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10-16-1992

Reality Check: Instructing Patrons in CD-ROM Use

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Original Citation

Ballard, Rochelle R. and Meg Scharf, *Reality check: Instructing Patrons in CD-ROM use*, presentation given to a joint meeting of the Florida Chapter, Association of College and Research Libraries and the Florida/Caribbean Chapter of the Special Libraries Association, Tampa, FL, 1992.



Reality Check: Instructing Patrons in CD-ROM Use

Presented by Meg Scharf and Rochelle Ballard at the Fall meeting of the Florida Chapter of the Association of College and Research Libraries and the Florida/Caribbean Chapter of the Special Libraries Association, Tampa, FL, October 16, 1992

When we began to put terminals for CD-ROM use out on our Reference floor several years ago, patron reaction ranged from outrageously high expectations to computer phobia. We still receive requests to be shown "the computer with everything on it that I need" or to be shown how to get information "in any other way besides using a computer". So for all patron groups, learning about CD-ROMs is a reality check. They discover what they can really expect to find by using CD-ROMs, and that often the benefits outweigh any momentary anxiety over keying in the correct terms and commands. For public service librarians, instructing patrons in CD-ROM use is also a reality check. We welcomed these new tools with enthusiasm and found that we needed to return to earth and plan how instruction was to take place. We believed--correctly-- that these new tools would bring in patrons that had never used the Library as more than a study hall, but once the CD-ROMs were installed we found that we needed a strategy for patron instruction. At UCF, we have 13 terminals with CD-ROM readers and 2 online systems. Most of them are dedicated to one particular database, such as MEDLINE, or shared by bases using the same software, such as Wilson's Social Sciences Index and Humanities Index. 11 of these terminals are located in the index area closest to the Reference Desk, in full view of the librarians staffing the desk. The other two terminals are housed in subject areas: one in the

area housing the Patent and Trademark materials, and the other in Government Documents. Instruction aims to give the patron information on the contents of the database, how to retrieve the information, and "housekeeping" details such as leaving the terminal on, reserving a terminal for personal use, etc.

Instruction is carried out in several ways at UCF: Individualized at the Reference Desk, CD-ROM instruction integrated into regular Bibliographic Instruction sessions, Informal group sessions called Infozaps, and through the instruction sheets available at the bank of CD-ROM terminals.

At the Reference Desk, instruction can result from a question directly aimed at a particular database, or from a request for information that can best be obtained from a CD-ROM. Most of you here today have probably experienced what we have at UCF: volume of patrons has increased while the number of public service librarians has remained static. So our policy on the individualized instruction at the Reference Desk has sprung from our own daily reality check.

First of all, we see our service at the Desk as an extension of the teaching function of the University. Those of you in public and special libraries are, by the nature of your institution, more interested in the destination than in the journey: Your patrons expect you to deliver the answer. We are more interested in instructing the patron so that they can find the material or the answer on their own. We tend to view our CD-ROMs primarily as tools for use by the end-user, for our patrons. All of our CD-ROM databases are menu-driven. We have documentation, our own instruction sheets, and thesauri located next to each terminal in an effort to let each patron learn

on his or her own. When patrons approach the desk for assistance with a CD-ROM, or ask a question which can best be answered by using a CD-ROM, we encourage them to get started--that is, to try to use it themselves --either by taking a tutorial or by reading the instructions available or by using the menu. Of course, we briefly explain the content of the database and briefly explore its applicability to the student's needs. We tell them to come back in a short time with questions. We often try to check back with these patrons and often find that they have been able to help themselves and simply need a few brief questions answered or refinement of their search strategy. If the patron needs more in-depth help, we will do a demonstration aimed at their particular search strategy, and then instruct them on use of the thesaurus, suggest searching on related topics, or using the menu to print or download results. We have noticed that often our demos draw a small crowd. Students using printed indexes or other tools nearby will come over to watch. In these demonstrations, we try to emphasize what can be done to perform further research rather than emphasizing the results. We don't have statistics to prove this, but over the course of time it seems that the questions on our CD-ROMs are more sophisticated and more quickly answered, and the need for these informal yet full-blown individualized demos decreases.

Our second approach to instruction is to include CD-ROM demos as part of our regular, faculty-requested Bibliographic Instruction(BI) sessions. We typically teach over 100 of these per semester. Most of our classes are 50 minutes long. The BI sessions are requested by a faculty member who wants to familiarize students with

the basic research tools needed to support work in that particular class. *Throughout the class*, the librarian presents the same example to demonstrate the use of those tools, building the lesson plan around devising search strategies for that example and their applications in those tools. Our aim is to demonstrate the use of the CD-ROM in such a way that the printed tools and the online catalog are not de-valued. We want to present CD-ROM use simply as another research tool--not the beginning and end of research. We've found that a short demo on one or more CD-ROMs near the end of the 50 minute session is usually most successful. If presented at the beginning, students will invariably ignore the printed tools--no matter how vital to the subject. Our BI classroom is equipped with a CD-ROM reader, a PC, and an Infocus LCD panel, enabling us to show images on the overhead projector as they appear on the screen of the computer. Since the demo is a rather short one, students are given the appropriate handouts and instruction sheets, and are invited to ask questions at the desk or to stay after class--if time permits--for more detailed instruction.

We've all heard the saying, "Those who can, DO; those who cannot, TEACH". This does not work in CD-ROM instruction--librarians must know the workings of a database to present it to students. Rochelle Ballard will address our librarians' learning of new databases, as well as our other two approaches to use instruction.

REALITY CHECK: INSTRUCTING PATRONS AND STAFF IN CD-ROM USE

Presented by
Rochelle Ballard and Meg Scharf
October 16, 1992, Tampa, Florida

As stated earlier, the UCF Reference Department houses 13 cd-rom databases and 2 online search systems. These databases are purchased from 10 different vendors. 10 vendors mean ten different search protocols or command systems to learn. How do we accomplish this? How do staff members remember all the commands for so many systems? We try to manage this by conducting workshops and preparing help sheets for each cd-rom database. Before a new cd-rom is placed out on the Reference floor, it is first held back in the Reference Department. This gives the Librarians and Staff an opportunity to learn the system and hopefully become familiar and comfortable with it before it is placed out on the floor for public use.

If a new search system is especially cumbersome or difficult, a workshop is held for librarians and staff. These workshops are informal and what I like to call 'we'll teach each other' sessions. Librarians are encouraged to search the database before coming to the workshop and bring any notes or problems encountered using the system. Hopefully during the session, all problems will be solved and any system glitches or short-cuts discovered will be shared with the entire group.

In September, 1991, the Reference Department decided to provide instruction in the use of individual cd-rom databases. We call these sessions InfoZap Workshops. The classes are 50 minutes long, open to anyone, do not require advance registration, and provide concentrated instruction in the use of a particular cd-rom database. About 15 InfoZap workshops are taught each semester. Workshop schedules are published in the campus newspapers, on the campus local area network, announced by Librarians in bibliographic instruction classes, and posted in the Reference room. Pocket sized schedules are available in the CD-ROM area and miniature signs are attached to the individual workstations announcing the time, date, and location of upcoming workshops. All classes are held in the Bibliographic Instruction classroom. Live demonstrations of the featured cd-rom are performed using the Infocus lcd projection panel. Emphasis is placed on teaching basic search techniques, the mechanics of the system. Attendees are taken step-by-step through a search from identifying search concepts and developing a search strategy to printing or downloading search results. Modifying searches, boolean logic, word proximity, and truncation are discussed and demonstrated. Even though lesson plans have been developed for each of the sessions taught, no two lessons are the same. These workshops are meant to be informal and flexible. Open discussion and questions are encouraged. Many times, attendees will present

problems they encountered using the cd-roms. Every effort is made to provide a solution to the student's problem and make suggestions that will improve their search results.

How to Search sheets have been developed for most of the cd-rom databases. These sheets provide step by step instructions for searching a particular system. They are distributed as a handout at the InfoZap workshops and serve as a refresher to Reference Librarians. How to Search sheets are also available for pick-up in stackable trays in the CD-ROM area. With 10 different search protocols being used on the floor, the sheets are a handy reminder of system commands. The Help sheets are available in 2 formats:

- (1) A two sided single sheet handout; and
- (2) A legal size laminated sheet posted on each cd-rom work station.

Basic instructions for searching, printing, downloading, viewing, saving and retrieving searches are provided. Search tips such as using truncation, proximity operators, and field searching are also given. We have tried to be consistent in the preparation of the How To Search Sheets. Each one is developed using the same format and layout and every effort has been made to include similar information for each of the databases.

I would like to say that the four methods of cd-rom instruction used by the University of Central Florida have been a complete success and all of our

students are top notched cd-rom searchers. Unfortunately, that is not the case. I still experience a reality check when I encounter the business student who uses ERIC to locate new product information or the student who insists on filling in every space of the search menu. As a librarian, I get the shakes at the thought of a new cd-rom with a different search system. But I shrug it off, because I know we will produce a How to Search sheet letting me know I should use a question mark and not an asterisk or colon for truncation and to use w/2 to indicate word proximity and not the word near or an underscore.