

KnowItNow24x7 SMS Reference Manual



***A supplement to the
KnowItNow24x7 Training & Reference Manual
and the
KnowItNow24x7 Provider Handbook***

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Don Boozer
KnowItNow24x7 Coordinator

Chapter 1 - Introduction

Text messaging (also referred to as **texting** or **SMS** (Short Message Service)) is a rapidly expanding medium of communication. According to the *Pew Internet & American Life Project*, 72% of cell phone owners now use their mobile phones to send or receive text messages. KnowItNow24x7 felt it was important to provide an SMS option for Ohioans to interact with the service in order to further the goal of answering patrons' questions online anywhere and anytime.

In late 2010, KnowItNow24x7 entered into a contract with Mosio Text-a-Librarian to provide Ohioans the option of using their cell phones and mobile devices to interact with Ohio's virtual reference service. The contract with Mosio will allow patrons to use a simple 5-digit number (as opposed to a 10-digit regular phone number) and short keywords to send a text message to KnowItNow24x7. Keywords are used to route questions to the appropriate librarians monitoring the statewide service.

As part of the contract with Mosio, Ohio libraries who actively participate in KnowItNow24x7 will also be given the opportunity to purchase, for a greatly reduced annual fee, their own SMS keywords to provide their patrons with a *local* text reference service. In order to receive this preferred pricing, libraries must staff the live statewide KnowItNow24x7 chat service for a minimum of three hours per week.

This supplement to the existing KnowItNow24x7 manuals provides procedures, background, and context on SMS reference for librarians staffing the collaborative service. All procedures outlined here will work the same regardless of whether the patron sends a text message to the statewide service or a local library's text reference service mentioned above.

Chapter 2 - Patron Perspective: Initiating a Text Reference Question

Patrons will send a question to KnowItNow24x7 by use of a **short code** and a **keyword**.

A **short code** is a 5-digit “phone number” to which the question is sent. This makes typing in the phone number easier than the traditional 10-digit phone number with an area code. In the case of KnowItNow24x7, this short code is **66746**.

The **keyword** is the information used by both Mosio and KnowItNow24x7 to route the question to the appropriate queue. This is also the “name” used to store the short code in one’s Contacts on their mobile phone. KnowItNow24x7 will have two primary keywords:

knowitnow Used by patrons to send a question to the “public” queue. This is the keyword used by those who would normally use ***www.knowitnow.org*** to initiate a chat reference session.

ohiolink Used by patrons to send a question to the “academic” queue. This is the keyword used by those who would normally use ***academic.knowitnow.org*** to initiate a chat reference session. KnowItNow Academic is staffed by OhioLINK librarians primarily for students of OhioLINK colleges and universities although they also answer questions from those choosing “University/College/Trade School” as their grade level on the KnowItNow.org website.

“local keywords” These will be determined by Ohio libraries wishing to participate in the local text reference service option.

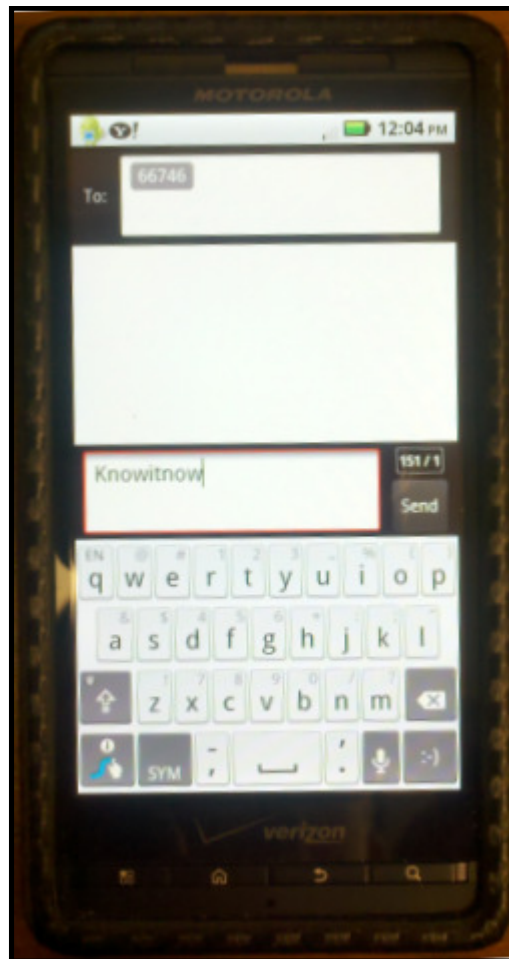
While announcements will be posted to KnowItNow24x7’s websites at ***www.knowitnow.org*** and ***academic.knowitnow.org***, Ohio librarians should also make their patrons aware of the text messaging options available to them.

The basic instructions for sending a question via SMS are as simple as “**Text knowitnow to 66746**” but this is only part of the process. Once this initial message is sent, the keyword can be saved in a patron’s Contacts and subsequent messages can be sent using this contact.

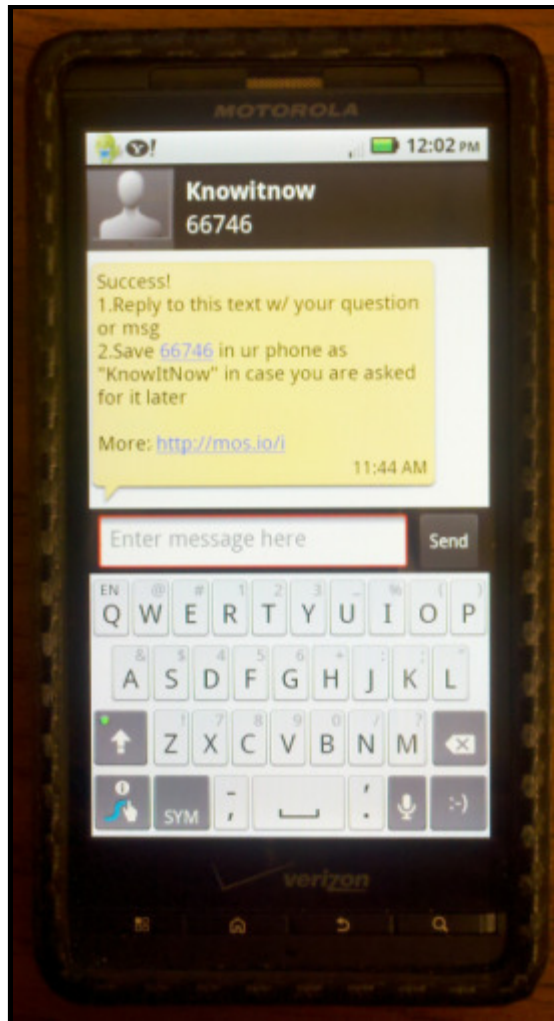
It will be useful for librarians staffing the service to know how this procedure of initiating a text reference question will look to a patron.

The following detailed steps are what a **patron** would follow to send a question to KnowItNow24x7 via SMS:

1. The phone number entered is **66746**.
2. The first message a patron should send should be simply the keyword. In this case, **knowitnow...**



3. The patron will get an automatic reply with the following information:



The message on the phone reads:

Success!

- 1. Reply to this text w/ your question or msg.**
- 2. Save [66746](tel:66746) in ur phone as “KnowItNow” in case you are asked for it later.**

More: <http://mos.io/i>

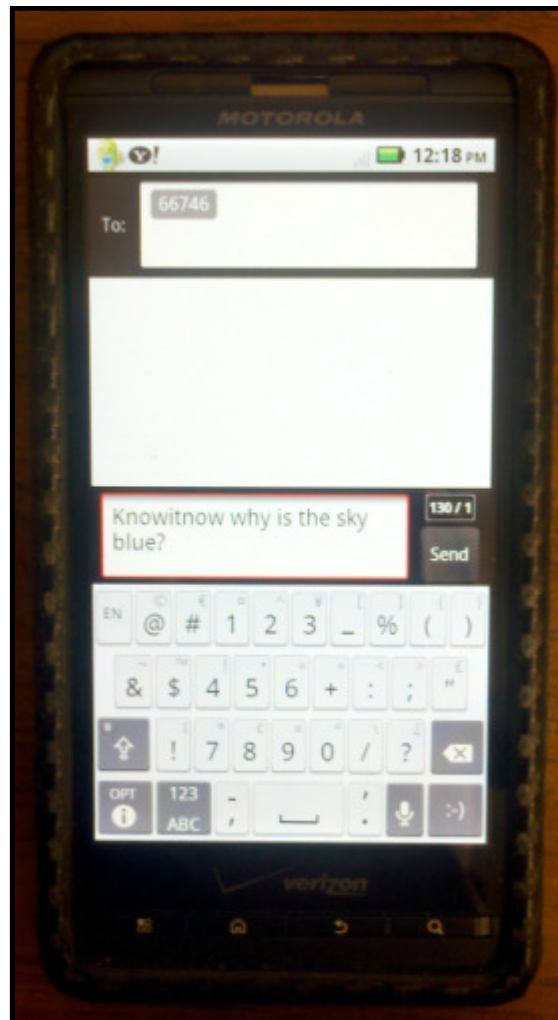
4. The patron can now save the number in their Contacts in their mobile phone with *KnowItNow* as the first name (if a decision has to be made on first or last name).
5. To ask an actual question, the patron can now reply to that first message received or use the number from their Contacts list.

The steps above would work the same way for the **ohiolink** keyword or the various local keywords used by libraries utilizing the local text reference option.

Alternative Method:

An alternative method for sending the first question via SMS (or even subsequent questions) is to simply include **knowitnow** as the first word in the message as in:

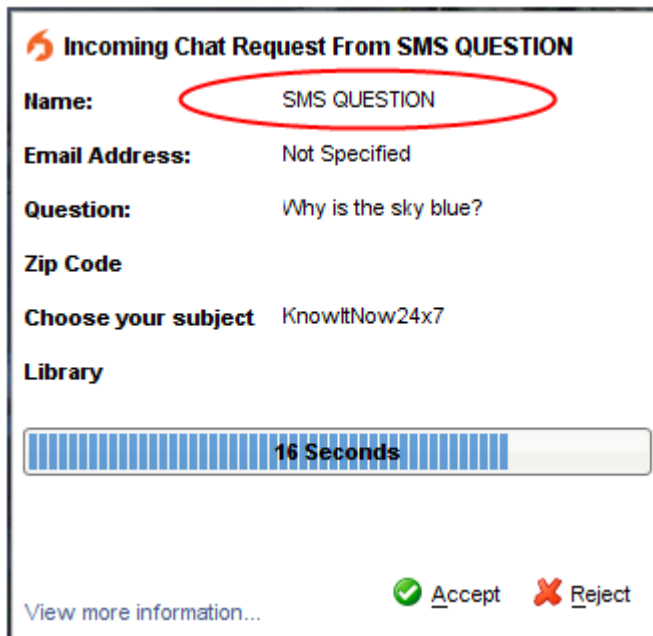
knowitnow why is the sky blue?



Note that the capitalization in the keyword (e.g., **Knowitnow**, **knowitnow**, **KnowItNow**) does not affect the SMS operation.

Chapter 3 – Accepting the SMS Alert

All alerts for incoming SMS questions will come through the existing SparkRef software currently used for monitoring KnowItNow24x7. The incoming request box will look similar to the image below:





The screenshot shows a web interface for an incoming chat request. At the top, it says "Incoming Chat Request From SMS QUESTION". Below this, there are several fields: "Name:" with the value "SMS QUESTION" (circled in red), "Email Address:" with "Not Specified", "Question:" with "Why is the sky blue?", "Zip Code" (blank), "Choose your subject" with "KnowItNow24x7", and "Library" (blank). At the bottom, there is a progress bar labeled "16 Seconds" and two buttons: "Accept" (with a green checkmark icon) and "Reject" (with a red X icon). A link "View more information..." is also present.

Note the **Name:** field (circled in the image above) on all incoming SMS questions will be **SMS QUESTION**, alerting the librarian that this question is being texted by a patron and *not* being initiated through either **www.knowitnow.org** or **academic.knowitnow.org**.

Note also that the **Zip Code** and **Library** fields are blank. There is no way to require the patron to input a ZIP code in their text messages, and therefore no way to assign a local library.

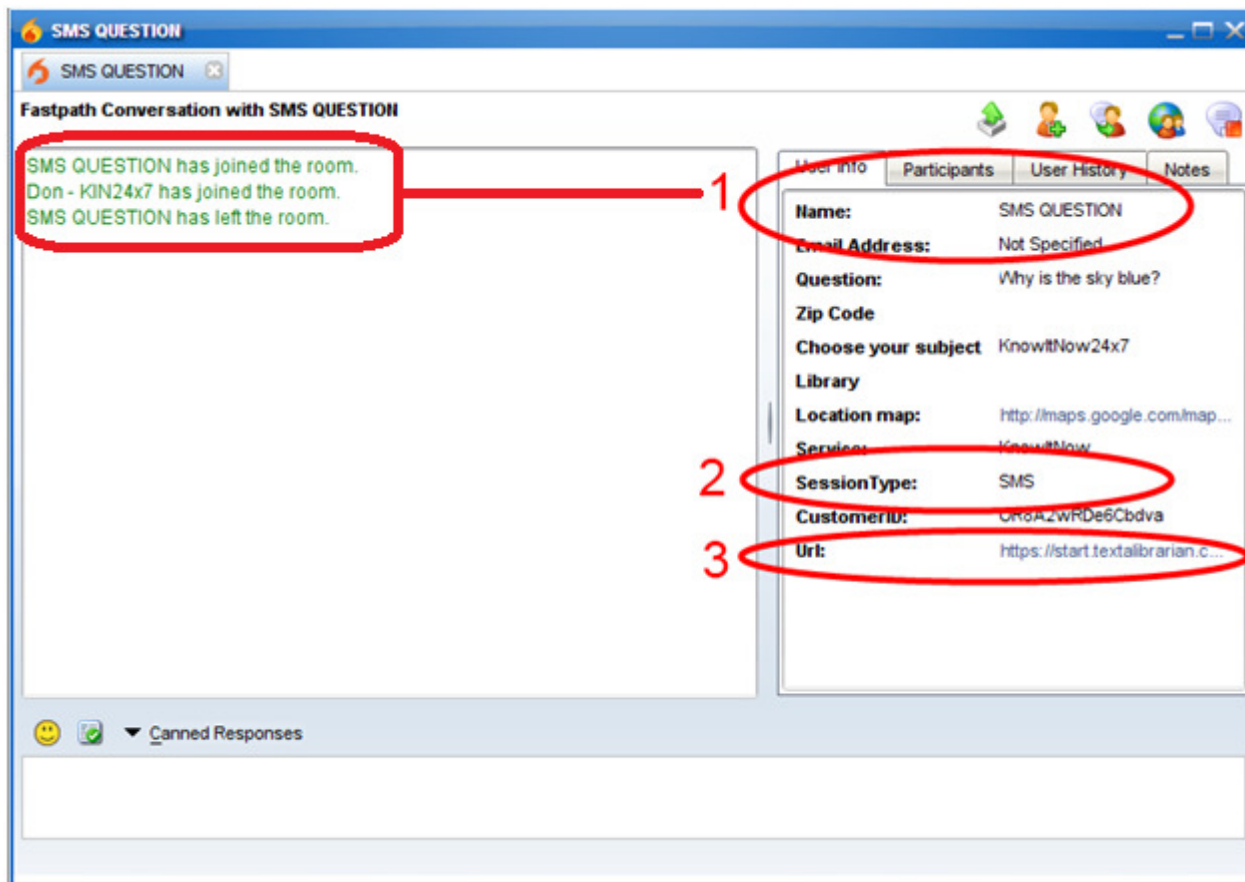
For SMS messages, **Choose your subject** will display **KnowItNow24x7** (for incoming SMS questions sent to **knowitnow**), **OhioLINK** (for those sent to KnowItNow Academic via the **ohiolink** keyword), or a local keyword.

Each librarian has 20 seconds in which to pick up the alert just as a regular chat session request.

Click  [Accept](#) to accept and answer the SMS question. Clicking  [Accept](#) will open the usual SparkRef window with some significant differences (outlined in red in the next chapter).

Chapter 4 - Answering SMS Questions

The SparkRef Window



Referencing the three circled areas in the above image, all SMS questions will have the following characteristics in the SparkRef window:

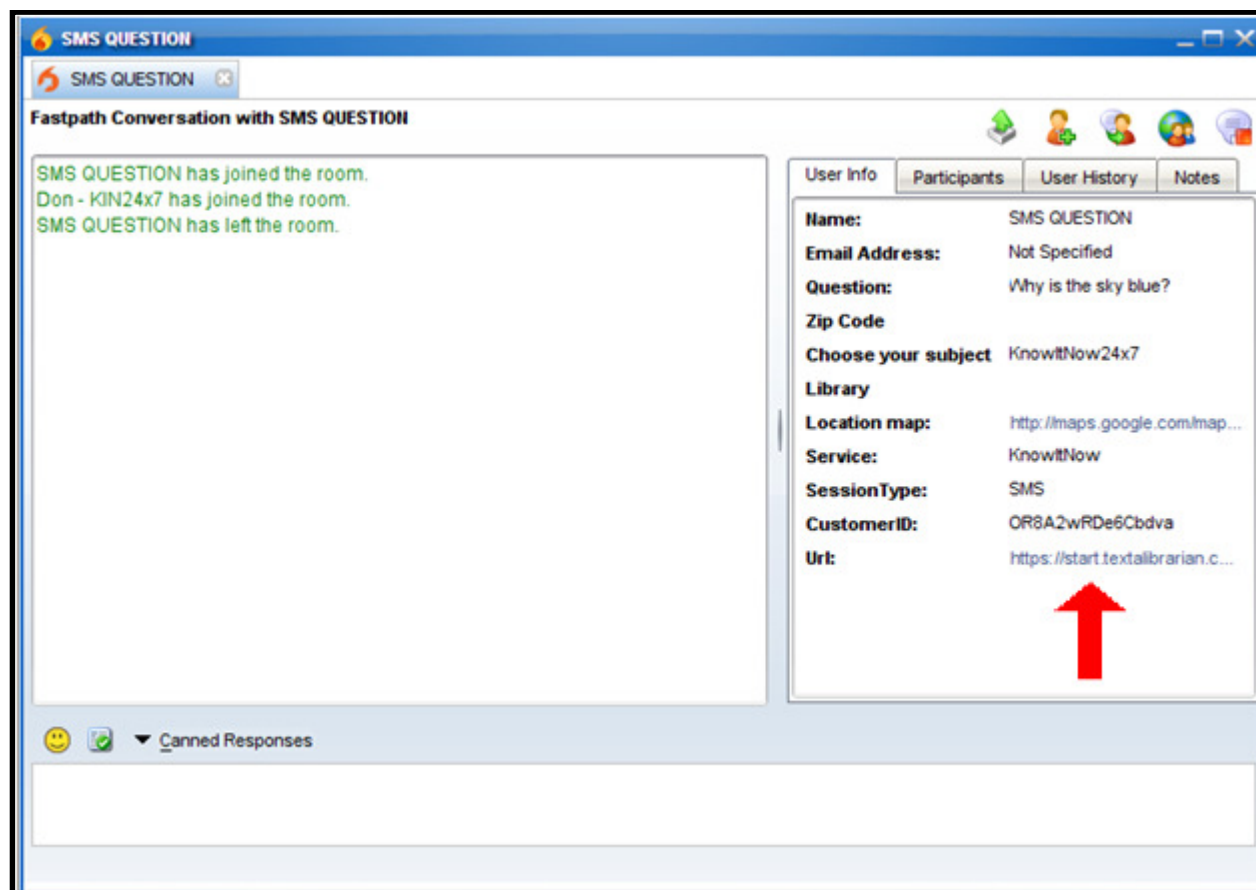
- 1 – The **Name:** field will *always* be **SMS QUESTION**. Patrons texting in questions do not input their name, therefore the default for this field will *always* be SMS QUESTION whether the patron is texting to **knowitnow**, **ohiolink**, or one of the local keywords. Note that **SMS QUESTION** also displays in the chat window to the left as well.
- 2 – The **SessionType:** field will always be **SMS**. This field indicates whether the message is a webchat or SMS.
- 3 – The **Url:** field will always have a link that begins **https://start.textalibrarian.c...** This field is important because this is the link librarians will click to open the Text-a-Librarian interface where the SMS question is actually answered.

If the librarian sees these three characteristics (especially the SMS QUESTION in the **Name:** field at the top of the metadata and in the chat window (**SMS QUESTION has joined the room.**), **Click the URL. Do NOT begin typing a reply in the chat box.**

Replying to an SMS Question

As mentioned above: **Click the URL. Do NOT begin typing a reply in the chat box.**

Step 1 – Click the hyperlink in the Url: field.



The Text-a-Librarian Window

Clicking the URL will open the Text-a-Librarian interface (see image below) in the librarian's default Internet browser. The librarian will be taken directly to the Text-a-Librarian interface by clicking the hyperlink.

In the image below, the question can be seen as it appears in the SparkRef window:

Why is the sky blue?

Librarians should leave the SparkRef chat window **OPEN** while an SMS question is being replied to. The open window counts towards the maximum allotment of three (3) simultaneous online patrons. **After** finishing with the SMS question, end the SparkRef session as normally: Close the session and assign the appropriate resolution code (See section on [closing the SparkRef window](#) below).

Here we see the Text a Librarian interface opened. Let's examine some important features:

- 1 – The keyword used by the patron is displayed at the top.
- 2 - The patron's question as texted appears at the top (e.g., **Why is the sky blue?**)

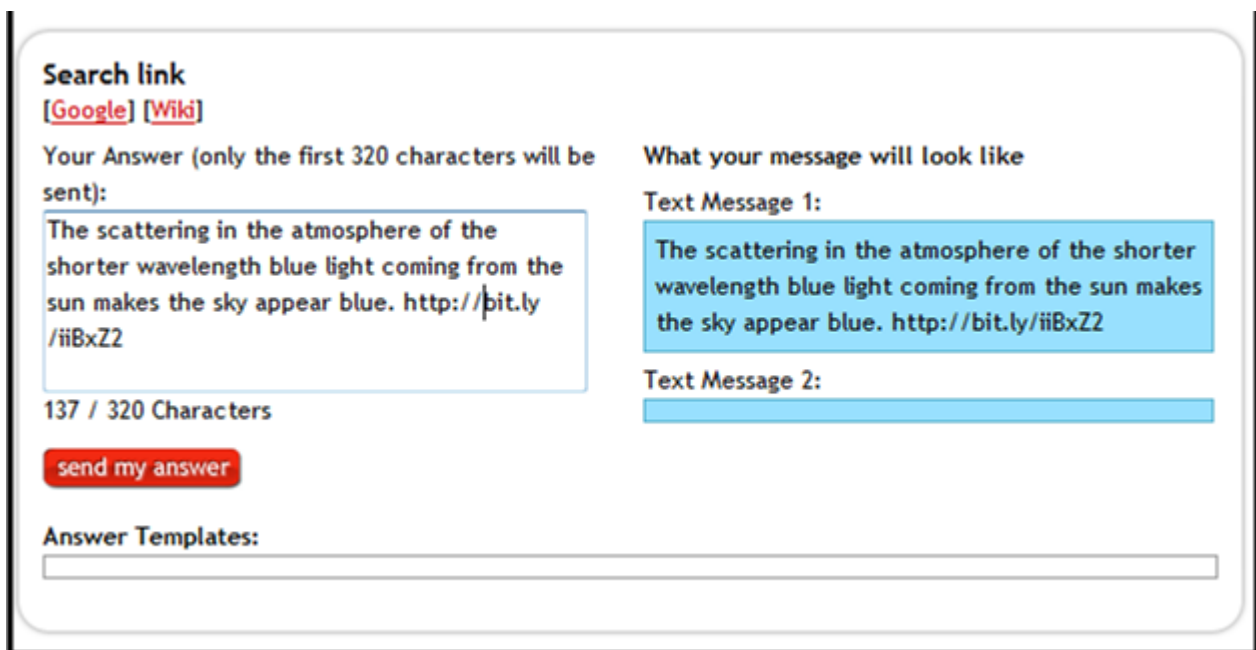
3 - **[Translate]** refers to the ability of the interface to “translate” from text-speak (k, g2g, ty, lol, etc.) to English. For example, if a patron were to send (hypothetically) something like **fyi, ianal but r these tos legal? g2g cul**, and the librarian clicked **[Translate]**, the following would display: **For your information, I am not a lawyer but are these terms of service legal? Got to go. See you later.** There is no need to be fluent in the language of text-speak to reply to SMS questions. **[Translate]** will translate over 800 of these types of abbreviations and acronyms if necessary.

4 - Notice that the patron name is simply given as **patron507628** to provide privacy. This is followed by the date and time that the message was received.

5 - The box below the question is where the reply will be typed.

Type the Answer

Here we see a detail showing the answer being typed into the lower portion of the box above:



The screenshot shows a chat interface with the following elements:

- Search link:** [Google] [Wiki]
- Your Answer (only the first 320 characters will be sent):** A text input field containing: "The scattering in the atmosphere of the shorter wavelength blue light coming from the sun makes the sky appear blue. http://bit.ly/iiBxZ2". Below the field is a character counter: "137 / 320 Characters".
- send my answer:** A red button.
- Answer Templates:** A text input field.
- What your message will look like:** A preview section with two text message boxes. "Text Message 1:" shows the typed text as it will appear. "Text Message 2:" shows an empty text message box.

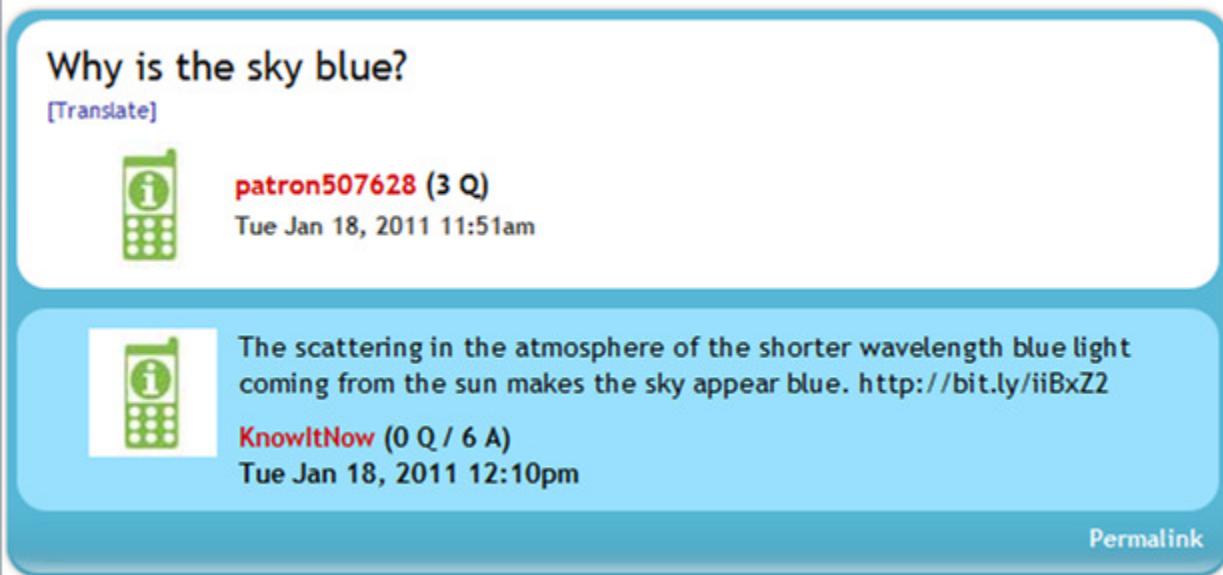
Note that **only the first 320 characters will be sent**. It is actually preferable to keep replies to **under 160 characters**. This will send only one text message to the patron. It is best to send only one message being that some patrons may not have an unlimited text plan for their mobile devices. You can see that the portion of the box to the right will display the message as it will look to the patron. Additionally, the character counter is below the portion where the answer is actually typed (on the left). Here the answer is only 137 characters (**137 / 320 Characters**).

If sending a longer URL, it is best to use a URL shortener such as Bit.ly (<http://bit.ly/>), TinyURL (<http://tinyurl.com/>), is.gd (<http://is.gd/>), or any other of a number of popular websites that do this. See this article on the KnowItNow24x7 Provider site on the benefits of using Bit.ly's bundle option: <http://provider.knowitnow.org/content/new-reference-tools-bitly-announced> or as a shortened URL: bit.ly/gMwsLJ. Even this shows the advantage of a 66-character URL over a simple 13-character one. The web address displayed in the answer above is a bit.ly bundle that includes three websites that provide information on the topic "Why is the sky blue?": <http://bit.ly/iiBxZ2>.

Send the Answer

When satisfied with the reply, click  .

The display will change to...



The screenshot shows a mobile interface with a question and answer. The question is "Why is the sky blue?" with a "[Translate]" link below it. The question is attributed to "patron507628 (3 Q)" and is dated "Tue Jan 18, 2011 11:51am". The answer is "The scattering in the atmosphere of the shorter wavelength blue light coming from the sun makes the sky appear blue. <http://bit.ly/iiBxZ2>" and is attributed to "KnowItNow (0 Q / 6 A)" and dated "Tue Jan 18, 2011 12:10pm". A "Permalink" link is visible in the bottom right corner of the answer box.

...showing that the question has been answered.

If the same patron sends subsequent questions, he or she will be assigned the same patron number (in this case, **patron507628**)...

What is the circumference of the earth ?

[\[Translate\]](#)



patron507628 (4 Q)

Wed Jan 19, 2011 11:18am

[Permalink](#)

Here you can see that this patron has sent four questions (**patron507628 (4 Q)**). When the question is answered, it will display just like the other question answered previously.

What is the circumference of the earth ?

[\[Translate\]](#)



patron507628 (4 Q)

Wed Jan 19, 2011 11:18am



According to NASA, the Earth is 24,901 miles at the equator.
<http://solarsystem.nasa.gov/planets/profile.cfm?Display=Facts&Object=Earth>

KnowItNow (0 Q / 7 A)

Wed Jan 19, 2011 11:21am

[Permalink](#)

Note that in the previous question (Why is the sky blue?), the blue-shaded answer portion showed **KnowItNow (0 Q / 6 A)** but now displays **KnowItNow (0 Q / 7 A)**. This shows that now seven answers have been sent to this patron by librarians monitoring the **knowitnow** keyword. In this case, the full URL is used because it is still under 160 characters although a shortened URL would probably have been preferable (if the patron must type the URL into a browser).

Dealing with Complex Questions

Most patrons using text messaging will be aware of the limitation of 160 characters and will ask questions that lend themselves to short answers. Sometimes, however, patrons will ask a question that requires more in-depth research. In cases such as these, librarians should:

- Use professional knowledge and judgment to assess whether the research needed to provide a sufficient answer cannot be accomplished by SMS.

- Offer to follow-up with the patron by via email or ask a follow-up question.
- Keep follow-up questions succinct and to the point.
- Avoid replies that simply state that the librarian needs more information.
- Ask for explicit clarification on a point or exact information to move the question forward.
- Ask for the patron's email address within the text reply if choosing to follow-up by email.
- Complete the reference transaction in as few messages as possible.

While the patron may not connect to the same librarian when replying to this kind of “answer”, anyone accepting the SMS reply should be able to pick up where the previous librarian left off using the Text-a-Librarian interface (which collates messages from the same patron).

Some have found that patrons are amenable to longer initial answers that span multiple text messages; however, unless this is absolutely necessary, multiple messages should be avoided.

Remember that SMS is *not* chat. A “traditional” reference interview is not really feasible within the SMS medium. Librarians are highly encouraged to use their professional judgment in deciding what resources are appropriate to answer the patrons’ questions and to send those resources. If a short, factual reply will adequately answer the question, provide a short, factual reply.

Close the SparkRef Window

After sending the answer via the Text-a-Librarian interface, that browser window may be closed.

Go back to the SparkRef Window and close it using the normal procedure with the

Close Conversation icon .

If the SMS question was completed, simply choose **Complete** from the resolution codes. If you provided the offer to follow-up by email, choose **Follow-up**. (See Chapter 6 in this manual for more on this.)

Session Survey

Please enter a Resolution code

Completed

Followup

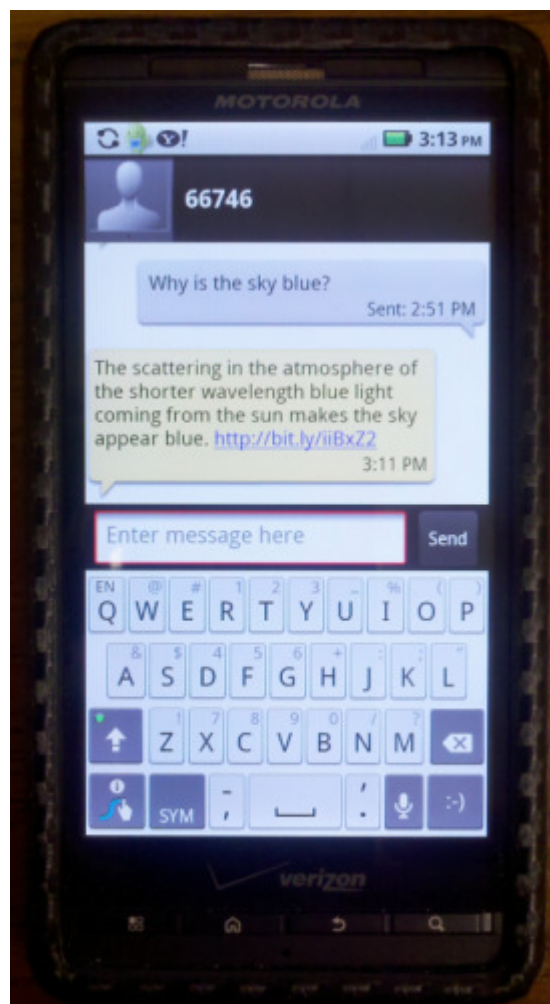
Transfer

Disconnected

Prank

Save

Chapter 5 - Receiving the Answer: Patron Perspective






Within minutes of the librarian clicking **send my answer** , the patron receives the answer on their mobile device.

If his or her phone has wi-fi connectivity, the hyperlink is clickable and can be opened within the device's browser.

If the patron's phone does not have wi-fi, the link (in this case, bit.ly/iiBxZ2) can be typed into any browser, and the information sent can be easily retrieved. This is one of the benefits of using a URL shortener: The patron has less characters to type into the web browser if this is necessary. In the example, Bit.ly provides a simple 13-character URL whereas just one of the URLs bundled there is 79 characters long.

Chapter 6 - KnowItNow24x7 SMS: Workflow Summary

The following are a summary of the steps outlined above for librarians to follow when replying to SMS questions for KnowItNow24x7. This page can serve as a “cheat sheet”:

1. Click  **Accept** on the SparkRef incoming alert.
2. Determine if the question is sent by SMS.
3. Click the link in the URL field to open the Text-a-Librarian interface.
4. Leave the SparkRef Window open.
5. Research the answer and type the reply in the Text-a-Librarian interface.
6. Click  to send the reply.
7. Click **Close Conversation** icon  in the SparkRef Window.
8. Assign the appropriate resolution code.

Chapter 7 - SMS Reference: KnowItNow24x7 Best Practices

- Accept all incoming SparkRef alerts as quickly as possible.
- Click on Text-a-Librarian URL in SparkRef window as quickly as possible.
- Reply to SMS questions as quickly, efficiently, and professionally as possible.
- Leave SparkRef window **open** while answering SMS question from Text-a-Librarian interface.
- Keep text message answers to 160 characters or less.
- If a short, factual reply will adequately answer the question, provide a short, factual reply.
- If a URL is provided, use one of the many freely-available URL shorteners available online. Bit.ly, in particular, is good in that it allows for “bundling” multiple URLs into one short web address.
- If the question is complex or requires more in-depth research, offer to follow-up with the patron by via email or ask for more information. While the patron may not connect to the same librarian when replying, anyone picking up the SMS reply should be able to pick up where the previous librarian left off using the Text-a-Librarian interface (which collates messages from the same patron).
- Close the SparkRef window **after** answering the SMS question.
- Assign the proper Resolution Code.

Chapter 8 - SMS Reference: Resources

As with any medium, some questions are more easily handled than others. This is true for in-person transactions, phone, e-mail, chat, and now SMS. The goal should always be to balance excellent customer service with quality reference transactions.

The following are some online articles that provide background on SMS reference:

ALA Techsource

“The Joy of Text” (12/17/2009)

<http://www.alatechsource.org/blog/2009/12/the-joy-of-text.html>

Library Journal

“Text Message Reference: Is It Effective?” (10/15/2009)

<http://www.libraryjournal.com/article/CA6701869.html>

ACRLog

“Every Wonder About That SMS Reference Service” (2/8/2006)

<http://acrlog.org/2006/02/08/ever-wonder-about-that-sms-reference-service/>

Information and research on the Internet and mobile devices:

Pew Internet & American Life Project

From the Project’s Mission Statement: “The Project aims to be an authoritative source on the evolution of the internet through surveys that examine how Americans use the internet and how their activities affect their lives.”

<http://www.pewinternet.org/>

