

VIRTUAL REFERENCE DESK – ELAG2004 Workshop

1 Introduction

The basic principle of a Virtual Reference Desk is a 24-hours shared reference service, which allows users (students, staff and researchers) to ask questions, whereby librarians provide answers or guidance either by e-mail, website forms, instant messaging or interactive video, and eventually via videophone. A VRD service is a web-based structure of connected libraries and information services and access is possible from any location either work, home or remote/mobile.

The main access would be via a Portal, which would consist of a “catalogue” of catalogues of available resources with Z39.50 and/or XML cross-access searching and a VRD button.

The Portal with VRD will provide single-point access to heterogeneous resources (reference and full-text) to users and allow personalized cross-database and domain searching via HTTP/XML and Z39.50 interfaces.

Specialized companies are offering software/hardware solutions and reference access (see paragraph 2). Library management system vendors have stepped into this business too.

2 Software companies

Potential virtual reference desk (VRD) service and software providers as partners are

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|-----------------------------------|--|
| 24/7 Reference | www.247ref.org |
| Docutek Information Systems, Inc. | www.docutek.com |
| eLibrarian | www.elibrarian.com |
| QuestionPoint | www.oclc.org |
| Tutor.com | www.tutor.com |

3 Why a Virtual Reference Desk (VRD)

Today reference staff has access to the Internet and a variety of other resources online and offline: reference books, CD-ROM/DVD and in print files/bibliographies. Their duties have changed in the last decade from just reference services to helping users with technical issues (reformatting diskettes, fixing printers and/or workstations).

The professional reference job is impacted heavily by the following trends:

- many patrons feel that they don't need a librarian due to the Internet (and the OPAC)
- commercial services are providing satisfactory information resources at the end-user's point of need/service
- 24/7/365
- unavailability of qualified staff
- lack of (very) specialized subject knowledge
- an institution cannot subscribe to all online/Internet resources and
- an institution cannot subscribe to less-frequent used resources (anymore)

In looking for alternatives libraries have started services, like e-mail, telephone, chatting, submission of Web-forms, etc., which have had less or more success. However the “always on” nature of the Internet has given the impetus of providing “24/7” (around-the-clock) reference services with live interaction and call routing to a network of subject specialists.

To accommodate these reference needs libraries are offering Virtual Reference Desks (VRD) via collaborative projects (networks of expertise intermediation) or via using commercial VRD services, of which many cooperate with ILS vendors to physically accommodate these services.

4 Issues for discussion

Technology

- Client may need special software in addition to easily downloaded applets.
- Client may need special hardware.
- Library end hardware / software required (note associated installation and maintenance costs).
- Software is 3rd party hosted and resides with vendor (ASP).
- If yes, does library own Content, FAQs, and Knowledge base?
- If library changes vendors, can content be transferred?
- Voice over IP (Audio-voice, eliminating the need to type conversation).
- Video facility.
- Operating System requirements.
- Software works well with standard browsers (specify release / version).

Vendor Support

- Training: onsite or remote, preliminary and follow-up
- thorough and clear (online-) documentation.
- Technical support readily available, what are agreed service levels (e.g. response time)?

Customisation / Adaptability/ease of use

- Library can create files of own pre-scripted frequently used message and URLs.
- Each institution within a system can customize it to suit their own purposes including patron interface.
- Staff and client screen layout and vocabulary are user friendly and customisable.

Features and Functionality

- Defaults can be turned off when not staffed and default to email.
- Library can choose multiple points on website for chat link.
- Library can customize browsers on remote computers to have this link.
- Librarian can push the following out to client: web pages, files, articles, documentation, slide presentations.
- Form sharing; librarian can guide users to complete form.
- Co browsing available, where librarian goes, client can go; where client goes, librarian can go.
- Client can browse independently; librarian can leave patron and return.
- Conference facility.
- Librarian can refer client to other staff.
- Queue for client arrival at chat site.
- Automatic periodic messages to client when librarian busy searching, changeable at intervals chosen by library.
- Transactions, can code transactions as completed or not completed. For incomplete transactions, email reminder sent to appropriate staff for follow-up.
- Automatic client receipt of transcript at end of session.
- Archive facility to store transcripts.
- Good transaction logs easily accessible.
- Allows automatic searching of client's question in knowledge base before connecting client
- Number of simultaneous users.
- "Waiting room" facility.
- Evaluation survey automatically sent to patron.
- Customisable management reporting capacity.

Privacy / Confidentiality

- Library can ensure confidentiality of transaction to client.
- Client can be anonymous.
- Client can allow or disallow library to keep archive of client's transactions.

Cost structure and budget considerations