

### Context

**Ask a Librarian / Clavardez avec nos bibliothécaires** is a **virtual reference service** that connects university students, faculty, and researchers at participating libraries with real-time research assistance through chat. Operated through **Scholars Portal**, the service arm of the Ontario Council of University Libraries (OCUL), the collaborative chat service is offered at **15 university libraries** across Ontario and Quebec, in **English and French**.

The virtual reference service has been using LivePerson's Agent Console software to chat for the past five years. However, this summer, the provider is **discontinuing the software** and **migrating the service** onto its new platform, called LiveEngage. This software has a significantly different interface and new features.

### Objectives

- **Evaluate** the new platform, LiveEngage, using a range of criteria essential to the functioning and operations of the service, to ensure the new platform meets the learning and research demands of the chat service's diverse, bilingual university communities.
- **Identify and compare** other virtual reference software on the market, to determine if LivePerson's products continue to be the best fit for our chat service, as the technological landscape has changed dramatically since the Ask a Librarian steering committee selected a chat software in 2011.

### Evaluation Criteria

- Developed criteria based on the **administrative** and **chat-related functions** and behaviors that the software must support in order for the service to operate
- Created additional criteria to capture the **unique needs of a consortial service**, such as support for multiple languages, ability to categorize and route chats based on the library of origin, capacity to view incoming call information and observe other operators' chats
- Grouped the criteria into broad **categories**, to compare how well each software would **meet the needs** of its primary users (coordinators, operators, and library patrons)

#### General

- Developed for libraries
- Can be configured for consortia
- Pricing model and cost
- Technical support

#### Operator Experience

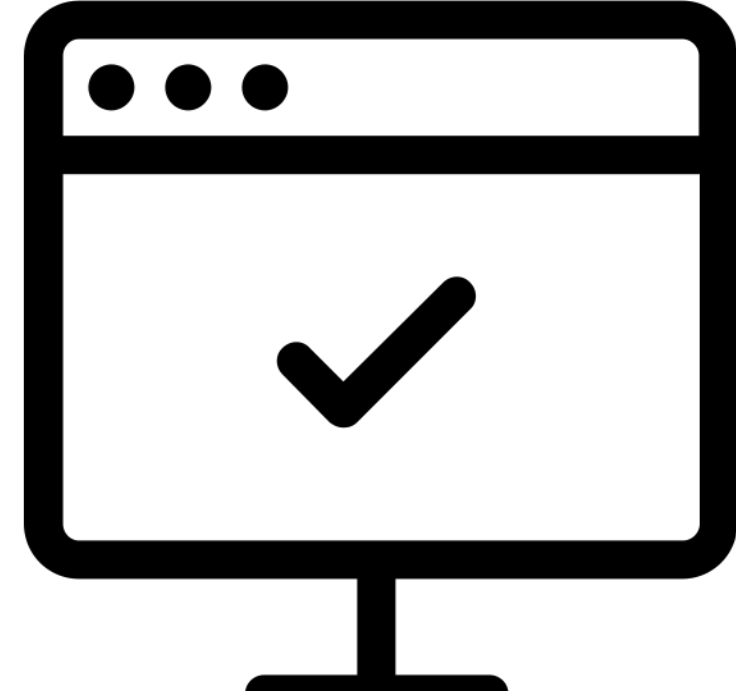


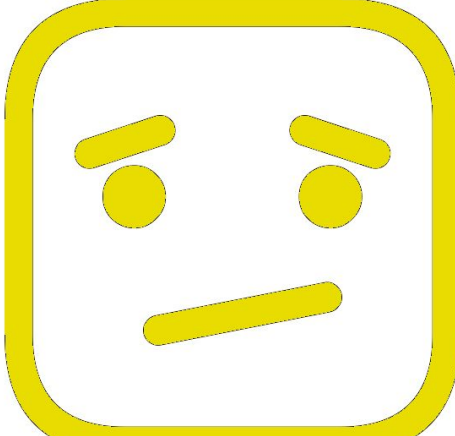
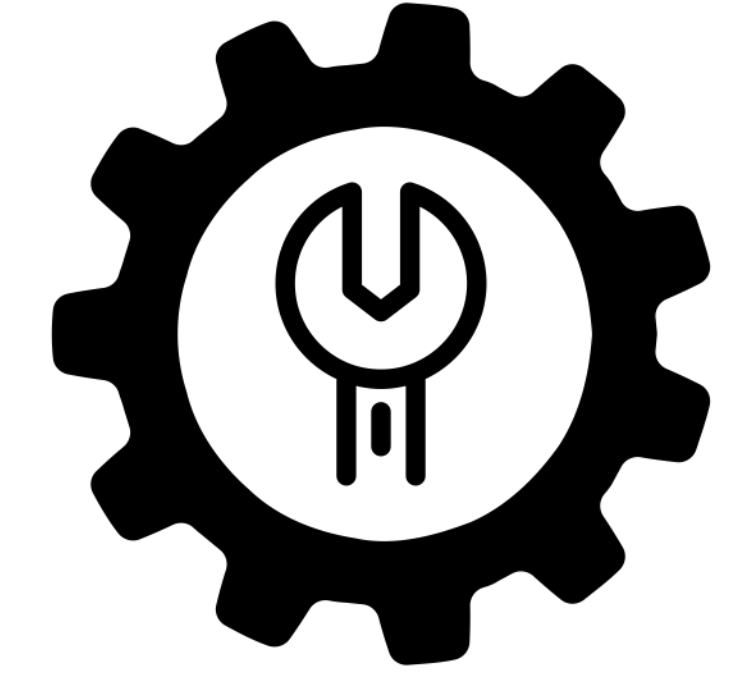



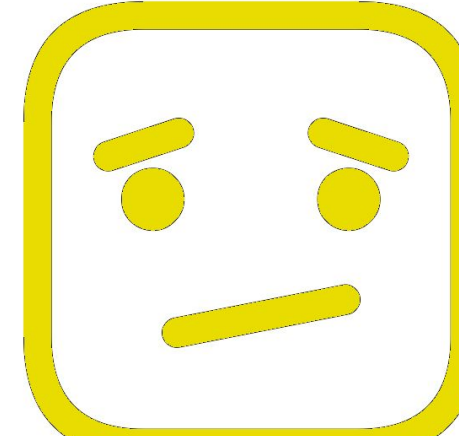
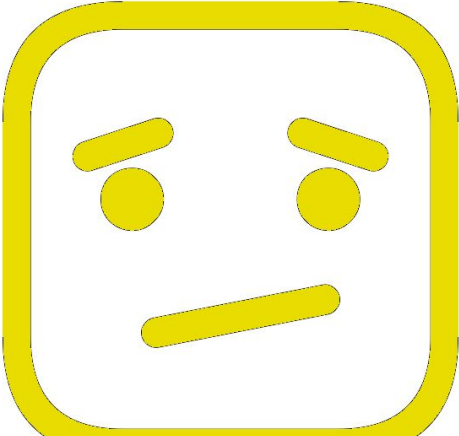

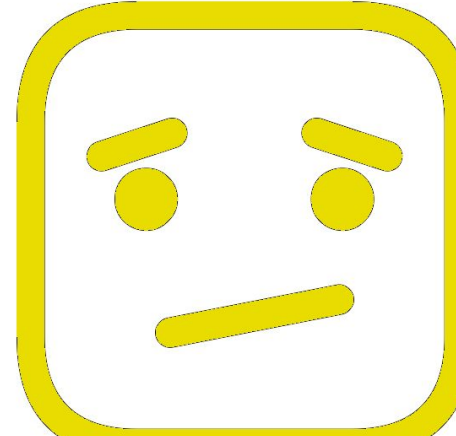
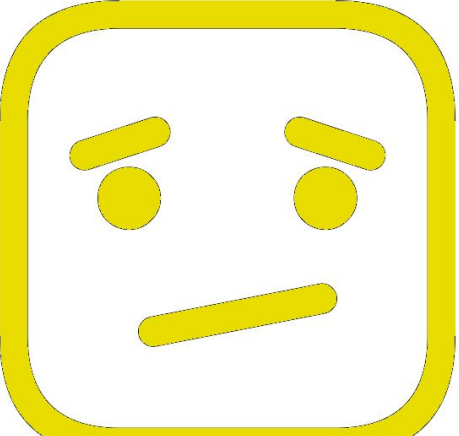

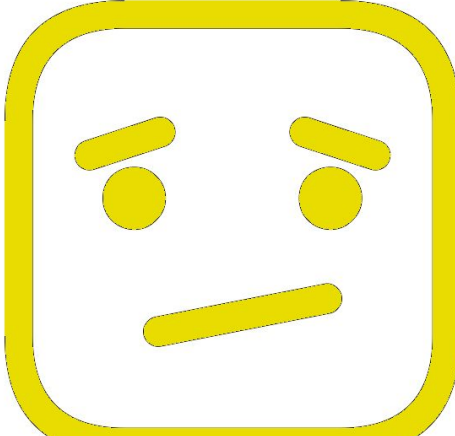

- Ability to categorize chats
- Managing and monitoring queues
- Incoming call information
- User surveys
- Chat between operators
- Blocking abusive visitors

#### Administrative Features

- Customization
- Multiple levels of access
- Transcripts available
- Statistics available

#### User Experience

- Offline behavior
- Offered in English and French
- Capability to print/save/email transcript
- Browser compatibility
- Accessibility
- Privacy

	LiveEngage	LibraryH3lp	LibChat	QuestionPoint
General	 <small>Created by Gregor Ciesnar from Noun Project</small> <ul style="list-style-type: none"><li>• Not developed for libraries</li><li>• Can be configured for consortia</li><li>• Costly (priced by chat in USD)</li><li>• Support by chat/email only</li></ul>	 <ul style="list-style-type: none"><li>• Developed for libraries and suitable for consortia</li><li>• Reasonable cost in CAD</li><li>• Client and technical support through phone, email, chat</li></ul>	 <ul style="list-style-type: none"><li>• Developed for libraries and suitable for consortia</li><li>• Must subscribe to LibAnswers to use LibChat module (priced separately)</li></ul>	 <ul style="list-style-type: none"><li>• Developed for libraries and suitable for consortia</li><li>• Group discount</li><li>• Technical support by phone and email, as well as blog and wiki</li></ul>
Administrative Features	 <small>Created by Björn Andersson from Noun Project</small> <ul style="list-style-type: none"><li>• Highly customizable: profiles for each language, unique buttons for participating libraries, custom surveys, etc.</li><li>• Can create and assign custom levels of access</li><li>• Robust statistical module</li></ul>	 <ul style="list-style-type: none"><li>• Chat widget and surveys are customizable</li><li>• Different levels of access available</li><li>• Robust statistical module with granular reports</li><li>• Can browse and download past chat transcripts</li></ul>	 <ul style="list-style-type: none"><li>• Chat widget is customizable in appearance and functionality</li><li>• Can assign levels of access</li><li>• Transcripts, chat activity reports, and user ratings available</li></ul>	 <ul style="list-style-type: none"><li>• Can customize chat widget, forms, and surveys</li><li>• Can assign levels of access</li><li>• Archived transcripts available</li><li>• Robust reporting and analytics</li></ul>
Operator Experience	 <ul style="list-style-type: none"><li>• Can categorize chats and view incoming chat info</li><li>• Cannot choose specific chats or observe others' chats</li><li>• Customizable surveys</li><li>• No chat between operators</li><li>• Can block abusive visitors</li></ul>	 <ul style="list-style-type: none"><li>• Unique queues for each user group (with own widgets)</li><li>• No incoming chat information</li><li>• No pre-chat survey, and exit survey not presented at end of chat (can embed in widget)</li><li>• Chat between operators</li></ul>	 <ul style="list-style-type: none"><li>• Can categorize chats by department or library</li><li>• Can view incoming call info</li><li>• Entry form and exit survey</li><li>• Group chat between operators</li><li>• Can block specific IPs</li></ul>	 <ul style="list-style-type: none"><li>• Can establish unique queues for libraries in the consortium</li><li>• Cannot observe others' chats</li><li>• Minimal incoming chat info</li><li>• Pre-chat and exit surveys</li><li>• IM between operators</li><li>• Cannot block abusive users</li></ul>
User Experience	 <ul style="list-style-type: none"><li>• Can email question to when chat is offline</li><li>• Operator and user interface available in EN and FR</li><li>• Poor accessibility and privacy (visitor monitoring, no VPAT)</li></ul>	 <ul style="list-style-type: none"><li>• Customizable offline behavior</li><li>• Widget available in EN and FR</li><li>• Flexible privacy options (e.g. control over how transcripts are saved and anonymized)</li><li>• Superior accessibility (has VPAT)</li></ul>	 <ul style="list-style-type: none"><li>• Redirected to knowledge base when offline (not email)</li><li>• Limited language options</li><li>• Patron info can be purged</li><li>• Compatible with screen readers</li></ul>	 <ul style="list-style-type: none"><li>• Can offer email service when chat is offline, or route question to 24/7 cooperative</li><li>• Can create EN/FR chat profiles</li><li>• Anonymous chat option</li><li>• ADA-compliant and offers VPAT</li></ul>

### Results



**LiveEngage** is strong in several areas: it offers many **customization** options, it allows for sophisticated **categorization** and routing of chats, it presents a wealth of **information about incoming chats**, and it provides **language** control over the user and operator interfaces.

There are several aspects of the software that make it unsuitable for a consortial service. Operators **cannot choose which chats they would like to take**, making it hard to match users with staff from their home libraries, and operators **cannot observe their colleagues' chats**, which undermines the collaborative nature of the service.

The platform also has **monitoring** capabilities over web visitors, a privacy concern for libraries. Its **lack of a VPAT and poor accessibility** are barriers to meeting libraries' responsibilities under the AODA. Its **high cost** is also problematic.



**LibraryH3lp** has several standout features. It was designed for libraries, and the system can be **configured for consortia**, with each partner in the service receiving a custom chat widget that routes questions to the institution's queue. LibraryH3lp will do this **set-up for free**.

LibraryH3lp also has superior **accessibility** and **privacy**. The chat widget is compatible with assistive technology, and the entire system has been reviewed by three university accessibility offices for users with visual disabilities. It is also possible to prevent chat transcripts from being saved to preserve privacy, or to anonymize transcripts.

The system does have some limitations. There is no way to set up questions before the chat is launched, so operators **cannot view information about the incoming call**. The **exit survey** is not presented automatically (although it can be embedded into the widget), limiting the service's options for evaluation.



**LibChat** is designed for libraries, and the chat system is **suitable for consortia**, as chats can be categorized by library. The widget is **customizable**, and entry forms and exit surveys can be configured to **gather information** for categorization and evaluation purposes. Operators can **view the incoming chat information** to decide whether they should take the chat, and **group chat** capability supports the collaborative aspect of the service.

LibChat is a module of Springshare's LibAnswers, not a stand-alone product. This presents an **added cost**, as Scholars Portal would need to subscribe to **LibAnswers** in order to use LibChat. When chat is offline, LibChat redirects to LibAnswers; it does not offer an offline email service, which means Ask a Librarian would need to change its offline procedures.



**QuestionPoint** is intended for libraries, and the chat system is **appropriate for consortia**, as queues can be established for each partner library, and operators can **collaborate by sending IMs** from within the software. The chat widget, forms, and surveys are **customizable**, and **English and French profiles** can be created for a bilingual service. When the service is offline, questions can be routed to QuestionPoint's **24/7 cooperative**.

QuestionPoint has adequate **privacy** features - for instance, users can choose to chat anonymously - and rates strongly on **accessibility**. The software is ADA compliant and has a VPAT document outlining how it meets accessibility requirements.

The software has some weaknesses: **not all information about an incoming chat is visible** before it's picked up, and operators **cannot observe each other's chats**.

### Conclusion

While **commercial contact centre software** like LiveEngage is flexible and offers a wealth of features, it is **not a perfect fit** for virtual reference. Vendors from the e-commerce sector do not fully understand library use cases, especially consortial arrangements, and some software **features are inappropriate** for a library.

**Library-developed products are preferable**, although it can be difficult to find software that caters to consortia, especially ones serving different language groups. It is challenging to find software with enough French-language support for the OCUL community, as most chat software is developed in the United States.

There is more library-specific chat software on the market than ever before, reflecting the **rapid pace of technological change** and users' growing **preference for textual communication**. It is imperative for Ask a Librarian / Clavardez avec nos bibliothécaires to keep pace by continually reviewing software options, to ensure chat software is meeting the learning and research needs and communication preferences of the service's diverse, bilingual university communities.