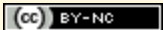


# Ask Us! Creating, Assessing, and Improving Chat Reference Services in Your Library

Kim Pittman  
Gabriel Gardner



# Chat @ UMD

show page push window

**Pam:** I need a book - fast!

▲ NEWEST MESSAGE ▲

**Jodi:** Hello Pam,

**Pam:** How do I get a book we don't have

**Jodi:** Hello. Welcome to VRL, what can I do for you?

Send Message      Quit

Internet

Welcome to the UMD Library

Library Catalog    Electronic Resources    Indexes and Databases    Circulation Services    Interlibrary Loan

What's New and Events    Frequently Asked Questions    Special Collections    Connect from Off Campus

Library Services: Ask a Librarian    Go

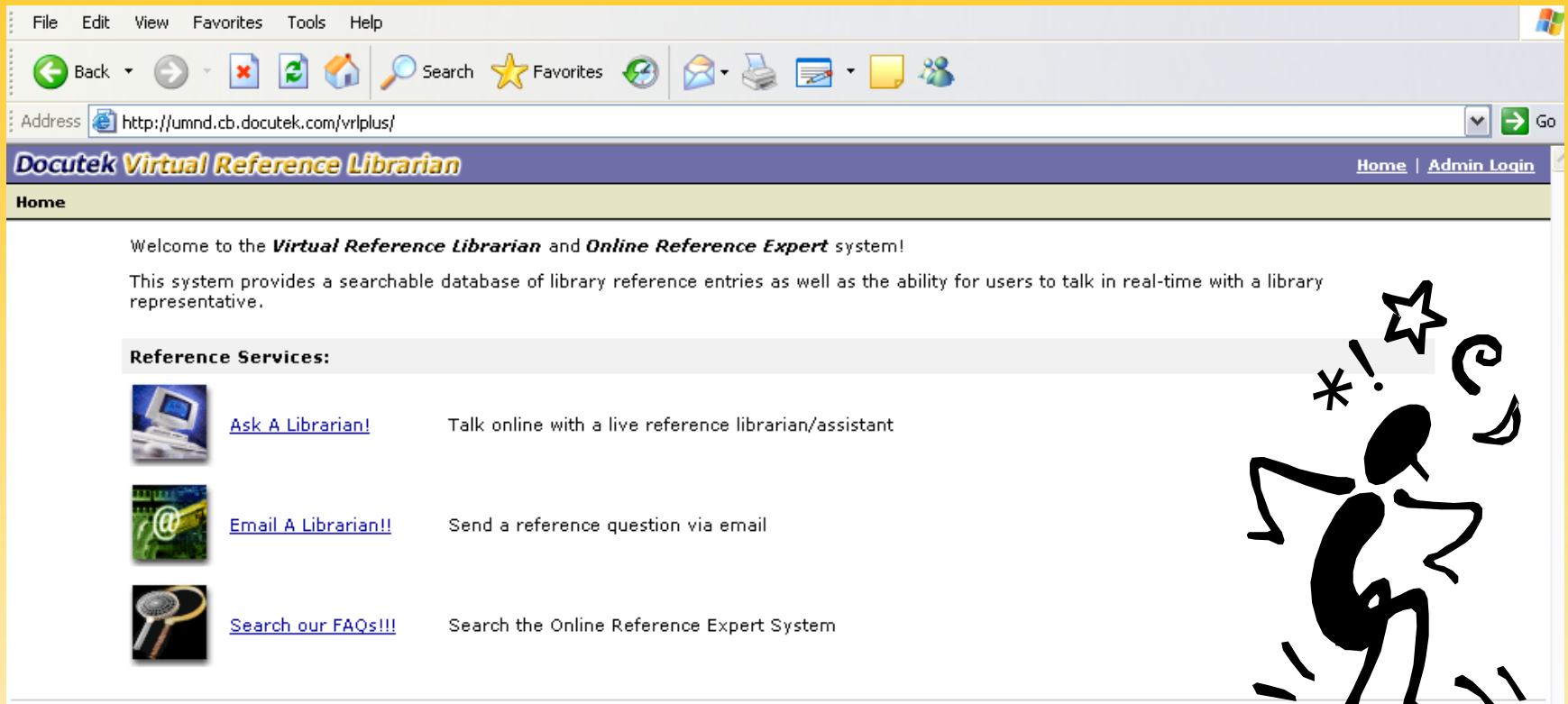
Library Information: Hours    Go

Give to the UMD Library    Federal Depository    RefWorks    Online Reference Collection    e-Journal Locator

The UMD Library Catalog may be down on Sundays from 6:00 a.m. to noon if there is maintenance to perform. If maintenance is not required, the catalog will be available during these hours.

Done    Internet

Once upon a time in 2004(ish)...

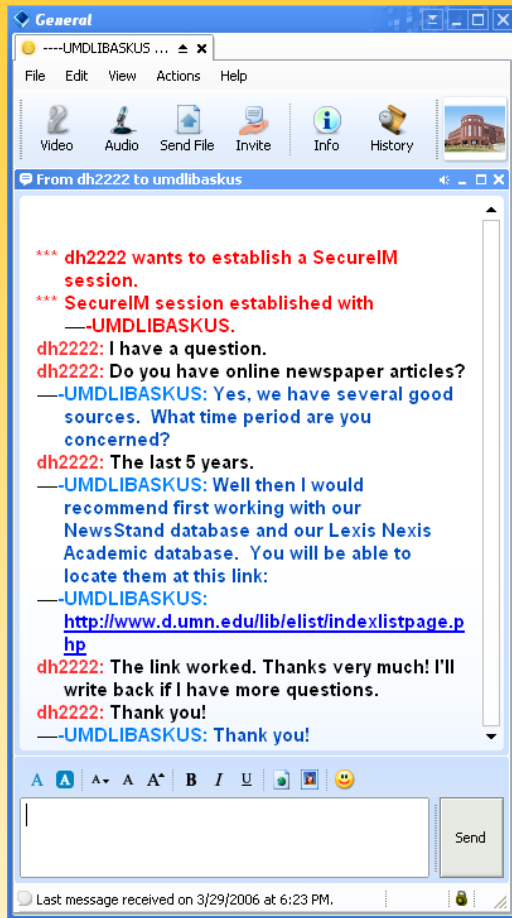


## Docutek, 2004:

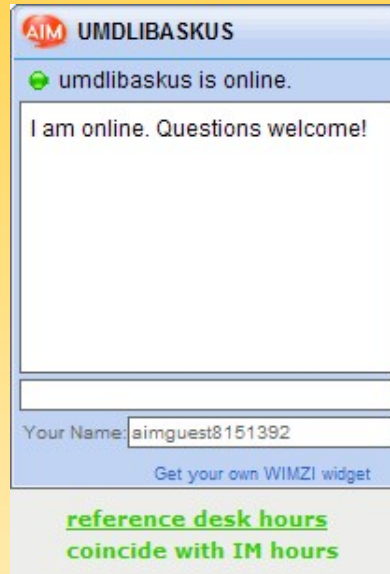
“Robust” co-browsing experience not preferred by patrons; interface difficult for librarians

# Chat @ UMD

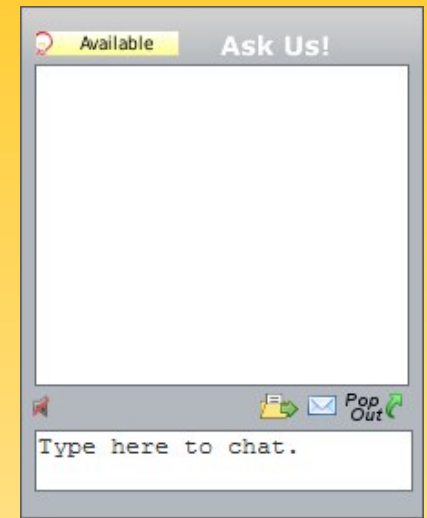
# Chat @ UMD



**2005, Trillian, Librarian view:**  
Unreliable, single-librarian monitoring



**2005, User view**

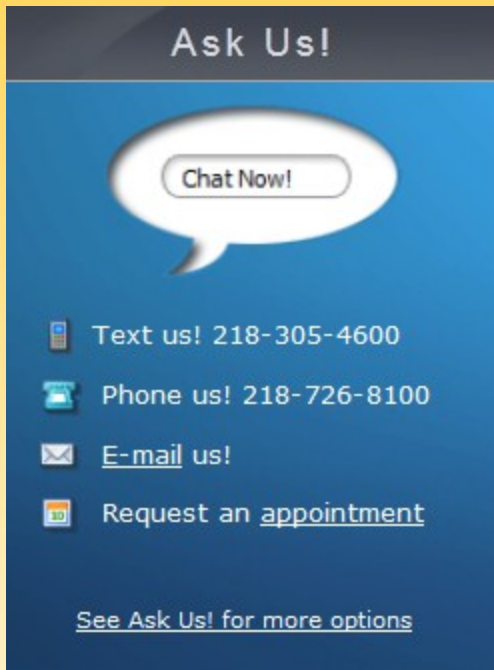


**2009, Library H3lp:**  
Embedded widget woes

**Google Voice for texting, 2009:**  
Slow delivery time



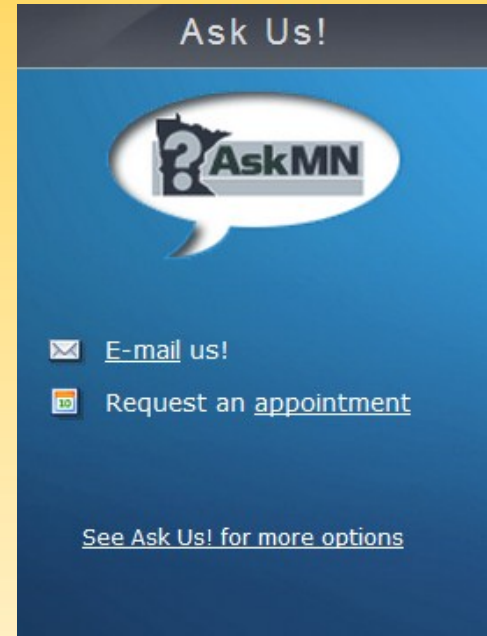
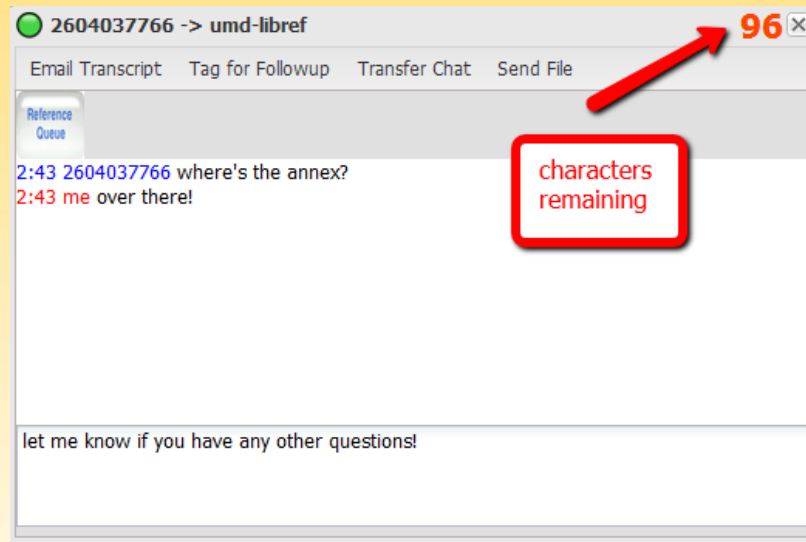
# Chat @ UMD



**2011, Library H3lp:**  
Pop-out widget



**2011, Twilio:**  
SMS Gateway integrated  
with Library H3lp



**AskMN (QuestionPoint):**  
24/7 coverage

**CREATE**



# Software is a means...

- Client

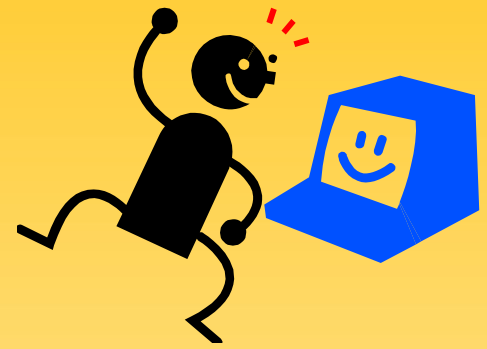
- OS / web-based
- License
- Features
  - Offline messaging
  - Message logging
  - File transfer
- Protocol support

- Protocol

- Groups
- Security
- Audio/VOIP
- Video



... to an end



10:13 [umd-refdesk@libraryh3lp.com](mailto:umd-refdesk@libraryh3lp.com) Did you find the journal title though?  
10:14 [16093522781333379303559963@libraryh3lp.com](mailto:16093522781333379303559963@libraryh3lp.com) yep i think i got it now thanks to you!  
10:14 [umd-refdesk@libraryh3lp.com](mailto:umd-refdesk@libraryh3lp.com) Oh good  
10:14 [umd-refdesk@libraryh3lp.com](mailto:umd-refdesk@libraryh3lp.com) Anything else I can do for you?  
10:14 [16093522781333379303559963@libraryh3lp.com](mailto:16093522781333379303559963@libraryh3lp.com) nope thats everything thanks :)  
10:14 [umd-refdesk@libraryh3lp.com](mailto:umd-refdesk@libraryh3lp.com) Great  
10:14 [umd-refdesk@libraryh3lp.com](mailto:umd-refdesk@libraryh3lp.com) Your feedback is important to us. Please take this brief anonymous survey to help us improve our service. <http://z.umn.edu/chatsurvey> Thanks!  
10:14 [16093522781333379303559963@libraryh3lp.com](mailto:16093522781333379303559963@libraryh3lp.com) ok!!



# Discussion

- If you have a chat service, what criteria did you use to select it?
- What features are most important to you in a chat service?
  - <http://z.umn.edu/arldaskus>

**ASSESS**

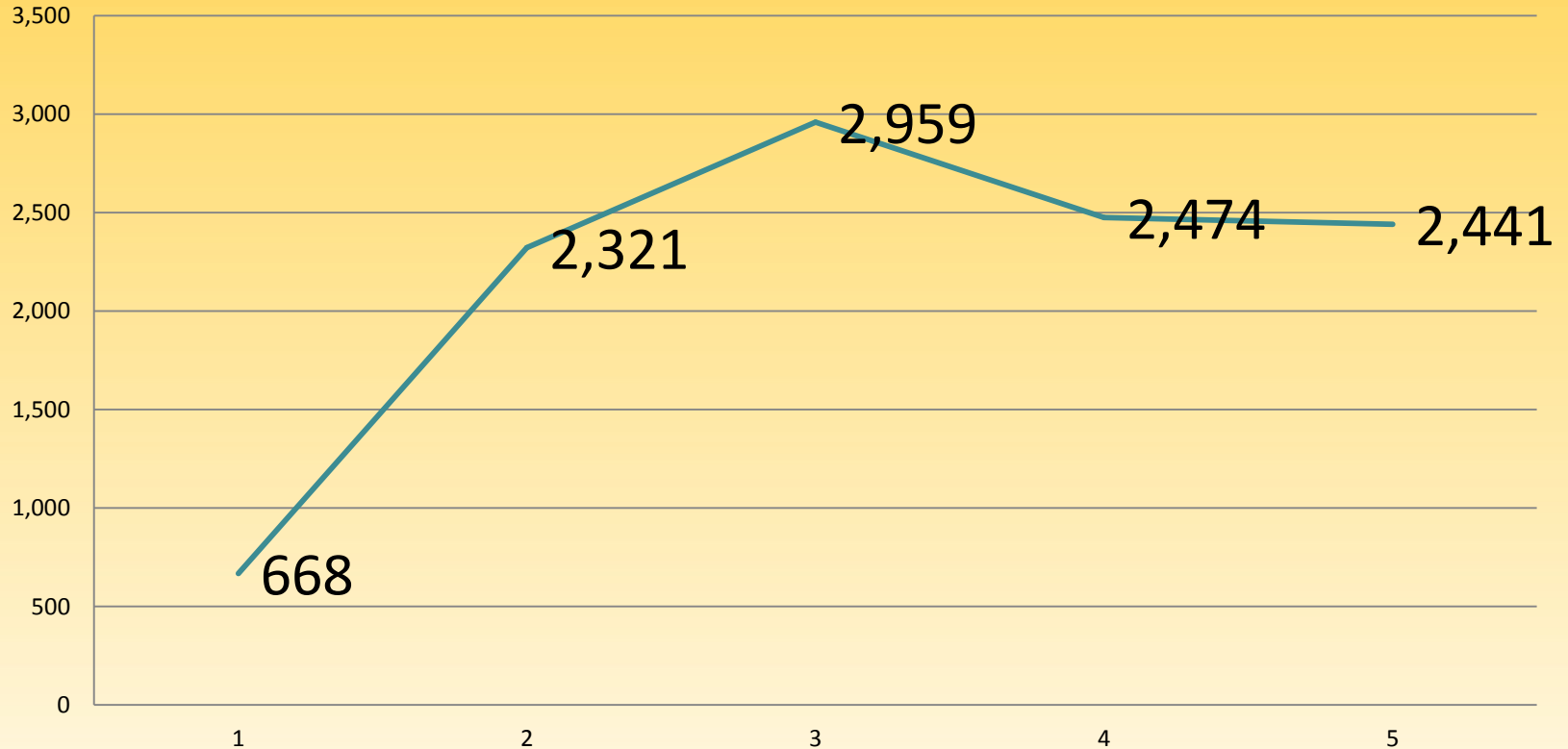


# Why assess?

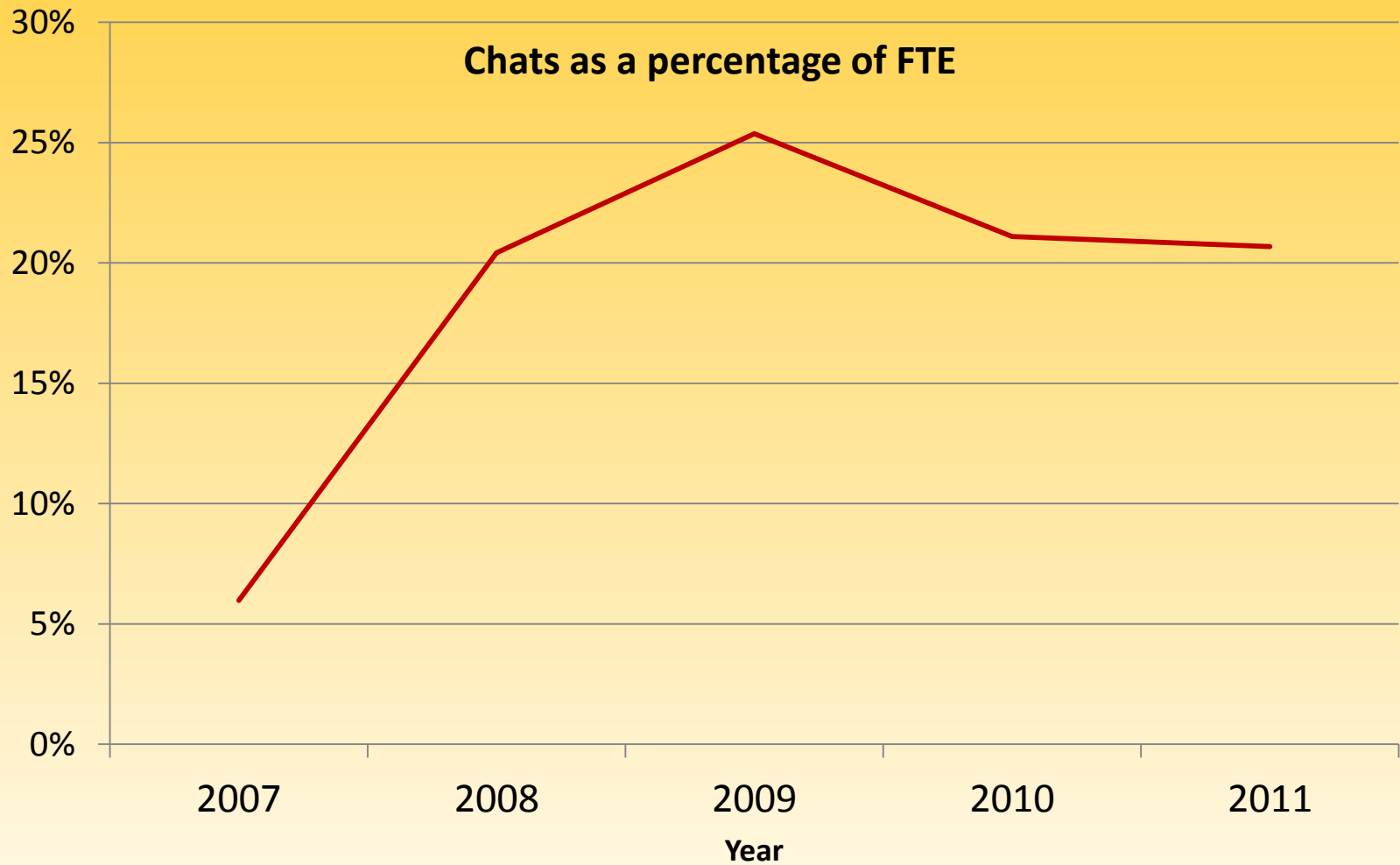
- Understand usage patterns
- Gauge user satisfaction
- Evaluate quality of service
- Identify potential improvements in promotion, usability, and service quality

# Statistics

Chats per year, 2007-2011



# Statistics

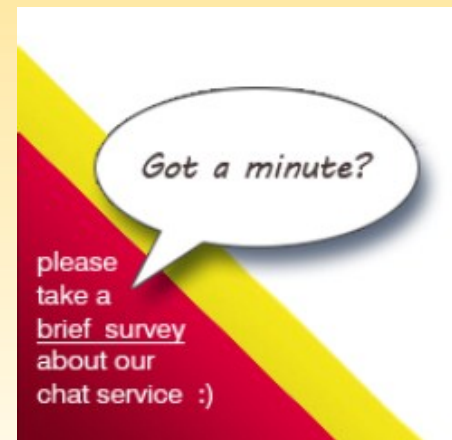


# Surveys

- Exit survey to gauge patron satisfaction

12:16 me can I help you with anything else?  
12:16 16018968731335201276904190 nope that is it. thanks!  
12:16 me sure thing, have a good afternoon  
12:16 me Your feedback is important to us. Please take this brief anonymous survey to help us improve our service.  
<http://z.umn.edu/chatsurvey> Thanks!

- Additional survey to evaluate awareness of chat and reasons for non-use



## Chat Patron Survey

This brief survey should take about 2-3 minutes to complete. UMD Library is committed to providing excellent service to you and your sincere feedback is crucial to our focus on improvement and patron service.

\* Required

On a scale of 0-5, where 0=Very Dissatisfied and 5=Very Satisfied, please indicate your satisfaction with the following:

**Librarian's ability to understand your question(s) \***

1 2 3 4 5

Very Dissatisfied      Very Satisfied

**Promptness of librarian's replies to your question(s) \***

1 2 3 4 5

Very Dissatisfied      Very Satisfied

**Quality of the response to your question(s) \***

1 2 3 4 5

Very Dissatisfied      Very Satisfied

**Are you likely to use the library's chat reference service again? \***

1 2 3 4 5

Very unlikely      Very likely

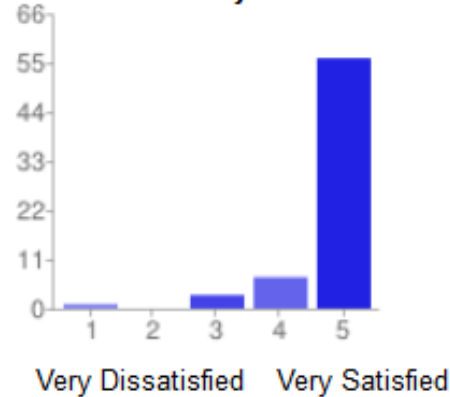
**If there were one thing UMD Library could do to improve our chat reference service, what would that be?**

# Surveys

- Created using Google Forms
- Guerilla survey testing
- Link delivered by macro and included in chat box

# Our exit survey results

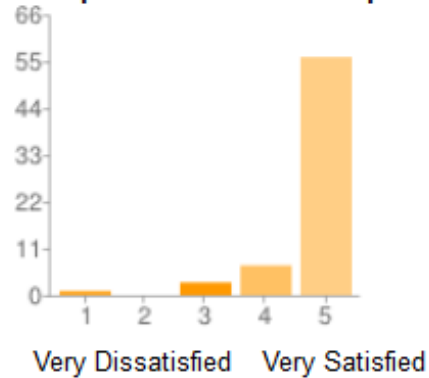
Librarian's ability to understand your question(s)



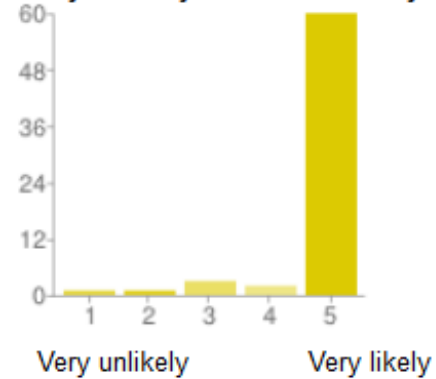
Quality of the response to your question(s)



Promptness of librarian's replies to your question(s)



Are you likely to use the library's chat reference service again?





# Phase 2 results

## Chat Patron Survey

This brief survey should take about 2-3 minutes to complete.

UMD Library offers 24-hour chat reference service. This service allows you to contact a librarian with your questions using instant messaging. UMD Library is committed to providing excellent service to you and your feedback will help us improve our chat service.

\* Required

Have you ever used UMD Library's chat service? \*

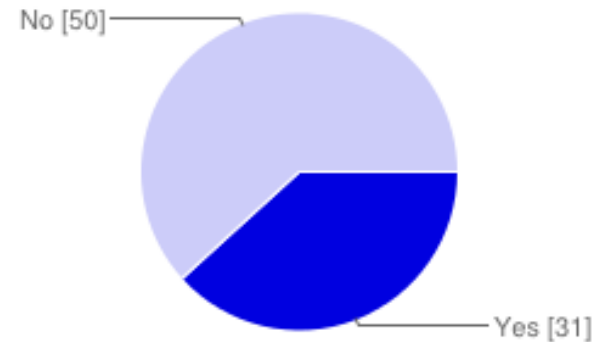
- Yes
- No

Continue »

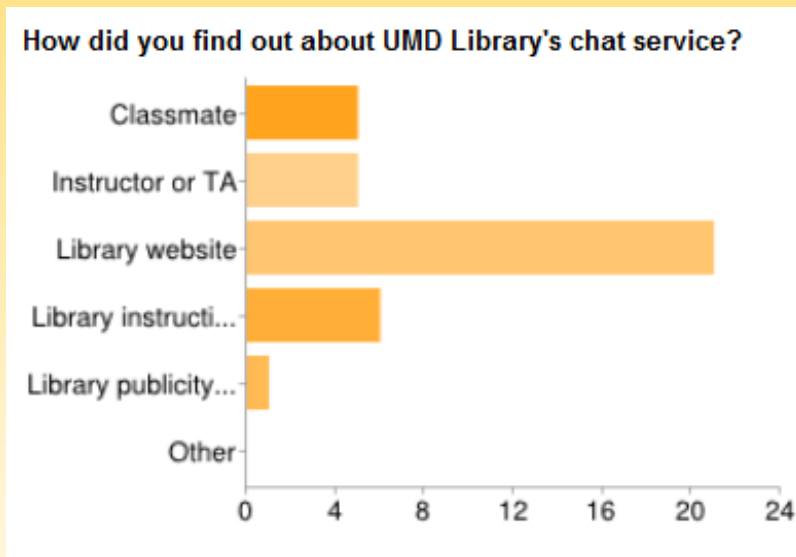
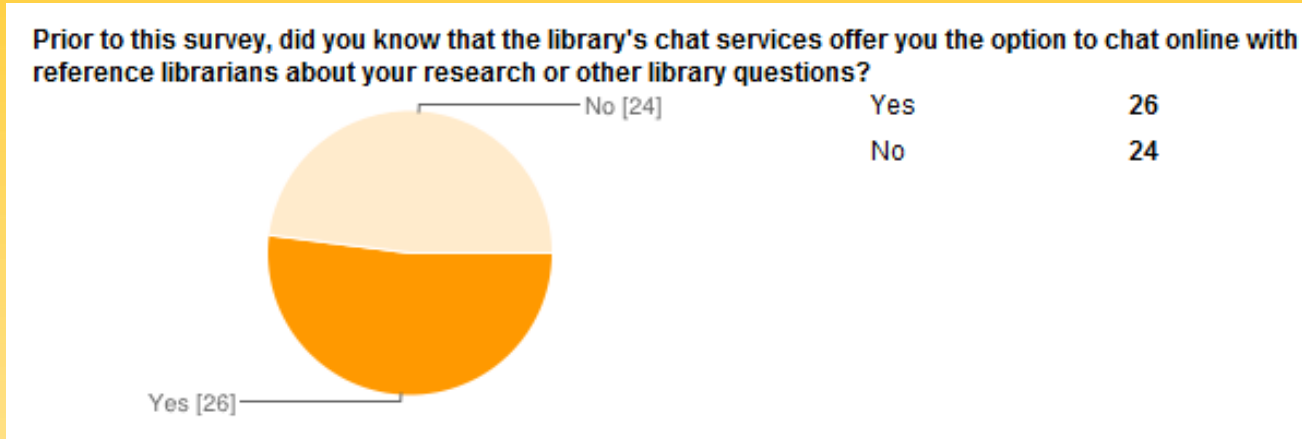
Powered by [Google Docs](#)

[Report Abuse](#) - [Terms of Service](#) - [Additional Terms](#)

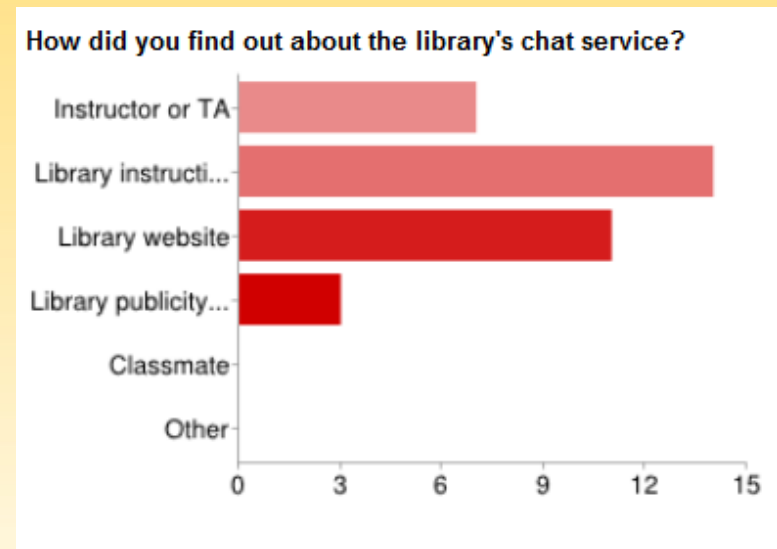
Have you ever used UMD Library's chat service?



# Phase 2 results: Chat non-users



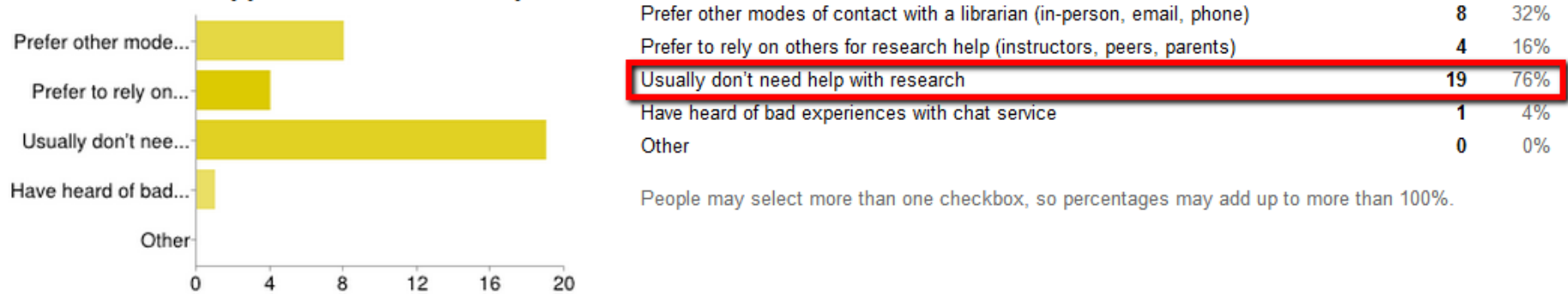
Chat users



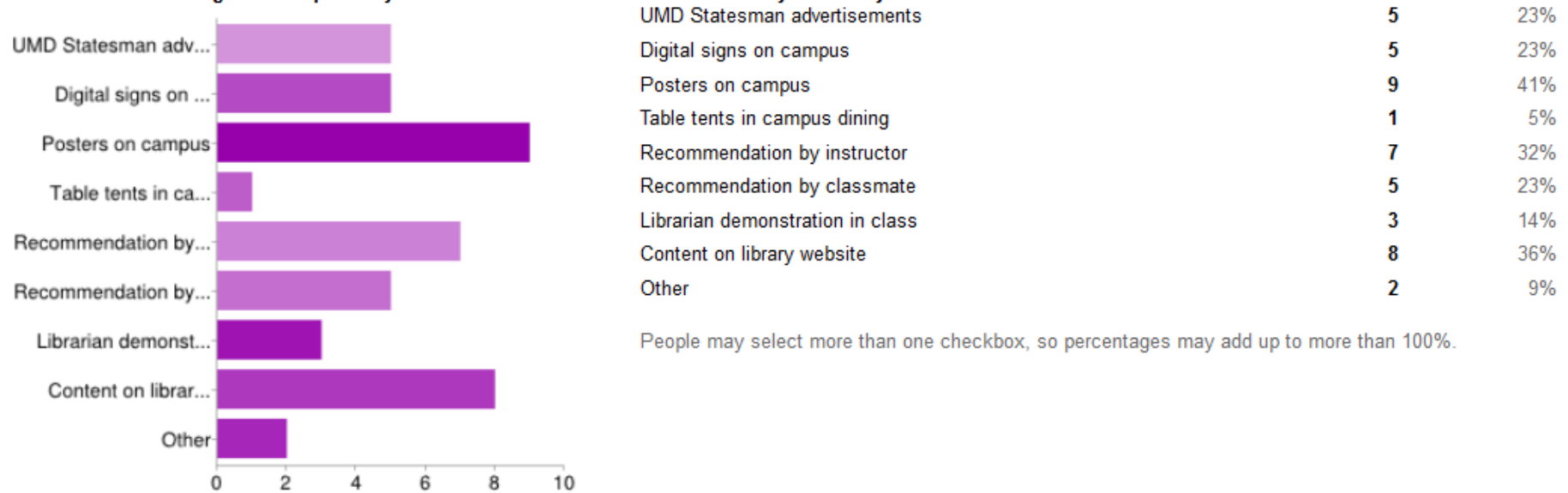
Chat non-users

# Phase 2 results: Chat non-users

Please comment on why you have not used the library's chat services.

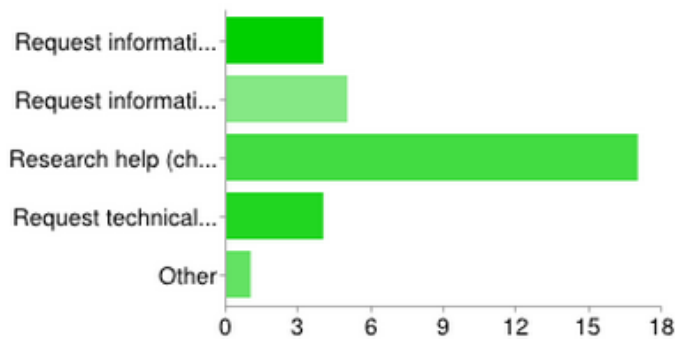


Which of the following forms of publicity for our chat service would be most likely to catch your attention?



# Phase 2 results

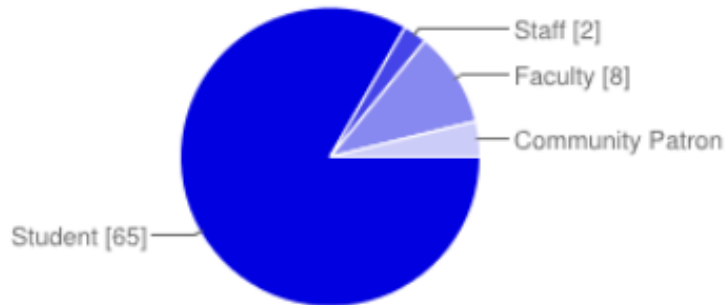
In which of these situations would you be most likely to use the library's chat services?



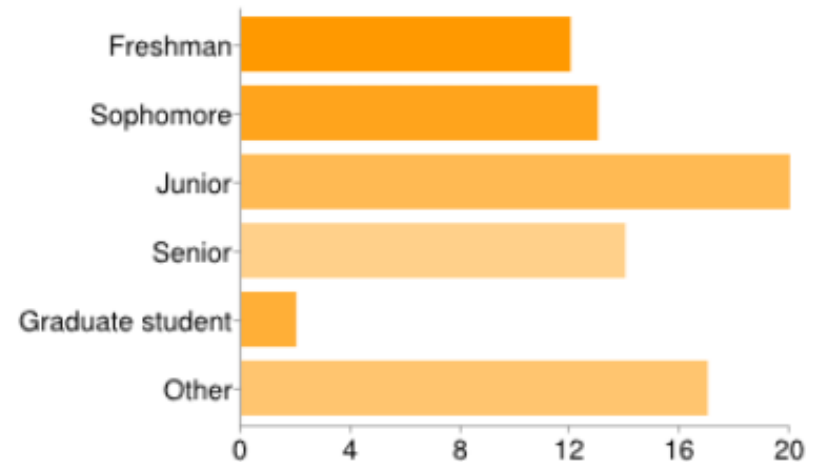
Situation	Count	Percentage
Request information about library hours	4	17%
Request information about library services (renewals, fines, group study rooms, etc.)	5	22%
Research help (choosing search terms, using article databases, finding sources, etc.)	17	74%
Request technical assistance with computers, printers, etc.	4	17%
Other	1	4%

People may select more than one checkbox, so percentages may add up to more than 100%.

Which of the following categories best describes you?



If you are enrolled as a student at UMD, what is your status?



# Other evaluation methods

## Transcript analysis

- Quality of answer: completeness & accuracy
- Compliance with RUSA guidelines/use of reference interview
- Librarian behaviors and communication strategies
- Role of teaching & learning

## Focus groups/interviews

- With non-users



# Discussion

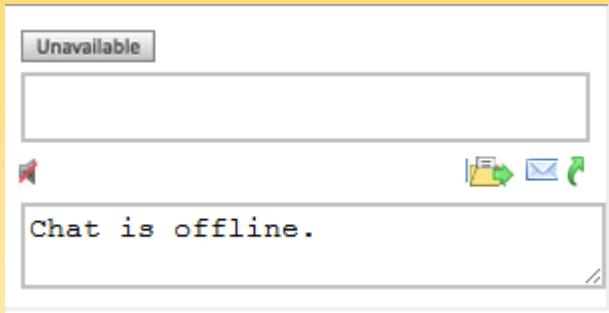
- What chat evaluation techniques have you used at your library?
  - Would you recommend these to others?
  - If you haven't implemented chat evaluation at your library, why not?
- 
- <http://z.umn.edu/arldaskus>

**IMPROVE**



# Widget Generation

Naked LibraryH3lp widget



Choose Widget

New Widget

Widget:

Name:

Copy Widget

Delete Widget

Share your widget

Copy from shared widget:

Branding

Presence Theme (gallery):

Title:

Title Size:

Title Color:

Typing Notification Identity:

Typing Notification Color:

Turn sound on by default

Frame

Chat History

Message Box

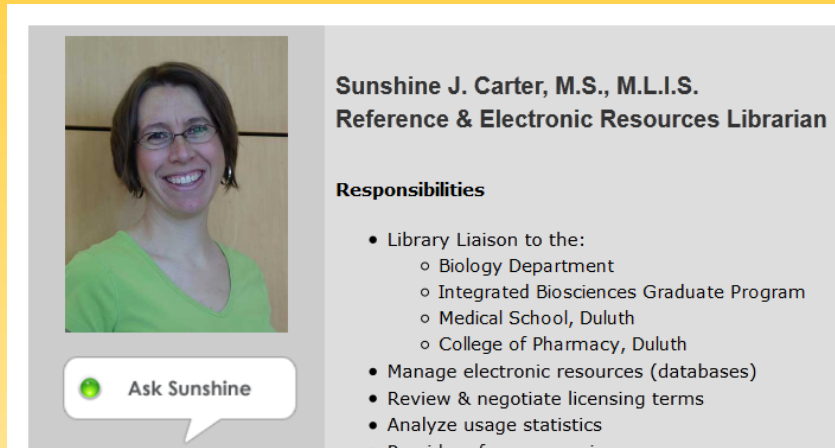
Wicked CSS Hack

Save Widget Discard Changes

Activity Reports Queues Users Widgets Services Settings



# Location, location, location



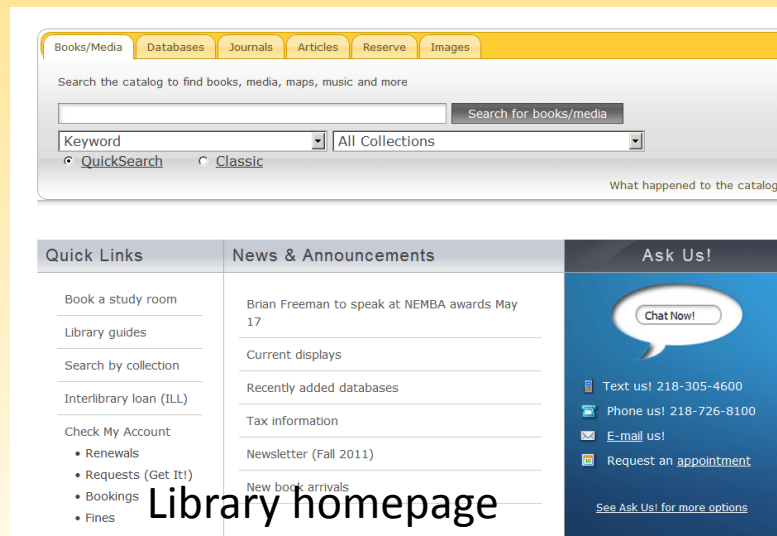
**Sunshine J. Carter, M.S., M.L.I.S.**  
Reference & Electronic Resources Librarian

**Responsibilities**

- Library Liaison to the:
  - Biology Department
  - Integrated Biosciences Graduate Program
  - Medical School, Duluth
  - College of Pharmacy, Duluth
- Manage electronic resources (databases)
- Review & negotiate licensing terms
- Analyze usage statistics

[Ask Sunshine](#)

## Staff profile pages



Books/Media Databases Journals Articles Reserve Images

Search the catalog to find books, media, maps, music and more

Search for books/media

Keyword  All Collections

QuickSearch  Classic

What happened to the catalog?

Quick Links	News & Announcements	Ask Us!
<ul style="list-style-type: none"><li>Book a study room</li><li>Library guides</li><li>Search by collection</li><li>Interlibrary loan (ILL)</li><li>Check My Account<ul style="list-style-type: none"><li>• Renewals</li><li>• Requests (Get It!)</li><li>• Bookings</li><li>• Fines</li></ul></li></ul>	<ul style="list-style-type: none"><li>Brian Freeman to speak at NEMBA awards May 17</li><li>Current displays</li><li>Recently added databases</li><li>Tax information</li><li>Newsletter (Fall 2011)</li><li>New book arrivals</li></ul>	<p><a href="#">Chat Now!</a></p> <ul style="list-style-type: none"><li><a href="#">Text us! 218-305-4600</a></li><li><a href="#">Phone us! 218-726-8100</a></li><li><a href="#">E-mail us!</a></li><li><a href="#">Request an appointment</a></li></ul> <p><a href="#">See Ask Us! for more options</a></p>

**Library homepage**

## LibGuides

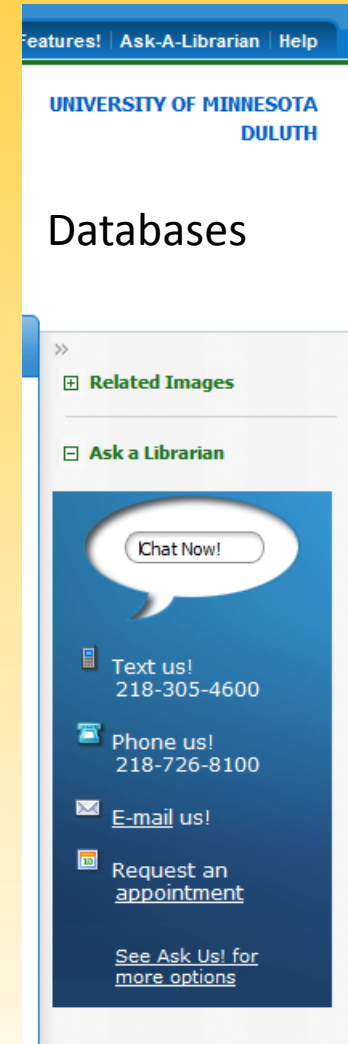


**Reference Librarian**



**Kim Pittman**

[Ask Kim](#)



[Features!](#) [Ask-A-Librarian](#) [Help](#)

**UNIVERSITY OF MINNESOTA  
DULUTH**

## Databases

[Related Images](#)

[Ask a Librarian](#)

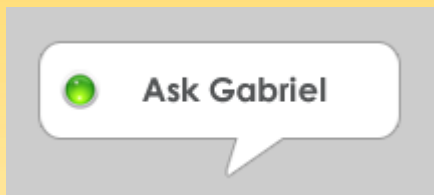
[Chat Now!](#)

- [Text us! 218-305-4600](#)
- [Phone us! 218-726-8100](#)
- [E-mail us!](#)
- [Request an appointment](#)

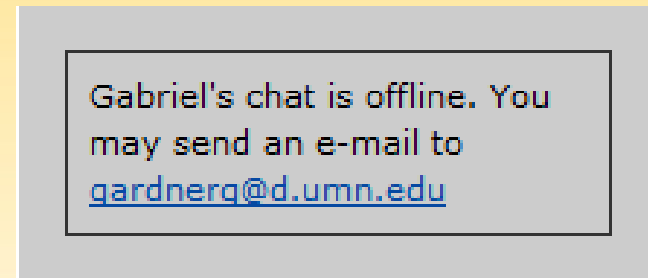
[See Ask Us! for more options](#)

# Never at rest

- The librarian is in



- A librarian is in



- No UMD librarians available



# Where else?

- 404s
- Link resolver pages
- Course management system
- Library catalog
- Mobile site



# Training

- “Think like a user” exercise
- Transcript review
- Emphasis on service quality, not mechanics

7:16 Ask a Librarian For Census 2010 data, we'll have to use American FactFinder 2, <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

7:16 Ask a Librarian yes, and we have to find out the block group or tract numbers for downtown Duluth.

7:16 me that's where I keep getting lost

7:17 Ask a Librarian And I'm not too familiar with it either (though I need to get way better--I'm a government documents librarian!).

7:17 Ask a Librarian But I'll give it a shot!

7:18 me haha - thanks for your help!

7:18 Ask a Librarian This is where it gets fun, doing it on chat!



# A picture is worth...

- Screencasting
  - In-person > screencast > text/audio only

- Issues

- Audio
- Editing
- File output

1 Results for All Campuses Catalog sorted by: relevance

Book [Add to e-Shelf](#) **White Paper on the conduct of the general elections in March 1977.**  
Pakistan.  
Rawalpindi : Govt. of Pakistan 1978  
**At a U of M campus library**

**Locations (Get It)** Details Reviews & Tags Additional services [Send to](#) [Print](#) [Close](#)

Availability and locations at other U of M campuses

Location	Call Number	Description	Status	Request Options
UM TC Wilson Library Ames	JQ558 .P34 1978a		Regular Loan Not Checked Out	<a href="#">Sign in to request</a>

# ... and video is even better

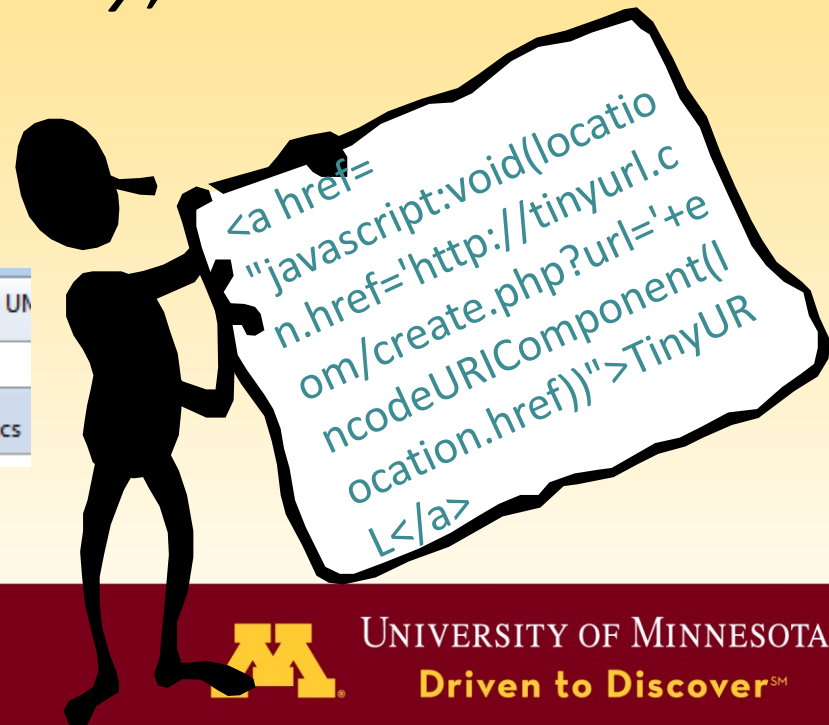
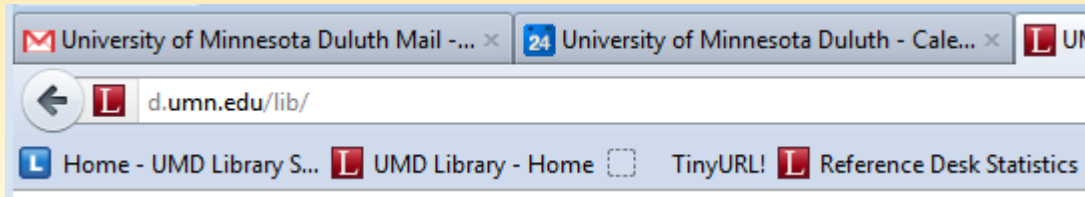
- Shareability is key
  - Screencast.com (TechSmith)
- Free
  - Jing (TechSmith)
  - Many others
- Paid
  - Captivate (Adobe)
  - Camtasia (TechSmith)

# URL shrtnrs

- *TinyURL, Bit.Ly, Goo.Gl*, others
- Essential for texting
- Avoid line breaks
- Click stats (bit.ly, goo.gl)

# Shrtnr Bookmarklets

- Short JavaScripts
- Halve the time and clicks
- Available for *TinyURL*, *Bit.Ly*, and *Goo.Gl*





# From this

The screenshot shows a web browser window displaying an EBSCOhost search results page. A yellow arrow points from the search bar area towards the top right. The search bar contains the text "Reference Librarian" and "screencast". The search results show a single entry with the following details:

- Permalink:** <https://login.libpdb.d.umn.edu:2443/login?url=http://search.ebscohost.com>
- Authors:** Williams, Simone<sup>1</sup>
- Source:** Reference Librarian; Apr-Jun 2011; Vol. 51, Iss. 2, p148-162, 15p
- Document Type:** Article
- Subject Terms:**
  - \*INFORMATION literacy
  - \*LIBRARY orientation for college students
  - \*WEB-based instruction
  - \*ACADEMIC libraries
  - \*COMPUTER network resources
  - \*COMPUTER assisted instruction
  - \*COURSEWARE
  - WEB 2.0

Red text overlays the screenshot with the following URL: <https://login.libpdb.d.umn.edu:2443/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=ehh&AN=40147574&site=ehost-live>

# To this

The screenshot shows the Bitly website interface. At the top, the Bitly logo is displayed with the tagline "Shorten, share and track your links". A large red URL, <http://bit.ly/J2ly1x>, is overlaid on the page. Below the logo, there is a search bar containing the URL <https://login.libpdb.d.umn.edu:2443/login?url=http://search.ebscoh> and a "Shorten" button. To the right of the search bar is a "Sign In" button. Below the search bar, there is a table with three columns: "Shortened links", "Real-time stats", and "Long link". The first row of the table is highlighted with a yellow box. The "Shortened links" column contains <http://bit.ly/J2ly1x>, the "Real-time stats" column contains "Customize | Copy", and the "Long link" column contains <https://login.libpdb.d.umn.edu:2443/log>. Below the table, there is a blue banner with the text "Bitly helps you share, track, and analyze your links." and a "Sign Up »" button. At the bottom of the page, there are two buttons: "Sign in with Twitter" and "Sign in with Facebook". A small cartoon fish icon is visible at the bottom center.

bitly  
Shorten, share and track your links

<http://bit.ly/J2ly1x>

<https://login.libpdb.d.umn.edu:2443/login?url=http://search.ebscoh> Shorten Sign In

Shortened links	Real-time stats	Long link
<a href="http://bit.ly/J2ly1x">http://bit.ly/J2ly1x</a>	Customize   Copy	<a href="https://login.libpdb.d.umn.edu:2443/log">https://login.libpdb.d.umn.edu:2443/log</a>
<a href="http://bit.ly/J2ly1x">http://bit.ly/J2ly1x</a>	Customize   Copy	<a href="https://login.libpdb.d.umn.edu:2443/log">https://login.libpdb.d.umn.edu:2443/log</a>
<a href="http://bit.ly/l2qifz">http://bit.ly/l2qifz</a>	Customize   Copy	<a href="http://www.d.umn.edu/lib/elist/subject">http://www.d.umn.edu/lib/elist/subject</a>

Bitly helps you share, track, and analyze your links. Sign Up »

Sign in with Twitter Sign in with Facebook

# To script, or not to script, ...

## MACROS

---

When in Pidgin (or Webchat), during a conversation, press:

**F1      HOW MAY I HELP?**

Hello, you've reached the UMD Library reference desk. How may I help you?

**F2      BUSY - I NEED A FEW MINUTES**

Hello, I am helping another patron at the moment and need a few more minutes. Please leave your window open and I will be with you shortly. Or, you can e-mail us using this form: <http://www.d.umn.edu/lib/askus/email.htm>. Thank you for contacting umdlibaskus.

**F3      HOLD ON WHILE I LOOK**

I need a few minutes to look that up, could you please hold on?

- Tools

- Intra-app
- AutoHotKey (f/oss, Windows only)
- Keyboard Maestro (proprietary, Mac only)
- Macro Express (proprietary, Windows only)

# ... that is the question:

- Pros
  - Fast
  - Easy
  - Accurate/consistent
- Cons
  - Impersonal
  - Texting char. limits
  - De-professionalization?

# “Outsourcing”

- QuestionPoint: 24/7 chat coverage
  - A complete reference management system integrating chat and email
- Prospects
  - Greater coverage, potential cost savings
- Perils
  - Local vs. non-local Qs



# Discussion

- What tools (free or otherwise) do you use to improve the user or operator experience?
- What training techniques or exercises have you found most effective?
  - <http://z.umn.edu/arldaskus>

# References, pt. 1

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# QUESTIONS?



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