

IM: Instant Messaging
An information resource for Oregon libraries
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Quick Start

A quick guide to creating an Instant Messaging service at your library.

What is Instant Messaging?

- Instant Messaging is a way of instant text communication between two or more people over a network. IM can be used over computers, cell phones, or other devices that allow access to a computer or telephone network.

Choose a Service

- The most popular services are AOL Instant Messenger (also known as AIM) (<http://www.aim.com/>), Yahoo! Messenger (<http://messenger.yahoo.com>), and Microsoft's MSN Messenger (<http://join.msn.com>).

Sign Up

- Each service is free, but all require separate signups.
- Determine if you're going to use one or multiple logins for your library. One login means only one person can be logged in at one time.
- Some services allow you to create profiles and personalize your account.

Choose your Software

- People using one IM service cannot usually talk to people using different IM services. There are some software products that allow you to use multiple services at once. Check out Trillian (<http://www.trillian.cc/>), Miranda IM (<http://www.miranda-im.org/>), or Gaim (<http://gaim.sourceforge.net/>). Pick software that works best for your library's computer configuration.
- If your service only uses one IM network, it may be simpler to download a program offered by your service provider. Each also offers a web-based IM tool that does not require downloading a program to your computer, but the trade-off is that you will have to view more advertisements.

Sign On

- Log on and start answering questions from your eagerly awaiting public.

Tell People

- Icons on your library's website, flyers, bookmarks, and word-of-mouth will help people learn about your service.
- Encourage your users to add you to their buddy lists. They'll be able to tell whenever a librarian is available to help them.

What is IM?

IM stands for *Instant Messaging*, a way of communicating between two or more people instantly over a network. Most communication takes place using a client program, and is different from e-mail in that it happens synchronously – instantly! – just like having a conversation with someone in-person.

Some of the most popular free client programs are

- AOL Instant Messenger (aka AIM) (<http://www.aim.com/>)
- Yahoo! Messenger (<http://messenger.yahoo.com/>)
- MSN Messenger (from Microsoft) (<http://join.msn.com/>)

Typically, people using one network cannot talk to people using a different network*. However, there is software that allows a person to log on to multiple services and be connected to them all at once.

Some of these programs are:

- Trillian (<http://www.trillian.cc/>)
- Miranda IM (<http://www.miranda-im.org/>)
- Gaim (<http://gaim.sourceforge.net/>)

Most IM programs allow for personalization. Users can create profiles, and add other users to their “buddy lists” to keep track of their friends and other people they want to communicate with often. Most programs also allow users to put up “away messages” that indicate they are unable to answer immediately. This allows users to log on, and stay logged on, but only answer when they want to.

Resources

Schmidt, Aaron, and Michael Stephens. "IM me." *Library Journal* 130.6 (2005): 34-35. Academic Search Premier. 10 May 2006. <http://search.epnet.com>.

How do IM and L-net compliment one another?

Instant messaging services have no direct financial cost to the library and are easy to set up and operate. These facts may make some people ask, “Why do we need L-net at all?” We believe that instant messaging services and L-net compliment each other in many ways.

- L-net is pledged to serve all Oregonians, while a library IM service would connect patrons directly to the local library.
- When your library and IM service close for the day, L-net is available 24 hours a day, 7 days a week.
- Many patrons already use IM services, but some do not. Anyone who can get to a web browser can use L-net.
- Schools and public libraries that filter internet access sometimes block IM networks. In the near future, institutions receiving e-Rate funds may even be required to do so. L-net is not in this category.

* Yahoo! and MSN are in the process of merging their networks.

Why should libraries IM?

There are a large number of people who use IM to communicate on a regular basis. Some people IM socially with friends and others professionally with co-workers. In 2004, the Pew Internet and American Life project reported that 54 million American adults used IM.

Besides adults, teens and college students are also heavy users of IM services. It has been harder and harder to get these groups to *come to* the library, and IM is an opportunity to reach out to them.

By joining established IM networks, libraries make themselves available as information resources to those millions of IM users. The library's IM screen name becomes an access point for the library.

Instead of having each patron come to the library for service (in person, on the phone, through the library web site or through L-net), the library becomes part of each patron's group of trusted friends.

Another reason that libraries may want to offer IM services is that there are no direct costs - signing up and using IM services is free.

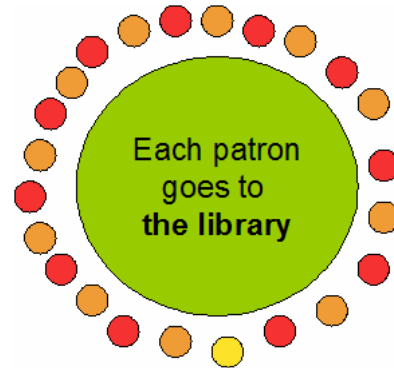
Of course, indirect costs to IM do exist, not the least of which is patron privacy and confidentiality. Libraries may naturally assume that staffing is also an indirect cost, but this needn't be the case. Many libraries already offering IM services describe them as "low impact". The librarian on the desk gains only a new way to communicate with people, not an additional responsibility.

This guide is meant to cover all the bases, help you think about offering an IM service at your library and give you a starting point for where to learn more.

Resources

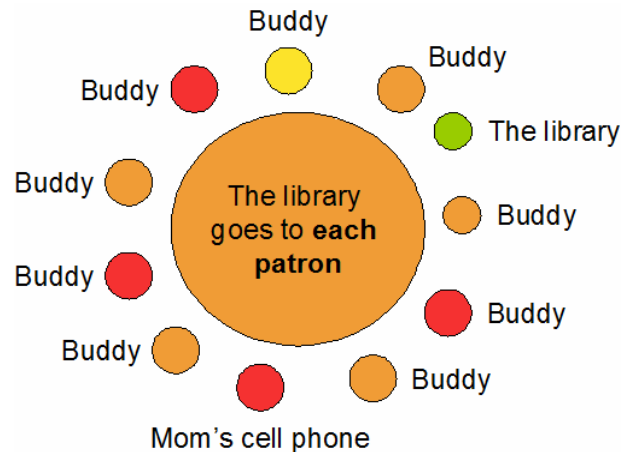
How Americans Use Instant Messaging by Pew Internet and American Life, 2004. (http://www.pewinternet.org/pdfs/PIP_Instantmessage_Report.pdf)

Traditional service models



The library is at the center of everyone's experience.

An IM service model



The library is part of a patron's group of trusted friends.

Setup and Training

Since most IM services and their client programs are free of charge, cost to set up your IM service is negligible. However, you will of course want to seek permission from your library IT department or network administrator to load software (see **Network Security** for tips on dealing with their concerns). The software loads easily onto any computer, and is ready to use after installation.

Setting up an account with the service is the next step, and you can do this through the websites for the IM services listed above. A technology-savvy staff person can probably teach other library staff how to IM in only a few minutes. For ideas, see the resources below.

Internal IM

Before going live and offering an IM service to your public, a good way to familiarize staff with IM is to use it internally. Staff members can set up accounts (or use a shared account) and communicate with each other. This can be useful for communications between departments, buildings, or even library systems. Try it out on some simple procedures, such as paging materials from a storage facility or asking for help on the reference desk.

Encryption

Almost all Instant Messaging services have an internal function or work with a third-party product that will let you encrypt your instant messages so that only the sender and receiver can understand them. You can't demand that every patron use an encrypted connection, but if you are using IM for internal purposes only, consider encrypting your messages.

Resources

For those staff members unfamiliar with IM, there are a number of training resources online. See:

http://blog.uwinnipeg.ca/schwagbag/archives/2005/07/im_staff_traini.html and
<http://edificeref.info/?p=71>

Evaluation and Statistics

How do you evaluate the success of the program? How do you define success? It's a challenging issue for every library.

Keeping statistics about how many visitors you get is a common way of measuring the popularity of your program. Many of the commercial programs allow you to save transcripts of your sessions. Your IM program will have written instructions for how to do this. However, to best protect your patrons' privacy, we recommend not keeping transcripts at all (see the **Privacy and Confidentiality** section for more).

An alternative is to keep statistics manually, by putting down a hash mark on a tally sheet for each IM patron – just like many libraries already do at their reference desks.

Resources

"Instant Messaging Reference in an Academic Library: A Case Study." Marianne Foley. *College & Research Libraries* v. 63 no. 1 (January 2002) p. 36-45
<http://www.ala.org/ala/acrl/acrlpubs/crljournal/backissues2002b/january02/foley.pdf>

Guidelines

Each library needs to establish guidelines for an IM service. You might wish to look at your telephone or e-mail policies and fashion guidelines for your IM service similarly.

Some things to cover in your guidelines:

- Hours and days of coverage
- Who will be allowed to use your service
- System security (see Security & Safety section; for example, not running programs sent via IM)
- Who to talk to first: IM, L-net, phone or in-person client? (Hint: Check your telephone guidelines, you may determine they are suitable for IM as well)
- Use of an Away message
- Logging off
- Number/kind of screen names: for example, a single name for the desk/service, a name for each public desk, a name for each librarian (useful for professional referrals), or combination
- Policy for when to block a "problem patron"
- Use of buddy lists
- How to handle spim (the IM version of e-mail spam)

Be prepared for dealing with (and/or having a contingency plan for):

- Pranks and people "goofing around"
- Unpleasant interactions. Though you should find that most people are friendly and pleasant.
- Success. The literature indicates that most IM services are very seldom overrun with questions, however.
- Being added to buddy lists. Younger users especially may be inclined to put you on their buddy lists, which encourages repeat use of the service.
- Multitasking. Many IM users are doing lots of things at once and might not maintain a steady dialog with you.
- Use of slang. All librarians should learn the most common slang, along with learning to type IM "shorthand" (see Resources).

Resources

"OMG: IM Slang Is Invading Everyday English" by Neda Ulaby
(<http://www.npr.org/templates/story/story.php?storyId=5221618>)

Netlingo List of Acronyms & Text Messaging Shorthand
(<http://www.netlingo.com/emailsh.cfm>)

AIM Acronym Dictionary (<http://www.aim.com/acronyms.adp?aolp=>)

Marketing

Who do you expect to use the service? Teens? College students? Their parents? Local businesses?

The best way to find out who might use the service is to ask around. An informal survey on your webpage or in person at the library doors is easy to do. Some questions you might want to ask include:

- Do you use Instant Messaging?
- If so, which IM tool(s) do you use?
- Would you IM with the library?

“Soft launches”

Introduce the new service quietly by simply making it appear on your web page one day without fanfare, and let your patrons find it on their own.

- Make sure your web page lists all of the ways patrons can contact the library, and include IM among the list: in person, by telephone, by e-mail, L-net, instant messaging, etc.
- Use AOL, Yahoo! and MSN logos that your patrons are familiar with. This will make the new service recognizable.

Presence

Simple HTML added to your web page can tell patrons whether you are online or not.

- Aim Presence (<http://www.aim.com/presence/main.adp>)
- Yahoo! Messenger “Add online presence to your website” (<http://messenger.yahoo.com/addpresence.php>)

Make a big deal

- Create a bookmark, flyer or poster
- Issue a press release
- Post a notice near your public computers
- Tell patrons individually
- Hold a “Release” party or event in the library

Let people know what the service is good for

Sample copy:

Can't find that book? Don't know what to read next? Paper due tomorrow?
IM the Librarian!

Check to see how many buddy lists you are on

Aimfight is a service of AOL that gauges your screen name's popularity relative to other AIM users (<http://aimfight.com>).

Resources

King County Library System and University of Washington: Virtual Reference Service Marketing Guidelines.
<http://www.secstate.wa.gov/library/libraries/projects/virtualRef/textdocs/MarketingGuidelines.pdf>

Privacy and Confidentiality

Microsoft, Yahoo! and AOL are all very open about telling their customers that they use our personal information in order to target advertisements and deliver other services. No service defines the content of instant messages as "personal information", though evidence suggests that all commercial IM service providers use this content in various ways, including the delivery of more advertisements.

Libraries should assume that instant messaging service providers will keep a log of instant messages that are sent between patrons and librarians*. Knowing this, libraries should try to keep patrons' personal information out of instant messages. This includes patrons' names, library barcodes, telephone numbers, e-mail addresses, and anything else which might personally identify the patron.

The dilemma becomes that we want to reach out to patrons online and make personal connections, but want to discourage the transfer of personal information.

Rather than see this as a problem, libraries can also take the opportunity to engage the patron in a discussion of online privacy. The library's role should be to encourage patrons to make informed and conscious decisions regarding their online privacy. Avoid ultimatums and lectures. If a patron decides to share their personal information anyway, be gracious and accept it.

Here are some strategies for dealing with patron privacy in instant messaging.

- Anticipate – if it seems like an interaction is heading towards needing a patron's personal information, let the patron know you'd like to protect their privacy before they divulge anything.

Librarian: For your privacy, we prefer you not enter personal info or library card # here, but you can call us at (541) 503-5415.

- Sympathize – you can't do everything over IM that you can do in person, and patrons may be annoyed at this.

Patron: why the heck not?

Librarian: we think that IM services don't do enough to protect your privacy...

*In March 2005, the internet community cried out at an update to AOL's Terms of Service agreement, which read, "You waive any right to privacy". In response, AOL eventually changed the wording in their policy, and asked people to trust them. "...the amount of IM traffic is on the order of hundreds of gigabytes a day. It would be very costly, and we have no desire to record all IM traffic."

The statement that AOL doesn't record all IM traffic implies that they do record some of it. Past events may help explain why. In 1995, the New York Times reported that AOL had "fully cooperated" with the Federal Bureau of Investigation during a two-year investigation into child pornography on AOL's networks. Federal agents searched 125 homes and offices and arrested 12 people.

Resources

Tales of a Running Man, blog by Justin Uberti (a manager at AOL working on AIM), March 14, 2005.
<http://journals.aol.com/juberti/runningman/entries/128>

"Use of Computer Network For Child Sex Sets Off Raids; Child Sex Over the Computer Sets Off Raids" by David Johnston. New York Times New York, N.Y.: Sep 14, 1995. p. A1

Librarian: and we'd rather be on the safe side. Can you call us instead?

- Have an actual policy of what you are willing and able to do over instant messaging. You may wish to model your IM policy after your telephone policy. Put the policy on the web and give the patron the link to it. Accept and pass on their comments and suggestions.
- Be ready to discuss *why* you don't want their personal information:
 - IM service providers keep records, mostly to sell advertising, but the thought of Microsoft, Yahoo! or AOL having our library card numbers is creepy. It's no one's business but our own what we do at the library.
 - If the transcript is saved on a computer accidentally, another person could find it and use your information.
 - Hackers may be listening, however unlikely that may seem.
 - The library wants to make sure no one has the chance to impersonate you.
- Let the patron make the ultimate decision. If a barcode gets sent over IM that's ok. The damage is done – continue to help them but let them know about your policy.

Librarian: The library prefers you not send us your barcode over IM. But since you did, I'll renew your books :)

Dealing with patron privacy (an example):

Patron: i have a question about my account

Librarian: Ok. For your privacy, we prefer you not enter personal info or library card # here, but you can call us at (541) 503-5415.

Librarian: But if you're willing to give me all the non-personal details, I'll try to help – what's up?

Patron: i don't know my PIN number

Librarian: have you tried the last 4 digits of your phone number?

Patron: no luck

Librarian: ok, I can't send you your pin here, you'll have to come in or call us...

Librarian: it's a pain, but it's really to protect your privacy.

Patron: i understand. ;) you are privacy freaks!

Librarian: and proud!

Dealing with patron privacy (an example of what not to do):

Patron: i have a question about my account

Librarian: STOP!

Patron: ?

Librarian: To protect your privacy, don't tell us anything about yourself!

Librarian: Big brother and his hacker cousins are watching!

Patron: um ... are you the library?

Buddy lists

One feature of Instant Messaging software is the ability to keep a "Buddy list" of friends and other people that you communicate with frequently. Many people will refuse to IM with people who are not on their buddy list for safety reasons.

To respect your patrons' privacy, we recommend you not keep patrons on your buddy list. However, it is okay if a patron adds the library to hers! Some libraries even report that this encourages use of the IM service.

Transcripts

Instant Messaging software often allows each person chatting to save records of chat transcripts to their hard drive. Transcripts are useful to evaluate your service but may contain personal information, and that shouldn't be treated lightly.

If you decide to keep transcripts, create a policy for how long you will keep them. Additionally, if you work at a public library or publicly-funded school or academic library, transcripts could possibly be declared public records. Consult an attorney if you are unsure of how to deal with possible demands for the release of transcripts under public records law.

Resources

IM service privacy policies:

- MSN - <http://privacy.msn.com>
- AIM - https://my.screenname.aol.com/_cqr/main/privacy_txt.jsp
- Yahoo! - <http://privacy.yahoo.com/>

NASCIO Research Brief - TLK2UL8R: The Privacy Implications of Instant and Text Messaging Technologies in State Government
<http://www.nascio.org/nascioCommittees/privacy/instantMessagingBrief.pdf>

Safety

Safety is a concern for both the library and for users of your IM service. Safety issues include online sexual predators and identity theft. We advise that you offer a link to safety tips for your users (two good examples are below). Librarians providing the service want to be friendly and approachable but should also pay attention to some common sense safety measures.

Good advice for both librarians and patrons is:

- Do not give out passwords, account numbers or other sensitive data
- Do not provide another person your personal information, such as home addresses or phone numbers
- Use a pseudonym for your online persona
- A common strategy for both privacy and safety on the internet is for users to change screen names occasionally.

Resources

10 tips for safer instant messaging.

<http://www.microsoft.com/athome/security/online/imsafety.msp> Published: October 3, 2005 | Updated: November 18, 2005; accessed 5/1/06.

Instant Message (IM) Safety Tips <http://www.security.uci.edu/im.php>. Last Updated: April 19, 2006. Information Provided by Network & Academic Computing Services, University of California, Irvine Irvine, CA 92627

Network security

Some IT departments disallow or block IM to protect the library's network from being compromised by unfriendly activity. This includes SPIM (spam for IM), malware, phishing, viruses and worms. When you talk to your library's information technology staff about beginning to offer an IM service, you should know something about these issues.

Online services such as the World Wide Web, e-mail and Instant Messaging can happen simultaneously over the internet without interrupting each other because each is assigned to a different network port. Ports are numbered from 0-65535, though typical internet users only use a dozen or less. Miscreants can take advantage of the vast number of unused ports to try to gain access to servers and other network devices. A firewall manages the traffic on different network ports, blocking traffic on many and limiting it on others.

Ports used by instant messaging services are sometimes blocked or limited by firewalls so that your network can be more secure.

If the IT staff at your library are unwilling to allow traffic on network ports required for IM services, you should still be able use IM services by connecting to web versions of IM software, which use the network port assigned for the World Wide Web.

Other risks are similar to those associated with e-mail. The same anti-virus software and common sense you use to keep your e-mail secure can help your IM service as well: keep your security and anti-virus software up-to-date and do not open attachments from people you don't know.

Web versions

- AIM Express http://www.aim.com/get_aim/express/aim_expr.adp
- MSN Web Messenger <http://webmessenger.msn.com/>
- Yahoo! Web Messenger <http://messenger.yahoo.com/webmsgr/fmsgr.php>
- Meebo (combines all three) <http://www.meebo.com/>

Resources

Chatting with Confidence: Instant Messaging Security. Steve DeVecchio, WebJunction (Nov 11, 2005) (OCLC Online Computer Library Center, Inc.) <http://webjunction.org/do/DisplayContent?id=11993>

5 steps to help avoid instant message viruses
(<http://www.microsoft.com/athome/security/viruses/imvirus.msp>) Microsoft Security At Home, c2006, Microsoft Corporation; accessed 5/1/06

Enterprise IM

Almost all of the buzz about Instant Messaging in libraries has been about *commercial* IM networks such as AOL Instant Messenger, MSN Messenger, Yahoo! Messenger and Google Talk.

As more and more people use instant messaging, more and more private companies want to have some control over that communication. They may be worried about corporate espionage, employee and customer privacy, or security. In some cases, a company may simply want to make sure no one is using any naughty words (especially in derogatory ways).

The generic name for the product that many private companies are turning to is "Enterprise IM". Enterprise IM allows individual institutions to maintain local control over secure and private instant messaging networks.

Besides private corporations, government agencies are becoming interested in Enterprise IM also, maybe even your local city, county or state government office.