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The New York State Library Experience—Serving the Patron at a Remote Location

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Reference

“We have all seen many essays and articles on the traditional reference interview at a reference desk. Some articles divide the reference interview into parts; many feature reader/librarian interaction; and there are some which concentrate on very specific aspects of the process, for example, body language. On the others hand, there are few articles on the reference interview preceding a data base (DB) search.... [T]hose that exist....stress the importance of the reference interview preceding a DB search and point out how similar it is to the traditional one at the reference desk. The same attitudes and skills apply: approachability, interest in the reader and his or her question, skill in ferreting out what the reader is really asking, non-verbal communication skills, and knowledge of the reference tools available. There is definitely the same problem with ‘librarianese,’ though there is another level of jargon added: “computerese.”

McIlvaine, Eileen. (1983). Effective ways to interview data base users. *Urban Academic Librarian*, 2(1/2), 44.

**THE NEW YORK STATE LIBRARY EXPERIENCE--
SERVING THE PATRON AT A REMOTE LOCATION**

by

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Data base searching (DBS) at the New York State Library started in 1973 on a local level through the SUNY Biomedical Communications Network, otherwise known as SUNY/BCN, with three DBs: MEDLARS, Psychological Abstracts, and ERIC. In 1974 the complement of data bases increased to four with the addition of the New York Times Information Bank, which was available by direct access. The division of labor for searching was made along subject lines--medical librarians searched Psychological Abstracts and MEDLARS, the librarians in the education library ran ERIC searches, and general reference librarians searched the Information Bank. During 1976 a federally funded Pilot Project was begun, which provided DBs to the North Country and Western New York 3R's regions, and a Search Analyst was hired at the State Library to run the searches requested through the project. A year later there were two Search Analysts preparing for the second Pilot Project, which had been expanded to include all regions of the state. By 1978 there were four full-time Search Analysts searching twenty-five DBs and all searching was done in the DB Services unit. In 1979, the quota of searches available on the Pilot Project was increased from 220 to 440 per month; the staff in the west was increased to seven, and the number of DBs went up to forty.

Now, although there are no longer separate subject libraries at the State Library, the division of labor for searching is still made along subject lines. Each Search Analyst (SA) is a subject specialist who searches primarily those questions which fall into his or her area of expertise. This means that a request for an INFORM search is handled by an SA who specializes in the business field, an MLA Bibliography search is run by a humanities searcher, and so on. Each of us seven Search Analysts is a librarian with reference experience, and each of us has received not only special training in DB searching but also training to increase our knowledge of specific DBs in our various subject fields. Just to keep my running history of statistics up to date: during the first nine months of 1980, my six colleagues and I have run approximately 6,200 searches, which is an average of 100 searches per month for each of us. But that's enough about us. I really want to talk to you about the patrons.

With the exception of staff at the State Library, all of our patrons work or study or conduct research

somewhere else. And with the further exception of State Agency or Legislative personnel in the Albany area, our patrons are located miles away from us and may have no direct contact with us whatsoever. The problems associated with processing requests from this latter group, and some of the remedies for these problems are what I would like to examine. Patrons from this group are the ones who come to people like yourselves, for the most part reference or inter-library loan librarians, for assistance. These are the search requests that we receive through the Pilot Project.

The Project, now in its fourth year, was designed to supplement the efforts of other libraries' reference staff in providing literature searches to their patrons. DB searches would be provided on an individual basis, in much the same way that reference questions are answered. Besides providing individually tailored bibliographies in response to patrons' questions, the Pilot Project would make it possible for librarians to determine if the use of DB searching justified providing it at a local level. In some cases this has actually happened.

A few things about Pilot Project searches which may be unique to the Project ought to be mentioned at this point. First of all, the 440 quota searches per month which we may run do not include what we call "one-term searches." Typically, these are searches in which the patron wants *everything* on some topic such as mental retardation. What we do instead are searches which require the combination of concepts, two or more, such as the mentally retarded and respite care. Second, Pilot Project Searches (PPS) are offered free of charge up to a point, and that point depends on the format of the DB. If it has abstracts, we print up to fifty citations with the abstracts; if it has no abstracts, we will give up to 100 citations. Third, and this is probably the most important thing, we rely very much on the librarians at the points of origin of these search requests to guide their patrons in what to expect from their requests and to give us all the information we need in order to run the searches properly.

There are certain pitfalls which can occur when running DB searches at high volume for people who have communicated their requests through an intermediary, who is also at a remote location. From our experiences one may be able to see how the forms we use, the reference interview, and the search formulation interact in actual practice. Search requests on the Pilot Project come to the State Library through the inter-library loan system over teletype or TWX. This is the first place from which trouble can arise in the form of delays or confusion, and it can happen in four very specific ways.

For one thing, the system can go down--it can.

57 The New York State Library Experience

simply cease to function. Now, from my experience with our DB hardware, I know that any number of major or minor events can cause the system to go down. Which particular devils plague a teletype system, I really do not know. But at any rate, down time is just a minor inconvenience these days. We have not had too many prolonged instances for quite a few months, and we consider ourselves very lucky. More commonly, we encounter three other problems: typographical errors, garbled messages, and missing or partial messages.

They tell me that a TWX operator doesn't necessarily know when a message has been transmitted incorrectly because of the nature of the equipment, so the responsibility for overcoming this inconvenience is in the hands of the recipient, namely DB services. We will telephone the library system or the individual librarian in the case of missing or garbled messages, and the matter is usually cleared up in short order.

Typos, however, can be a bit more problematic. For instance, a search on "The Self-Concept of Slaves"--may rise an eyebrow or two, but we will run it and may even find a few citations. Later we learn that what the patron really wanted to know about was "The Self-Concept of Slavs," that is, "Slavic peoples." To show that we have searched the topic the way it was requested, we attach to the resulting search print-out the actual TWX message that was received at the library. This is so that the librarian can determine whether or not what we received was indeed what the patron wanted us to search for. In this case, this is probably the way the typographical error was caught. However, the communication problems in themselves are really minor. The major problem seems to be the lack of information about the topic, or the lack of details, or, as we see it, the lack of search options.

When we run a DB search, we are trying to find information which resembles as closely as possible what the patron wants to find, given the limitations of the tools we are using. In other words, we are trying to strike a balance between what the patron wants and what it is possible for us to give. We are endeavoring to "custom-tailor" a bibliography--this was the original premise of the Project--yet the tools we are using to produce the bibliography are not necessarily flexible enough to allow for such tailoring. And so it becomes necessary to compromise in many cases. The quality of the compromise is dependent upon the number and kinds of modifications the searcher can make at the time the search is being run. If the searcher knows precisely what the patron will accept as a satisfactory response to his or her question, the searcher can still "custom-tailor" the search in spite of limitations. If, however, the searcher knows only the topic and nothing else, then the compromise that is made with regard to that topic is going to be at best uninformed.

The typographical error I just mentioned could have been caught before the wrong search had been run, if the request had contained more information, such as synonyms for the word "Slavs"—perhaps "Eastern Europeans," or "Slavic-speaking peoples," or the names of Slavic peoples, such as "Czechs" or "Serbo-Croatians," and so on. Had there been a support for the search in the form of suggested synonyms or words that clarified what the terms meant, the word "slaves" would have been more seriously questioned.

Regarding social sciences and humanities DBs in particular, because of the abundance of room for misinterpretation, it is very important that the SA has a complete picture of what is being requested. Aside from typos, legitimate questions come into the library which are not searchable because there is no supporting information. For instance, consider this subject: "clergy and family therapy." Now, is it "the role of the clergy as family therapists," or is it "how many clergymen and their families are clients in therapy?" Or take: "police and suicide prevention." Does the patron want to know about "the prevention of suicide among police officers," or "how police are used as counselors in suicide prevention?"

Having foreseen most of these difficulties at the beginning of the pilot project, the SAs devised standard forms on which the search request could be recorded in all its particulars. These forms are kept at the telephone in our unit, because we receive non-Pilot Project requests by phone, and a version of it is used by librarians for TWX requests. The form is designed to elicit the information that the SA will need in order to run the search.

The first significant thing we ask for is a statement of the search topic, as clearly and as concisely as it can be stated. Sometimes, instead of plain English, we get plus signs, parentheses, slashes, or just a list of terms. These things really don't help us, so we try to be firm about the search statement. We need to understand the request rationally before we can convert it into a search strategy.

Next, we ask for pertinent terminology, synonyms, and appropriate subject terms. This is where we expect to find the Czechs and the Slavic-speaking peoples. This group of words or phrases helps to round out our conception of the search and also gives us a few sturdy hinges from which to hang our search strategy.

We also request the citation of, and I quote from the form, "a recent relevant reference." Many library collections simply do not contain thesauri to DBs, and therefore librarians may not be able to supply appropriate subject terms. But if the reference cited can be retrieved on-line, we may be able to use the terms under which it is indexed to find more articles of a similar nature. Thus, the reference may provide

59 The New York State Library Experience

subject terms when there is no thesaurus available.

The rest of the form is reserved for noting the limiting factors which the searcher must take into account. These include, for example, the language that the material should be in, geographic areas, historical periods, specific populations, age groups, grade levels, and years of the DB that ought to be covered in the search. If we cannot make the search as specific as it has been requested to be and still deliver a printout, we will try to work our way back toward more general coverage, removing limitations as we go. Or conversely, if no limitations are specified, we may limit, for example, to English-language material in order to give the patron useful results within the quota search limit of 50 or 100 citations. The point is, we may have to make search decisions while we are running the search, and we appreciate having the patron's guidelines.

In addition, we want to know which approach the patron prefers us to make to the search, either narrow or broad. The narrow search would limit to very specific terms, and the broad search might take in related terms, or narrower terms under a broad subject heading. This is another aid for the searcher in case decisions must be made in order to modify the search.

For all the requests, we ask for the name and the telephone number of both the librarian and the patron, in case there should be any doubt in the mind of the SA as to what the patron is really looking for. After the search has been completed, we send a printout key and cover letter to explain to the patron what the results have been, and, in some cases, why they might not be precisely as he or she requested them. The key also explains how to interpret the search results and how to receive copies of whatever has been cited in the printout. In this way we try to custom tailor not only the search, but also our contact with the clientele.

Generally speaking, for the Pilot Project searches the problems are really not connected so much to the fact that the SA does not have face-to-face contact with the patron, because our emissary in the field, the reference librarian, does have such face to face contact. Rather, the problem seems to be an unfamiliarity on the part of either the librarian or the patron with DB searching, or with specific DBs, or with our procedures. Seminars can address the first two problems; but to help with the third problem, DB Services tries the direct approach. We write and distribute our own *DB Services Users' Manual*, the latest edition of which is dated 1979, and of which there will soon be a new edition. We have a brochure which briefly describes what DB searching is and what we offer. Members of the Unit conduct training sessions throughout the state, and we have also written an article describing our

URBAN ACADEMIC LIBRARIAN 60

training activities, which appeared in the Fall 1979 edition of *The Bookmark*. In case these are insufficient in providing information about DB Services or any aspect of our work, we are available to answer any questions and respond to any suggestions for the improvement of our service.

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