Modules in PLP's Altarama RefChatter Contract

The PLP chat project contract includes:

- RefChatter (IM and widgets)
- SMS add-on Module to RefChatter
- RefTracker for managing follow-up work on chat requests

Shirley Forster, Altarama principal who wrote and developed the software, sent this fuller description:

"The contract is for an online reference system that consists of the following components:

- A RefChatter online reference system with unlimited queues, operators and
- transactions in the first year

- The SMS add-on for RefChatter with one phone number and up to 30,000 messages (in and out) in the first year 16 hours of training for administrators and operators in the use of RefChatter and its SMS add on

- A RefTracker system to manage follow-up work from the online reference service only

- RefTutor desktop sharing usage instructions, 12 hours training, and setup assistance in RefTracker and RefTutor

"Together the components provide an excellent online reference system that you can use centrally, at the individual member libraries, or a combination of both.

"RefChatter is the key to this service providing a web based interface where operators can chat with patrons in an easy to use and consistent manner no matter which of a variety of online communication methods the patron chooses to contact them by.

"Contact methods that patrons can use include Instant Messaging (AIM, Yahoo, MSN, and Gtalk), Internet Messaging Services (ICQ and QQ), widgets (RefChatter 's own widget, Meebo me and a widget in Facebook), Twitter, and SMS/Txting via RefChatter 's SMS add on service - you set up the methods that you want available for use with each queue. Patrons come in through queues that are monitored by operators allowing the patrons to be directed to the most appropriate operators (in your case those at their home library)..

"Queues can be monitored by more than one operator and the operators can chat with each other and pass patron chat sessions between each other. RefChatter is hierarchical which means that although the service is provided by PLP, member libraries can operate their own private queues if desired, and members can co-

operate by operating each other's queues if that is desirable.   The system automatically gathers transcripts and statistics.

"RefTutor desktop sharing can be utilized in conjunction with RefChatter and RefTracker to allow the operator and patron to see the same web page on their computer screens (similar to the old Ask Now co-browse system but in a reliable way). This provides and excellent tool for teaching online information seeking skills where it becomes evident from a chat that this is required.

"When your RefChatter service is offline, you will want patrons to be able to submit questions for response by email. And often questions that come in as a chat really can't be answered appropriately in that environment and need offline research and a response by email. Your individual members may already have local systems for managing those questions requiring follow up and if that is the case the member can integrate links to their local system into the RefChatter widget. However where local members do not have such a system, such as centrally at PLP, RefTracker will provide a simple yet sophisticated way for them to deal with offline and research questions coming in to your RefChatter based system or its widget space when the service is offline.

"RefTracker is in fact much more powerful than just being able to handle the offline and research questions from your RefChatter service, and your member libraries may prefer to separately license it for their own needs. In an individual library it can handle ALL of the different type of requests coming into your library, allowing them to be answered more efficiently than existing systems, ensuring that answers are retained and can be reused, creating a knowledge base where patrons can find answers for themselves, and gathering statistics with no additional effort. An extended RefTracker contract could even allow all of your members to co-operatively working in one system so that your work is aggregated and shared between all reference staff. We will investigate how you and your members can best use RefTracker with your online system and where else it could be cost effectively implemented once the online system is up and running smoothly. "

Hyperlinks for the various product names link through to brochures describing those products in more detail:

RefChatter -
<http://www.altarama.com/file.axd?file=2010%2f4%2fRefChatter+op+100407.pdf>
RefTracker
<http://www.altarama.com/file.axd?file=2010%2f4%2fRefTracker+op+100407.pdf>
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Support site with documentation and more:
http://supportsite.altarama.com/RefChatter/tabid/56/Default.aspx