Practical Solutions . . .

Creating a Database for Research Requests*

Beth Morey**

Ms. Morey offers a variety of suggestions on how to keep track of prior research questions and solutions, ranging from the "low-tech" but tried-and-true card file method to the use of commercial database software programs.

¶1 It all began with a research request that seemed simple enough but turned out to be a bear: "Where on the Internet can one find securities forms that can be downloaded, edited, and printed?" The particular form we had been seeking was proving to be elusive. One of the other researchers recalled finding the form online once before, but it had been in an unexpected place and it was too long ago to recall the details. We keep notes of our research projects, but there's no good way to access them. Well, necessity is the mother of invention, right?

¶2 As a consequence of this experience, I began weighing the pros and cons of converting the research request form and filing system we currently use into a searchable database. Rather than reinvent the wheel in order to solve this problem, however, I posted the following request for help to the law-lib and privatelawlib discussion lists:

> We are considering creating a database to store research requests (current and historical), which would provide a permanent, searchable record of requests (and, hopefully, solutions). Is anyone else doing this? Considered it? Tried it and then quit?[1]

Summary of Solutions

¶3 Not surprisingly, many law librarians have found a way to keep track of research questions and solutions. The responses I received suggested a broad range of options, both high- and low-tech, as well as a number of uses for the database I hadn't considered. The consensus appeared to be that the value offered by

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a database justifies the additional time and effort required to create and maintain one.

¶4 Many respondents indicated the database software they were using and the fields they included in the databases they developed. Before offering excerpts from the actual responses, here is a summary of their suggestions.

Suggested Software Solutions

- Database programs: Access, DB/Textworks, Cold Fusion, Folio Infobase
- Electronic Rolodex or Cardfile programs: PCFile, MemoryMate, Microsoft Cardfile, AZZ Cardfile
- Helpdesk software: HEAT, a product of Goldmine Software Corporation
- In-house-developed software
- Other software types: Microsoft Outlook, WordPerfect, Microsoft Excel, Lotus Notes

Suggested Database Fields

- Date of request—automatic, if possible
- Deadline
- Date completed
- Category of request—recommended for statistics. Suggested categories: Interlibrary loan, research, document delivery
- Billing number
- Requestor
- Request taken by
- Research completed by
- Request or question
- General text field—for notes, solution, sources used, etc.
- Time spent
- Amount spent or associated costs—related invoices, cost, date paid
- Databases searched or publications used—can be useful for statistics as well
- Library or office—for those sharing a database across multiple offices, useful for restricting searches, statistics
- Record number—automatically assigned by software, record can be printed, attached to supporting documents and filed by number to be located again later.

Commentary[2]

¶5 "What I did was to create an Excel spreadsheet which listed the date, requestor, category of request (i.e., online research, ready reference, ILL, etc.), the

2. I have omitted names and affiliations from the excerpted responses.

client/matter number or firm billing number, initials of library staff member performing the research, and then a brief statement of the project in a 'comments' column. I would enter the requests monthly and then file the original paperwork in the attorney reference files. The spreadsheet was useful both because I could search by any of the above fields (to see from which firm I borrowed that obscure title three years ago!), and because it was a simple matter to tally reference statistics which I maintained by practice group and submitted quarterly to the head of the section. . . . I could always go to the attorney files, once I was able to retrieve the specifics, to get the details of the research strategy."

¶6 "When I get a reference request by e-mail, I drag it to an archive folder I call 'Reference Reports.' I can also drag the answer to the folder from 'Sent Items.' Since Outlook has its own search function, there is no setup necessary for a data file. Make a new 'Reference Reports' file for each year and you can send the folder to your personal folder in 'My Documents.'"

¶7 "We keep notes about our progress on requests, including which sources we've had success with and which have failed, with a Cold Fusion database application that is fully searchable. It's working very well for us."

¶8 "Is there an MLS program in town? Getting your database set up could be a great project for a student internship. They would get credit for creating something plus they should learn a lot entering the information."

¶9 "Currently, we're recording the request, search strategy, etc., into a work log in WordPerfect. Periodically, the WordPerfect files are imported into a Folio Infobase. Once imported into the infobase, searching is pretty fast, but there are at least two major impediments. The time required to make the initial record—even with the worklog open on the desktop, the time required to key requestor, client/matter, etc. creates a barrier to use. The second is the delay in moving the worklog to the infobase. Soon however, we'll start using HEAT, a 'helpdesk' software package. The computer department will use HEAT to track computer-related calls, the library will use it to track reference and research requests. We're customizing it—some fields will be used only by the library. The system should allow the auto-fill of fields, picklists from recent client/matter requests, etc. Ultimately, if the request comes by phone, the system will auto-fill the caller and requester field from the phone system itself and suggest the most recent client/matters used by the requester (and permit easy lookup of other client/matters). The text fields are large enough to paste in the search strategies. The system tracks whether the request is open or closed—the status can be checked by the requester or by another librarian in case we receive that infamous call, 'I talked with someone, but I don't remember who. . . .' Finally, it will be possible to export the key elements into our time and billing system so that we don't have to rekey it."

¶10 "I recently left a firm that was doing what you envisage [using Lotus Notes]. They designed an in-house system that was fairly simple in its key field structure, but that had a couple of benefits over other systems: Lotus Notes is integrated as both database and e-mail; it enables look-up fields to validate informa-

tion at entry (e.g., requestor name and business unit); and it allows access by multiple users, across different locations (i.e., the librarians or researchers could information share both the request load and the answers from different offices and cities)."

¶11 "I just started using a system I designed in FoxPro. The research request is written into a simple form, either by the librarian or (eventually) the attorney. When you click on a 'submit' button, the information is automatically saved into a searchable database, and a form is printed on the librarian's printer which contains all the request information plus an area to write in how the search was conducted. It's still in the testing stages."

¶12 "I'm kind of a database nut . . . but I've given up on this particular project a couple of times. My problem, I think, is that I've always tried to create too many very specific fields for the information. If the database was built instead on a single table, using a descriptive title and maybe two additional fields (one for the request and other notes, and another for sources used), I think it would be more workable. More like an electronic version of a card file than a relational database. The important thing would be consistency in style of entry, particularly in creating 'titles,' to ensure better retrieval."

¶13 "We created a database for frequently asked reference questions using askSam for Windows. The advantage of this software is that you can use fields or not. For reference questions, the only field we created was for the date. Everything is searched full text, and it works very nicely. When we enter a new record, we try to think of other keywords and add them at the bottom, but it isn't formal indexing. The problem with these systems is making sure everyone uses it and is consistent about the way they enter records. Unless everyone stays committed to the project, it will fall into disuse."

¶14 "Our four-person staff maintains a database of approximately 1,800 records. Some records are for information we had a hard time tracking down and would hate to have to retrace our steps to find. Many records are just our version of a 'cheat' sheet and cover things like: the best source for a particular form; where to find a full discussion of annulments; and summaries, including citations, of ordinances in our ten or so local municipalities (and the County Code for unincorporated areas) on topics such as discharging firearms, use of bike paths, etc."

¶15 "At my last job, I created an InMagic database to record difficult reference questions and their solutions. With InMagic it was easy to set up with the limited fields that we needed: date, requestor, librarian, question, and resolution. Since InMagic can do full-text searching, we didn't really worry about controlled vocabulary. I think it was fairly successful, but it does depend on the willingness of people to input their information."

¶16 "Laugh if you must, but I don't use the computer to store my reference questions; I use 3- by 5-inch cards and keep them in an old-fashioned metal box. I have them stored by keyword (for instance, a *Consumer Product Index* (CPI)

question would simply be filed under the 'Cs'). Most of what I store deals with esoteric terms, their definitions, and where I can find them. This is especially true with forms and other hard-to-find items."

¶17 "In precomputer days . . . we kept a paper list of 'Frequently Asked Questions.' The purpose was to save time in providing answers to questions asked on a regular basis. Some of those answers required some digging and having the list handy saved a lot of time."

¶18 "It would be an involved project, but you could probably do this two ways (both browser-based): (1) with dropdown menu forms and fill-in text boxes, (2) with XML, creating a database of taxonomies . . . by question types and responses. On the other hand, it might be cheaper and easier to just get a help-desk management-type software package."

¶19 "We have a database of reference and research requests we created using DB/TextWorks. We also use it to print out bimonthly library staff time billing reports. We definitely try to enter every billable request. On difficult requests, we try to enter enough information in the 'action taken / information located' field so that it can be used to find the information again or to follow up on an incomplete request."

¶20 "We have a Research Reference Request System that was developed in-house by our IT department and implemented in 1991. We now have over 1,000 reference requests available for searching. It has proved to be invaluable. The system is used by all libraries in our network and allows searching for requests within one office, or across all libraries. Not every reference request is added to the system (e.g., something that only takes a few minutes rarely rates an entry), but we haven't laid down any firm guidelines—generally, we have left this as a judgment call for the officer completing the research."

¶21 "I've never found anything better for historical reference questions than my old 3- by 5-inch index card file."

¶22 "We have designed a database in Inmagic. You can design as many fields as you want and, as there is no limit to their size, you can add as much information in each field as you like. Each record automatically receives a running report number. As each research request is entered, all the relevant pieces of paper, copies of invoices, notations, etc. are stapled together and the report number is added to the top corner. Then they are filed numerically in an out-of-the-way location. Inmagic allows a search to be made on all fields. All related reports will be listed on the screen with the complete entries as they were input. If necessary, it is easy to go back to the numerical files to find the original paperwork."

¶23 "I put tricky research projects in a rolodex file by subject."

¶24 "I use Inmagic for my catalog and I also have a database for reference requests. We designed the database ourselves and included fields for requesting attorney, date, subject (in which I usually put the whole question), sources tried, and where the answer was found. I also have fields for associated costs, like

invoice number, cost, date paid, client number, etc. I use it not only to remember where I got information, but to keep track for review time. Also, having a field for requesting attorney is helpful since it helps trigger the memory."

¶25 "At a library where I formerly worked we had a wonderful LotusNotes database designed for this purpose. We used it to track reference statistics, including time spent and specific resources used. There was a comments field where library staff were supposed to input helpful information such as relevant URLs, search queries, and specific details about where the answer was found. Some staff were better than others about using this, but at the very least one could see that the question had been asked before, which staff member answered it, and general guidance in terms of resources used. At my current firm I save research requests as individual WordPerfect files in folders arranged by attorney initials and request date."

¶26 "I use a very simple program from Microsoft: cardfile. It is an electronic rolodex. You title each 'card' and then just put anything on the card. The cards are searchable and you can look at multiple card titles at the same time. NO training is necessary. If you can operate a computer, you can do this."

¶27 "I created a database in Inmagic. The purpose of the database, however, is not to track answers, as I can usually remember those, but to keep track of questions. Having this information helps in proving the worth of having a reference person or, in my case, Cybrarian, around. If you actually keep track of the number of questions—big and small—you get, everyone will be astonished. Bean counters will love you because you are counting beans, too! Downside: it takes time to maintain."