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Implementing Virtual Reference: Hollywood Technology in Real Life

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IMPLEMENTING VIRTUAL HOLLYWOOD

Progressive directors can guide you toward cutting edge technologies

BY ROY BALLESTE

Hollywood is often one step ahead of reality because many movies portray technologies that aren't available yet. The 2000 movie *Red Planet* transported viewers to the year 2057 aboard a Mars 1 spacecraft where they saw how astronauts utilized virtual chat to contact friends back on Earth. For many, this technological concept might have seemed revolutionary—but interestingly, it's available to us already. I (Roy Balleste) had gone to the Computers in Libraries Conference in 2001 and had seen a demonstration of chat reference at work, which convinced me of its potential applications on Earth.

The Internet has brought great developments in communication, some of which were introduced as customer service applications. Out of these technologies the Virtual Reference Desk (VRD) was created. Although the concept of chat reference was being tested in several academic libraries by early 2001, many institutions just stayed in the theater seats to watch the show. That was the case with law libraries in the U.S., and by January 2002 still none had ventured into this new technology. Then in March 2002, Florida's St. Thomas University Law Library joined forces with nearby Nova Southeastern University (NSU) Law Library to form a consortium with the objective of planning a VRD service. In this article, I'll share our experiences with this tool and discuss its inner workings. You can incorporate it into any library setting regardless of whether you work in academic, public, government, or special libraries. My colleague, St. Thomas library director Gordon Russell, has joined me in the "The View from the Director's Chair" section, and I've written the rest of the article from the point of view of one who's studied and implemented this technology. We'll talk about virtual reference not as reference librarians who use it, but as administrators who decided to buy it.

The View from the Director's Chair

Our interest in virtual reference was spurred by decisions to increase the digital holdings of the law library. I had a vision that the online catalog should serve as the portal to the virtual library in much the same way that the library entrance invites our students and faculty inside. To do this it was necessary to provide links within the OPAC to electronic indexes and full-text materials. My staff worked to provide links to online periodicals, subscription databases, Web-based legal materials, and a consortial purchase of netLibrary books. This resulted in more than 20,000 links.



DIRECTOR

REFERENCE:

TECHNOLOGY IN REAL LIFE

that will make your library service almost as futuristic as a Hollywood movie.

AND GORDON RUSSELL

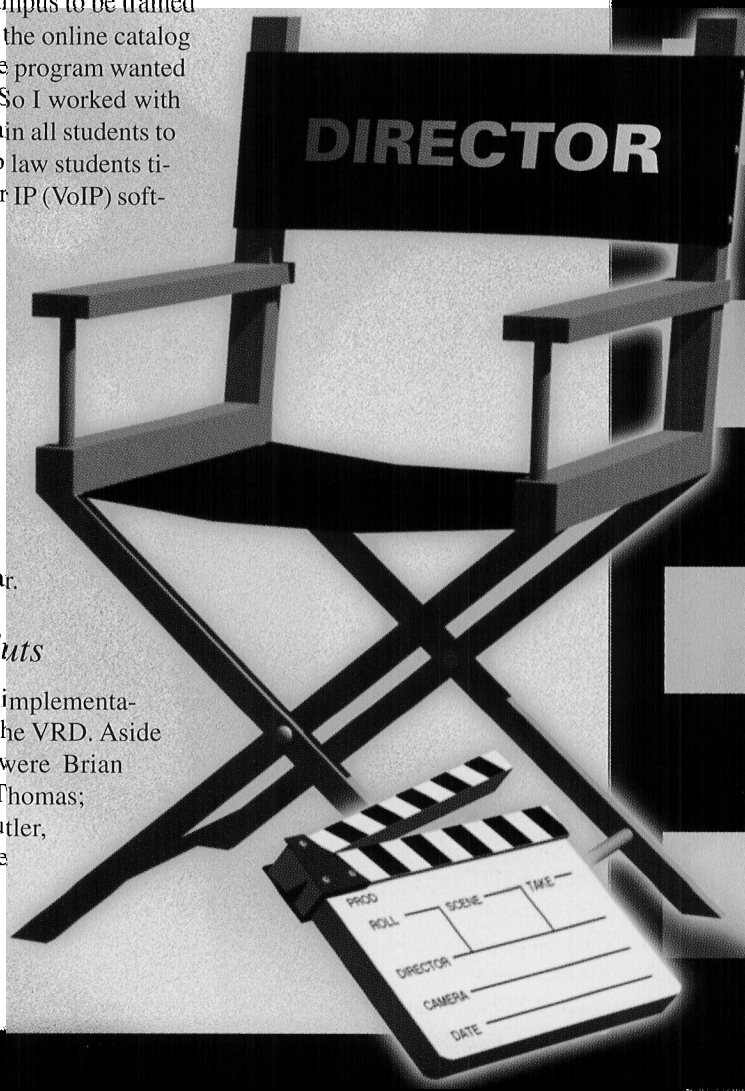
Like other libraries, we were seeing less foot traffic and decreased usage of our physical resources, but at the same time we were *not* seeing a corresponding increase in our students' usage of the online resources. This was partly a result of the fact that all of our law students get passwords to access Westlaw and Lexis early in the program, and most students just used those services and the Internet. If the best information was not on Lexis, Westlaw, or the Internet, they would just use whatever they *could* find in those three sources without searching the vast electronic databases available through our library.

At the same time, the law school started an online Master of Laws (LL.M.) program in international taxation that required students to spend 1 week on campus to be trained to use the online databases that they would have access to as well as the online catalog and other library resources. However, the managers of this new online program wanted to move away from requiring students to spend a week on campus. So I worked with the program managers to develop an online introductory course to train all students to use the electronic resources. (I had already taught an online course to law students titled Computer Assisted Legal Research and had used some Voice over IP (VoIP) software for weekly synchronous group meetings.)

All these things made me think about developing an online reference service. At a law library meeting I discussed these ideas with the director of Nova Southeastern Law Library, Billie Jo Kaufman. She suggested that we do something together. We both were convinced that our students would make use of such a service. Both schools have wireless networks and most students have laptops. There was some evidence that our students would use virtual reference because of their use of Lexis Live Research Help. The Lexis online chat service had started in the summer of 2001 and we were able to get monthly usage statistics on law students from St. Thomas and NSU. Those numbers had gone up every month of the school year.

Looking at the Players and Making the Tough Cuts

Once our two libraries had joined, we took several steps toward implementation. First, we created a committee to plan, research, and establish the VRD. Aside from Gordon Russell and me, the members of the committee were Brian Williams, research and information services coordinator from St. Thomas; and director Billie Jo Kaufman and associate director Lisa Smith-Butler, both from NSU Law Library. Once we'd made a list of all available vendors, we researched their Web sites to weigh their products' pros and cons.



First, we looked at the software features such as co-browsing and chat. Co-browsing permits the librarian to utilize the patron's computer browser to show him the same Web page that the librarian

is looking at. This is very important because the search becomes part of the historical record of the user's browser, so he will be able to recall that search later if needed. Of course, the chat option goes

hand-in-hand with co-browsing. One important advantage of chat is that it's conducted in real time, using a chat box that's conveniently located on the screen for easy access.

Our second consideration was whether the vendors had already worked with libraries. We wanted to find out how their technology was being used by other libraries and, of course, their success rates. Our third consideration was ease of navigation. For us it was important to utilize software that offered intuitive features for both the librarian and the patron. The fourth consideration was service, especially tech support. There's nothing more problematic than having unfamiliar software and not knowing how to use it. If a vendor was willing to provide remote and on-site training, that was a plus for us. Last but not least, our fifth consideration was the cost. This analytical process lasted for several months while we studied all our options.

After much deliberation, we distilled the vendor list to only two candidates and invited them for live demos. At this point we were very serious. Our contact with these two vendors was behind closed doors. We had a speakerphone, a couple of laptops, a large screen with an LCD projector, and all members of our committee present. Once again we reviewed the five considerations described above and requested as many demos as we could. We had a battery of questions prepared and we were closely studying the responses. Once the demos were completed, the final decision was left with two members of the committee—just as in Hollywood, the directors had the final say.

What the Hollywood-Like Technology Had to Offer

Convey Systems left a positive impression on us, and the directors chose Convey's OnDemand service because it had several features that we all liked: easy-to-use chat, co-browsing, Voice over IP, secure encrypted connections, and digital video.

Chat: While all vendors provide some form of chat box, our committee did not like chat boxes that would require an additional browser pop-up box, since this would potentially shrink the view of the

Vendors That Go Virtual

Convey Systems, Inc.

OnDemand

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877/623-5087
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sales@conveysystems.com
<http://www.conveysystems.com>

Digi-Net Technologies, Inc.

eLibrarian

1034 N.W. 57th St.
Gainesville, FL 32605
877/404-2428
352/333-3042
(Fax) 352/333-1117
info@digichat.com
<http://elibrarian.digi-net.com>

divine, Inc.

NetAgent

1301 N. Elston Ave.
Chicago, IL 60622
773/394-6600
866/999-3846
(Fax) 773/394-6601
sales@divine.com
<http://www.divine.com>

Docutek Information Systems, Inc.

Docutek VRLplus

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Suite 205
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(Fax) 650/286-7311
info@docutek.com
<http://www.docutek.com>

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(Fax) 011-41-1-364-4084
info@clickandcare.com
<http://www.clickandcare.com>

International

Business Systems, Inc.

LiveAssistance

14102 Sullyfield Circle
Suite 150
Chantilly, VA 20151
703/488-3600,
(Fax) 703/817-0991
info@liveassistance.com
<http://www.liveassistance.com>

LSSI

Library Systems & Services, LLC

Virtual Reference Toolkit

20250 Century Blvd.
Germantown, MD 20874
301/540-5100
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lssi@lssi.com
<http://www.lssi.com>

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user's screen. But Convey's chat box is a "browser-based interface." That means that the patron's browser will become the chat box by increasing its size slightly. This also means that everything on the user's end occurs within the same browser, thus minimizing the chances that the patron might accidentally collapse the chat session. We liked two other factors too: The technology to push Web pages is very easy to learn with Convey, and the system allows you to save the chat session, which in turn provides you with a guide to the most-often-asked questions. Convey's design also allows you to prepare pre-made answers (called "scripts"), which are useful for those basic questions because you can send the scripts immediately, thus shortening the waiting time of your customers.

Co-Browsing: The OnDemand service offers three types of co-browsing functions:

1. URL Share—Just type the URL and take your patrons to a Web page quickly.
2. Application Share—This is similar to URL Share, however here the patron is able to see the step-by-step movements of your mouse.
3. Client Share—The patron observes as you navigate your own browser.

Voice over IP: The librarian can turn on the VoIP feature and talk with the patron (assuming that the PC's microphone and speakers are working). That lets them co-browse and converse at the same time for even better service.

Secure Encrypted Connections: All connections between the librarian and the patron are secure. Patrons can chat privately knowing that only the librarians will have access to their questions because the software is encrypted with Secure Sockets Layer (SSL). This feature scrambles messages as they travel over the Web so that, if outsiders intercept them, they cannot read them.

Digital Video: Convey offers a digital video option. The librarian can set up a camera and activate the video feature so the patron can see the librarian while they're conversing, either on the phone or online. The picture appears not in a pop-up window but in the patron's browser itself.

Going into Production

On top of all this, we found this system's implementation to be very easy. Here's how it worked: Staff had to download the Convey PRO (Personal Response Operator) software. Every librarian in each of the libraries downloaded the PRO, although only two may answer at a time (per our license agreement). Connections are routed through Convey's headquarters in North Carolina utilizing Convey FCM (Firewall Conference Manager) software. (Although hosting the FCM at your institution will add speed to your connection, we have not encountered any speed problems with our remote host.)

On the user side, each patron must download a plug-in that resides on his or her browser as an icon: Convey's OnDemand Button. By clicking on the button the patron connects to the VRD. This button is always present when the student is navigating the library Web pages.

Once we were decided, signed up, and paid up, we began training. We requested on-site training from a member of Convey Systems' technical support staff, who spent a full day training Brian Williams and me. We in turn trained all the other librarians over the course of 6 weeks. We taught our colleagues as a group first, then scheduled individual 1-hour appointments with each librarian; later they practiced with one another. Usually within a couple of training sessions the librarian felt comfortable with the software. As with anything, the more we practiced, the better we got at it.

If you're wondering about the price of all this, we purchased two seat licenses at a cost of \$3,000 each. We also paid a one-time fee of \$800 for one on-site training session. The only other expense is the yearly \$900 software maintenance fee.

Our Premiere, Our Future

We started offering the science-fiction-like service on Sept. 16, 2002. We sent three e-mail blasts and provided handouts to notify the law schools' communities about our service. We also gave demos to the faculty. Additionally, we displayed links prominently in our Web pages. In fact, St. Thomas staff added a link from its catalog directly to the Virtual Reference Chat (VRC) page.

Today we staff our Virtual Reference Chat service with one librarian (rotated between the two libraries) from 2 p.m. to 5 p.m. and from 7 p.m. to 10 p.m. Monday through Friday. As the service becomes popular, we'll think about increasing the staff and the hours of operation. We are also considering increasing the number of libraries that will work with us in the consortium. This new service is not indigenous to South Florida. As we wrote this article, Louisiana State University Law Library was in the process of setting up a service using LiveAssistance. Also, the

University of Wisconsin Law School was setting one up with Convey Systems. Finally, the New England Law Library Consortium began a pilot project last fall called library LAWLINE. This one runs 24/7 and includes 18 law libraries. It will be interesting to see what they experience in their first year.

As for us, our next step is to develop a new marketing campaign that promises to increase the usage of our service. As we expected, there wasn't too much business in the first 3 months, but that has slowly changed. Our students, members of the "instant messaging age," find themselves on familiar ground with a virtual reference chat service.

In closing I'd like to say that our committee's instincts about Convey's quality were correct. Shortly after we began working with the vendor, Convey joined forces with QuestionPoint on a collaborative reference service developed by the Library of Congress and OCLC. I guess you could say that our directors know a rising star when they see one.



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