



RefChatter Set-up FAQ's – Sara Washington

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What the heck is RefChatter and why do we need to consider participating in the RefChatter service?

RefChatter is a web-based chat application that allows the librarians at your branch to communicate with patrons all over the consortium. By providing a constant online reference presence, patrons across the consortium will be more likely to turn to the library when they need assistance; kind of like always giving business to a store whose opening hours are predictable.

How will using RefChatter increase reference traffic?

Patrons have a number of communication channels that they're already familiar with. These channels include SMS texting through their cell phones, Twitter, and Instant Messaging clients such as MSN Messenger, Gtalk, AIM, and Yahoo! Messenger. These Instant Messaging (or IM) clients are associated with whichever email system(s) the patron uses for their regular email communications.

Librarians try to 'bring the library to the patron', and using online reference is a way to achieve this goal. RefChatter provides a way to aggregate all of these communication channels into one, allowing librarians to monitor one website (the webchat client), instead of having to monitor all these channels separately.

Another way patrons seek out librarian assistance is by going online to the library's website. There, they may find a phone number or an email address to contact the library. By adding in a chat widget box, the library can provide yet another way for patrons to get instant help.

RefChatter seems really complicated to me, and frankly, I'm not sure it's worth the effort.

RefChatter does a lot of things. It brings in chat messages from many channels, creates reports, archives transcripts, and allows a constant online presence even when librarians change shifts. There's a lot going on under the hood in RefChatter, so the initial setup of RefChatter can be a little overwhelming. Just like any new program, it takes some getting used to. However, you'll find that it simplifies your workload when the ball gets rolling, and it gets easier to use the more time you spend with it. Promise.

What does Sara mean when she talks about queues?

Queues are public entry points. They are set up to provide a way to identify where the questions are coming from. For example, Berkeley patrons may ask questions that they send via a widget chat box that they find on the Berkeley Public Library webpage, or they might send a question through texting, Twitter, or Yahoo! IM. All of these questions will come into the 'plp_bep1' queue. As a result, a librarian in Oakland can see that the patron is probably somewhere in the Berkeley area, and therefore have some context to go with the patron's question.

How do we make sure that our patrons have a way of contacting the libraries in the consortium?

By setting up your library's queue, you can allow patrons in your area to communicate with librarians in the consortium. There are two ways that patron questions come into the library: Gateways and the widget chat box.

What does a Gateway do and why should I even bother?

A Gateway integrates public profiles with a queue. These public profiles include: Twitter, SMS texting, and IM clients such as AIM, MSN, Yahoo!, and Gtalk. By creating a Yahoo! gateway, for example, your patrons who normally use Yahoo! can use this familiar way to communicate with the library. Providing this type of communication option will increase your library's reference traffic and will give you another way to provide help to your patrons, since you're allowing the patrons to ask questions through a channel that they're already familiar with.

How do I create Gateways?

First, create an account and download the IM software on your computer, if necessary. For example, to create a Yahoo! Gateway, go to the Yahoo! website and sign up for a new account. This account will be used **only** for your online chat service. If your library already has a Yahoo! account, and that account is **only** used to answer reference questions, then you can just use it as your Yahoo! Gateway. If, however, you have a Yahoo! account that you use for other purposes besides online chat reference, you'll need to create a brand new Yahoo! account for the Gateway.

The IM clients are associated with an email account. By creating an account, you'll also be creating an Instant Messaging account associated with that email address. You might need to download software in order to activate the Instant Messaging part of the account. It would be best if your Instant Messaging ID made a reference to your library (for example: ask_berkeley).

Here are the links to IM clients and Twitter:

Yahoo!:

<https://edit.yahoo.com/registration?.src=fpctx&.intl=us&.done=http://www.yahoo.com/>

AIM: <http://www.aim.com/>

MSN Messenger: <http://explore.live.com/windows-live-messenger?os=win7>

Google talk (Gtalk): <http://www.google.com/talk/>

Twitter: <http://twitter.com/>

Once you've created accounts for these IM clients and Twitter, you can enter in the username and password for each in the RefChatter admin site (<http://refchatter.net>). Please make sure that the queues are offline before adding the gateways (no operators online). Also, please note that the MSN gateway requires a username in the form of an email address (for example: ask_berkeley@hotmail.com)

This is all too much for me. I don't have time to set up all these accounts!

Sara will be happy to create IM accounts and Gateways for you, if you'd prefer ☺

What about chat widget boxes?

We'll address chat widget boxes in a later module.

Help!

Please feel free to email Sara directly: swashington@altarama.com