

## **Are We Getting Warmer? Query Clarification in Chat Reference**

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The *Seeking Synchronicity* web site: <http://www.oclc.org/research/projects/synchronicity/>  
has additional information about this research project, including the Power Point slides and handouts  
for this presentation.

This research is an outcome from the project: *Seeking Synchronicity: Evaluating Virtual Reference Services  
from User, Non-User, and Librarian Perspectives*. It is funded by the Institute of Museum & Library Services  
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## **Query Clarification Classification Scheme Outline**

**Juicy Quotes**  
(Clarifier)\*  
    **User**  
    **Librarian**  
(Clarification)  
    **Yes**  
    **Scripted**  
    **No**  
    **No Clarification Necessary**  
(Type of question)  
    **Open Question**  
    **Closed Question**  
(Query type)  
    **Self-Generated Query**  
    **Imposed Query**  
        **School assignment**  
        **Work related**  
    **Unknown**  
(Stage of interaction)  
    **Before Searching**  
    **During Searching**  
    **After Searching**  
(Information Sought)  
    **Topic**  
    **Search History**  
    **Background**  
    **Extent/depth**  
    **Type of Resource**  
**Verification**  
**Correction**  
**Follow-up Question**  
**Referral Question**

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**Query Clarification Classification Scheme for Virtual Reference Interactions**  
**Node Descriptions & Transcript Examples**

<b>Nodes</b>	<b>Description</b>	<b>Examples</b>
<b>Juicy Quotes</b>	Prime examples of any particular code below. Also includes examples of rare or unique occurrences in transcripts.	N/A
(Clarifier)		
<b>User</b>		N/A
<b>Librarian</b>		N/A
(Clarification)		
<b>Yes</b>	Occurrence of clarification.	N/A
<b>Scripted</b>	Use of canned script for clarification.	[Is this for a school assignment? If so, what grade level so I don't give you something that is to difficulty or too easy.]
<b>No</b>	Absence of clarification.	N/A
<b>No Clarification Necessary</b>	In light of content/detail of user's question, no clarification is necessary on the librarian's part. "We all know that some questions need no negotiations – such as when the physical library is open, does the library provide a given service, or how to access databases when off campus. We know these questions do not need to be negotiated; because once the customer has the answer, they are gone. They hang up the phone or sign off of a chat service, sometimes without even saying thank you, thanks, or tks" (Kaske, 2004, p. 295).	U: "I cannot find the Writ of Execution form online with the other forms. Please direct me."** L: "That's form no. EJ-130. Here's the link:"
(Type of question)		
<b>Open Question</b>	"Questions are open when the response is left up to the respondent; when they cannot be answered 'yes' or 'no'" (King, 1972, p. 158). "Open questions... allow users to respond in their own words and do not limit answers to the narrow range of choices presented by the closed question: open questions are invitations to talk" (Dervin & Dewdney, 1986, p. 508).	L: "How are you hoping to use this information?"

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<b>Closed Question</b>	<p>“Questions are closed when the respondent does not have a choice in his response other than those provided by the questioner” (King, 1972, p. 158).</p> <p>“Closed questions... limit the expected range of response to a ‘yes’/‘no,’ ‘this’/‘that’ answer... a closed question always restricts the freedom of the user’s response” (Dervin &amp; Dewdney, 1986, p. 508).</p>	L: “Do you want the Trenton or Washington representatives?”
(Query Type)		
<b>Self-Generated Query</b>	User identifies a personal information need and asks a question. “Self-generated questions arise from the context of a person’s life and are pursued by the person who is asking the questions” (Gross, 2005, p. 164).	U: “I want to plan a camping and rock climbing trip to Pilot Mountain. Do you have any recommendations?”
<b>Imposed Query</b>	“Imposed questions occur when the person who constructs the question asks someone else to transact it.” (Gross, 2005, p. 164).	See examples below.
<b>School Assignment</b>	Clarifies school-related project requirements. “How is the information going to be used?” (Katz, 2002, p. 133). “Why does the enquirer want this information?” (Taylor, 1968, p. 129).	U: “For a history project, I must do a poster diagram of the evolution of pyramids from masatbas to step pyramids to straight-sided pyramids. Please find me websites and books (at least 1 book) with information on these different types of pyramids.”
<b>Work Related</b>	Clarifies work-related project requirements.	U: “I work for a Poli-Sci professor and she needs some information from "The Working Press of the Nation" (magazines and internal publications directory). We don't have a copy of this on campus, and I haven't been able to reach the Reference desks of the 3 area libraries that have the book. Can you help?”
<b>Unknown</b>	Unable to determine origin of query.	U: “who is the state rep for nj”
(Stage of interaction)		
<b>Before Searching</b>	Clarifies before beginning of search or at the beginning of interaction during or immediately following greeting ritual.	N/A
<b>During Searching</b>	Clarifies after searching has commenced or in the middle of interaction.	N/A

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<b>After Searching</b>	Clarifies immediately before or after closing ritual.	N/A
(Information Sought)		
<b>Topic</b>	Seeking or offering additional information on topic. "...the primary purpose of negotiated subject definition is to provide some general delineation of the area... continued dialogue on the ramifications and structure of the subject will define, expand, narrow, and qualify the enquiry" (Taylor, 1968, 128).	L: "Where did you hear this term, in class?" L: "Do you mean what natural resources?" L: "What kind of advertisements are you thinking about or considering?" L: "I'm not finding that title. Do you know anything about it?"
<b>Search History</b>	Clarifies sources and strategies already used. "How much information does the user already have about the topic?" (Katz, 2002, p. 133).	L: "Have you tried the last four digits of your phone number" L: "Where have you looked for an answer to your question so far?"
<b>Background</b>	Clarifies personal background characteristics of user. This question "in the negotiation process has to do with the personal background of the inquirer... Answers to these types of question have relevance to the total negotiation process... in short, it is the context, the environment for the negotiation process" (Taylor, 1968, p. 129).	L: "Are you at uni?" "...what year are you in?" L: "Is this for a school project?" L: "...can you tell me more about your project..." L: "Can you tell me a bit more about your assignment?"
<b>Extent/Depth</b>	Clarifies extent/depth/amount of information sought. "What degree of sophistication is required?" "How much is needed?" (Katz, 2002, p. 133).	U: "the thing is i need it to be simple and not to wordy so its easy to find the information that i need"
<b>Type of Resource</b>	Clarifies type of materials or formats for desired resources. "What kind of information is needed?" (Katz, 2002, p. 133).	L: "Are you looking for books, articles, or online information?" L: "What sort of materials or formats are you interested in?" L: "Are you trying to find titles of e-journals, by keyword? Or, rather, are you trying to find individual articles?"
<b>Verification</b>	Clarification by confirming/paraphrasing/summarizing. "In any interview, no matter how short, it is wise to summarize the question of the facets of the question. The client may then correct or modify the librarian's response" (Katz, 2002, p. 131). "Other times, the librarian would echo the patron's request in question (or question-like) form, either using the same words or paraphrasing what the patron had asked." (Ford, 2003, p. 250).	L: "You want a web site on Brown vs Bd of Educ?" L: "So there was some kind of vote in your county back in 2000? Is that correct?" L: "OK so it sounds like you want to protest the election results."

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<p><b>Correction</b></p>	<p>One corrects the other's misunderstanding. "...many of the questions asked – by librarians and patrons alike – moved interactions along by confirming understanding, and repairing misunderstandings." (Ford, 2003, p. 249).</p>	<p>U: "i know you can access it as a student for free"  L: "Yes, you can get into westlaw for free, but from what i can tell this is only access to legal information and laws, not individual criminal records"</p> <hr/> <p>L: "Do you eam the John Stevens who was the cheif engineer of the Panama Canal?"  U: "No John Stevens III, He was the father of American Railroads"</p> <hr/> <p>L: "There is a book called Heroes of the Holocaust by Arnold Geier."  U: "no herous of the holocaust by allan zullo and mara bovsun"</p>
<p><b>Follow-up Question</b></p>	<p>Confirming user has received the correct information and in an ample amount. "The follow-up question can help fix some of the problems which may occur during a reference interview (such as miscommunication, not understanding the question, faulty assumptions, etc.)..." (Durrance, 1995, p. 254).</p>	<p>L: "Does it give you the info. you need?"  L: "Does this answer your question?"  L: "Do you think you can use what I've given you here?"  L: "Does this completely answer your question?"</p>
<p><b>Referral Question</b></p>	<p>Librarian asks if user would like to be referred to another librarian subject specialist, or another reference mode, for follow-up to the query.</p>	<p>L: "I'm not having much luck, a business librarian might know of a source I am missing, Can I have one contact you back via email?"  L: "Would you like me to forward it for followup by email?"  L: "There is a library in NJ that specializes in business questions. Would you like me to forward your question to them?"</p>

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