“OK… I get it!”

Implementing IM/SMS reference services, statistics tracking, and online tutorials

LibraryH3lp, Gimlet and Jing

The reason for the choice in the title of this presentation is to set the tone for what will be included and what will not be included.

The decision of whether to implement instant message reference and/or text message reference for patron queries is unique to every library and situation. Studies can be read, inquiries can be submitted soliciting experience from other libraries, and pilot projects undertaken to name just a few. All are valid start points. However, if you are past this step, or have decided to skip it altogether this presentation will hopefully help.

You may have also already heard through the grapevine from various sources about patron satisfaction with chat reference or you might have experience with this technology in your personal life. You might be saying “OK… I get it! I know I want to do this but don’t have the time to research where to start and don’t know what service to use.”

The following suggested services are what the State Library of Kansas (SLK) is currently using, all at either no-cost or low-cost. This presentation will not only include a service for instant message and text message reference, but also a statistics tracker which creates a knowledge base and a video tutorial creator.
LibraryH3lp- “You’ve found LibraryH3lp, original home of the most awesome multi-operator integrated web-chat / instant-messaging / text-messaging / social-networking user-communication dohickey on the net.” http://libraryh3lp.com/.

The foundation of LibraryH3lp is open source and was co-developed by Pam Sessoms (Electronic Reference Services Librarian at University of North Carolina-Chapel Hill) and Eric Sessoms (computer programmer). LibraryH3lp “was initially designed to permit sharing of night-time virtual reference with colleagues at North Carolina State and Duke University libraries.”

The State Library of Kansas first started out using a Meebo Me chat widget around May 2008 and in early Fall began moving towards LibraryH3lp. The SLK chat reference with LibraryH3lp was fully up and running in time for the start of the 2009 Kansas Legislative Session.

Additional reading-
Pidgin is a universal chat client and all of the code is open source and licensed under the General Public License.

Basically, you can sign into multiple instant message accounts with Pidgin. LibraryH3lp has a custom plug-in with additional instructions on set-up and customizations within their help documents. The chat network for LibraryH3lp is a Jabber (XMPP).

If your staff uses instant message you can also route these through Pidgin. In the past, when SLK had Groupwise, this was easily accomplished and now that we have Google Apps it is the same. Not all staff members are within LibraryH3lp as an operator so Pidgin would not need to be used by all. However, it is encouraged for all staff members who deal with patrons or who work with other libraries. We have been seeing an increase in the number of other librarians contacting librarians within the SLK staff and all effort is made to keep the patron within the communication medium chosen. At this point it is an option for the staff outside of the reference department, but not a requirement.
LibraryH3lp has a gateway to receive text message questions in the same format as instant message questions within Pidgin by using a Google Voice number. Instead of patrons sending a text message (SMS) to a shortened series of numbers and including a code for your library at the beginning of a message for it to be routed, a Google Voice number can be more easily programmed into patrons’ address books.

The SLK number is 785-256-0733 with 785-256 appearing as an exchange for Topeka, KS. 0733 spells out 0REF, just for the fun of it. During the Google Voice set-up you have a little leeway with the number you decide on. We received our number during the time when Google Voice was still “invitation only” so things might be slightly different now.
LibraryH3lp documents section http://libraryh3lp.com/doc can answer all questions regarding set-up.

However, AltraRama offers a product called RefChatter and provides commercial setup, training and support. http://www.altarama.com/page/RefChatter.aspx

As a reference librarian and not a person with a formal technology background, I was able to setup the back-end administration side and create the widget. This was accomplished intermittently over the course of about a day. The actual placement on the website was done by the person who maintains our website from the html code provided from LibraryH3lp.

WordPress sites which are hosted on your own server should have the ability to place the chat widget box but I do not believe wordpress.com sites have this option at this time.

Within Facebook there is an ability to add a LibraryH3lp chat widget within the new Facebook custom iframe tabs format.
Pricing structure for LibraryH3lp. The drop-down box for “Public Libraries” has been selected showing the different options.

The State Library of Kansas doesn’t really fit into one of these categories. Our price was determined after testing the services for a number of months and comparing the number of chats to the number within an academic library. At the time, at least, we were equivalent to the number which UNC-Chapel Hill was receiving and priced accordingly.
LibraryH3lp log-in screen. This is mainly used to transfer a chat to another librarian or to look at statistics. Daily log-in at the beginning of a shift occurs through Pidgin.

The State Library chose to remain anonymous with patrons and have “slkreference” show as our name within the chat.

However, the actual librarian usernames must be unique throughout the LibraryH3lp system. We use “slk1, slk2, and slk3.”
Back-end of LibraryH3lp.

> “Users, Queues, and Gateways” tab

>> “Queues” section will list all queues created. slkreference has a checkmark indicating it is the one selected and the users and gateways section are specific to that queue.

>> “Users” slkreference is selected and within the “Queues” section so it will only show checkmarks next to those within that queue (slk1, slk2, slk3). This section will list all queues created. slkreference is the only queue we have widgets for on our webpages. Reference librarians are in this queue and everyone else is listed under the slkother which would display if checked. Green circle indicates available. Grey circle is offline.

>> “Gateways” shows the additional voice (Google Voice) gateway with the Username statelibraryofkansas. We had a unique gmail account created for the sole purpose of this Google Voice account so it was not connected to any one staff person’s email.

>> “Properties” shows that transcripts are enabled. The default is for the transcripts not to be enabled.
State Library of Kansas “Ask a Librarian” page available within the left sidebar on any page within http://www.kslib.info/.

Embedded widget provided and the patron does not need to download any software but can begin to type a question immediately. For example, “where can i locate the ks constitution?”

The patron can select the green arrow to pop out the chat box to a separate window. By selecting the envelope the patron can email themselves a transcript of the discussion.

Pop out widgets are also available to have placed on a website. A patron would click the image of a chat box and a new window will appear before any question is typed.
Shows response of “slkreference” with a link provided, etc.
Librarian side of a conversation. No matter what program you are working on this box will force to the top, in most cases.

Shows patron’s initial question, “Hi, do you know where I can find the state symbols?” All librarians available will see this message. After a librarian responds to the patron, the other librarians within the queue will be notified. In this case the question was answered by "slk3".

One of the first messages at the beginning of each chat session is the option to transfer to another available librarian by selecting the link provided.
Showing link which was provided to the patron for the state symbols of Kansas. When the patron navigates away from the page the librarian will receive an alert that the patron “has left the conversation”. In most cases this is at the obvious end of the question, as above, but sometimes a patron will accidently close the window with the chat box. A pop out widget may help in this situation though we do not have much trouble with this.
Sometimes questions are best answered by another staff member not within the Reference Department. This type of question could be answered by an SLK reference librarian, but could also be transferred to the State Data Center Coordinator at SLK for a variety of reasons.
Initial contact with the patron is necessary before a transfer. This is helpful in letting the patron know you will be sending them to another librarian for assistance and help avoid frustration as transferring usually takes about 30 seconds to complete. It depends on the patron as to how long they will wait for an initial response.

At this point it is suggested to call or contact through internal instant message, etc., the librarian you wish to transfer the patron to in order to give them a heads up but also to make sure they are available for the transfer.

Click on the link to transfer. This will take you to the LibraryH3lp log-in screen.
After you sign-in you will have the option to transfer.
Select the librarian you wish to transfer the patron to from the drop-down selection.
This screen will let you know when the transaction has been completed.
What the librarian who receives the transferred patron will see. The initial question will be provided at the beginning. The last message will indicate that this was a transfer and a link is provided to the conversation between the librarian and patron up to the point of transfer.
After you click the link to view the conversation up to the point of transfer you will arrive at this screen (you may need to sign in).
Statistics are also available from the LibraryH3lp administrators page.

A calendar view is available to show the total number of chats for each day. By selecting one of the days you will be able to view the chat history.
This shows the chat history for the particular day chosen from the calendar statistics page (Jan. 27, 2011).

Notice the referring URL section on the right. This can be helpful in knowing how a patron located your chat reference, especially if you have the widget on multiple pages within your website or other websites. For example, there is one from http://www.kslib.info/employees/ - this is from a section of the SLK website devoted to State Employees.

Notice that 2 questions went unanswered. There can be many reasons for this happening. In this particular case you can see from the “Guest” numbers in the list that there were already 2 conversations with this patron. One with slk1 and another with slk3.
If you hover or click on the guest number you can see what the patron wrote. Practicing what we call “tough love” is the same as ignoring a patron.

The reason these are separate transactions is because the patron must have navigated away from the page and then returned, or we closed the chat box on our end.
This particular calendar day we received a lot of text message reference questions. Notice “voice” within the “protocol” section. These are questions which arrived via the Google Voice gateway.

An interest group had placed an advertisement giving our contact information urging members of the public to send a text message to obtain contact information for their legislators. Because of the nature of text messaging over instant message the “duration” section is much longer.

Instead of having a guest number, the patron’s phone number is given. These have been grayed out for privacy but you can see that they were received from every area code in the state: 785, 316, 620 and 913.
Some custom reports are also available. This one is showing the chats per hour for Jan 1 - Mar 31.
Because of the nature of using Google Voice with LibraryH3lp, situations occur when there can be a service interruption. LibraryH3lp has a twitter account used almost exclusively for the purpose of notifying customers about the Google Voice gateway.

http://twitter.com/libraryh3lp

There are many ways to follow a twitter feed including setting up an RSS feed or signing up to receive tweets via SMS (text message). Currently, an SLK staff member subscribes to the tweets through SMS.
Alternatives


Meebo Me is one of the most popular alternatives to LibraryH3lp, but there are many others. Suggestions can be located at http://www.libsuccess.org/index.php?title=Online_Reference#Libraries_Using_Virtual_Reference_Services.

There are many reasons SLK switched from Meebo to LibraryH3lp. Only one librarian per chat widget, and no ability to transfer to another librarian are just a few.
Gimlet was created by Eric Larson and Nate Vack, who are the same guys that built LibStats and use a large variety of open source programs.

Gimlet can be used to track statistics and build a knowledge base of questions and answers.

Nate and Eric wrote LibStats from 2003-2004. Nate was the Head of Computer Services at University of Madison’s Wendt Library (Engineering) and Eric was a School of Library and Information Science graduate student. By 2004 LibStats was used across all of the UW-Madison’s campus libraries. The project was first open-sourced in 2005 and in 2007 was available on Google Code.

Sidecar Publications LLC is their startup company and Gimlet is their first offering. Basically, Sidecar is interested in visualizing library-use data and helping libraries decipher how their assets are accessed and used.
Gimlet itself is available at no charge but if you would like reports, it is $10/month. If you start using this application and decide 6 months (for example) down the line to add reports, the statistics will include everything going back to your original sign-up date.
Set-up is easy. Add the email address for people who will be inputting statistics. They will receive an email asking for confirmation and will be prompted to create a password.

Note: “My account” tab only available within administrator login.
Set-up continued. Modifications can be made to what the choices in each category are. Main headings cannot be changed. The checkmark indicates it will display as a choice to be selected at input. These can be changed at anytime by the administrator.
Login screen. At set-up you will be asked to create a unique url. This url is what you will use daily to login to the service.

For example: https://*****.gimlet.us/
Gimlet input screen. Self explanatory for the most part.

The difficulty scale is the most subjective. The suggested guideline is to use The READ Scale (Reference Effort Assessment Data). Information on its creation can be located at: http://www.dom.edu/library/READ/index.html. The State Library of Kansas has modified The READ Scale to include examples of the type of questions we receive, so it is customized. Most of our questions deal with the Legislature so someone unfamiliar with the process or procedures would rank those questions more difficult than we do, for example. (Attachment)
Input screen for the administrator account.

Slightly different to include “Change stats categories” under the “Location” section, the ability to “Edit tag list” and an additional tab at the top for “My account”.
List of questions and answers. Black font is the question and gray is the answer (if provided).
Using the “Search” tab at the top you can locate similar questions to see if you can re-use the answer in some way. Truncation of a word is accomplished by using an * after a minimum of 3 letters.

You can “star” a Q/A and the search will bring those to the top within the search results.

There is also an advanced search section and other sort options available.
Report Overview screen showing August 1, 2010 through March 28, 2011.
“Reports” tab with “Detail” selected showing “hour of day” and “day of week” together. This type of report can help with staffing a reference desk or service point, for example.

Spreadsheet Export available.
Detail report showing difficulty and who the questions were asked by.

Spreadsheet Export available.
All reports are able to be exported into a format able to be read by Microsoft Excel, Google Docs or OpenOffice.

To run the report and export click “Go!”
Gimlet offers a very helpful FAQ section on their website and also email support. Set-up can be accomplished entirely through the FAQ section. I have found email responses to specific issues very fast!
Jing is a product of TechSmith, which was created in 1987. TechSmith “has seven products that do anything from take screen captures, to screen recording and managing consumer content.” http://www.techsmith.com/company/about.asp

Jing is a screencast application (also known as visual communication) that records exactly what is on your computer screen and also audio through your microphone. There is no cost to Jing and videos are recorded with .SWF (Shockwave Flash) format and are limited to 5 minutes in length. There is a Pro upgrade available for $14.95/year which allows instant uploading to YouTube, ability to capture from a webcam, no branding by Jing within the video and the ability to record in MP4 format instead of .SWF. Videos are still limited to 5 minutes in length, however.

The State Library of Kansas reference department uses Jing to provide online tutorials to assist patrons in navigating databases and websites in general. Others on staff use the software Camtasia, also a TechSmith product, which has more options, including easier editing capability and no length constraints, but requires purchase.
Screencast.com, another product of TechSmith is also available at no cost up to certain storage and bandwidth limits. Jing videos upload with the click of a button to a screencast.com account. Code to embed within a website or blog is provided, as well as a link for sending as an email.

There currently is a situation with embedded videos within a website not showing up if viewed from within Firefox. However, a work-around would be to take an image and make it a clickable link to the screencast.com hosted video.
This is an example of how the State Library of Kansas has used tutorials. Within the State Employees section of the SLK website we provide a service called Journal Finder. This service allows patrons (and librarians) the ability to type in the title of a journal and locate which statewide database or Capitol Complex only database holds the title. Print journal holdings are also displayed.

Since this service displays both statewide databases and those only available to state agencies within the Capitol Complex the video shows how to determine which are available statewide and which are not.

Notice the "View Tutorial" link

Feel free to visit http://www.kslib.info/employees/ to learn more about Journal Finder. (note- the video will be slightly updated soon but content will not change)
After you click on “View Tutorial” you will come to the embedded video page.

The extra text below the video was added by SLK to assist patrons in expanding the video to full-screen.
Because Jing only saves within the .SWF format, uploading to YouTube is not possible without converting to a different format, as the ability to upload a .SWF is not available within YouTube.

Format Factory is a no-cost solution and will convert a .SWF to something YouTube will accept, for example the .MP4 format. This is what is commonly referred to as donation-ware in which, if you really love this product, please help keep it alive!

Alan Pine, Computer Technician at the State Library of Kansas, is a beta tester for this software. Beta testing comes after the Alpha (in-house) stage of design. Programmers receive volunteers for Beta testers who are tech folks and try to break and/or tear apart the product to find weaknesses.

This is the only known no-cost software which will transfer a .SWF to a YouTube friendly format.
Applications mentioned

- Pidgin  [http://www.pidgin.im/](http://www.pidgin.im/)
- Google Voice  [http://www.google.com/voice/about](http://www.google.com/voice/about)
- Gimlet  [http://gimlet.us/](http://gimlet.us/)
- Screencast  [https://www.screencast.com/](https://www.screencast.com/)

Link provided for the applications mentioned.
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Ask a Librarian http://www.kslib.info/ask.html