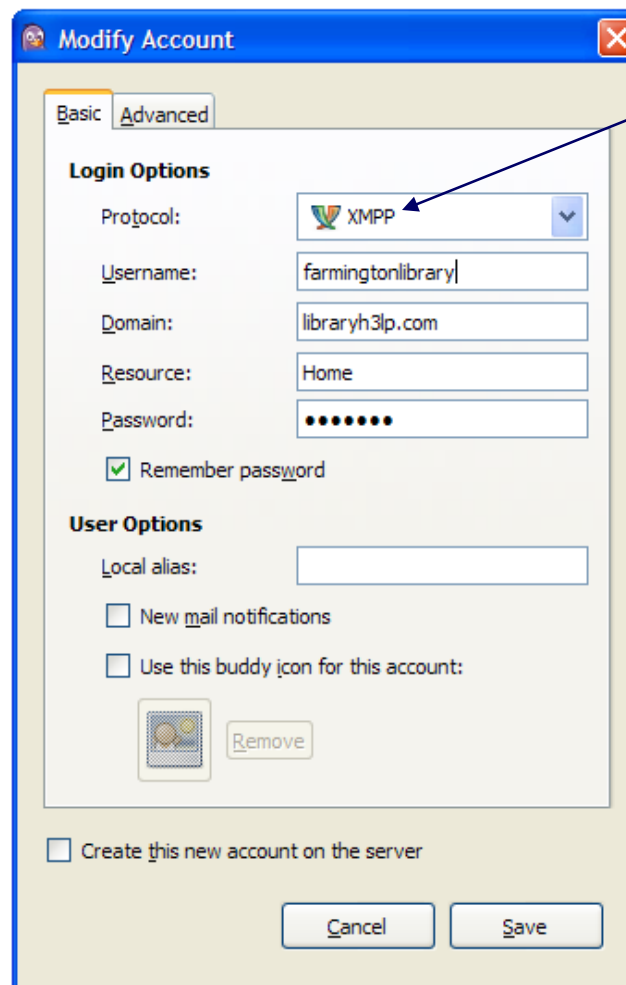
At the bottom left, there is a section titled "fplreferencedesk Gateways" with a "Show Passwords" checkbox and a table of gateway information:

Protocol	Username
aim	justaskfpl
yahoo	justaskfpl
msn	justaskfpl@hotmail.com
gtalk	justaskfpl

# Instant Messaging @ Your Library

## Option 3: Gold

- Setting up LibraryH3lp XMPP connection in Pidgin



# Instant Messaging @ Your Library

## Option 3: Gold

- Easily accessible transcripts from Administrative side  
<http://libraryh3lp.com/admin>



[calendar page](#)

[refresh](#)

[export to csv](#) (right-click, save as)

<< [prev 2010/02/02](#) [2010/02/04 next](#) >>

Select: [all](#) [none](#) [system](#)


	Guest	Protocol	Queue	Started	Answered	Duration	Operator
<input type="checkbox"/>	<a href="#">quest380911</a>	web	<a href="#">fpreferencedesk</a>	2010-02-03 19:49:31	11s	9m39s	farmingtonlibrary

# Instant Messaging @ Your Library

## Option 3: Gold

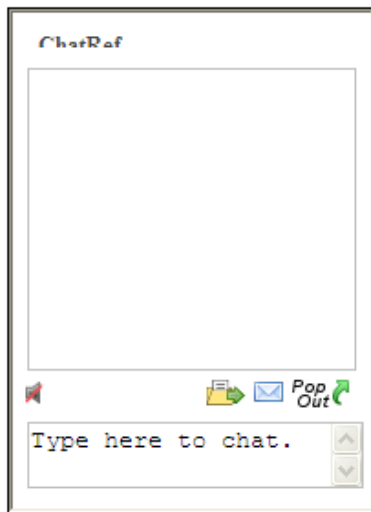
---

### □ Webchat client

Just Ask  Online

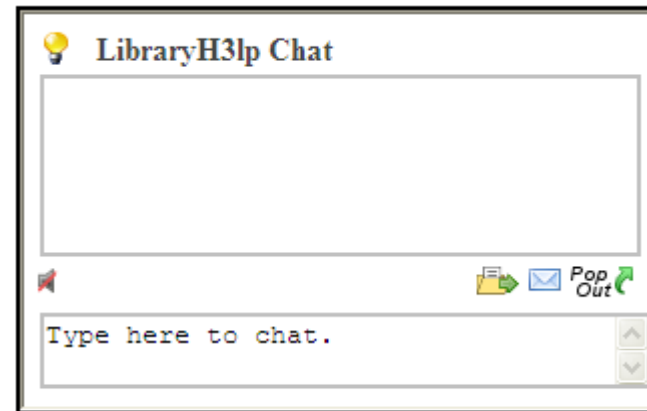
[Be our Buddy!](#) Chat with us online

Need advice on search strategies, or us anything!



Example 1

Example 2



<http://www.infoway.org/reference/justask2.asp>

# Instant Messaging @ Your Library

## The upside of Gold

---

- ❑ Designed by a librarian, for libraries
- ❑ Can monitor IM from two computers at once!
- ❑ Excellent tech support
  - <http://groups.google.com/group/libraryh3lp>
- ❑ More widget options make for reduced issues
- ❑ SMS gateway—make sure all gateway usernames are lower case
- ❑ Does statistics/charts and easily accessible transcripts for you
- ❑ For more info: <http://libraryh3lp.com/docs/h3lp>

# Instant Messaging @ Your Library

## The downside of Gold

---

- ❑ It isn't free, but the fee is nominal
- ❑ Works better with Mozilla Firefox than Internet Explorer
- ❑ You are required to type http:// to enable patrons to access hyperlinks
- ❑ Away mode issues
- ❑ Relatively new service, still expanding
- ❑ Requires a significant knowledge of Web 2.0 technology and web design



# Instant Messaging @ Your Library

## Option 3A: Gold Plus

---

- ❑ If you would like commercial training and support: RefChatter from Altrarama is a re-branded LibraryH3lp
- ❑ Different pricing structure
- ❑ Webchat client only: external clients (like Pidgin) are not supported
- ❑ For more info: <http://www.altarama.com/page/Is-It-Right-for-Me.aspx>

# Instant Messaging Implementation

---

- ❑ Select 2-3 IM possibilities for staff to test
- ❑ Establish methods and criteria to orient staff
- ❑ Choose IM program based on staff recommendations and how well it fits your library
- ❑ Here is what we did:
  - Showed staff how to use chat programs of choice
  - Designed a questionnaire for them to fill out with their feedback—what they liked, didn't like, etc

# Instant Messaging Implementation

---

- Write a policy to regulate patron use
  - Here's ours:  
<http://www.infoway.org/policies/instantmessaging.asp>
  - You can supplement this with **pre-written responses** to patron FAQ's and responses to inappropriate inquiries
- Make it known to your patrons! Promote!
  - Provide incentives for staff from **all departments** to help promote the service
  - Don't refer to your service as "chat"
    - Patrons mistakenly assume this means "chat room" (1)

1. Naylor, Sharon, Stoffel, Bruce, & Van Der Laan, Sharon (2008). Why isn't our chat reference used more? Reference & User Services Quarterly. 47.4, 342-354, 349.

# To Sum It All Up...

---

- ❑ Instant messaging is a supplement, not a replacement
- ❑ The properties of IM programs are similar, but they appear different
- ❑ Instant messaging is customizable
  - Are you a Gold, Silver, or Bronze?
- ❑ Be sure that staff are on board and are aware of the service
- ❑ Assess the effectiveness of your IM service
- ❑ Have fun and feel free to experiment!

# Questions? Comments?

---

- ❑ If you would like more handouts, or if you think of any questions later on, feel free to shoot me an email:
  - Karen McCoy, Adult Services Librarian  
Email: [kblong@infoway.org](mailto:kblong@infoway.org)

