Recommendations for Instant Messsaging Virtual Reference Service
Archer Library, University of Regina
Submitted by Cara Bradley
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ROTIS met on Tuesday July 18, 2006 and decided that the Archer Library would proceed with using Instant Messaging (IM) or "Chat" software in the provision of virtual reference service. This decision was based on several factors:

1. commercial virtual reference software seems to be in a state of flux, with each of the major vendors releasing new products in the past few months. Experiences of other libraries have shown that these products are not yet stable enough to serve as a basis for virtual reference service.
2. many libraries that started offering virtual reference with dedicated commercial products have decided to either supplement or replace their commercial software with an instant messaging service.
3. students are already using and familiar with Instant Messaging, suggesting that interest in and use of an IM virtual reference service may be greater than use of a virtual reference program requiring additional downloading and learning of new interfaces. In fact, research indicates that from 2002-2005, 86% of high school-age Canadians use IM every day (see Young Canadians in a Wired World: http://www.media-awareness.ca/english/research/ycww/). Some of these students have since graduated from high school and are now the undergraduates that we serve.
4. several library staff (including reference assistants and systems staff) are already heavy users of IM and comfortable with this technology. This reduces the staff training burden and provides ready-made training and support capacity.
5. some of the most popular instant messaging programs (MSN, in particular) have recently increased their functionality and are now comparable to commercial virtual reference products. Preliminary testing in the library indicates that functions like co-browsing and file sharing work well within certain IM programs.

Cara Bradley and Amy Kerr followed up on the July 18 ROTIS meeting by investigating the range and functionality of IM services available. Services under consideration were Yahoo, AOL, MSN, and Trillian.

Initial investigation considered the relative popularity of these services among staff and potential student users of an IM virtual reference service. MSN clearly emerged as the Canadian market leader (this is in contrast to the U.S. market which is dominated by AOL). An informal survey of library staff (attached—see Appendix A) indicated that all staff currently using IM both used and preferred MSN over other services. This was

confirmed by informal discussions with U of R students and also by McMaster University's survey of library patrons (see http://www.blogwithoutalibrary.net/talk/ola2006/IM.pdf). Thus, while our investigations did include the other services mentioned above, we focused more heavily on MSN because of its widespread use and popularity.

The latest version of MSN's Messenger program, called "Windows Live Messenger" can be downloaded free-of-charge at: http://get.live.com/messenger/overview.
This product contains several new and/or improved features that would be useful in the provision of virtual reference service. First, a recent agreement between MSN and Yahoo means that users of the newest versions of either software can communicate with users on the other platform. This means that, should the library proceed with MSN's instant message service, service can also be provided to Yahoo clients.
Secondly (and importantly for virtual reference), MSN Live Messenger allows users to co-browse. This means that, in addition to providing textual directions, library staff can actually "take control" of a patron's computer and show them how to search a database, etc. Thirdly, this software also allows the sharing of files, which would allow library staff to quickly and easily provide patrons with important library handouts and documentation.

Our investigation into Yahoo and AOL were not as extensive, given the obvious student/staff preference for MSN, but many of the key features outlined above seemed either unavailable or, in cases where they were available, less intuitive to use.

We also experimented with Trillian (http://www.ceruleanstudios.com/), a program that allows its users to monitor several chat platforms simultaneously. Several libraries are using Trillian so that they can communicate with patrons using any of the major IM programs (Yahoo, AOL, and MSN). While we found that Trillian did achieve its stated goal quite well, it only seems to encompass functionality common to all products. In other words, much of the advanced functionality of the recent release of MSN Live Messenger was lost when the service was accessed via Trillian. Perhaps most importantly, the ability to co-browse in MSN Live Messenger disappeared when the service was monitored and accessed in Trillian. Given the new compatibility between MSN and Yahoo, it does not make sense to sacrifice the power to co-browse to serve a negligible number of AOL clients.

Therefore, we recommend that the library use MSN Live Messenger to deliver Instant Messaging reference service.

Technical requirements for using MSN Live Messenger are fairly basic, but systems staff intervention will be required to get the software up and running on library computers:
1. Staff can download the software onto their machines without difficulty. They do, however, require systems staff with administrative privileges to change permissions in order to allow remote access.
2. The computers in the Information Commons/Instruction Lab will need to have MSN Live Messenger downloaded on them by Computing Service staff since

users do not seem to have the required permission to do this. (University of Saskatchewan research indicates that over 30% of virtual reference requests come from students physically located on-campus and/or in the library—see Appendix B--so it makes sense to have this software available on library/campus computers).

Our investigation was limited to investigating and recommending the most appropriate instant messaging system for our needs and the associated technical requirements. There are, of course, many other elements of the service that must be considered. Some of these that came up in our discussions/investigations include:

- ensuring staff buy-in and support
- staff training (both in the software and in providing reference in an instant online setting)
- service hours
- administration—should there be a designated Virtual Reference Service Coordinator?
- staffing (staffed by those on the desk, or others scheduled to monitor from their desks)
- policy for non-U of R requests
- handling UREAD and non-UREAD patrons
- promotion/marketing
- tracking use
- evaluating the service
- etc.

The University of Saskatchewan's report on the second year of their virtual reference pilot (see Appendix B) provides a good outline of the issues/policies/procedures that need to be addressed before a virtual reference service (whether via proprietary software or IM) can be implemented.