

Instant Messaging

“IM is user-centered and builds relationships with library users.”

–Aaron Schmidt, Walking Paper, <http://walkingpaper.org/212>

Part 1: Instant Messaging in Libraries

Instant messaging, commonly referred to as IM, is real-time, synchronous conversation between two people via the Internet. Features of the various messaging clients, none of which can actually communicate with each other, include:

- **Buddy Lists:** a listing of your trusted friends, colleagues, and family members;
- **Chat Window:** a window where chatters input text and press enter or send;
- **Status Indicator:** a notation of location or current state of being, such as “In My Office” or “Out to Lunch” (this is known as an “away message” as well).

Other features might include file transfer and the capability for video chat or voice chat.

IM has been around for a long time in Internet years. Remember your America Online buddies you chatted with



Figure 15:
IM Chat Window

via dial up back in 1995? IM is still around and going stronger than ever. IM has also been dubbed a Web 2.0 tool because of its participatory, social nature. IM creates connections.

It is also a very popular tool! The AOL Instant Messaging Trends Survey reports:

- Thirty-eight percent say they send as many or more IMs than e-mail [messages], and the younger users are, the more likely they are to favor IM. Two-thirds



Figure 16:
IM Buddy List

(66 percent) of teens and young adults (ages 13–21) say they send more IMs than e-mail [messages], up from 49 percent last year.

- Meanwhile, 20 percent say they currently enjoy, or would like to try, making live voice calls to other computers, landlines, and cell phones directly from their IM service. Another 12 percent say they would be interested in an IM-based VoIP service that could replace their primary household phone line.¹

Pew Internet and American Life also reported on IM and the age groups that use it in late 2004:

- Forty-two percent of Internet users—more than 53 million American adults—report using instant messaging.
- Within the instant messaging Gen Y (18–27 years) age group, 46 percent report using IM more frequently than e-mail. In contrast, only 18 percent of Gen X-ers (28–39 years) instant message more often than e-mailing. In older generations the percentage is even smaller.
- Twenty-one percent of IM-ers in each of the Gen Y and Gen X age groups log onto IM several times a day, followed by 17 percent of Trailing Boomers (40–49), 15 percent of Leading Boomers (50–59), 10 percent of Matures (60–68), and a mere 9 percent of the After Work (69 and older) age group.
- Thirty-five percent, or the largest portion of those who IM for about an hour are Gen Y-ers. In contrast, the greatest percentage of instant messengers who IM for less than 15 minutes consist of Trailing Boomers (26 percent).²

The Pew Report on IM serves as a useful document to cite as supporting evidence for planning and implementing this service in libraries.

The #1 benefit of IM in libraries is it puts the library where traditionally hard-to-reach users already are, in a medium they're comfortable with, and in a way that's 100% free for the library.

Sarah Houghton, The Librarian in Black,
<http://librarianinblack.typepad.com/librarianinblack>

Surveying the Use of IM in Libraries

What can libraries and librarians do with IM? Many librarians have implemented external reference services via IM clients for their users. Some have found that IM allows them to more easily reach out to librarians in their organization and throughout the world (see appendix 2). Leave it to re-

sourceful librarians to realize that if millions of people are using a social tool, maybe the library should be as well!

For a look at libraries offering IM reference, access the Library Success Wiki, and take a look at the “Libraries offering IM Reference” section. More than seventy-five libraries are listed as of May 1, 2006.

As I've written at Tame the Web and spoken about at many conferences, the number-one benefit of IM reference is the fact that, through IM, librarians put themselves out in the cyberspaces, online places where our users are working and playing. It creates a means of social interaction—of community. Many of these users are teens, a demographic that has adopted the medium in high numbers. IM is a way to engage them online.

“Online Reference,” Library Success Wiki

www.libsuccess.org/index.php?title=Online_Reference&PHPSESSID=6907bce00d66fdb114a14759fba44364

“Librarian, How Do You IM? A TTW Survey”

http://tametheweb.com/2006/03/librarian_how_do_you_im_a_ttw.html

It also puts the librarian as close as possible to the point of need of an information seeker—especially if the IM name is featured throughout your Web site and the online catalog as well as on other Web sites in your community.

Another IM benefit for library users: through IM, a user can ask just about any question and remain rather anonymous. This minimizes the occurrence of feelings of embarrassment, which a library user could feel when asking about sensitive subjects.

Librarian, How Do You IM?

For the *Computers in Libraries 2006* Conference, in a session devoted to IM and libraries, I was asked to speak a few minutes about how IM can improve collaboration and build community among librarians. So I created a brief survey at Survey Monkey, and the informal survey yielded more than 600 responses. Most interesting, I thought, were the open-ended, qualitative answers.

Question: “What are the benefits of IM?”; Answers:

- *It's made it easier to communicate and to arrange meetings, carpools, and so on.*
- *I can discuss projects in real time with colleagues that are thousands of miles away or right down the road. It makes collaborating easier and opens up many doors.*
- *IM has begun to build bridges across the traditional staff/faculty divide.*
- *There is greater connection between us than before.*

This last comment is telling. Could it be about your library system? Do you have discouraged librarians in your system? One of the survey respondents replied: “Many librarians in my library system would like to use IM both for reference and for staff purposes. However, this library system is very reluctant to change and slow to respond to most new ideas. I feel very discouraged when I meet with professionals in other library systems that get to try new things.”

I also received some survey feedback about barriers in some libraries that prevent the librarians from using IM. One type of barrier was the perceived intrusiveness of IM, “I don’t use it. E-mail works just fine for me, without the intrusiveness of IM.” Another barrier was time: “We are a small staff and don’t have time to be confined to the computer.” IT barriers were also cited: “Our City IT has forbidden its use for security reasons, so we rely on e-mail, phone, and face-to-face conversations to communicate and maintain relationships.”

I think IM in my public library is an example of the generation gap between staff members. We do not allow patrons to IM on library computers, and staff [members] are not supposed to IM, either. However, many of the young professionals do have one or more IM programs downloaded onto their computers (including the IT department), and we use IM at work. The staff that uses IM are more likely to want the IM and games ban dropped on public computers and want to start reference IM, a library blog, etc. So I see a direct correlation between librarians/library staff who IM and those who are forward thinking about library programs and technology.

Tame the Web IM-Survey Respondent, http://tametheweb.com/2006/03/librarian_how_do_you_im_a_ttw.html

The most interesting to me was the perceived “digital divide” in many libraries. Two different respondents noted: “Creates a digital divide, lots of LastGen librarians at MPOW who don’t use it and are out of the loop,” and “I think IM in my public library is an example of the generation gap between staff members. We do not allow patrons to IM on library computers, and staff are not supposed to IM, either.”

So here are my suggestions for moving forward if you are interested in IM in libraries:

- more education;

- more case studies; and
- further examination of security issues.

Read more about the survey at: http://tametheweb.com/2006/03/librarian_how_do_you_im_a_ttw.html.

A scan through the “Online Reference” section of the Library Success Wiki reveals that many are following the procedures developed by the early adopters. Thomas Ford Memorial library in Western Springs, Illinois, and St. Joseph County Public Library in Indiana were two of the first libraries to offer such a service.

Remember how virtual reference services were supposed to change the very foundations of what we do? Remember how some librarians discovered that those systems required users to navigate into a slowly loading chat queue inside their browser so you could send, or “push” pages to them? Remember the price tag to participate in this type of service—let alone the money spent on training and promotion? Well, guess what? Libraries can use a newer method with the same results—any library, of any size, and for a very low cost that can result in a high return on investment. Many libraries have jumped on the Instant Messaging (IM) train, and it can be a **FASTER** ride to effective virtual reference on the cheap.

Michael Stephens, Tech Tips For Every Librarian, *Faster IM, Computers in Libraries*, April 2006

Faster IM

In a recent *Computers in Libraries* article, I proposed the **FASTER** model of thinking about IM Reference, for any type or size of library. This model addresses questions about implementation, workflow, and training.

- **F** is for *Flow*: Your workflow won’t suffer at all if you incorporate an IM application on one of your reference-area computers; IM simply becomes part of the reference staff duties.
- **A** is for *Asking Questions*: IM Reference is still reference. Use your reference-interview skills and create some predefined questions/responses to engage the IMing user.
- **S** is for *Software*: Use software that connects to all of the major IM clients. The major clients are AOL Instant Messenger (AIM), Yahoo! Messenger, and MSN Messenger.

- **T** is for *Training*: It is important, however, to give all of the librarians participating in the project a chance to practice first. They'll thank you for it! All of the folks that work the reference desk at SJCPPL have been trained to handle IM questions. It's part of the workflow each shift. The same goes for all the other internal IM-reference points: if you work at the desk, you have had IM training. One of these days, it may even be a requirement for prospective librarian employees (such as in the 2.0 job descriptions noted on page 13).
- **E** is for *Easy*: In the case of the *FASTER* IM, "easy" simply means making it easy for the library's users to find the library and ask questions of the library online.
- **R** is for *ROI*: IM yields a good return on investment: free software and minimal training.³

Using One IM App

Connecting to all three via one application is an easier solution than opening all three of the clients on your IM reference computer. Give one of these a try:

- Trillian—A Windows-based application that supports multiple types of chat. The application, available as a free download or upgradeable to the "pro" version for a fee, includes audio chat, file transfers, group chats, and chat rooms. (www.ceruleanstudios.com)
- Gaim—An open-source software choice that runs on Windows, Macs, and more, and sports similar features as Trillian. (<http://gaim.sourceforge.net>)
- Fire—An open-source Macintosh application used by SJCPPL for virtual reference, with many of the same features as the above. (<http://fire.sourceforge.net>)
- Adium—Another open source Macintosh application. (www.adiumx.com)

In addition, there is GoogleTalk (www.google.com/talk) and ICQ (www.icq.com). These could also be solutions for online reference, if your user base utilizes them. And watch for MySpace Messenger; it will be a must for libraries wanting to reach teen and young adult users. (<http://mashable.com/2006/03/12/myspace-messenger-screenshots-emerge-launch-imminent>).

A Note about SMS

According to Pew Internet and American Life Project, "One in three (thirty-three percent) IM users send mobile IMs or text messages from their cell phones at least once

a week. This is a dramatic increase over 2004, when just nineteen percent said they do so, and 2003 when the figure was ten percent."⁴ Some libraries have started *Short Messaging Service* (SMS) reference points. Students at South Eastern Louisiana University can text the library with their cell phones. For more, read the Librarian in Black's excellent summary of a presentation on the topic at Internet Librarian 2005 (http://librarianinblack.typepad.com/librarianinblack/2005/11/text_a_libraria.html).

Before You Start IM in Your Library . . .

There are just a few things to be mindful of before you implement IM in your library. The Alexandrian Public Library (Mt. Vernon, Indiana) put forth these guidelines (which could be a policy or procedure statement that your library could emulate):

- Any screen names that send IMs containing obscene language or that are harassing will be blocked.
- We are unable to answer lengthy research questions via IM—for example, a complicated genealogical research question.
- We are also unable to provide advice on questions of a medical, tax, or legal nature.
- IM Reference is part of our regular reference service, which includes in-person and telephone reference services. Sometimes we might be answering all kinds of questions at the same time, so please be patient.⁵

When a question is too complex to answer over chat—say people want law questions answered, or they really need to be looking over a text to fully understand the information—we ask them to come in to the library and to look over the information themselves (if possible). It seems to me that patrons have been self-monitoring question complexity—we do get some head-scratchers via e-mail, rarely do we get IM questions which are more than ready reference. To this date, we have not gotten any complaints via IM.

Sarah Hill, SJCPPL Head of Reference, on IM-Reference Questions at SJCPPL

Part 2: Implementing IM in Libraries

First, you and your staff members will need to determine a screen name and then register it at all three IM clients. SJCPPL registered the screen name *AskSJCPPL* at all three, and then followed up with *AskSJCPPL AV* for audio-visual

department-related reference. Screen names are registered through the Web at the chat clients' respective sites. Just input some basic information and create a name in each one by following the step-by-step directions online. This step is FREE!

Secondly, you'll need to train and encourage staff members to interface via IM from their desks. Aaron Schmidt, (from Thomas Ford Memorial Library in Western Springs, Illinois) and I reported in *Library Journal* that IM "training can be similar to sessions created for virtual reference: highlighting how to insert URLs, predefining text messages ("please wait while I get that answer"), and emphasizing getting comfortable with the unexpected." They urged librarians to dive in and "play out a reference scenario" as a method of getting comfortable.⁶

Basic IM training competencies might include:

- Logging in to the application;
- The basics of chatting via a chat window with definitions;
- Inserting URLs and sending files; and
- Applying reference interview skills to the IM interaction.

Your library will want to make IM part of your technology plan and include it in your policy manual. Make sure it is valued as a reference service. At SJCP, IM is integrated into the flow of reference services at the main library-reference desk. Two or three librarians staff the desk and answer questions in person, via the phone, and via IM. E-mail reference is done in the workroom on a dedicated computer. I actually helped rewrite part of our policy manual during my final months at SJCP, and IM is included as a form of reference. It is third in the breakdown of how the librarians take questions: in person first, followed by phone, then IM.

You'll also want to make it part of your staff-development plan. Staff members should be comfortable with IM applications, and they should use it at their desks to improve workflow. Administrators should as well; this sets the tone that IM is important in the library, that IM is not just the domain of younger librarians.

A new service such as IM will thrive if staff is behind it, so have a plan to "Create Staff Buy-In." If they have been involved in planning, had training, and a chance to play and understand where IM falls in the information service provided by your particular library, staff members will understand the importance of logging in and performing good reference. Beyond IM, buy-in is very important for all technology projects in libraries.

Educate all staff members about the service, and make sure everyone on staff knows that the library is going to offer IM reference. In addition, it will be important for your staff members to "learn the lingo"; if you are reaching out to teens, students or young adults, you may

want to spend some time learning the vernacular of IM. Many Web sites offer glossaries of IM and chat lingo so you can decipher what BRB or GMTA mean! (BRB=Be Right Back and GMTA=Great Minds Think Alike)

Why Are We Doing This?

A few months ago the Reference staff at SJCP trained the librarians who would be using IM at their service desks. Katie, who was doing the particular session I heard about, asked the group: "Why are we doing this training?"

"IM is cool," someone said . . . "IM is so hot right now," said another (who may read my blog too much!)

"Nope," Katie said. "We are doing this because it is a way to reach a good segment of our users. . . ." She went on to cite some of the recent articles, studies, and surveys out there that make the case for IM.

"Why are we doing this?" may be asked more than you think at your library as more and more projects center around technology. If the question is there, you may be missing a perfect opportunity to create staff buy-in for such projects.

TTW Post on Staff Buy-In, http://tametheweb.com/2005/10/ten_steps_to_insure_staff_buyi.html

Part 3: Best Practices for IM in Libraries

- **Promote your screen name and service.** It also needs to be publicized and promoted just like any library service or program. Sometimes I think we forget to promote our technology-related or Web-related initiatives because promotion seems to be inherent in the Web. Personally, I'd like to see a library put up a billboard or bus poster that says: "Have a Question? IM Your Librarian."
- **Add your IM name to your business cards, signature files, and Web portal.** Promote your name every way you can. Add it to your Web presence, including your OPAC pages and contact information. Let staff members have their IM names on their business cards.
- **Create a standardized, consistent naming convention for your IM screen names.** Take a look at the libraries offering this type of reference. Note the form of the name. At SJCP, we registered *AskSJCP* at all three clients.

- **Use away messages effectively.** Some libraries that IM set up an automatic away message: “The librarian will be right with you,” or a similar sentence for incoming questions. Create a few choices and use them for times you might be working on another question, searching the stacks, or away from the desk.
- **Use online sources only if the best answer can be given from them.** Sometimes it is best to ask the IMing user to come to the library to pick up materials or do more work with the librarian in person. If the answer is only in a printed resource, offer to scan it and send it via e-mail, or hold the book for the user to come in to the library.

More Resources on IM

AOL Instant Messenger (AIM): www.aim.com

AskSJCPL: www.libraryforlife.org/asksjcpl/asksjcpl.html

Edifice Ref’s Trillian Training: <http://edificeref.info/?p=71>

Fire: <http://fire.sourceforge.net>

Fire Training: http://tametheweb.com/2005/05/more_im_training_materials.html

Gaim: <http://gaim.sourceforge.net>

IM SOS: http://tametheweb.com/2005/06/im_sos.html

IM Training at Tame the Web: http://tametheweb.com/2005/04/training_im_a_ready_to_go_modu.html

Library Success Wiki—Virtual Reference and IM: www.libsuccess.org/index.php?title=Online_Reference

MSN Messenger: <http://messenger.msn.com>

Sherri Vokey’s IM at UNLV Post: http://blog.uwinnipeg.ca/schwagbag/archives/2005/06/iming_goes_live.html

Sherri Vokey’s Training Modules: http://blog.uwinnipeg.ca/schwagbag/archives/2005/07/im_staff_traini.html

Trillian: www.ceruleanstudios.com

Yahoo! Messenger: <http://messenger.yahoo.com>

Instant Messaging & Text Messaging

Stephen Abram, “Twenty Reasons for Teacher-Librarians to Love IM,” *Multimedia & Internet@Schools* 11 no. 4 (July/August 2004): 16–8.

Christina M. Desai, “Instant Messaging Reference: How Does It Compare?” *The Electronic Library* 21, no. 1 (February 2003): 21–30.

Sarah Houghton and Aaron Schmidt, “Web-Based Chat vs. Instant Messaging,” *Online* 29, no. 4: 26–30.

Irene McDermott, “Text Messaging: E-Mail on the Go,” *Searcher* 12, no. 9 (October 2004): 47–50.

E. Thompson, “Expertise Is One Click Away with Instant Messaging,” *KM Review* 6, no. 4 (2003): 16–9.

Notes

1. AOL’s Third Annual Instant Messaging Trends Survey (2005), www.aim.com/survey (accessed June 5, 2006).
2. Eulynn Shui and Amanda Lenhart, “How Americans Use Instant Messaging,” Pew Internet/American Life Project, Reports: Online Activities & Pursuits (September 1, 2004), www.pewinternet.org/PPF/r/133/report_display.asp (accessed June 5, 2006).
3. Rachel Singer Gordon and Michael Stephens, “IM=FASTER Virtual Reference on the Cheap!” *Computers in Libraries* 26, no. 4 (April 2006): 36.
4. Lee Rainie, “PIP Comments: The Rise of Cell Phone Text Messaging,” Pew Internet and American Life Project (March 14, 2005), www.pewinternet.org/PPF/p/1060/pipcomments.asp (accessed July 11, 2006).
5. Guidelines for the Alexandrian Public Library (Mt. Vernon, Indiana) IM Reference Service, www.apl.lib.in.us/im.html (accessed June 5, 2006).
6. Aaron Schmidt and Michael Stephens, “IM Me,” *Library Journal* (April 1, 2005), www.libraryjournal.com/article/CA512192.html (accessed June 5, 2006).

Appendix 2:
IM a Librarian, created by Darren Chase, SUNY Stonybrook Library

HEALTH SCIENCES CENTER LIBRARY

STONY BROOK UNIVERSITY

Hours
Directions
Contact Us

Advanced search

HSC Library

- > Home
- > View On-line Books, Journals and Databases
- > Library Catalog
- > Research Guides and Tools
- > Education
- > Barty S. Collier Learning Center
- > Interlibrary Loan Requests
- > Ask a Reference Librarian
- > About Us
- > SiteMap

Quick Links

- > Harrison's Online
- > MDCConsult
- > PubMed
- > PubMed + LinkOut
- > Science Direct
- > Web of Science

Useful Links

- > Health Sciences Center
- > Stony Brook University Hospital
- > School of Medicine
- > Medicine & Health Sciences

You are here: H.S.C. Library > IM a Librarian!

IM a Librarian!

Send an instant message for instant help with your research. Add us to your buddy list. Available Monday-Friday, 9:00AM-6:00PM

Do you instant message? Your library does!

To IM a Librarian click on the screen name below (for example, "HSC Reference") of your IM service (AIM).

Don't have IM access? Web client access is available via the **IM Service** links in the table below. Here's more information ...

The Librarian is

IM Service	Screen Name
AIM (AOL Instant Messenger)	HSC Reference
YIM (Yahoo! Messenger)	fac_reference
MSN (Microsoft Messenger)	fac_reference@hotmail.com

Registration Is Free
IM a Librarian supports the three most popular IM services: AIM, YIM and MSN Messenger. All of these services are free. To register and begin IMing, use the "IM Service" links in the above table to connect to the web versions of each messenger service, or you can use the client versions which are available for download here: AIM | YIM | MSN

Check Our Online Status
We strive to make the instant message service available during regular reference desk hours, but sometimes we are away. Checking our online status is the best way to know if we are available. For information about the various ways to connect with a librarian, see our Ask a Librarian page.

News

- Web Citation Index Trial until October 18, 2006
2006-04-28
- What's New in AccessMedicine
2006-03-27
- EXAM MASTER Online Trial until June 15, 2006
2006-03-17

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Upcoming Events

- ES105: Introduction to OVID MEDLINE
Classroom 2
2006-05-24
- Lunch Bytes: American Memory NEW!
Classroom 2
2006-05-25
- ES465: Evidence-Based Medicine Tools & Resources
Classroom 2
2006-05-26