Answering Questions Via Instant Messaging

Policy and Procedures - March 2009

Instant messaging (IM) is increasingly a preferred method of communication by our patrons. To support these users, the Health Sciences Library will pilot offer Reference and TEC assistance via IM. In addition, liaisons may choose to add an IM option to their portal pages.

Instant Messaging Options

Patrons will be able to contact staff through instant messaging in at least two places:

- On the Ask a Librarian page
- The “Ask Rover” icon on the computer lab desktops

Both accounts feature an IM box embedded in the Web page, so patrons do not need IM accounts.

1) This service will be available when the Library is open and staff in the Reference and IM “queues” or groups are logged in.

2) Instant messages will be answered through the Pidgin chat client and Libraryh3lp system. Training will be provided.

3) IM assistance is prioritized for use by Health System affiliates, and will be advertised as such. Desk staffers may use their discretion in answering questions from non-Health System and non-UVA patrons.

Circulation Staff will “page” Reference staff through the Ask a Librarian widget on their desktop:

Messages will be formatted as follows:

**Come out:** topic (e.g. Come out: lit search)
- means that a patron is here and can a Reference librarian come out to work with them

10:07 guest146598@libraryh3lp.com Come out lit search
10:07 karen_knight@libraryh3lp.com I'll be there - Karen

**Phone:** topic (e.g. Phone: proxy question)
- means that a patron is on the phone and can Circ transfer the call to you

11:52 guest143158@libraryh3lp.com Phone patron - online availability problem
11:52 andrea_horne@libraryh3lp.com I'll take it - Andrea
11:52 andrea_horne@libraryh3lp.com 4-9985

How Pidgin Works

When a patron uses the Ask a Librarian instant message box or Ask Rover icon, the request will be received by those library staff who a) have Pidgin open and active at their computer and b) are in the appropriate queue (Reference vs. TEC). Pidgin will go inactive on an individual’s computer after 3 minutes of non-activity (no mouse or keyboard movements) at the computer.
1. Pidgin should automatically start when you turn on and log in to your computer.

You will see the icon of a square and circle in the lower right task bar when Pidgin is logged in:

![8:24 AM icon](image)

If you do not see Pidgin running, go to Start, then All Programs, then Pidgin to start the program.

2. A new message will be received by all members of the queue. However, only one person may answer the message. Once this message is “taken” by a library staff member, no one else may join in.

3. After you answer a message, it is best if you close the IM window. Otherwise, the chatter can start up the conversation again in that same thread, (even after several minutes) and you may not they are back to continue the conversation.

3. You may transfer a message if necessary. See accompanying “Transferring Instant Messages”

4. You may change your Status manually if you wish. Double-click the square-circle icon in your task bar to open your Buddy List. Click on Available at the bottom of the list and change to Away or another status. **NOTE: if you change your status manually, you must also remember to change it back!**

5. You may check your Pidgin settings if necessary. Double-click on the square-circle icon in your task bar to open your buddy list. Click on Tools, then Preferences.

   a) Under Status/Idle, you may change the number of minutes before you go Offline.

   b) Under Logging, you may want to turn on logging for instant messages and chats (but not status changes - too much information!)

6. You may arrange your Buddy List to your liking, including nicknames and groups. See the accompanying document “How to Manage Your Buddy List in Pidgin”.

**Etiquette**

Acknowledge a user’s instant message right away, even if it will take you a few seconds to find their answer. Remember you may need to “touch base” frequently with the IM client to let them know you’re still “on the line”.

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