Browsing in the Special Library:
The Caterpillar is not Dead, a Call for Metamorphosis

Charles Hageman Frey, MLIS
Research Librarian
Nelson Mullins Riley & Scarborough, L.L.P.
Charleston, SC
Member, SLA Legal Division

Introduction

Our young hero looks for a book on gold digging, he stumbles around and finds one on gold making, alchemy, he is inspired, he learns a science, he saves the world, he makes millions, all because of one simple accident, serendipity, the product of library browsing. In this example though is our character in the stacks of the New York Public Library, or is he is sitting at a desk staring into the electrified screen of a library catalog? We could see it both ways. We have seen it both ways.

The challenge that lies at the feet of librarians today is how best to cultivate the act of browsing so that information acquisition is maximized. Opposed to our starry eyed patron in my example, the patrons of the special library are not usually browsing for serendipitous pleasure but are in fact on a detailed search. I humbly suggest that while browsing tools have changed in the technological world of today, that basic browsing strategies have not. Therefore while we need to morph certain techniques into a new support system for the special library browser we also do not want to discontinue the old ways completely. Success comes through growth and growth need not be a process of replacement, but simply augmentation.

The Science of Browsing

One of the great debates of librarians in any field is whether we respond to the informational search techniques of our patron base or do we try to direct those techniques into a style we believe is most successful. In reality I believe most of us do a little of both and that applies to the idea of browsing also. For this reason I would like to submit a grave generalization, that librarians are and should be scientists. After all it is not library arts but library science. For this reason I believe the answer to the question of browsing should at least be attempted scientifically, whether the rigors of hard scientists such as physicists gasp at that presumption or not. None-the-less I think identifying what browsing is, why people do it, and how it is done can best help us to equip ourselves to facilitate the success of our patrons.

Browsing is defined as “to inspect something in a leisurely and casual way”[i]. Yet strangely a new definition has arisen lately from the demand of technology, “to look for information on the Internet.”[ii] I actually am more satisfied with the second definition then the first for the world of special libraries, because while browsing can be a casual action, it often does not have a casual motivation. I would like to expand the narrow idea that browsing has commonly been entrusted to only the internet, we as special librarians know better then anybody regarding that. Those not searching for summer reading, which is 99% of our patron base, are looking for some specific information, and just because they do not know where eventually the information will come from does not mean that it is leisurely and casual. Therefore for the purposes of this paper, I would like to define browsing simply as the act of looking for an information resource without having a predetermined resource in mind. In this way, browsing applies to both the electronic form of searching as well as the physical print source searching.

Now that we understand what browsing in this context is, we must identify why people go about doing it. Mostly this is because they can’t find us at our desks, but allowing for a moment of self deception let us assume all the librarians of the world are at a conference so our patrons are left to their own devices and can’t be helped by our brilliance. This in real life is often true, whether patrons are at home, school, or in the office, the librarians of the world are not always accessible. Without the availability of assistance patrons browse for one simple reason. They do not know where to find the information they need. To a lesser degree they may do this even if librarians are available for assistance based on fear of our intimidating stature, or ignorance of our skills to assist them, but none the less the patron finds themselves on their own. It may be in the library it may not, so they look through the resources and try to determine if there is one that will satisfy their information need. Ultimately browsing is just another action the patron does to fulfill an information need, but this act is more undefined because it is not a matter of an A to B process but instead a journey with only the end in mind without knowledge of the path.

It is this path that has changed over the years. Originally the path to the perfect source took wandering the halls or catacombs or whatever store house there was of paper books. Trying to determine from the etchings on the spine of a book whether it may have a chance in answering your question can be quite challenging. Maybe if you were lucky there was a list that had information about each item so that instead of physically walking from item to item, opening and reading, determining, returning, and continuing, you could actually sit. Sitting while letting your eyes look over what became a catalog was the first great step in browsing advancement by the ancient librarians. Well I guess in reality the first was allowing people other then the keeper of the tablets, scrolls, books, to actually look through the materials themselves, opposed to relying exclusively on the librarian’s good nature and fine memory. Once patrons were allowed behind the desk, into the stacks of books, browsing became an integrated part of every library. Then with the concept of a record, followed by the idea of a detailed record, holding such things as subjects, the browsing activity exploded with subject classification.

From that point we settled into a fairly steady predictable stream of patron browsing and library support. Where do I find how to build a canoe, in one of those, or maybe this one? Then the advancement of classification systems, first localized and then universal, got sophisticated.

Collected items into methodical subject areas and was a browsers dream developed. Predetermined ways to group books into categories of subjects, which would facilitate not only browsing in a specific library but from library to library, it was brilliant. I could look in the HG 500s at Harvard, and if they didn't have what I needed, I could walk across Boston to MIT and look at the HG 500s and immediately compare to see if they had anything to help. Sometimes, you might get caught between Dewey and Library Congress but still it had improved the tools we gave patrons to make their browsing more successful. Remember the problem with browsing is the patron doesn't even know if their information exists in your collection so you must facilitate the process as much as possible before they become exhausted from elapsed time, and conclude that the information is not there. The Librarian tragedy of course is when a patron exits without having gathered their desired information when in fact it was among the library's resources all along.

Tools help us avoid this disaster. It has always been about tools for the librarian, whether we are the tool ourselves, or we create scientific devices and methods to assist our patrons with their core information seeking when they are on their own. Since classification it has been hardware and not methodology that has made the biggest advances in library technology. The ultimate of these hardware items of course is the personal computer. This has allowed patrons on a grand scale access to computer databases that hold various forms of the catalog, or some kind of representation of collection holdings. Along with this proliferation of the computer is entwined the Internet which allows a computer anywhere to access any public online catalog or database in the world. This freedom from location has transformed the act of browsing from a completely local activity that can only be done in a specific area, to a truly virtual experience where the patron can browse a collection from any computer anywhere on the planet. This has obviously changed the dynamic of browsing itself.

We as a technological society are not yet at the point where a virtual reality is readily available in which a person can electronically simulate the act of physically walking the book stacks and viewing resources as they do in person in non-virtual, or real, life. This may come one day, along with another discussion paper from me, but it would put even more of a hardware commitment on the user then we have now. Therefore I am going to proceed with the distinction that electronic browsing from a computer and physical browsing from inside a print library collection are two different techniques. Our job is to identify how the electronic technique has either superseded or complemented the more traditional physical style of browsing, and then how do we facilitate the successful and effective use of the browsing act.

World of Special Libraries

Our analysis for these specific purposes has to do with special libraries. This makes our data unique from both public libraries and university libraries. Whether my data collection and the conclusion I draw from that data applies to these other types of libraries I leave to future interpreters, but I am focusing on special libraries with their unique customer base, specific collection characteristics, and distinctive facility structure.

The special library that I was analyzing was a law firm library. Obviously one of the challenges of any special library analysis is that in reality many special libraries are singularly unique, and that a law firm library may be difficult to compare to a research library at the DuPont labs. However, I think that there are insights to be drawn and I hope my use of a law firm library does not exclude this data or the conclusions I have drawn from any relevance to other special library situations. Now within a law firm library there is a client base of attorneys, paralegals, administrative assistants, and staff. I surveyed the browsing techniques of only the attorneys and paralegals as these people make up the direct users of the library and hence the true potential browsers of the law firm library. Their characteristics like those of most special libraries are not one of pleasure, or scholastics, but instead of business, client business to be specific. Therefore their habits are serious and pressured. They want to have their information needs satisfied as quickly and easily as possible so they can move on to the direct business at hand. The library is a pure support system that allows them to do their work, which makes the firm money and allows the library to continue to exist. Like many special libraries, a grave distinction compared to other libraries, without success in their informational support of their client base, their existence would most surely be in jeopardy as would the librarian job. This gives ours patrons a unique characteristic, which in turn gives us a special kind of motivation to identify, analysis, support, and succeed. This success begins with one thing, the collection.

The collection of a special library is much more tailored then those of other major libraries. Since money for the collection is tied more directly to the success of those resources, often collection development is guided more by patron demands then librarian acquisition ideology. That is not to say there are not many collection choices the special librarian makes, it is just that those choices are more tempered in nature. In that we often think down to the very name of a patron who may use an addition we make to the collection. Anything deviating from this amount of specifics risks a general malaise from the purse string holders over resources that are not being maximized. This actually creates an environment in the collection where most patrons are familiar with a specific area and a designated list of resources, and they rarely stray from that niche. Their browsing often comes when they must stray, a banking lawyer has a securities need, a family law paralegal needs support on tax law. It is in these situations that browsing the collection comes into play, and when the collection must meet the demand of quick and positive support. The 80-20 rule of the large public and collegiate libraries is just an impossible thing in the special library that we struggle against all the time with our collection development. Not to mention the constant attempt to integrate the wonderful electronic availability of many resources, while still keeping the collection a complete unit. The law firm collection I looked at has both print and electronic resources, as you all do I am sure. Integral to the collection use, of course, is the physical presence of the resources.

The facilities of a special library many years ago often looked similar to miniatures of the university and public library structures. Now the huge libraries and the special libraries have taken a departure from each other. Many of my comrades have lost their designated library space all together, and find themselves sharing a file room as the “library”. Even worse are the pressures stemming from the myths of complete electronic availability, they have caused the loss of massive amounts of space from special libraries. If you can hold onto an area for print materials these are often delegated to the back of the patron mind as a second tier resource to whatever you have put together electronically. While our big brother libraries get coffee shops

and computer centers, we get closets, and dictates of electronic superiority. The physical area of my surveyed law firm library is a non-central location with collapsible shelving and some free standing shelving. While this allows for traditional browsing, there are also the virtual stacks which can be accessed via an online catalog. The online space has no constraints with regard to size of course, and one might feel people would wander there all the time but indeed my survey found things quite different.

The Data

My questionnaire was submitted to two office branches of the firm, and only to the paralegals and attorneys at those locations. Of the offices surveyed 31 out of 75 responded to a 2 question survey (see Appendix). The survey asked if they browsed the physical library or the electronic catalog, and how often they did either of these activities. As you can see from Figure 1 the browsing technique people used the most was physical browsing. 25 people said they did some kind of physical browsing while only 15 said they did any electronic browsing at all. Therefore the conclusion is that print browsing is not just still alive but it still dominates electronic browsing. People still make the trip down to the physical library to browse even though their desktop is perfectly capable of giving them the experience electronically. The amount of browsing is a different story.

You can see from Figure 2 that while 52% of the people surveyed did not use electronic browsing at all there was 6 percent who identified themselves as using it “often”, along with 16% who said “sometimes”, and 26% “rarely”. This is an interesting contrast to Figure 3 which states about the same percentage of users as “often”, but “sometimes” use is over double that of electronic and “rarely” has a significant increase compared to that of “rarely” electronic browsing. The fact that the “sometimes” users are so much higher and that this is where the bulk of the physical browsers come from, tells me that the traditional browsing techniques are still ingrained in our minds, whether it be from school, or wherever. Now in the future this may change but to support our client base now, we do not want to attribute to them futuristic characteristics that they in reality have not yet acquired. This is who they are, the in-betweens, still in the comfort zone of the pre-electronic. When they are confused or wandering for resources, the go to what they are comfortable with, what they are used to, and that is the physical print browsing. There has been much talk about technological advances and grand internet electronic techniques to help increase browsing from a desktop, but from this data I would claim we need not abandon the print collection and it’s role in the act of browsing.

Figure 1.

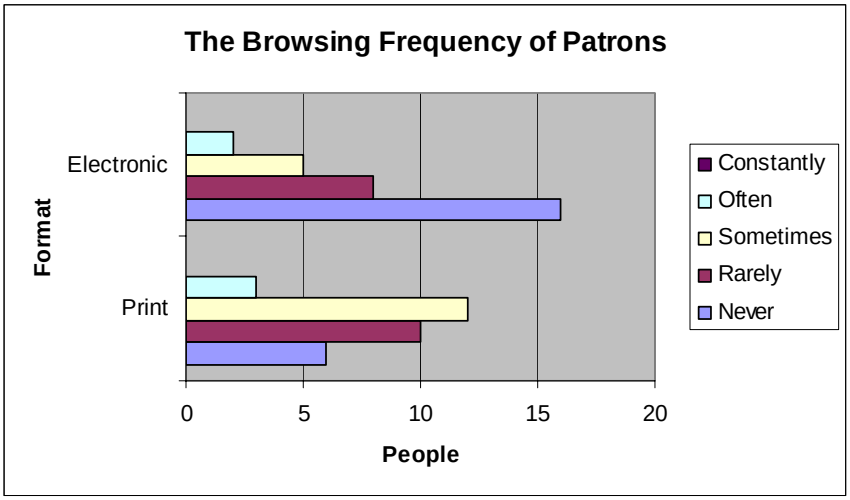


Figure 2.

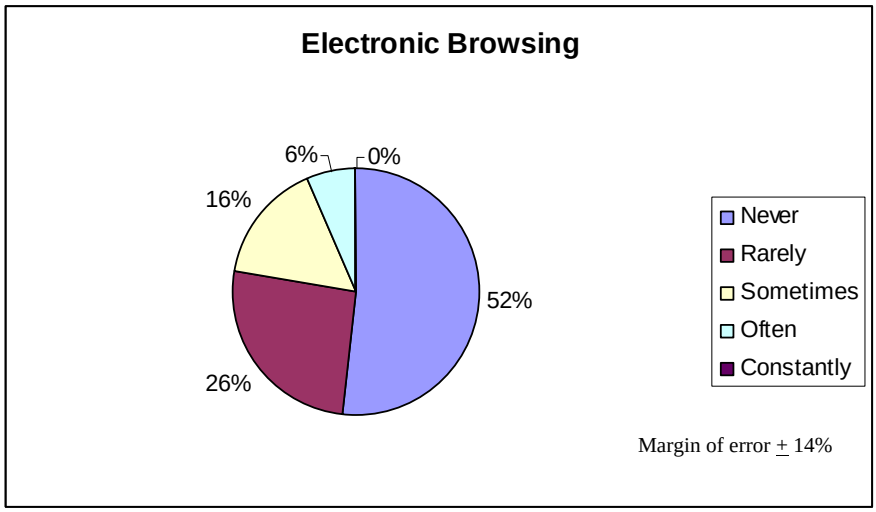
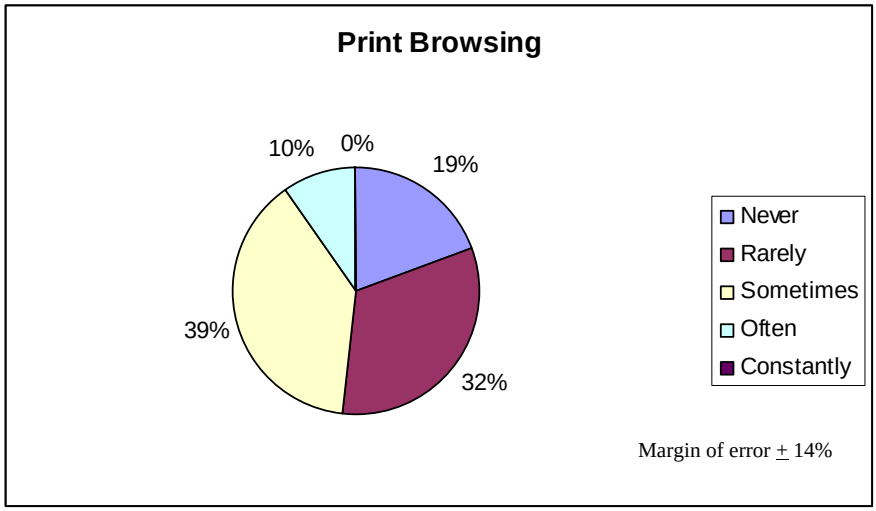


Figure 3.



Response to Data

PRINT BROWSING

After data collection and analysis we want to change our system so that we serve our patrons better, and I think we need to do this in both the electronic and physical print arena. First let me address the print collection stacks, since I believe these are being used for browsing much more then people still realize. Obviously though all our resources are no longer print, so how do we get the physical browsers informed about the digital items they are not seeing. I know some people are going to be hesitant to facilitate the physical browsers because it is difficult to support this activity or at least more difficult then electronic browsing but I think there are several simple things that can help us do this successfully. One thing that librarians have been using for years is book dummies. I know that many libraries use book dummies to signify to their patrons items that are in storage. You may have a set of journals and keep the old edition in storage or simply in a different part of the collection, and book dummies have been used very successfully to redirect patrons. Why not use this idea for the browsing patron who needs to know about your electronic resources. If you have a book dummy next to the tax management portfolios that simply reads RIA Checkpoint, then anybody browsing for tax help will know that there is also an electronic resource that may be able to help solve their information need called RIA Checkpoint. They are book dummies, they look like books, they fit well into the collection, they will not be obtrusive, and they could facilitate electronic use very well. Low cost, simple technique that could have huge benefits for your physical browsing patrons.

Like the book dummies I want to use old techniques and transform them into tools for use today that helps integrate our electronic and physical collections, because we know from gathered data that patrons are still coming to the library to physically browse. Another old tool I want to use is the print index, a list by title of electronic items in a subject area. I know in the larger public and university libraries this would seem excessive and intimidating to many patrons who are browsing. They do not want to pick up a book that is an index and read it looking for items of interest, but in the special library I think this could be small and localized. Most special libraries, I know mine does, has odd binders, or treatises, spiral notebooks, let's say non-traditionally bound materials, so what would be the harm in having a couple strategically placed lists of electronic resources divided by subject. That way when somebody is browsing for securities materials and they don't see the CCH Federal Securities Reporter on the book shelf, they browse for 2 seconds through the subject list and see that the CCH Federal Securities Reporter is an online resource under the securities subject heading. I know browsing physically is more of a body activity then a reading activity, but what is electronic browsing. In many ways at its basic level electronic browsing is all reading lists, so why not again give them the opportunity. It may not help everybody, all your physical browsing patrons may not pick up the indexes, but some might, and again I think it is an easy, cheap, non-intrusive tool that may have benefits to the clientele.

Finally I have one last item to get the physical browsers into the electronic resources, because I think that is the crux of our objective. We want those who are browsing the physical print resources not to be denied the knowledge of electronic resources just because they chose to

browse via the physical library stacks, rather then from their computer desktop. Again, the collection is our core tool to support our patrons, browsing, is their attempt to find something in the collection. We need them to see the whole collection or we are losing our fundamental battle with information needs, we can't help them with half our resources, we need everything we have to help, to succeed. Therefore my third idea to keep them abreast of electronic resources is website labeling on the actual print materials. I know that many of the special libraries have historic or valuable materials that don't allow this as a possibility, and for that purpose I would refer you to the book dummy idea which gives you basically the same function without vandalizing any materials. However, in the law library and I know in some of the other special libraries out there, we have materials that may be out of date or discontinued but are held for historical or reference purposes. Often these items are labeled with stickers that identify them as superseded or discontinued so the patron can use them but use them in the correct way. Now I claim that since we are doing this already with some of our resources that have been discontinued in print but are still available online why not increase the sticker use. One example is that zoning codes in some places can only be found online now, and I know that some libraries have stickers indicating this on the old zoning materials. They may even have the actual website that you need to go to see the current zoning code. Why not increase this usage, not just on outdated materials but on current materials that have companion websites or electronic resources. It is almost like a subject index resource list for each book. Obviously this item could be more work then we would like, and I wouldn't recommend doing it for all your resources, but identify strategic points in your collection where it might be helpful. Let's say you have a federal sentencing guidelines handbook. A sticker with the website of the Federal Sentencing Guidelines Commission, I think could be safe. It would be helpful to the browsing patron, it is probably a very stable website, so you would not have to be concerned with updating, or changing, and it is not a website that browsers in the health law area are going to care about, it is a very specific item. Which is what we are trying to do, browsers in a special library already know the question they just don't know what resources to use to answer it. Let us help them the best we can.

We don't want to put up a sign that says, "Closed stacks all browsing must be done online". While that is tempting, I know. We are still facilitating whatever informational seeking technique our patrons are using, and if one of those techniques is physically browsing the print collection. Then let us try and help them see all the possible resources at their disposal. We want to help them through whatever technique they choose to discover where information is located. These three simple items, book dummies, paper indexes, and website labels I think are quick, easy, cheap, and yet potentially very helpful to our browsing community.

ELECTRONIC BROWSING

Now obviously much of our patron base is using the online catalog and browsing electronically. While cementing one foot in the old way, I am not aghast or opposed to the electronic browsing that is obviously going on and will continue to grow. Laura Cronk, Director of Information Science at Wilmington in 2002 said in an interview, "I think people are still grappling with how you browse electronically. I think it took time for users to get used to the electronic, but I think now they enjoy it."[iii] My agreement with Ms. Cronk is complete, but what I want to stay away from is the implication that this acceptance of online electronic browsing has made people abandon traditional browsing techniques. The key is to address both, so while I

think the data supports that physical print browsing needs to continue to be supported, I am not one to reject the idea that we must continue to embrace the new electronic browsing concept also. I think the tools of electronic browsing have been discussed quite often in other areas of the library community with regard to library portals, Amazon like websites, and information gateways. I just want to run through a few things that I think again, will make sure our electronic browser is getting access to the entire collection. It always surprised me that the online catalog seemed to continue to serve the browser well in regard to the physical collection but that it was also deficient with regard to the electronic collection, even though the browsing itself was electronic.

Amazon has often been sited as a good example for electronic browsing, with their "look in" option, colorful cover page displays, tables of contents, and you-might-also-enjoy-this sections, all of which is great. I whole heartedly suggest you implement these things, if you are a computer genius, have a large staff of computer geniuses, and a lot of time and money on your own hands. I would say go nuts, scan in ever cover page, table of contents, if you have one of the super Library management systems you probably already have the subject indexing linking record to record. However let me make a few suggestions to keep in mind. First of all browsing electronically is often still reading lists, not looking at the colorful title pages. It's cool to click on a book and see the colors, but is it needed. Actually in the legal field sometimes it is, as with any human the legal patrons often remember the book they want by sight and not name.

All that being said the first idea I want to speak about has been around for sometime, but I think needs to be re-emphasized because it is the most important. Make sure your OPAC has all of your resources in it, no matter what the format. I know it is difficult, but catalog everything, every website, every CDROM, every electronic database, full catalog records, Dublin Core, whatever you want to do, just allow me to literally find everything you have paid for in the catalog in one form or another. I don't mind if it is only a bare bones list of titles, but make sure everything is represented. The patron doesn't want to waste time browsing if they aren't even browsing everything available, so please place all media from print to Holograms in the database catalog.

Now if you're going to spring for the high dollar system that has all the bells and whistles then makes sure your patrons know how to use it, educate them on subject headings, direct linking, table of contents availability, everything you have. This is your browsing highway. If they understand how to navigate on it then they understand how to browse electronically. Other then that they are just doing random searches hoping to stumble onto a keyword title or classification section that is what they want. Along with this tell your library system editors we want subject heading title browse. In other words, I want to click on a subject heading, have all the titles listed in alphabetical order like when I do a normal title browse. I also want to call number browse, let me see within a subject heading all the sort options that you have in your initial catalog system search. Big places like the University of Chicago and their Horizon system have this, why not the technology for the special library. These are the electronic catalog tools that give electronic browsing its power.

The main point in supporting the ability of your patrons to browse whether it be electronically or physically is to make sure they are browsing your whole collection. If they are

browsing on the computer, make sure they have access to see the holdings of your library in all formats from the dusty books on the shelves to the multi-media electronic database you have online. In turn, be sure that when the customers are wandering your stacks, or whatever you have now that serves as your physical library, that they too are getting the most for their browse. Make sure that you give them the option wherever they are to see as much as they can, so as best to make a browsing choice, and then hopefully discover a solution to their information need.

Conclusion

Let us return to our initial question, how do we help our patrons browse better. First we found out that while we personally may wish all the patrons were now browsing online, or perhaps we wish it was yester year and they were all still browsing in the physical stacks, the reality is they are doing both. Surprisingly, to me, more are still browsing in the classic sense, walking the physical book stacks and trying to find a resource that will help them. While online browsing is occurring it has not transformed everybody yet. This makes our position as librarian difficult at this time in history because we are transitioning. We may or may not ever transform completely over to electronic browsing, who knows, but we are definitely not there yet. Therefore we must be experts in supporting both formats of browsing.

Alas, doing two things is always more difficult then doing one, but I think we must try the best we can to spread ourselves across in support of all the patron browsing today. This means still doing physical support in the stacks such as book dummies, indexes, and website labeling. It does not mean, however, that we can abandon our responsibility online. The trouble is that online the browsing is often more supportive of the physical print materials even though they are browsing in an electronic format. We must remember to link through the catalog with all our resources no matter what the format so that electronic online browsing is not a replacement for physical browsing with all its negatives, but instead a new technique with never before seen positives. We use the electronic options to expand browsing capabilities, so they are seeing the physical collection and the electronic collection in the same browsing actions but with even more browsing tools at their disposal.

I know we are all very busy just trying to keep the library alive, let alone enhancing the browsing features, but I do think this is a support activity within our grasp. We are different from the larger general libraries, because we can access our patron group easier and address their needs more specifically. Therefore I ask that you take this paper as a brain storming exercise of suggestion. Maybe these items are perfect for adoption in your library, or perhaps they spark ideas within your own structure that are similar or different, but none the less the point is to find new ways to better open the entire collection to your patron base while they are browsing.

It is change that ultimately the librarian must address. New technology, creates new opportunities, new thinking for people, which moves a change in the world and the library must change too. As I mentioned this point in time is more volatile then most, but we still must resist the desire to over react in either direction. Trying to hold onto the old style completely will only lead to out of touch disaster with our customers. Though, it is possible that the more dangerous response is to reject what we were doing in the past completely and find ourselves jumping too

far ahead to where the patron base has not yet reached. This mistake would alienate our service community from what they once knew, and only frustrate them with things they do not understand. Forward thinking is good, but not at the expense of customer support. It is for this reason that I call for us to roll down the middle of past and future, and try to carve out a line that holds on to the parts of the browsing past that still apply, while incorporating the new changes that the evolving world has done to our patrons, and their library browsing. This form of browsing support, grown from the old but transformed into a new, will give special librarians the opportunity to be successful in our support of patron browsing today.

Appendix

Law Library Survey

Question 1:
How often do you physically go to the library and
Browse for an item?
1. Never
2. Rarely
3. Sometimes
4. Often
5. Constantly

Question 2:
How often do you go to the online library catalog and
Browse for an item?
1. Never
2. Rarely
3. Sometimes
4. Often
5. Constantly

Endnotes

[i] Berube, MS (editor), *American Heritage College Dictionary*, 4th edition. New York: Houghton Mifflin Company, 2004, p.185.

[ii] Ibid.

[iii] Shaver, Leslie and Nikki Enright, "The Day of the Electronic Library", *Information Outlook,* 6, no. 8 (August 2002).

BIBLIOGRAPHY

Daniels, Wayne, “Browsing Your Virtual Library: The Case of Expanding Universe”, *Library Hi Tech*, 15, no. 3-4 (1997): 119-126.

Feng, Ling, Manfred A. Jeusfeld, and Jeroen Hoppenbrouwers, “Beyond Information Searching and Browsing: Acquiring Knowledge from Digital Libraries”, *Information Processing and Management*, 41 (2005): 97–120.

Italie, Hillel, "Booksellers Ponder the Future of Browsing", *The Cincinnati Enquirer*, June 7, 2005.

McKay, D. and S.J. Cunningham, “Browsing a Digital Library: A New Approach for the New Zealand Digital Library”, *Lecture Notes in Computer Science. no. 2911*, (2003): 329-339.

Mikel, Walter, “Site of the Month: Do we Browse? Dewey ever”, *School Library Journal*, 47, no. 12 (2001): 26.

Reach, Catherine Sanders, David Whelan and Molly Flood, “Feasibility and Viability of the Digital Library in a Private Law Firm”, *Law Library Journal*, 95 (2003): 369-382.

Sumner, Tamara, Faisal Ahmad, and Qianyi Gu, “A Web Service Interface for Creating Concept Browsing Interfaces”, *D-Lib Magazine*, 10, no. 11 (November 2004): 1.

Tan, K. F., M. Wing, N. Revell, and G. Marsden, “Facts and Myths of Browsing and Searching in a Digital Library”, *Lecture Notes in Computer Science. no. 1513*, (1998): 669.

Whisner, Mary, “Practicing Reference . . . Alphabetical Order and Other "Simple" Systems”, *Law Library Journal*, 96 (2004): 757-763.

Witten, I. H., “Browsing around a Digital Library: Today and Tomorrow”, *Lecture Notes in Computer Science. no. 1848*, (2000): 12-26.