

“Just-in-Case” Answers: The Twenty-First- Century Vertical File

This article discusses the use of OCLC’s QuestionPoint service for managing electronic publications and other items that fall outside the scope of OCLC Library’s OPAC and Web resources pages, yet need to be “put somewhere.” The local knowledge base serves as both a collection development tool and as a virtual vertical file, with records that are easy to enter, search, update, or delete.

We do not deliberately collect for the Vertical File, but add to it day by day the useful thing which turns up. These include clippings from newspapers, excerpts from periodicals . . . broadsides that are not injured by folding . . . anything that we know will be used if available.

—Wilson Bulletin, 1919

Information that “will be used if available” sounds like the contents of the Internet.¹ As with libraries everywhere, the OCLC Library has come to depend on the Internet as an almost limitless resource. And like libraries everywhere, it has confronted the advantages and disadvantages of that scope. This means that in addition to using the OPAC and OCLC library’s webpages, OCLC library staff have used a mix of bookmarks, del.icio.us tags, and Post-it® notes to keep track of relevant, authoritative, substantive, and potentially reusable information.

Much has been written about the use of QuestionPoint’s transaction

management capabilities and of the important role of knowledge bases in providing closure to an inquiry. In contrast, this article will look at QuestionPoint’s use as a management tool for *future* questions, for items that fall outside the scope of OCLC library’s OPAC and Web resources pages yet need to be “put somewhere.” The QuestionPoint local knowledge base is just the spot for these new vertical file items.

About OCLC Library

OCLC is the world’s largest nonprofit membership computer library service and research organization. More than 69,000 libraries in 112 countries and territories around the world use OCLC services to locate, acquire, catalog, lend, and preserve library materials. OCLC Library was established in 1977 to provide support for OCLC’s mission. The collection concentrates on library, information and computer sciences, business management, and has special collections that include the papers of Frederick G. Kilgour and archives of the Dewey Decimal Classification™.

OCLC Library has a distinct clientele to which it offers a complete range of services—print and electronic collections, reference, interlibrary loan—within its subject areas. Because of the nature of the organization, the library supports long-term and collaborative research, such as that done by OCLC Programs and Research staff, as well as the immediate information needs of product management and marketing staff. OCLC Library also provides information to OCLC’s other service areas, such as finance and human resources.

While most OCLC Library acquisitions are done on demand, OCLC Library selects and maintains an extensive collection of periodicals, journals, and reference resources, most of them online and accessible—along with the OPAC—to

OCLC employees worldwide from the library’s webpages (See figure 1). Often, however, OCLC staff, like those of many organizations, are too busy to consult these resources themselves and thus depend on the library.

OCLC Library staff pursue the answers to such research questions through its collections and look to enhance the collections with “anything that we know will be” of use. One of the challenges is keeping track of the “anything” that falls outside the library’s primary collections scope; QuestionPoint helps with that task.

Traditional uses of QuestionPoint

QuestionPoint is a service that provides question management tools aimed at increasing the visibility of reference services and making them more efficient. OCLC Library uses many of those tools, but there are significant ones it does not use (for example, Chat). And although the library’s QuestionPoint-based AskA link is visible by default on the front page of the corporate intranet as well as on OCLC Library-specific pages, less than 8 percent of questions over the last year were received through that link.

One reason for this low use may be that for most of OCLC Library’s history, e-mail has been the primary contact method, and so it remains. Even when the staff need clarification of a question, they automatically opt for telephone or e-mail messaging. Working with a Web form and question-and-answer software has not caught on as a replacement for these more established methods.

However, QuestionPoint remains

Tam Dalrymple (dalrympt@oclc.org) is Senior Information Specialist at OCLC, Dublin, Ohio.

the reference “workspace.” When questions come in through e-mail or phone, librarians enter them into QuestionPoint, using it to add notes and keep track of sources checked. Completed transactions are added to the local knowledge base. (Because their questions involve proprietary matters, many special libraries do not add their answers to the global knowledge base, and OCLC Library is no exception. The local knowledge base is accessible only by OCLC Library staff.)

Not surprisingly, most of the questions received are about libraries, museums, and other cultural institutions, their collections, users, and staff. This means that the likelihood of reuse of the information in the OCLC Library knowledge base is relatively high, and makes the local knowledge base an early stop in the reference process. Though statistics vary widely by individual institutions and type of library—and though some libraries have opted

not to use the knowledge base—the average ratio for *all* QuestionPoint libraries is about one knowledge base search for every three questions received. In contrast, in the past year OCLC Library staff averaged 4.2 local knowledge base searches for every three questions received.

The view of the QuestionPoint knowledge base as a repository of answers to questions that have been asked is a traditional one. OCLC Library’s use of the QuestionPoint knowledge base *in anticipation* of information needs of its clients—as a way of collection development—is distinctive. In many respects this use creates an updated version of the old-fashioned vertical file.

Nontraditional uses of QuestionPoint

Just-in-case

The vertical file has a quirky place

in the annals of librarianship. It has been the repository for facts and information too good to throw away but not quite good enough to catalog. H. W. Wilson still offers its *Vertical File Index*, a specialized subject index to pamphlets issued on topics often unavailable in book form, which began in 1932. By now, except for special collections, the Internet has practically relegated the vertical file to the backroom with the card platens and electric erasers.

OCLC Library now uses its QuestionPoint knowledge base to manage information that once might have gone into a vertical file: the authoritative reports, studies, .org sites, and other resources that are often not substantive enough to catalog, but too good to hide away in a single staff member’s bookmarks. The QuestionPoint knowledge base provides a place for these resources; more importantly, QuestionPoint provides fast, efficient ways to collect, tag, manage, and use them. QuestionPoint allows development of such collections with powerful capabilities that allow for future retrieval and use of the information, and it does so without the incredibly time-consuming processes of the past. A 1909 description of such processes describes in detail the inefficiency of yore:

In the Public library [sic] of Newark, N.J., material is filed in folders made of No. 1 tag manila paper, cut into pieces about 11x18 inches in size. One end is so turned up against the others as to make a receptacle 11x19 1/2 inches. The front fold is a half inch shorter than the back one, and this leaves a margin exposed on the back one, whereon the subject of that folder is written.²

Thus a major benefit of using QuestionPoint to manage these resources is saving time. Because QuestionPoint is a routine part of OCLC Library’s workflow, it allows the addition of items directly to the

OCLC Library

How to Find	Topics/Subjects	OCLC Library Resources
<ul style="list-style-type: none"> ▪ Articles ▪ Blogs ▪ Books ▪ Journals ▪ Newspapers <p>Search for an item in libraries near you: Enter title, subject or person</p> <input type="text"/> <p></p> <p> See the 1st edition of Dewey's classification with notes for the 2nd edition</p>	<ul style="list-style-type: none"> ▪ Acquisition & Cataloging Tools ▪ Archives & Preservation ▪ Arts & Humanities ▪ Books, Journals & Publishing ▪ Business, Marketing & Management ▪ Education ▪ Global & travel information ▪ Government ▪ Libraries and Library & Information Science ▪ OCLC's Regional Service Providers ▪ Reference & General Interest ▪ Science ▪ Social Sciences ▪ Standards ▪ State & National Libraries & Library Assns ▪ Statistics ▪ Technology <p style="text-align: center;"></p> <p style="text-align: center;">Get Answers! 614-761-5954</p>	<ul style="list-style-type: none"> ▪ Blogs ▪ Databases ▪ Directories ▪ Electronic Journals ▪ Library Catalog ▪ OCLC Archives <p style="text-align: center;">OCLC Products</p> <ul style="list-style-type: none"> ▪ ArchiveGrid ▪ CAMIO ▪ FirstSearch ▪ NetLibrary ▪ QuestionPoint KnowledgeBase

Figure 1. OCLC Library intranet homepage

knowledge base quickly and with a minimum of fuss. There is initially no need to make the entry “pretty,” but only to describe the resource briefly, add the URL, and tag it (see figure 2). Unlike a physical vertical file, tagging items in the knowledge base allows items to be “put” in multiple places. Staff can also add comments that characterize the authoritative-ness of a resource.

Occasionally librarians come across articles or resources that might address multiple questions. Instead of burying the data in one overarching knowledge base record, staff can make an entry for each aspect of the resource. An example of this is www.galbithink.org/libraries/analysis.htm, a page created by Douglas Galbi, Senior Economist with the Federal Communications Commission (see figure 3). The site provides statistics, including historical statistics, on U.S. public libraries.

Rather than describe these generically with a tag like “library statistics”—not very useful in any case—each source can be added separately to the QuestionPoint knowledge base. For example, the item “Audiovisual Materials in U.S. Public Libraries” can be assigned specific tags—audiovisual, AV, videos—that will make the data more accessible in the future. In other words, librarians use the FAQ model of asking and answering just one question at a time.

An important element in adding “answers” to OCLC Library’s knowledge base is the ability to provide context. With QuestionPoint, librarians can not only describe what the resource is, but why it may be of future use. And just the act of adding information to the knowledge base serves as a valuable mnemonic—“I’ve seen that somewhere.” Records added to the knowledge base in this way can be easily updated with information about newer editions or better sources. Equally valuable is the ability to edit and add keywords when the resource becomes useful

Record 11 of 31 Previous | Next | Return to Record List Print View

Update Delete

Record ID: 156747
 Q&A ID: 2972063 [Question Detail]
 Submitted to Knowledge Base on: 11/21/2007 Last Update: 11/21/2007 Forwarded/Copied: 0

Question

Question: FOR REFERENCE FILE: Information on reading the reading habits and skills of U.S. children, teens and adults.

Requesting Institution: OCLC Library
 Knowledge Base: OCLC LIBR
 Source of Request: Online Manual Submittal
 Education Level: Adult/Life Long Learner
 Keywords: reading, NEA, National Endowment for the Arts
 Date Requested: 11/21/2007
 Subject:
 Geographic Code:
 Reason: Other
 Language of Question: English
 Sources Checked:

Answer

Answer: <http://www.nea.gov/research/ToRead.pdf>

Follow-up to Reading at Risk links declines in reading with poorer academic and social outcomes
 November 19, 2007
 Contact:
 Sally Gifford
 202-682-5606
 giffords@arts.gov

Washington, DC -- Today, the National Endowment for the Arts (NEA) announces the release of To Read or Not To Read: A Question of National Consequence, a new and comprehensive analysis of reading patterns in the United States. To Read or Not To Read gathers statistics from more than 40 studies on the reading habits and skills of children, teenagers, and adults. The compendium reveals recent declines in voluntary reading and test scores alike, exposing trends that

Figure 2. A sample QuestionPoint entry, this for a report by the National Endowment for the Arts

Libraries and Library Use

The growth of public libraries has been a vitally important aspect of the development of the information economy. At least in the U.S., public libraries have achieved near universal service and mediate between wide-area communication and local interests. Public libraries have long been concerned with social networking, content management systems, and user behavior in borrowing/sharing from a collection of works. With the rise of digital works and the Internet, these issues are now of broad interest in the communications industry.

This page links to work I've done on libraries. Comments and suggestions welcomed. I am grateful to the persons who have helped me with data and analysis. I would be happy to learn about other work on libraries that might offer insights for current communications industry analysis.

I. Circulating non-book items from libraries

- [Library users like audiovisuals](#)
- [Audiovisual Materials in U.S. Public Libraries](#)
- [Libraries have long lent more than books](#)
- [Item Formats in U.S. Public Libraries, 1955](#)
- [Print down slightly, video up sharply](#)
- [Public libraries outperformed video rental businesses](#)

II. Institutional forms of libraries

- [Organizational diversity in information infrastructure](#)

Figure 3. A page with diverse facts and figures: www.galbithink.org/libraries/analysis.htm

for unforeseen questions.

Sharing information with staff

The knowledge base also serves as a more formal collection development tool. When librarians run across potentially valuable resources, they

can send a description and a link to a product manager who may find it of use. Library staff use QuestionPoint’s keyword capability to add tags of people’s names and job titles to facilitate ongoing current awareness. Employees may provide feedback suggesting an item be added to the

permanent print collection, or linked to from the library website.

OCLC Library strives to inform users without subjecting them to information overload. When a 2007 survey of OCLC staff found the library's RSS feeds seldom used, librarians began to send e-mails directly to individuals and teams. The reaction of OCLC staff indicates that such personal messages, with content summaries that allow recipients to quickly evaluate the contents, are more often read than OCLC Library RSS feeds—especially if items sent continue to be valuable.

Requirements that enable this kind of sharing include knowledge of company goals, staff needs, and product initiatives. To keep up-to-date, librarians meet regularly with other OCLC staff, and monitor organizational changes. Attendance at OCLC's Members Council meetings provides information on hot topics that help identify resources for future use. While OCLC's growth as a global organization has brought challenges in maintaining awareness of the full range of organization needs, the QuestionPoint knowledge base offers a practical way to manage increased volume.

Maintaining resources of potential interest to staff with QuestionPoint has another benefit: it helps keep

librarians aware of internal experts who can help the library with questions, and in many cases allows the library to connect staff with mutual interests to one another. This has become especially important as OCLC has grown and its services continue to integrate with one another.

Conclusions

Beyond its usefulness as a system to receive, manage, and answer inquiries, QuestionPoint is providing a way to facilitate access to online resources that addresses the particular needs of OCLC Library's constituency. It is fast and easy to use: a standard part of the daily workflow. It enables direct links to sources and accommodates tagging those sources with the names of people and projects, as well as subjects. It serves as part of the library's collection management and selection system.

Using QuestionPoint in this way has some potential drawbacks. "Just in case" acquisition of virtual resources entails some of the risks of traditional acquisitions: acquiring resources that are seldom used, creating a database of resources that are difficult to retrieve, and perhaps the necessity of "weeding" or updating obsolete items. With company

growth comes the issue of scalability, as well.

But for now, the benefits have far outweighed the risks. Most of the items added have been identified for and shared with at least one staff member, so the effort has provided immediate payoff.

- The knowledge base serves as a collection development tool, helping to identify items that can be cataloged and added to the permanent collection.
- The record in the knowledge base can serve as a reminder to check for later editions.
- The knowledge base records are easy to update or even delete.

The QuestionPoint virtual vertical file helps OCLC Library manage and share those useful things that "just turn up."

References

1. "The Vertical File for Pamphlets and Miscellany," *Wilson Bulletin* 1, no. 16 (June 1919): 351.
2. Kate Louise Roberts, "Vertical File," *Public Libraries* 12 (Oct. 1907): 316-17.