

Widget What? Implementing Reliable Instant Messaging at Your Public Library

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What this workshop will
hopefully help you avoid:



Instant Messaging:

What does it mean for my library?

- More often, 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

- **Trillian** <http://www.ceruleanstudios.com>
 - AIM, Yahoo, and MSN all in one interface
- **Pidgin** <http://www.pidgin.com/im>
 - All of the above, plus GTalk, and more!
- **Meebo** <http://www.meebo.com>
 - Much like the above, except completely web-based (no downloads needed!), now includes Facebook Chat
- **Digsby** <http://www.digsby.com>
 - Compatible with different platforms (Mac and PC)
 - Website includes screenshots to help get you started

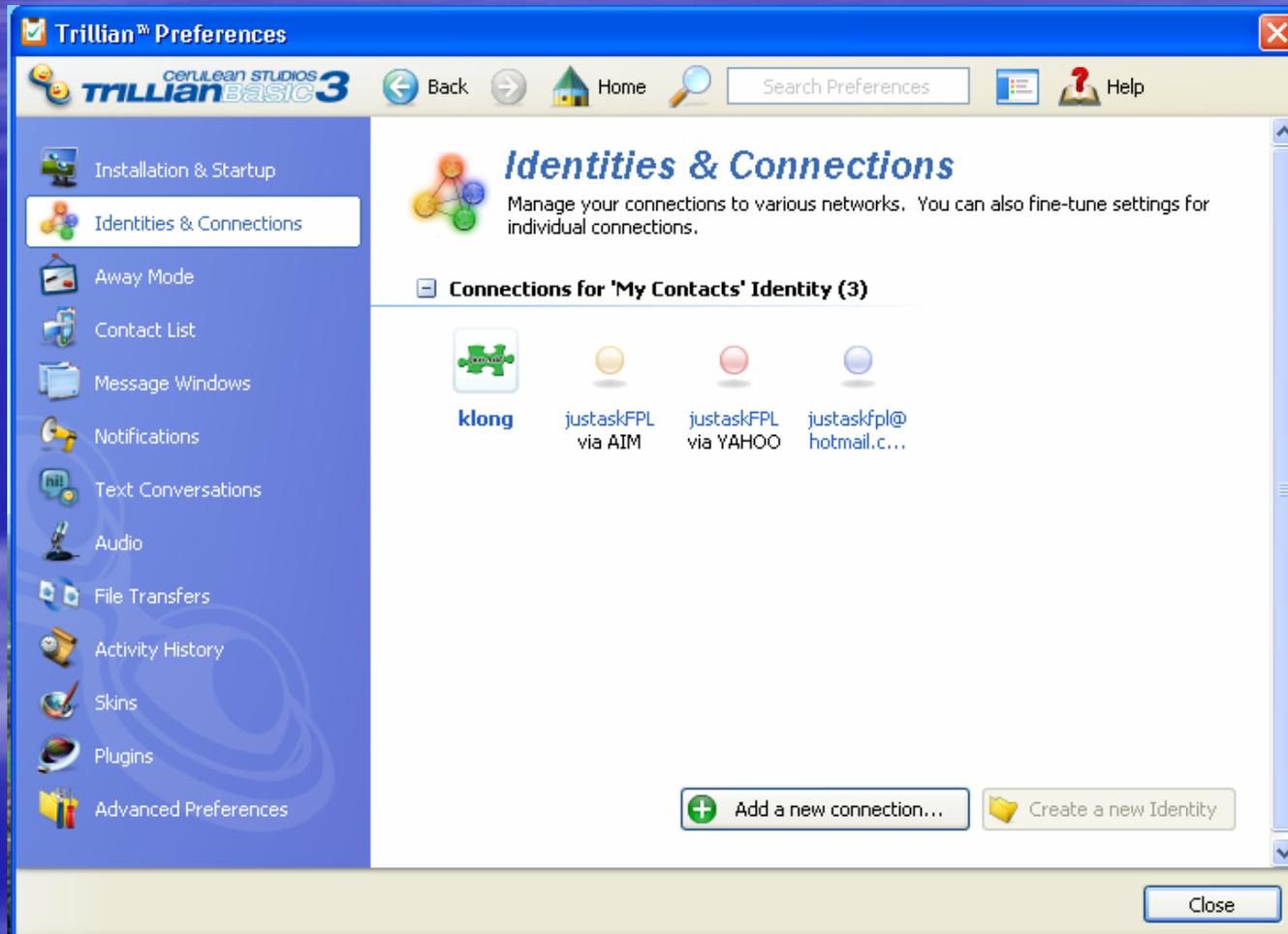
Instant Messaging @ Your Library

Option 1: **Bronze**

- The integration of one of the four aggregators at your library
- Choose the aggregator of your choice
- Download is free
- Register email accounts with the main chat services through AIM, MSN, Yahoo, and Gmail

Instant Messaging @ Your Library

Option 1: **Bronze**



Instant Messaging @ Your Library

The Upside of **Bronze**

- **FREE!**
- Minimum technical expertise required
- Patrons can add you as their buddy through AIM, Yahoo, MSN, and/or GTalk
- Aggregators pose no problems for SMS
 - SMS is available through AIM!
 - 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**

- Patrons are required to download IM software
 - They also need an email address accessible through either AIM, MSN, Yahoo or Gtalk
- Low visibility
- Each aggregator has its own learning curve
- Little to no tech support from the software manufacturers
- Some aggregators, particularly Trillian, are not Web 2.0 compatible

Instant Messaging @ Your Library

Option 2: Silver

- **Widget what? Add widgets to aggregators**
 - Internet based chat window that allows patrons to chat instantly via the library's web page
- **Types of widgets**
 - Embedded – within the web page
 - Pop-up – external from the web page
- **Common widgets used in libraries**
 - MeeboMe -Digsby -Plugoo -Chatango

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.

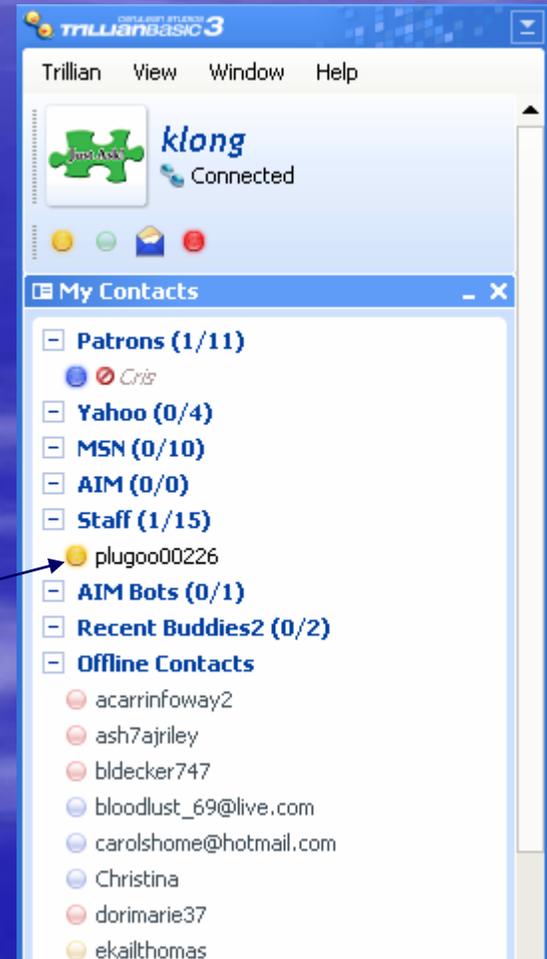
Your email address

Message title

Your message

> ok

get your **plugoo**



Instant Messaging @ Your Library

Option 2: Silver

The screenshot displays a web-based instant messaging interface. At the top, there are navigation tabs: "my profile", "my widgets" (which is selected), and "my settings". Below these tabs is a button labeled "My Plugoo".

The main area features a chat window titled "Just Ask!". The chat history shows a system message: "> I'm online! How may I help you today?" followed by a user message: "> Hello!". Below the chat window are two input fields: "Your message" and "Your email address", each with a corresponding icon (a play button and a speaker icon).

At the bottom of the interface is a configuration panel with a yellow "Skin" button. The panel has three tabs: "style", "text" (which is selected), and "options". The "text" tab contains several message templates and their corresponding input fields:

- ONLINE WELCOME MESSAGE:** "I'm online! How may I help you toda" (with a text input field)
- AWAY WELCOME MESSAGE:** "I am currently assisting other patrons. P" (with a text input field)
- OFFLINE WELCOME MESSAGE:** "Temporary technical troubles. Please em" (with a text input field)
- WHEN I'M BUSY MESSAGE:** "User is busy" (with a text input field)
- MY TITLE:** "Just Ask!" (with a text input field and font size controls)
- VISITOR OFFLINE MESSAGE TOPIC:** "Message title" (with a text input field)
- MESSAGE FIELD:** "Your message" (with a text input field)
- NICKNAME FIELD:** "Your email address" (with a text input field)

At the top right of the configuration panel are "cancel" and "save changes" buttons. A blue arrow points from the right side of the image to the "Your email address" input field in the configuration panel.

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 New Mexico 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](#)

Instant Messaging @ Your Library

Option 3: Gold

- LibraryH3lp: a useful aggregator/widget alternative
 - Created by Pam and Eric Sessoms at UNC Chapel Hill
- 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

The image displays three overlapping windows from the Pidgin instant messaging client, illustrating the configuration for Option 3: Gold.

- Queues:** Shows a single queue named "fpreferencedesk" with a checked checkbox and a green status indicator.
- Users:** Shows two users: "farmingtonlibrary" and "farmingtonlibrary2", both with checked checkboxes and green status indicators. An "Auto-Buddy" checkbox is also present.
- Accounts:** Shows a table of accounts with the following data:

Enabled	Username	Protocol
<input checked="" type="checkbox"/>	farmingtonlibrary@libraryh3lp.com/Home	XMPP

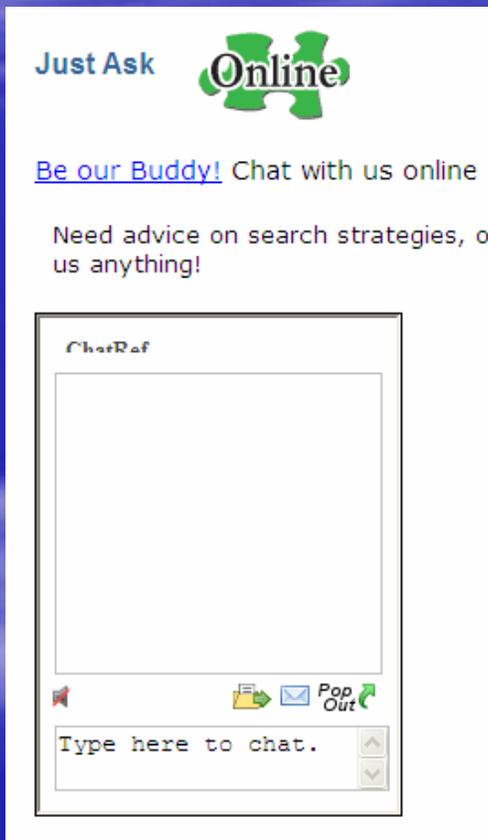
Buttons at the bottom include "Add...", "Modify...", "Delete", and "Close".
- fpreferencedesk Gateways:** A table listing various protocols and their corresponding usernames:

Protocol	Username
aim	justaskfpl
yahoo	justaskfpl
msn	justaskfpl@hotmail.com
gtalk	justaskfpl
- Buddy List:** A window with a menu bar (Buddies, Accounts, Tools, Help) and a status bar at the bottom showing "Available" with a green indicator and a small icon.

Instant Messaging @ Your Library

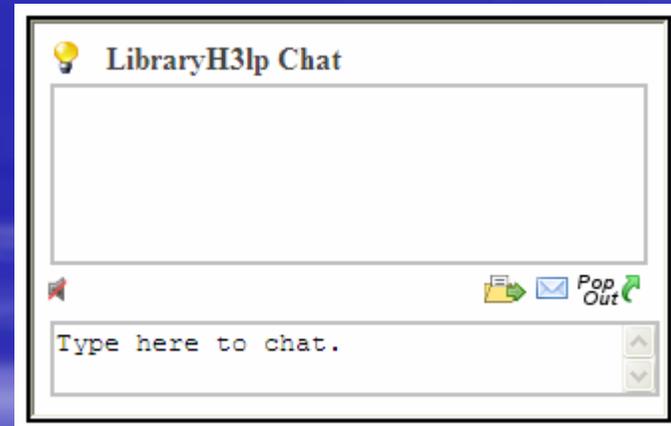
Option 3: Gold

- Webchat client



Example 1

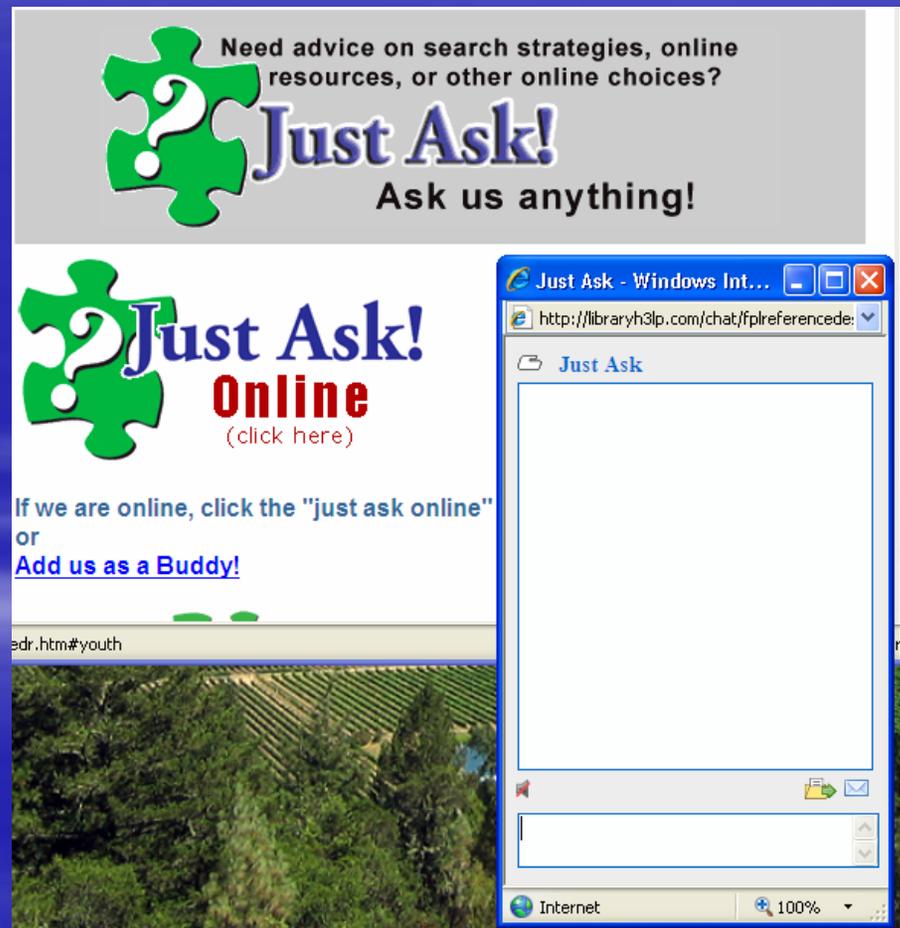
Example 2



Instant Messaging @ Your Library

Option 3: Gold

- Pidgin/Adium client: this is what we use now
 - Pop-out widget



The screenshot displays a web browser window with a 'Just Ask!' widget and a chat window. The widget features a green puzzle piece with a white question mark and the text 'Need advice on search strategies, online resources, or other online choices? Just Ask! Ask us anything!'. Below the widget, the text 'Just Ask! Online (click here)' is visible, along with instructions: 'If we are online, click the "just ask online" or Add us as a Buddy!'. The chat window, titled 'Just Ask - Windows Int...', shows a URL 'http://libraryh3lp.com/chat/fplpreferreded:' and a large empty text area for messages. The browser's status bar at the bottom indicates 'Internet' and '100%' zoom.

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
- 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
- Relatively new service, still working on the kinks
- Requires a significant knowledge of Web 2.0 technology and web design

Useful Web Links for IM in Libraries

- Lib Success Wiki on Online Reference:
 - http://www.libsuccess.org/index.php?title=Online_Reference
- More information on different types of widgets:
 - <http://libraryh3lp.com/docs/h3lp> → [Widget Style: Embedded, Pop-up, or Follow Me?](#)
- More on Meebo:
 - <http://www.meebo.com/support/article/25/>
 - <http://www.meebo.com/meebome>
- Comparison of Plugoo and Meebo:
 - <http://libraryvoice.com/archives/2007/02/20/plugoo-versus-meebo/>
- More on Digsby:
 - <http://wiki.digsby.com/doku.php?id=gettingstarted>
 - <http://widget.digsby.com/>
- More on Libraryh3lp:
 - <http://libraryh3lp.com/docs/h3lp>
 - <http://code.google.com/p/libraryh3lp/wiki/ScreenCasts>

Questions? Comments?

- Karen Long, Adult Services Librarian
Email: kblong@infoway.org
 - The rest of this session will consist of demonstrations of IM and how to set it up at your library

- Thank you for attending!



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.

“Netiquette”

- While instant messaging, it helps to remember to:
 - Allow the other person to finish before commenting
 - Be patient with slow replies on the other person’s end
 - Break long messages into short statements
 - Offer suggestions instead of commands
 - **NEVER USE ALL CAPS!** (That’s really bad.) (1)

To Sum It All Up...

- Instant messaging is a supplement, not a replacement
- The properties of IM programs are similar
- 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!