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Chatting About QuestionPoint and Docutek

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This year the Winter Park Public Library, a small to medium-sized municipal library located in Central Florida, will continue its third year of providing the latest in chat reference service to the public. Feeling that our community was increasingly turning to the Internet to find answers to reference questions, we began actively seeking opportunities to meet them online. Along the way, we changed chat software vendors three times and transformed our reference librarians into well-seasoned virtual librarians able to manage several different kinds of chat software.

The following article describes our experience using two popular interactive chat services: OCLC QuestionPoint and Docutek VRL*plus*. A search of the library literature revealed that no similar comparisons had been done. Regardless of the future of chat technology, the current buzz surrounding its use is prompting libraries across the country to seek out ways of acquiring a chat service. OCLC has strong name recognition due to its traditional role in providing library technology solutions. This factor plays an important role in marketing its QuestionPoint chat product. Docutek also offers library technology solutions with the idea of making technology simple and easy to use. Before the release of VRL*plus*, Docutek had already entered the library market by providing technology that enabled libraries to manage their electronic documents. In the following article, we will give our impressions of the overall functionality of QuestionPoint and Docutek chat based on our observations.

We began using OCLC's QuestionPoint not long after it was introduced in March 2002. At that time we were already

members of OCLC's Collaborative Digital Reference Service (CDRS) but used a separate vendor for our electronic chat service. We felt that moving to the new chat service would provide a good opportunity to help promote and expand our existing chat and email services. Our decision to switch was based on the fact that QuestionPoint was relatively inexpensive, promised new and advanced features, allowed multiple librarians to login simultaneously, and combined our chat and email services into one electronic reference system. Furthermore, any question that our staff was unable to answer could be referred to OCLC's Global Reference Network. After considering these points we were confident that we were making the right decision by migrating to QuestionPoint.

QuestionPoint separates its electronic chat service into two separate products referred to as standard (basic) and enhanced communications. The basic chat provides typical chat features but does not include voice, video, URL share, or the application sharing offered by the enhanced chat. The enhanced version of QuestionPoint is completely independent software from the basic chat. In order for patrons to use the enhanced version, a plug-in must be downloaded which is not required for the basic. If patrons refuse the download, they cannot access enhanced chat. Due to this and other concerns, our library depended mainly on the basic chat to carry out electronic reference services.

With QuestionPoint basic the librarian is alerted to incoming chats by a small pop up box indicating "New Chat User" and a brief audio alert. The operator screen

automatically appears after the librarian has accepted a chat. This Java pop up screen appears in front of other Windows applications, which allows the librarian to monitor chat while working on other tasks. Both the librarian and patron screens are similar in appearance and have more or less the same layout. This layout design is flawed because most of the screen has a uniform blue background that makes reading difficult. The screens readability is further diminished due to an automatic time stamp that appears to the right of each new message. The text box, however, has a more standard white background and is easier to use. Also, when a new message is sent or received, the entire transcript area goes momentarily blank. Waiting for the text to appear slows down the interaction and can be frustrating.

Pushing web pages is one of the primary ways of sending online material to patrons using QuestionPoint basic chat. To achieve this, the librarian can do one of two things: type the URL directly into the textbox, or paste it in after copying it from the Web browser. Once the address is entered into the text box, the librarian then pushes the page to the patron by clicking "send". Whenever a librarian pushes a page, it appears on the patron's screen in a separate Java box. Developed after basic chat's initial release, the page pushing feature is really an afterthought and more tedious than other chat programs that simply have a "push page" button allowing the operator to send whatever URL is showing in the browser.

We had a vision of eventually using QuestionPoint's enhanced chat to offer patrons more advanced features. Directly assisting remote patrons with using the catalog and database research was not possible in the past. We were excited about the possibility of having the technology to share applications and to better serve patrons who contacted the library from their home or office. Wanting to add the advanced features, but not knowing if patrons would accept the

download, we experimented by providing a choice between the basic and enhanced chat.

QuestionPoint enhanced communications was revamped and improved in June 2003. Previously, the enhanced chat relied on software originally released in summer of 2002 that functioned by embedding itself in the user's browser toolbar. In working with this earlier version of enhanced chat, our librarians found the system too unstable for public use. During testing, it would sometimes cause computers to freeze, resulting in lost sessions. In experimenting with application sharing, a delayed response time made the feature too frustrating and unwieldy for practical use. Knowing how quickly the librarian must react during a chat session, we felt that any software glitches could impede communication. We also disliked that the enhanced chat required the patron download a permanent software plug-in onto their computer. Staff thought this was not something the average computer user would be willing to do.

With the new improvements to the enhanced chat, QuestionPoint fixed many of the problems that kept our staff from introducing it to the public. Although it still requires a patron download, the software is now more stable and advanced features are easier to use. Perhaps one of its best additions is the URL share. This feature is useful for escorting patrons through online material and helping them locate electronic resources. However, this is different from true co-browsing in that neither the patron nor the librarian can see what the other is typing into a search box. This limitation is a problem when helping patrons access library catalogs and choosing effective search terms. Our staff encountered problems using the URL share to access certain library catalogs. For example, when sharing the Library of Congress catalog, the user could not see the search results. Each time we attempted to search the catalog the user's screen would report an error. We found

this also happened when attempting to share other library catalogs. Strangely enough, we were able to share our own library catalog with no problems.

The application sharing feature of the enhanced chat allows the librarian and patron to both view and work within an application. But unlike true co-browsing, the patron and librarian do not have simultaneous control of the application. This requires each to take turns and creates a back and forth exchange that is at times awkward and frustrating. However, this back and forth sharing is practical in that both parties can see what the other is doing. This allows the librarian to help patrons with search terms and also accommodates scrolling movements. Another challenge to application sharing is the "screen within a screen" design that makes scrolling and moving around difficult and occasionally obstructs the view. After testing earlier versions of this feature, the improvements that now make it functional do not take away from its fundamental flaws.

After using OCLC's QuestionPoint service for close to a year, Florida's Collaborative Statewide Live Reference project approached our library about becoming a member of a new virtual reference service. The two founding organizations, College Center for Library Automation (CCLA) and the Tampa Bay Library Consortium (TBLC), chose Docutek as the chat vendor for this project. The new service is funded by an LSTA grant and is growing monthly with the ultimate goal of being available seven days a week, 10 a.m. to 10 p.m. As we learned more about Docutek and the Florida collaborative project, we decided it would be a good choice for our library. The LSTA grant would cover system costs for at least the first year, enabling us to expand our current hours while reducing staff workloads, and all of the required files would reside on a centralized server in Tallahassee. So after using QuestionPoint for a year, we decided to join the Collaborative.

During training for Docutek, we were impressed with the features and general ease of use on both the librarian and user ends. The feature that most caught our attention was Docutek's co-browsing ability. Although QuestionPoint offers URL share and application sharing, it does not technically offer true co-browsing, where the librarian and patron view the same page at the same time and have mutual control of the browser. Docutek requires an applet in order to co-browse but it is not a permanent download as with the QuestionPoint enhanced. If patrons do not accept the Docutek applet, they can still use the service. In this case, patrons automatically enter Docutek in the "Classic Mode" instead of "Pro". Patrons are also defaulted to Classic Mode if they are Mac users or if they are using AOL, Netscape, and sometimes Windows XP. Entering chat in the Classic mode prohibits patrons from co-browsing but the librarian can still push pages to their screen. One of the drawbacks of page pushing in Docutek is that it takes several steps to initiate. However, the biggest problem we experienced with Docutek is that the *VRLplus* co-browsing feature is not always compatible with the Windows XP operating system. This problem forces many patrons using the XP operating system to enter chat in the Classic mode. With XP becoming more and more prevalent, it poses a real problem for Docutek users who want the advantages of co-browsing in the Pro mode.

The basic layout of Docutek *VRLplus* chat does not change between Classic and Pro modes. The only difference is that the browser toolbar does not appear in Classic Mode. When *VRLplus* opens, the main operator screen is divided into two windows. The top window contains the text box and other navigation tools. From here the librarian can accept new patrons, save frequently used responses as scripts, and save commonly used Web sites as bookmarks. The operator-to-operator chat feature is useful if a librarian needs to consult with another librarian on duty. Also, patrons can be transferred

between librarians or their questions can be referred on to other member libraries. The bottom half of the operator screen is a co-browse window that allows the librarian to assist patrons with locating online resources. This window is also used for pushing pages if the patron does not enter chat in the Pro mode.

When a patron enters the Docutek chat, two separate windows appear side by side on their screen. The left-hand window is a text box and chat transcript that is easy to read and simple to use. The right-hand window is a co-browse screen where the librarian can share online information with the patron. When a patron finishes chatting they simply click the "Quit" button to log out. A short survey pops up immediately following the patron logout. QuestionPoint also provides this type of survey; however, because it appears in the patron's email it is less likely to be completed. These surveys provide statistics on patron satisfaction and overall chat experience. In Docutek, patrons are then given the option to view the chat transcript and links to the sites visited during the session. A duplicate copy of this transcript can be sent to the email address provided when signing on. Docutek's layout is one of the best our staff has tested. Its readability and ease of use for patrons is noteworthy.

After three years of providing virtual reference, Winter Park Public Library staff has developed an understanding of the type of library service that patrons are seeking online. The electronic reference chat tools used by the staff all have positive and negative aspects. Overall, they allow the librarian to respond to the information needs of patrons in new ways. Whenever a screen freezes, a patron is dropped and lost, a page cannot be pushed, or co-browsing just does not work, the need for foolproof chat software is apparent. QuestionPoint and Docutek both have strengths and weaknesses, but we feel that streamlined reliable features win out over less functional bells and whistles. In considering the types of chat questions we have received over the past three years, there does not seem to be a need for advanced features that do not work consistently. QuestionPoint's basic chat is a fairly reliable example of how simple chat tools such as page pushing can consistently respond to patrons' online needs. The enhanced version, while offering advanced features, diminishes its utility by offering ineffectual fluff. Docutek provides a good balance by offering a true co-browsing option that does not require a patron download. In conclusion, our comparison of these chat services demonstrates that in the case of online live reference, a consistent and reliable product wins out over a service with questionable high-end features.