

# LIBRARY JOURNAL

## Live, Digital Reference Marketplace

by Buff Hirko -- 10/15/2002

Cover Story >

### **Buff Hirko reports that products are undergoing rapid change, with improvements in functions and features**

To those who watched automation systems evolve in the early Eighties, the world of digital reference seems oddly familiar. Vendors appear from unexpected places, then disappear. Others merge and expand. Limited function applications, such as HumanClick (now LivePerson Pro), go off in intriguing directions, integrating features like online surveys and security encryption (for transmitting credit card information) that may or may not be useful to libraries.

But there are also significant differences. The pace of development of digital reference is much faster. No one, apart from the developers themselves, can keep up with the changes. Perhaps reflecting this rapid development, no commonly accepted moniker exists for interactive digital service--virtual, real-time, synchronous, live chat all coexist. At times it seems that librarians have boarded a train without knowing where it's going, with more and more travelers climbing on every day. [For more on the issues surrounding live reference, see ['Live, Digital Reference,' LJ 10/1/02](#), p. 46-50.]

### **Rapid expansion**

To see a comparison of the features and requirements of the products listed in this article, see the Company Comparisons below.

The number of libraries experimenting with chat reference in 1999 could be counted on one hand. It's impossible to determine the ever-changing 2002 statistic (buildings? institutions? consortia?), but certainly there are hundreds of libraries in the United States, with more around the world, offering some type of digital reference. While that is a small percentage of all libraries, many more provide both web pages and e-mail service--the beginning of digital reference.

Most of the vendors began with call center software. These applications were designed to help clients frustrated with online ordering of merchandise or services by offering a live connection to a customer service representative. Customizing the software to handle the universe of library queries has been one of the great challenges for vendors. A handful of libraries have designed local applications using free instant messaging services (e.g., AOL) or open-source software like Rakim.

## **Vendor diversity**

Vendors fit into differing categories: for- or nonprofit, primarily commercial or library focused, large and small. Only OCLC and 24/7 Reference are nonprofit-based entities. LSSI and 24/7 Reference are based on eGain software, which supports commercial companies like Land's End. Both target the library market, as do Docutek and OCLC's QuestionPoint. Other vendors have a primary customer base of commercial businesses, with libraries being late additions. Interactive chat service is Internet-based, and these are tough times for Internet businesses--both LivePerson and eGain downsized recently.

Digital reference software packages range from down-to-earth to pie-in-the-sky. The combination of relatively low cost and product novelty may account for few libraries selecting digital reference software via an RFP process. Choices are based on vendor demonstrations, web site visits, features, price, and word-of-mouth recommendations.

## **Product variables**

Functionality and features are advancing rapidly. All applications offer live interactive chat, can push web pages, queue waiting patrons, and provide audible or visual alerts when a new customer comes online. The ability to push documents, PowerPoint presentations, and other nonweb resources is increasingly common. Most software e-mail transcripts of the chat session to the patron and generate statistics.

Report capabilities vary. Some offer spell checking and form-sharing. Persistent buttons allow patrons to initiate help requests when using licensed databases and can be set up on all library web pages without coding. Some systems generate phrases ('I'm still working on your question') at specified intervals.

To a greater or lesser degree, all of the vendors make it possible for the library to customize the look of screens, web forms, surveys, and other elements. This allows local branding, as well as harmonizing digital reference with existing web page design.

When OCLC and the Library of Congress introduced QuestionPoint, they integrated chat with the more prosaic e-mail reference and a knowledge base. The latter is a database of previously asked question and answer pairs, from which personal information has been stripped, that can be searched or browsed. LSSI announced that RefTracker, which provides similar capability, would become part of its standard package.

Remote control (application sharing) was developed as a tool for technical problem-solving. It allows librarians to share control of all programs on the computer desktop. This avoids the problem of authentication in using licensed databases, so librarians can share proprietary databases with patrons who may not be authorized users. It also allows direct access to library catalogs and other applications that are not web-based. Remote control makes it possible to correct software settings on the patron's computer, resolving issues with proxy server connections or other technical difficulties.

Support for browsers earlier than Internet Explorer 5.0+ and Netscape 4.0+ varies; requirements on the patron end often are lower. All vendors support Windows, while about half also support the Mac platform.

It is important to consider where the service is hosted since that will impact both costs and benefits. Some vendors offer the option of installing and maintaining the software and data on a library server. Benefits of local hosting include increased speed, direct access, control of transcripts and logs, and more flexibility for adding forms and surveys. But it also puts an added burden on local IT staff.

### **Looking ahead**

Digital reference software is developing quickly, but there is plenty of room for improvement. Some applications have difficulties with frame-busting web pages, which take over the operator's entire window and cause the browser to freeze.

As digital reference matures, it is likely to incorporate more sophisticated features and emerging technology. Much is made of the lack of visual or audio cues available in live online reference transactions. Voice-over IP offers a solution to patrons with single phone lines who want to speak with a librarian and search the Internet simultaneously. It has had limited use to date because it requires that the patron's computer be equipped not only with a sound card but also with a microphone.

Digital video cameras allowing online 'face to face' interactions also require equipment at both ends of the transaction. A more interesting concept is the call center bridge, which queues incoming telephone and interactive chat queries on a single digital line. This has great potential for efficient use of staff, but compatibility issues between digital reference and telephone company software must be resolved.

Predictions, while fun, may be a bit foolhardy. What we can be certain of is continuing change in the type and number of vendors, significant improvements in capability, and unforeseen developments in technology.

### **Company Profiles**

Contracts and clients as of August 2002 are listed for those companies that provided them. Companies should be contacted directly for current pricing information and possible discounts. Vendors are quickly adding new functions. Most web sites feature online demos. Two companies did not respond to our survey: their information is taken from their web sites.

### **Convey OnDemand**

Convey Systems, 5605 Carnegie Blvd., Suite 200, Charlotte, NC 28209, 704-357-9710  
[www.conveysystems.com](http://www.conveysystems.com)

In business since 1997

**Contracts:** 25

**Clients include:** University of Wisconsin at Madison, Baldwin County Schools (GA), Pace University (NY), Brigham Young University (UT), OCLC

**Price:** Setup \$100 per seat; monthly fee \$300 per seat

**Training:** \$200 per seat

OnDemand combines basic digital photo, text chat, and co-browsing capabilities with digital video, voice-over IP, and application sharing. This allows collaborative functionality for both participants in a transaction, regardless on which PC the content or application resides. OnDemand is fully customizable and is noted for its persistent button technology. In May 2002, Convey and OCLC announced a partnership to integrate OnDemand with QuestionPoint

### **Docutek VRLplus**

Docutek Information Systems, 111 Anza Blvd., Suite 205, Burlingame, CA 94010; 650-286-7300

[www.docutek.com](http://www.docutek.com)

In business since 1995

**Price:** Setup, one-time fee, \$1995; \$1995 annual fee per 5 seats. Vendor-hosted option, \$1500 per year extra. Group discounts are available

**Training:** Free online training; onsite training session, \$1000

Docutek's Eres electronic reserve system enables management of electronic documents and is in wide use in academic libraries. Earlier this year, the company added VRL*plus* to its OnCampus suite of online information products. In addition to real-time chat, cobrowsing, and form sharing, VRL*plus* offers fully integrated e-mail reference functionality. It includes a powerful statistics report generator, and the Online Reference Expert System allows the creation of Q&A databases.

### **DesktopStreaming**

Expertcity, Inc., 5385 Hollister Ave., Santa Barbara, CA 93111; 800-549-8541

[www.expertcity.com](http://www.expertcity.com)

In business since 1997

**Clients include:** Bucknell University (PA), Minneapolis Public Library

**Price:** Setup \$650 per seat; monthly fee \$325 per seat

**Training:** 1.5 hours online included; will provide onsite training to large accounts

DesktopStreaming is a full application-sharing system that includes real-time chat, queuing and routing technology, and two-way screen sharing or viewing. It also provides whiteboard and draw capability, allowing the operator to circle text, draw arrows, and make similar screen markings. The system supports phone calls with screen sharing and integrates with legacy chat, e-mail, and instant messaging. The required proprietary download for patron use is small at 150-548KB. It is browser-independent and works on any Internet connection above 28.8.

### **eLibrarian**

Digi-Net Technologies, Inc., 1034 NW 57th St., Gainesville, FL 23605; 352-333-3042

[elibrarian.digi-net.com](http://elibrarian.digi-net.com)

In business since 1996

**Contracts:** 3

**Clients include:** OhioLINK, Skagit Valley College (WA), Health Sciences Library Consortium (PA)

**Price:** Vendor-hosted option, setup, one-time fee \$200 per seat; monthly fee \$250 per seat. Licensed (locally hosted) option, setup \$4500 per seat; \$500 annual service plan

**Training:** Onsite, \$1995 per day plus travel expense

eLibrarian is Digi-Net's library-focused software based on its Groopz E-Commerce software, which is designed for call center use. It supports any language, provided the correct fonts are installed on a computer. The entire patron interface is customizable, including logos, colors, layout, and surveys. eLibrarian is offered in both a hosted option and as a license to run on a library server.

## **HorizonLive**

HorizonLive, 520 8th Ave., Suite 2300, New York, NY 10018; 212-533-1775

[www.horizonlive.com](http://www.horizonlive.com)

In business since 1998

**Clients include:** Lippincott Library (University of Pennsylvania), St. John's University (NY)

**Price:** Setup \$500; annual fee \$3000 per pair of seats

**Training:** 12 hours free; additional hours at \$150 per hour

HorizonLive provides tools for live instruction, training, and meetings over the Internet. In June it announced the release of its latest, web-based, 'thin-client' synchronous platform: HorizonLive 2.6. This offers streaming video/audio, live two-way voice-over IP, application sharing, and a virtual whiteboard. Any event can easily be recorded and indexed for playback at any time. Each feature can be turned on or off and completely rebranded. Downloads are only required for audio sessions. A Spanish version is available, and other languages can be custom-ordered.

## **LiveAssistance**

International Business Systems, Inc., 14102 Sullyfield Circle, Suite 150, Chantilly, VA 20151; 703-488-3981

[www.liveassistance.com](http://www.liveassistance.com)

In business since 1998

**Contracts:** 2 public, 18 academic, 1 special

**Clients include:** University of Michigan, Montgomery County Public Libraries (MD)

**Price:** Setup \$500; monthly fee \$150 per seat

**Training:** None

LiveAssistance, an electronic Customer Relationship Management software solution, released its version 3.0 in spring 2002, offering increased speed. In its real-time chat function, operators can click on a history button to view all previous chats of a particular customer. It can be completely customized for backgrounds, colors, and logos quite easily to match a library's web sites and allows the creation of exit surveys.

## **LivePerson**

LivePerson, Inc., 462 7th Ave., 21st fl., New York, NY 10018; 212-609-4200

[www.liveperson.com](http://www.liveperson.com)

In business since 1998

**Price:** Monthly fees: Pro (Basic) \$89.50; Corporate (Enhanced) \$350

**Training:** None

LivePerson, a publicly traded corporation that acquired HumanClick in October 2000, offers different versions of its real-time chat software: Corporate and the lower-priced LivePerson Pro. Corporate adds spell checker, transcript forwarding, surveys, reports, and other functions to Pro's basic chat and page-pushing. The company recently downsized.

## **LSSI Virtual Reference Toolkit**

Library Systems and Services, LLC, 20250 Century Blvd., Suite 200, Germantown, MD 20874-1114; 800-638-8725

[www.vrtoolkit.net](http://www.vrtoolkit.net)

In business since 1981

**Contracts:** 67, including 23 collaborative projects (2450 libraries)

**Clients include:** Duke University (NC), King County Library System (WA), New Jersey Library Network, North Carolina State University

**Price:** As low as \$3000 per year per seat; collaborative project costs can range as low as \$2000-\$3000 per library including all software, setup, and configuration, virtual reference training and 24/7 reference support from the LSSI Web Reference Center.

**Training:** \$800 per day plus expenses

LSSI customized eGain call center software for libraries, incorporating a wide range of features. Recent announcements include the joining of its live reference service with Gaylord's Polaris integrated library system and IRMS, which provides full e-mail management and a Q&A knowledge database. The software includes CiteRight™, an online citation and bibliography builder, and offers Spanish-language services. Another new product is Go Anywhere, which provides two-way application sharing. For an added fee, libraries can refer users to the Web Reference Center--where LSSI librarians provide 24/7 service.

## NetAgent

divine, inc., 1301 N. Elston Ave., Chicago, IL 60622; 773-394-6601

[divine.com](http://divine.com)

In business since 2000

**Clients include:** NOLA Regional Library System (OH), University of Florida

**Price:** Vendor-hosted option, monthly fee \$600 per seat, plus setup and training costs

Publicly traded divine acquired eshare's NetAgent products in July 2001 and added longtime library vendor Faxon a few months later. The NetAgent suite includes e-mail management, real-time chat, and related call center features. Modular features can be purchased separately. Autopilot allows an 'A.I.' to conduct basic parts of the interview and provide information to the operator.

## QuestionPoint

OCLC, Inc., 6565 Frantz Rd., Dublin, OH 43017-3395; 800-848-5878

[www.questionpoint.org](http://www.questionpoint.org)

In business since 1971 (nonprofit)

**Contracts:** 150, including consortia and libraries of all types

**Clients include:** INCOLSA (Indiana's multitype cooperative), Houston Public Library, University of Southern California, University of Edinburgh, Scotland

**Price:** QP Basic, Contributor (of questions and answers to the global database), annual fee per library: \$2000; noncontributor, \$2400. QP with enhanced communications, contributor, \$4000; noncontributor, \$4800. Five percent discount for full OCLC member libraries; 10-40 percent for groups.

**Training:** QP Basic, four hours online training free. QP Enhanced, four hours online training free; additional sessions available. Onsite training provided at a minimal charge plus travel expenses.

QuestionPoint grew out of the Library of Congress's Collaborative Digital Reference Service (CDRS). In June 2002, OCLC announced the production version of QuestionPoint Basic, as well as QuestionPoint with enhanced communications with software provided by Convey Systems. QuestionPoint provides a local knowledge database and also offers library-to-library use of automatic routing and the global knowledge database developed by CDRS. The latter is expected to be available directly to the public at a later date. QuestionPoint was developed as a cooperative reference system, and OCLC works intensively with standards organizations to enhance systems interoperability. The company plans to develop interfaces that will allow QuestionPoint to work with other vendors' digital reference software.

## **24/7 Reference**

24/7 Reference, 3675 E. Huntington Dr., Suite 100, Pasadena, CA 91107; 310-391-7444

[www.247ref.org](http://www.247ref.org)

In business since 2001 (nonprofit)

**Contracts:** 91 public, 48 academic, 12 special, 6 school, 14 consortia

**Clients include:** Metropolitan Cooperative Library System (CA), Public Library of Charlotte & Mecklenburg County (NC), University of Washington, AskEric (Syracuse University, NY)

**Price:** Setup \$4000 per seat; monthly fee \$300 per seat.

**Training:** \$1000 plus travel expenses, includes web-based plus one full day on site

Based on eGain software, 24/7 Reference was developed at California's Metropolitan Cooperative Library System. Libraries can join either a public library or academic collaborative by agreeing to monitor the library pool for ten hours per week, thus enjoying after-hours and peak hours support. 24/7 Reference provides a web-based schedule, which can be checked at any time to determine who is online. Reports are available on demand, online meetings can be conducted, and the system is fully customizable. Spanish-language service is available. A back-chat feature is being developed that will allow library staff to communicate with each other while working with online transactions.

	<b>Convey</b>	<b>Docutek VRL Plus</b>	<b>Desktop Streaming</b>	<b>eLibrarian</b>
<b>FEATURES</b>				
<b>Push Web Pages</b>	YES	YES	YES	YES
<b>Co-browsing</b>	Yes	Available in October	YES	YES
<b>Push non-web-based documents</b>	YES	NO	YES	NO
<b>Multilingual</b>	NO	YES	NO	YES
<b>Queue Management</b>	YES	YES	YES	YES
<b>Reports/Transcripts</b>	YES	YES	YES	YES
<b>E-Mail Message Center</b>	NO	YES	NO	NO
<b>Exit Surveys</b>	NO	NO	YES	YES
<b>Q&amp;A Knowledge Base</b>	YES	YES	NO	NO
<b>Meeting/Conferencing</b>	YES	NO	NO	NO
<b>Remote Control</b>	YES	NO	YES	NO
<b>Voice-over IP</b>	YES	NO	NO	NO
<b>REQUIREMENTS</b>				
Download Plug-in	YES	YES	YES	NO
Host Server	Vendor	Local or Vendor	Vendor	Vendor or Local
Platform supported	Windows	Windows & Mac	Windows	Windows & Mac
Works w/ IPACS	Any	Contact Vendor	Any	Contact Vendor

	<b>HorizonLive</b>	<b>LiveAssistance</b>	<b>LivePerson</b>	<b>LSSI</b>
<b>FEATURES</b>				
<b>Push Web Pages</b>	YES	YES	YES	YES
<b>Co-browsing</b>	YES	NO	NO	YES
<b>Push non-web-based documents</b>	YES	YES if referenced in URL	PRO Version Only	YES
<b>Multilingual</b>	YES	NO	YES	YES
<b>Queue Management</b>	YES	YES	PRO Version Only	YES
<b>Reports/ Transcripts</b>	YES	Reports Downloadable to Ms Excel or Access	Transcripts YES; reports with Pro Version Only	YES
<b>E-Mail Message Center</b>	YES	NO	PRO Version Only	YES
<b>Exit Surveys</b>	YES	YES	PRO Version Only	YES
<b>Q&amp;A Knowledge Base</b>	NO	YES	NO	YES
<b>Meeting/ Conferencing</b>	YES	NO	NO	YES
<b>Remote Control</b>	YES	NO	NO	YES
<b>Voice-over IP</b>	YES	NO	NO	YES (added fee)
<b>REQUIREMENTS</b>				
<b>Download Plug-in</b>	Only for Audio	NO	NO	Only for Remote Control
<b>Host Server</b>	Vendor	Vendor	Vendor	Vendor or Local
<b>Platform supported</b>	Windows & Mac	Windows & Mac	Windows & Mac	Windows
<b>Works w/IPACS</b>	Any	Contact Vendor	Contact Vendor	Most; all with remote control

	<b>NetAgent</b>	<b>QuestionPoint</b>	<b>QuestionPoint</b>	<b>24/7 Reference</b>
<b>FEATURES</b>		Basic	Enhanced	
<b>Push Web Pages</b>	YES	YES	YES	YES
<b>Co-browsing</b>	YES	NO	YES	YES
<b>Push non-web-based documents</b>	YES	NO	YES	YES
<b>Multilingual</b>	YES	YES	YES	YES
<b>Queue Management</b>	N/A	YES	YES	YES
<b>Reports/ Transcripts</b>	YES	YES	YES	YES
<b>E-Mail Message Center</b>	YES	YES	YES	YES
<b>Exit Surveys</b>	YES	NO	NO	YES
<b>Q&amp;A Knowledge Base</b>	NO	YES	NO	NO
<b>Meeting/ Conferencing</b>	NO	NO	YES	YES
<b>Remote Control</b>	NO	NO	YES	NO
<b>Voice-over IP</b>	NO	NO	YES	NO
<b>REQUIREMENTS</b>				
<b>Download Plug-in</b>	NO	NO	YES	NO
<b>Host Server</b>	Vendor or Local	Vendor	Vendor	Vendor
<b>Platform supported</b>	Windows & Mac	Windows & Mac	Windows	Windows
<b>Works w/IPACS</b>	Contact Vendor	Contact Vendor	Any	Most