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Online Catalogs and User Education

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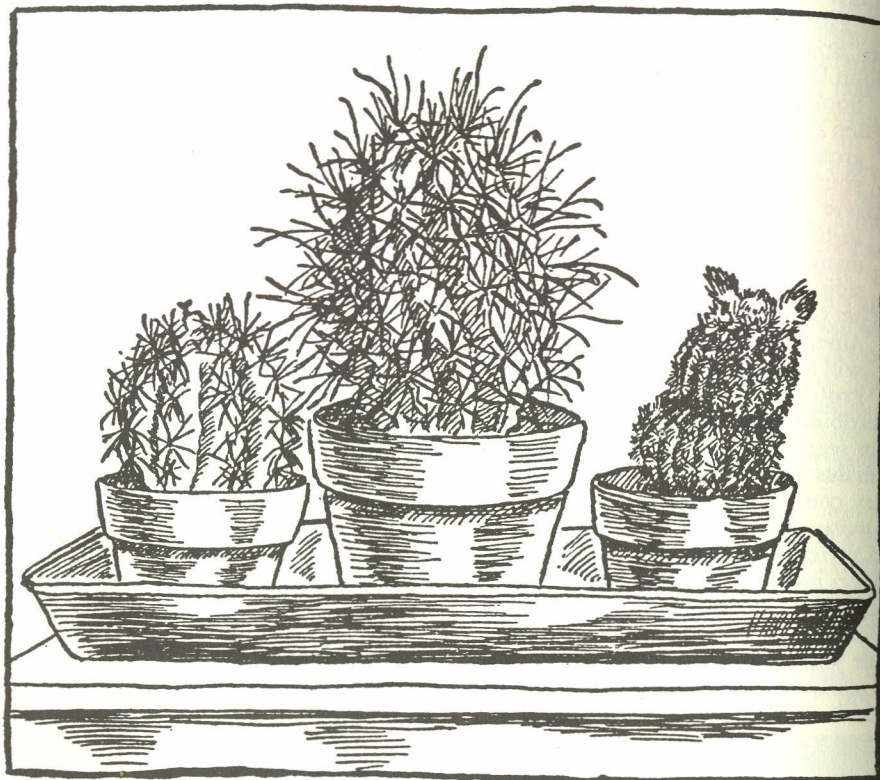
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USER EDUCATION



Online catalogs present exciting opportunities and challenges for bibliographic instruction librarians. Online catalogs offer features which make them far easier to use than a card catalog. Let's compare and contrast these two forms of catalog in some detail.

The most exciting feature of an online catalog is that it is interactive. As users key in search terms, the computer responds with a screen display. If users select terms not in the program, the computer suggests related terms to build into the search argument. As users continue their search, the online catalog prompts them with meaningful instructions for continuation. This interaction between the online catalog and users is the beginning of a far-reaching effect on library usage. As users are "rewarded" by the computer with successful

searches, they develop a feeling of accomplishment and satisfaction which can have a positive effect on library usage in general.

By contrast, the card catalog is passive and consequently difficult to use. For example, in a subject search, users generally try the most common term unsuccessfully because they have failed to use the correct subject heading. They may travel frantically from one end of the card catalog to another in pursuit of the correct subject heading. Even if "See" and "See Also" references are used for complicated subject searches, not all possible access points can be identified.

Users apparently agree with these conclusions on the relative merits of the online catalog. According to a study sponsored by the Council on Library Resources, even

users of the library who are not familiar with the card catalog think that it would only take thirty minutes to learn the features of an online catalog and that no formal training is necessary to use it. Users feel positive toward an online catalog and prefer it.¹

To understand better the potential of the online catalog to users, let's look at some specific systems enjoying widespread use. We will see that each system offers the benefits noted above but approaches the problem in a slightly different way.

ALIS II, produced by Dataphase, offers PAC (public access catalog) with a variety of features. Help screens that contain complete instructions for using different functions are available. PAC performs the following functions: author search, title search, combined author/title search, combined author/author search, subject search, Boolean subject search, call number search, and vendor number search. Any one of these functions can be entered from any point in PAC. PAC does not offer true keyword indexing. Bibliographic information appearing on the item status screen includes author, title, publisher, date of publication, and total library copies. For individual items, the user can view the location, status, date, media type, and the call number/volumes.

NOTIS, Northwestern Online Total Integrated System (Northwestern University Library), developed a PAC called LUIS (Library User Information System). LUIS offers help screens to support each type of display. LUIS performs the following functions: author search, title search, subject search, and search term truncation. Boolean searching is not offered. Bibliographic displays are in catalog card format. Multilevel displays (guide terms, brief index entries, full bibliographic data) are also available. Under development are cross references and call number index capabilities.

OCLC local systems, LS/2000, provides the following features: prompts and help screens are available with easy-to-follow instructions. True keyword access allows patrons to search fields using their own terms. Boolean "and" may be performed on search results within any single index

or between pairs of indexes. Searches may be restricted to specific library locations or collections. Searching functions include author, title, subject, keyword in title, title key (3,2,2,1 title key), author/title key (4,4 author/title key), call number, LC card number, ISSN/ISBN, and OCLC number.

GEAC Computers International provides help screens at any step in the search. The search functions include combined author/title search, author search, keyword search by author, subject and title, call number search, government document number search, ISBN, ISSN, ISRN, LCN, subject search, and title only search.

As might be evident from the brief review of the online catalog systems, standards for formatting displays within them vary. Bibliographic instruction librarians are thus challenged to train users to unique systems. By contrast, the format for information on a catalog card is standardized by the Library of Congress. The cards are of uniform size. Users are accustomed to finding subject and added entry headings at the top of the card.

After bibliographic instruction librarians learn the limitations and capabilities of their online system, they are ready to help their users. Of course, the users' experiences in the library or on the online catalog vary. This must be taken into consideration in bibliographic instruction program design. Identified for the purpose of developing online catalog bibliographic instruction programs, categories of users include non-online catalog users or first time library users, computer buffs, frequent online catalog users, and the reluctant online catalog users.

Non-online catalog users or first time library users are one of the largest category of users. These users may have used another library at some time in the past. Consequently, they may or may not understand the conceptual framework of the card catalog. They may be intimidated by an online catalog. Often they prefer experimenting with the online catalog alone. Some first time users confide in the librarian about their lack of knowledge and ask for help.

Computer buffs are characterized by be-

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ing computer literate. However, they have preconceived ideas about how the online catalog program should work. They are confident that they can sit down and begin a search process without consideration for the unique operation of an online catalog program. Generally, their experiences with computer terminals and menu driven programs guide them to the integrated help screens in the online catalog.

Frequent online catalog users are experienced in using the library. They are familiar with the basics of the unique online catalog program and have a good attitude toward the online catalog. However, they can be the biggest detractor if any changes or enhancements to the program are made. They have invested time in mastering the operations of the online catalog. Anticipate their response and make the transition easier for them by bringing them up to date with the changes to the program through a handout with a comparison of the old and the new programs. These individuals also enjoy individualized instruction from the librarian.

The last category is the reluctant online catalog users who are frequent users of the library. They dislike computers and change in general. They are familiar with the card catalog, but they admit that they hate machines. They are quick to say, "I don't know anything about computers." To help them adjust to the transition from a card catalog to an online catalog, a large group instruction session for first time users can be planned. In individual instruction with the non-online catalog users, librarians can assure them that they will not damage the computer or erase information. Hands-on experience is comforting for this last category of user.

Because of the variety of users, different methods of online catalog instructions are used. The following methods of online catalog instruction have proven successful with a variety of users:

1. Compare location of information from card catalog to online catalog,
2. Cluster terminals,
3. Prepare printed materials,

4. Integrate help screens into the online catalog program.

Let's look at these in more detail.

1. Comparing the location of information from a card in the card catalog to a display in the online catalog is a method of instruction. Users have a tendency to use the same library skills they have been using rather than to invest in learning new ones (Einstellung Effect).² Therefore, the bibliographic instruction librarian could compare the online catalog to the card catalog in basic ways. The choice of searching by author, title, or subject still exists. If users have experience using the card catalog, bibliographic instruction librarians can compare the position of call numbers and other types of information located on the card in the card catalog with the location of the same information in the online catalog displays. However, comparisons of this type should be simple and not complicated to the extent of explaining differences in types of subject headings and the searching thereof in the card catalog and then in the online catalog.

2. Clustering terminals in the library makes instruction for large classes or groups easier based on experience at Stephen F. Austin State University Library. Librarians can group five people around one terminal for instruction. These people can stand three feet away and still view the terminal screen comfortably. If six terminals are clustered together, a librarian could instruct thirty people at one time.

3. Printed materials, which are problem/task oriented to take home or to near the terminals, help users by addressing the mechanics of conducting a search systematically.³ Users appreciate printed instructions they can use at the terminal as they work alone.

4. Help screens built into online catalog programs are most successful. Note that each online catalog program mentioned previously included help screens. Help screens offer information on how to search the system, on definitions of terms, and on explanations of the system. Users can usually access help screens during any point of their search.

These methods have been used suc-

cessfully at a number of libraries. At Mankato State University, online catalog instruction is included in freshman orientation, workshops, and terminal demonstrations the first two weeks of each quarter. Printed handouts and a brochure are available next to the terminals. An advanced workshop is available to cover Boolean searching and the saving of Boolean search information.

Pikes Peak Public Library uses a videotaped show "Maggie's Place, Pike's Peak Library System." Staff is limited at the library so a corps of volunteers is used to explain the system. Brochures are also available.⁴

University of California, Berkeley has a self-help manual kept at the reference desk. A one-page summary of the operation is kept at each terminal. Instruction for the online catalog is offered in a for-credit course, "Bibliography I", in faculty seminars, and in classroom workshops. Other workshops offering hands-on experience are given twice a week.

Steen Library, Stephen F. Austin State University offers online catalog instruction workshops at the beginning of every fall semester. Instructions for searching by author, title, and subject are attached to the online catalog terminal. A guide, "Terminal Tidbits," is located near each terminal. Online catalog instruction is integrated into the Freshman English program every spring semester. Instructions for the online catalog are also included in class library orientation sessions. In-

dividual instruction is always available from the librarians at the reference desk.

Despite all of the different types of online catalog users and online catalog systems, bibliographic instruction librarians can use certain methods of instruction to meet their users' needs. The online catalog system creates an interactivity between users and the online catalog that does not exist with the card catalog. As users work with online catalog features such as key word indexing and Boolean subject searching, they discover that accessing information is easier. The challenge for bibliographic instruction librarians is to teach users to exploit effectively and to manipulate their unique online catalog.—M.T.

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