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THE MULTIFILE OPAC ENVIRONMENT: A Manageable Approach to Developing an Instruction Program

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(Adapted from a paper delivered at the ARLIS/NA Annual Conference, January 1993.)

Introduction

An 18th-century writer once said, "the more alternatives, the more difficult the choice."¹ Patrons in the latter part of the 20th century have many alternatives. Librarians must provide instruction programs to enable patrons to make meaningful and effective choices. This task, although at first overwhelming, can be made manageable by focusing on a few strategic areas.

In many libraries, the online public access catalog (OPAC) has become the "multifile OPAC." Multifile OPACs represent a new environment, with greatly expanded access options and increased complexity of access procedures. In addition to the library's own catalog, access is being offered to multiple online sources, including catalogs from hundreds of libraries. To function in this environment the librarian must learn first and then teach the essential wayfinding skills. Although the specifics of each environment vary, the multiplicity of offerings and necessity for choice remain constant. This paper presents one strategy for developing an instruction program in the multifile OPAC environment in a systematic manageable way.

Background

In the fall of 1992, the University of Nevada, Las Vegas (UNLV) Library brought up a multifile OPAC called NALIS (Nevada Academic Libraries Information System). This is a gateway system providing access to the UNLV catalog, to the University of Nevada-Reno catalog, to the many catalogs offered through Melvyl and CARL, such as, Harvard, Yale, ASU, etc., and to the catalogs of other libraries using the same online system that UNLV uses (INNOPAC). In addition to online catalogs, online periodical indexes, such as Uncover, and online databases and reference materials are accessible through NALIS.

As a consequence of the newly accessible resources, it became imperative to develop a program that would make students, in this case architecture graduate students working on their theses, aware of the resources now available for them to tap, and to provide them with the expertise to make use of those resources in their research. The challenge of developing the program was to identify those resources and to identify the unique needs and problems of the search environment. Given the substantial time commitment this would require, finding manageable approaches to the development of the instruction program was critical.

Focus Areas

After much reading and consideration, four areas emerged as basic to an instruction program for multifile OPACs: (1) selection criteria for the various databases, (2) access procedures, (3) approaches useful in searching new systems, and (4) search

concepts relevant across databases. These four areas formed an organizational framework for developing the instruction program and provided a manageable approach to issues of content, basic procedures, and instructional materials.

Reasons for Remote Database Searching

Several authors have addressed the question "why search remote databases?"² Although some of the reasons they cite, such as assisting in collection development or assessing the search capabilities of another system, are perhaps of more interest to librarians than to patrons, other reasons have relevance to architecture students, particularly architecture students engaged in thesis research.

The most obvious reason to search remote catalogs is to find citations to materials not at the home library. This reason is particularly compelling for students at UNLV since the architecture collection is small and can be expected to contain only a fraction of what is needed for research. However, even students at institutions with more established architecture collections can profitably search catalogs of libraries with subject strengths in their area of research.

The existence of specialized indexes and databases also suggests a compelling reason to invest the time to search other libraries. For example, the *Solar Energy Index* at Arizona State University (available through CARL), which contains articles, report literature, patents, pamphlets, and manuscripts, is an excellent resource. Subject strengths, whether reflected in separate databases or in the volume of titles appearing in a library's OPAC, are a primary consideration when choosing an online catalog.

The enhanced access provided by some libraries can lead back to resources owned by the home library. Access to book chapters, such as Carnegie Mellon seeks to provide,³ is exceptionally useful. Some libraries, such as the University of California, Berkeley Transportation Library, incorporate indexing of periodical articles into their online catalog. Retrieval of citations to contents of books and periodicals alerts the patron to materials that well may be in the home library.

Additional reasons for exploring other catalogs are as varied as the person doing the searching. Assessing a library collection before traveling to use it in person, taking advantage of the more sophisticated search techniques provided by some systems, retrieving the operating hours of the architecture branch illustrate a variety of motives!

Choice of Database: Selection Criteria

Reasons for searching a remote database, and criteria for selecting which catalog, database, or index to search are overlapping concepts. In addition to the reasons mentioned above, decision choices might also be based on how easy the system is to search,

the size of the architecture collection, the availability of CD-ROM databases covering similar material, and the mode or complexity of access.

It is not sufficient, however, to merely identify theoretical considerations. Those considerations must be converted from the general to the specific. Telling the patron to search a library with a relevant subject strength is more or less useful depending on the knowledge of the patron. Telling the patron to search Arizona State's library catalog for a research project in solar-related building is exponentially more useful. To be effective, the librarian must be able to call attention to the databases most likely to reward the patron's investment in learning and in searching.

Choice of Database: Guides for the Patron

The research required to identify OPACs most likely to be of interest to architecture patrons was time consuming. All libraries with catalogs accessible through NALIS were checked in the *ACSA Guide to Architecture Schools in North America*.⁴ Notations were made regarding volume count and subject specialties. Extensive online searching supplemented the institutional reports in the guide and provided data regarding ease of access and searching. This data was then embodied in the handout, "Choosing an Online Catalog," which was distributed to the students in conjunction with covering the material in class or individually (see figure 1).

The online catalogs handout includes only catalogs from accredited schools of architecture, but not all accredited schools were included. Some catalogs of accredited schools were eliminated because their collections did not seem to add to the other choices or because problems were consistently experienced during access attempts or during searching. These choices still appear on the screen of course and are still available to the patron if desired. The handout, however, omits the catalog choice from the list. The list, then, is a recommended list. This preselection serves a couple of purposes. It highlights those choices for which there are compelling reasons to attempt a search. In addition, by reducing the number of choices, it makes those remaining less overwhelming.

Another handout, "Choosing a Periodical Index," provides criteria for choosing indexes accessible through NALIS, CD-ROM indexes, and paper indexes, to set each in the broader context. Indexes with a range of formats and coverage illustrate the application of various criteria, such as coverage, periodicals indexed, format, years available, search features, and frequency of update.

The students were particularly interested in the periodical databases and indexes. They felt that books would be a problem to get from another library or take too long to obtain, but the articles might be found in the UNLV collection.

Access Procedures

Although a gateway system makes accessing remote databases transparent, even a gateway system is not always intuitive. The procedural difficulty lies in determining where a particular database appears in the hierarchical list of choices, or to phrase it in another way, how to get from here to there when a particular "there" is desired.

Three complementary approaches are used to provide maps or how-to-access guidance. The overall structure is communicated through a one-page flowchart format; a list of databases with step-by-step instructions on how to get there gives a narrative map; and the "Choosing an Online Catalog" (figure 1) handout provides a map in chart format. The chart format was initially more difficult to use, but the additional information provided in the chart overshadowed the initial difficulty.

Another aspect of access is the exiting procedure. Although most systems give exit instructions on initial screens, by the time the patron wants to exit the procedure is forgotten. Help screens are usually available. In addition, the commands handout (figure 2) includes the exit command for each system.

Useful Approaches for Searching New Systems

Several authors have recommended fruitful approaches for initial explorations of a system.⁵ The most useful of these are using online help screens and starting out with searches for known items. Making use of online help cannot be overempha-

Choosing an Online Catalog

1st Level Options	2nd Level Options	3rd Level Options
CARL (C) to access Maryland, ASU and ASU Solar Energy Index. ASU does do contents indexing.	Choose: Other Library Systems.	Choose 79: Arizona Libraries: specialty solar and energy efficient design; 20,000 vols.
		Choose 77: University of Maryland: building performance, preservation; 36,000 vols.
Innopac Libraries (L) to access libraries with online catalogs similar to UNLV's, and there fore easy to search since familiar	University of Oregon: subject strengths: environmental control systems, historic preservation; 9400 NA's.	
	Miami University (Ohio): visual studies; 6600 NA's.	
Melvyl (U) to access some very impressive collections, as well as text and reference databases. Melvyl is the catalog of	Library databases: University of California: List 1: CAT, TEN (for last ten years) or PE (for periodicals).	

Figure 1: Section from "Choosing an Online Catalog"

OPAC SEARCH COMMANDS: BASIC

	Author	Title	Subject	Word	Help	Exit
Innopac: UNLV Oregon Miami U	A	T, W	S, W	W	I (library info)	see menu; varies
CARL: ASU, U of Maryland	N	W, T	W	W	? ? [topic] ?H	//exit
U of Calif Melvyl	F XC F PA F CA	F XT F PE F XPE	F XS F SU	F PA F CA F SU	help explain [term]	end logoff

OPAC SEARCH COMMANDS: ADVANCED

	Truncation Symbol	Call No.	Limit	Boolean Operators	Comments
Innopac: UNLV Oregon Miami U	*	C	Language Material Word in Title Word in Author Word in Subject Publisher Year of publication Location	and or	
CARL: ASU, Maryland	defacto if one word	C	date e.g. [>1980]	and, or, and not, but not	

Figure 2: Sections from the Commands Handout.

sized as the most basic means of becoming familiar with both the contents and the search possibilities of a new system. The students who were willing to read the help screens, instead of forging ahead and flailing about, became familiar with and hence comfortable with a new system much more quickly.

Conducting sample searches for items that have a high likelihood of being included in a particular database is also a useful means of exploring new systems. For example, in a title search, try both a straight title search (words in order) and a title keyword search. Does the system let you do a title keyword search? If you do a word search, what fields does the system pull from? What word order is required in an author search? How does the system handle punctuation? By searching known items that might be expected to appear in any catalog, valuable initial feedback is obtained on search procedures and capabilities of the system.

The above is useful for librarian and patron alike. For the patron, an initial session with the librarian remains the most effective introduction. Judging from student experiences, having the librarian available while performing the initial searches in another library OPAC served to smooth the way and allowed for immediate clarification of problems like dissimilar terminology and unpredictable glitches. As one student commented, "it always seems to go better when you're here!"

Search Concepts Relevant Across Databases

One of the major problems of multiple systems is the difficulty of learning a range of new search commands and techniques.⁶ However, while search commands may be different in a new system, the functions they represent often transfer from the home system. In addition, there are key concepts which, if taught in the context of the home system, carry over to other systems as well.⁷ Examples of such concepts include natural language searching versus controlled vocabulary; uses of an author search as opposed to a subject search; limiting a search if too many entries are located, and expanding a search if too few entries are found. Once a student has assimilated those concepts, they seek out ways another system will allow them to formulate comparable strategies.

To assist the patron in identifying equivalent searching commands, charts of the basic and advanced commands in each of the systems accessed by NALIS were prepared. (See figure 2.) The command charts are effective as reminders once the patron has worked through a new system. They are not meant to be the sole method of instruction on managing a foreign system. In addition, to reinforce the more important search concepts presented during instruction, a handout with online searching vo-

cabulary definitions was prepared, explaining in narrative form such concepts as controlled vocabulary.

Conclusion

The searchers in the multifile OPAC environment are faced with many challenges. These challenges place pressure on the librarian, who is expected to be able to offer help and advice. In this relatively new environment the time required to be able to offer guidance on which database to choose, how to get there, and how to search and navigate the system imposes unavoidable stress.

There is pressure on the patron as well. There is pressure to make the most effective choice, to learn a wide variety of search procedures, and finally to evaluate the wealth of citations uncovered. Students also feel the pressure of time or their perceived lack of it. The major reservation throughout NALIS instruction was that there was just not enough time to "do it." These challenges and pressures are reflections of the expanding possibilities of today's research world. The goal of an instruction program in this environment is to convey research skills and attitudes adequate to realize those possibilities.

NOTES

1. Quote from D'Allainval, "L'Embaras des Richesses," in *Oxford Dictionary of Quotations* (Oxford: Oxford University Press, 1991). (From the online version, accessible at Rutgers, through Melvyl).

2. Among those who have covered this topic are Marilee Birchfield, *Casting a New Net: Searching Library Catalogs via the Internet*, paper presented at the Illinois Library Association /College and Research Libraries Forum Fall Conference, Urbana, Illinois, 8-9 November 1990, ERIC, ED329 295; Mary E. Engle, "Electronic Paths to Resource Sharing: Widening Opportunities Through the Internet," *Reference Services Review* (Winter 1991): 7-12, 62; Laine Farley, *Library Resources on the Internet: Strategies for Selection and Use*, RASD, 1991 (available via ftp from dla.ucop.edu); and Aggi W. Raeder and Karen L. Andrews, "Searching Library Catalogs on the Internet: A Survey," *Database Searcher* 6 (September 1990): 16-31.

3. Thomas J. Michalak, "An Experiment in Enhancing Catalog Records at Carnegie Mellon University," *Library Hi Tech* 8, no. 3 (1990): 33-41. UNLV is adding contents access for a limited number of architecture titles; planning is underway to assess the feasibility of expanding this approach.

4. *Guide to Architecture Schools in North America* (Washington, D.C.: Association of Collegiate Schools of Architecture Press, 1989).

5. Both Mary Engle and Laine Farley have addressed this. Farley has many additional recommendations.

6. This has been pointed out by Mary Engle; and by Genevieve Engel, "User Instruction for Access to Catalogs and Databases on the Internet," *Cataloging & Classification Quarterly* 13, no. 3-4 (1991): 141-56. It is important to remember, however, that it is not necessary to completely master a new system in order to search productively. It is also not necessary or always desirable to take advantage of all the sophisticated search techniques offered by a system. Bryce Allen and Gillian Allen, in "Cognitive Abilities of Academic Librarians and Their Patrons," *College & Research Libraries* 54 (January 1993): 67-73, report that students excel at browsing through lists of hits and that "browse interfaces . . . and basic services [are actually] more appropriate to their levels of cognitive ability" than the complex sophisticated systems preferred by many librarians.

7. Some of these concepts, discussed in the context of the capabilities of online searching compared to card catalog searching, are covered in an article by Marcella Stark and Mary Anne Waltz, "Thumbing the Cards: The Online Catalog, the Faculty and Instruction," in *Teaching the Online Catalog User*, ed. Carolyn A. Kirken-dall (Ann Arbor: Pierian Press, 1988), 35-42.

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