

# Managing reference e-mail in an archival setting

## Tools for the increasing number of reference queries

by Mary Margaret Bell

**G**iven the special challenges in performing archival reference and the changes in user expectations engendered by emerging technologies, what technological and information solutions may be used to acknowledge and respond to reference questions in the archives?

More time is generally needed to answer archival reference questions than library reference questions. According to a 1985 article by business archivist Cynthia Swank, inquiries to her archives required anywhere from ten minutes to fifty hours to answer.<sup>1</sup>

Another issue for archivists addressing questions from remote researchers is the necessity, as Mary Jo Pugh noted, to balance their requests with those of researchers who have come to the archives' research rooms.<sup>2</sup>

While archivists are weighing these time constraints, as well as the arrangement and description of new or backlogged accessions, many researchers believe that new technology should allow them to immediately find the information they seek or greatly expedite responses from repositories or libraries. Archivists need to address the interests of many researchers who are seeking historical information but have never used an archive.

### **Back in Gopher days**

The University Archives and Records Center at the University of Louisville (UL) went online in the early 1990s with the establishment of a gopher site; a Web site was launched in 1995.<sup>3</sup> In gopher days, the archives provided basic information about its holdings, hours, and operations. Early text file versions of archival finding aids were also posted on the gopher.

The current Web site has expanded to provide considerable information on the University Archives' holdings, access to the university's online catalog, additional finding aids, and links to other sites of interest to historical researchers.

At the time of the gopher's creation, the university was using the IBM mainframe e-mail and calendaring system, known as Professional Office System, and later OfficeVision. The University Archives established a service account to receive reference e-mail. This could be accessed by all employees at any time, but to ensure that mail was processed, the duty of checking it regularly became the responsibility of one or two employees. The mail checker weeds out spam or misdirected mail and forwards research inquiries to the reference archivist of the day.

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To account for time needed to respond, we began a practice of notifying senders that their queries had been received, that a fuller response was being researched, and that the specific response would be sent when completed. Within the PROFS/OfficeVision system, this took the form of a stored message that the mail checker sent manually to each message as it was examined. This provided an efficient and more consistent means of acknowledgment, but the notices were dispatched only during the repository's hours of operation.

**New ways to manage questions**

In 1997, the university changed its e-mail software to Novell's GroupWise product, which has an easy-to-use automatic reply feature. (Other popular e-mail programs, such as Microsoft Outlook and Eudora, also incorporate automatic reply functions.) With a condition established to prevent message looping, mail sent to the archives' address now receives an automatic acknowledgment at any time of day, without user intervention. This feature also allows us to send notices that the repository is closed over holiday breaks, or similar messages.

Response indicates users generally appreciate the acknowledgment. Complaints about delays have been reduced, and occasionally users write to thank us for replying so promptly.

As Web browsers improved in functionality, we created a reference question form to assist researchers in providing basic information and to structure the resulting e-mail message for staff review.<sup>4</sup> Links to the e-mail address alone are maintained for any users who may have browsers unable to process forms. The form also provides in-

formation that allows the staff to ask where the inquirers reside, so we may recommend an onsite examination of materials or tailor the response for someone unable to visit the repository. A JavaScript attached to the form requires senders to complete all the fields, but it does not prevent inaccurate information from being entered.

To balance our limited staffing resources, we have sought other ways to manage queries by providing resources such as an FAQ on our Web site.<sup>5</sup> People new to archival research sometimes do not recognize the unique nature of many archives' holdings and expect more resources to be duplicated, as in general library collections. The University Archives FAQ gives a basic description of the nature of archival and primary sources. It also describes our collecting focus and how that focus relates to the holdings of other regional repositories in Louisville and Kentucky. We direct individuals seeking transcripts to the registrar's office and refer questions on such popular topics as the history of old baseball bats and medical school history to appropriate libraries or other institutions.

The FAQ is posted to provide answers to visitors immediately, if they choose to read it; its alternative use is as a ready reference source cited in response to individual questions. Supplying consistent, general answers to frequently asked questions, although not personalized, quickly assists users in finding the information they seek.

The University Archives also uses stored responses to help users with common questions. Such messages allow rapid replies to users sending questions answered by the FAQ or other areas of the Web site. GroupWise and other popular software packages permit user-activated rules—instructions run by command rather than automatically. Thus the mail checker may highlight a query about baseball bats and run a rule that sends the appropriate stored response (which is also included in the FAQ).

Other software applications applicable to assisting e-mail responses are macro utilities, where boilerplate text may be stored and inserted into messages with a text or keyboard shortcut. These utilities, frequently employed in library settings to support technical services, work across

many applications and may be used for frequent phrases, URLs, or similar information regularly dispatched.

An ongoing challenge facing remote researchers and archives are queries requiring more research than can be handled in an archival repository's allotment for reference work. Many repositories have addressed this issue over the years by identifying local researchers who may be hired by the hour to examine materials in-depth. The University Archives now makes its list of local researchers available on its Web site and refers to the list in its FAQ to help distant researchers locate such individuals.

### Conclusion

Despite limited staffing, using the described tools helps meet the ever-increasing queries from larger numbers of new users. Researchers receive assurance that their e-mail did not disappear into cyberspace and that a more complete response is to come. We can spend the appropriate amount of

time providing the answer requested, knowing the user has been advised. Those needing answers to basic questions get quick answers.

The examples used here relate to archival reference, but such tools and strategies may be used to help answer reference e-mail in many library and information settings.

### Notes

1. Cynthia G. Swank, "Life in the Fast Lane: Reference in a Business Archives," *The Reference Librarian* 13 (Fall 1985): 82.

2. Mary Jo Pugh, *Providing Reference Services for Archives and Manuscripts* (Chicago, IL: The Society of American Archivists, 1992), p. 49.

3. <http://www.louisville.edu/library/uarc>.

4. <http://www.louisville.edu/library/uarc/archvref.html>.

5. <http://www.louisville.edu/library/uarc/faq.html>. ■



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