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## Using the iPad for Reference Services

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## ACRL TechConnect

Megan Lotts and Stephanie Graves

# Using the iPad for reference services

## Librarians go mobile

Reference services are becoming more mobile as technology allows librarians to expand service points and outreach opportunities. Like many techno-saturated librarians, the authors looked forward to Apple's release of the iPad in Spring 2010. This article gives one library's experience using the iPad for reference services.

### Background and setup

The Virtual Reference Coordinator submitted a proposal for the purchase of several iPads when end of fiscal year contingency monies were released in the spring of 2010. The Friends of Morris Library were also hosting their first grant process and a similar proposal was submitted. With the help of both the Library Administration and Friends group, we were able to purchase three 32GB, Wi-Fi only iPads and cases. University requirements also necessitated the purchase of the Apple Protection plan for each device.

In summer of 2010, the iPads arrived and were distributed to the virtual reference coordinator, the Fine Arts librarian, and a member of the library systems staff. Each person tested the device, explored the available apps, and recorded their experiences

in a shared document. This testing phase lasted approximately eight weeks. After the testers were comfortable with the devices, we began discussing how best to share the iPads among nine reference librarians for use during the Fall 2010 semester.

We began by labeling each iPad, both by writing on the device and naming the device in the iTunes account. This would help us identify which device was checked out to staff and would also help us keep track of which device needed updates or servicing.

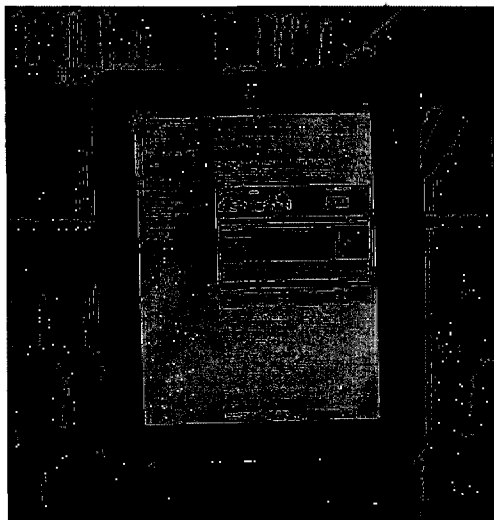
We indulged a sense of playfulness and named each after a variety of apple: Fuji, Pink Lady, and Red Delicious.

Next, we configured them to work with the campus VPN client for Internet access. Because the iPads are primarily designed as personal use devices, we had to adjust them to facilitate use by multiple librarians. Each university user has a unique username

called a Network ID and password. We were unable to obtain a generic Network ID for the iPads from the Information Technology

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Morris Library iPad. Visit this article online for detailed images.

(IT) unit. Instead, we had to use the iPad Setting menu and establish individual Network ID accounts for every librarian.

Each librarian's account had to be typed into the three iPads separately. The virtual reference coordinator set up all the accounts with the help of several student workers. The set up is also impermanent, because the university requires a change in Network ID password every 120 days. Every time a librarian changes passwords, their account on each iPad has to be altered. This setup is less than ideal and requires constant maintenance. We are working with IT to develop a generic user ID that will establish a Wi-Fi connection independent of individual accounts. Ideally, we would like to hand the librarians an iPad that "just works" on campus without any intervention by the individual user.

The Wi-Fi signal is strong in most parts of our newly renovated library. However, if a librarian steps into an elevator or stairwell, the signal is sometimes lost and they must reconnect. Librarians also report issues with the VPN client dropping due to an inactivity time-out, which the library cannot fix. If librarians do not touch the screen every fifteen minutes, the iPad reverts to "locked" mode. This is a feature that we can address, but was intentionally left in place for security reasons. The iPads can also be used across campus, but we encourage librarians to check the IT campus VPN Hot Spot map before venturing outside the library. One recent disappointment was learning the library's signal does not work well on our outdoor patio space, which is a popular destination for studying students.

Many of the items that make iPads exciting for libraries are only available from iTunes as downloaded apps. Some are free, but many have to be purchased. Library Administration gave \$50 annually towards the purchase of apps. It was important to leverage this money to maximum advantage, so it was decided to have all three iPads sync to the same iTunes account. This would resolve several issues. First, any app purchased

could be synced with all three devices without incurring the cost three times. Second, the iTunes account and password could be controlled by one "administrator," in this case the virtual reference coordinator. This would ensure that librarians didn't purchase unnecessary apps, spend the budget out too quickly, and gave the Accounting staff some reassurance that the university credit card information was protected. Third, syncing to one iTunes account means all three iPads look identical, preventing confusion by non-tech savvy librarians. The virtual reference coordinator maintains the iTunes account on a MacBook Pro, and anyone is welcome to suggest an app to be added to the collection. The purchase of fee-based apps is vetted through the virtual reference coordinator and the two staff members who helped test the iPads.

A LibGuide dedicated to the iPad project was created to help keep track of downloaded apps and their functions, provide updates about the project, and inform staff about outside resources regarding the use of iPads in libraries.<sup>1</sup>

As a state university, most purchases are subject to tax exemption. After purchasing our first apps from iTunes, the library's accountant discovered that we were charged tax. Subsequent discussions with iTunes support staff revealed that we were not going to be able to take advantage of exemption status on any purchases from the App Store. The library accountant has had to justify the tax charged for each app with the purchasing office on campus, an unfortunate consequence that we may have noted earlier had we read the fine print in the Terms and Conditions.<sup>2</sup>

### **Use of the iPads in reference**

The iPads are used primarily for roving reference by the reference and instruction librarians. When librarians are scheduled for a "roving reference" shift, they can check out an iPad from a locked staff drawer at the Information Desk. The sign out process is decidedly low tech, with a simple paper log.

The iPads are docked and charging inside of the drawer when not in use, and ideally are updated on a bi-weekly process.

While librarians are not required to rove with an iPad, those who are carrying them report that the iPads work great as a badge and initiator for roving reference. Librarians also comment that students have approached them asking, "What is that?" The iPads give the impression that the librarian is technically accessible and "cool." The renovated library is a popular spot, and it is difficult to find an empty computer station. Librarians with iPads can access information, such as a call number, without forcing the student to locate and log into a desktop. It untethers both the librarian and student from their computer workstations.

i P a d s have also given the mobility to

the librarians staffing the virtual reference service. For example, the virtual librarian can staff the service during reference meetings via iPad. Roving librarians can also monitor the virtual reference queue while moving. This allows for a back-up librarian on the virtual reference queue during busy times of the semester, without adding additional staff to the reference schedule.

The multi-function use of the iPad makes it ideal for reference. It is a mobile catalog, a fully featured Web browser, a calculator, an eBook reader, a dictation tool, a music player, and much more. The battery life is excellent, with librarians being able to rove around the building for an entire work day on one charge. In addition, we are constantly

exploring available apps in the iTunes store. The speed at which new apps are added is dizzying. While the library may spend time developing its own app, numerous apps are already available that can serve library users. Numerous library vendors are also releasing apps based on their services and collections.

### What's missing

Ideally, each librarian at Morris Library would have their own iPad. This would obviate the need for constant account management. It would also give librarians the freedom to explore apps and customize their

iPad to their individual needs.

Librarians report feeling uncomfortable with the iPad as a replacement for a traditional laptop. Although we purchased an app for word processing, the



Megan Lotts uses the iPad for roving reference.

iPads still lack an intuitive way of storing data. Librarians must learn to import and export documents from a Google Docs account or other Cloud storage like Apple's Mobile Me service.

A mobile keyboard dock was purchased to help alleviate librarians' concerns about typing with the iPad touchpad. However, the keyboard weighs more than the actual iPad and the docking arm does not collapse, making it problematic for travel. Several librarians have also reported a fear of the fragility of the touch screen and a concern that they will "break" something. Training workshops on specific apps may be necessary to help ease some librarians into this unfamiliar realm. The lack of a

camera also means that the iPad is incapable of functions that the smaller iPhone can accomplish, such as image capture and video conferencing.

Although librarians are allowed to check out the iPads for travel to conferences, no one has done so thus far.

The inability to "multitask" by toggling through several applications has some negative implications for reference. Librarians want to switch between searching for items in the library catalog and searching items using some of the apps such as PLoS Reader or Papers. An iOS 4.2 update in early 2011 allowed the capability for multitasking.

We are working on making the AirPrint functionality with the library's Systems staff. An additional feature, the ability to place apps in customized folders, may come in useful as we continue to discover new apps for reference use. In March 2011, Apple released the iPad 2 for purchase. This newer, lighter version of the iPad has two embedded camera, one in the front and one in the back.

Using video chat reference with the iPad 2, librarians video chat with patrons, switch to the backside camera and show images from a computer screen or print book. The authors hope to pursue funds to purchase an iPad 2 so that we can test this capability.

### **Next steps and the future**

After the first semester's use, we are now developing assessment of the iPads. Usage statistics will be derived from the sign out sheets showing how often the iPads are being used and which librarians are using them. We also hope to uncover any patterns in usage times throughout the course of the semester.

Next, a survey of the librarians will be conducted to determine what primary functions are being used, what apps are most useful, and what the librarians believe are missing. In conjunction with internal assessment, a survey of other libraries will be developed to elicit their

experiences with iPads in an academic library environment.

Assessment will play a vital role in determining how our library moves forward with deploying the iPads. However, we do not need survey results to tell us that we are not currently using the iPads optimally. We have yet to use the calendar and e-mail functions. But we have shared calendars that could be easily accessed and useful to the reference and instruction librarians. Also deciding which should be the primary e-mail account on the iPads requires careful consideration.

iPads are ideal tools for multimedia resources. Many campus departments have multimedia resources that could be added to the iTunes library as a starting point for a local collection. We plan to upload podcasts and videos from the growing collection of iTunesU content specific to our university. Although our library has created very little multimedia content, the authors have plans to investigate the creation of video and audio content, such as tours, instructional videos, and lecture podcasts.

A graduate student programmer is also working on creating a computer availability app for the library, which we envision will be popular with students.

The iPads have given reference services a foothold into the mobile technology landscape. The majority of the reference and instruction librarians are not mobile technology users; many do not have smart phones or other mobile devices. However, these same librarians often interact with students who are using multiple mobile devices.

As mobile devices are becoming less expensive and more readily available, we anticipate a increasing demand for mobile-enabled collections and services.

### **Notes**

1. LibGuide dedicated to the iPad project, [libguides.lib.siu.edu/iPads](http://libguides.lib.siu.edu/iPads).
2. Products, by pre-ordering, "iTunes Store terms and conditions," [www.apple.com/legal/itunes/us/terms.html#APPS](http://www.apple.com/legal/itunes/us/terms.html#APPS). 