

# **in**ula notes

*Indiana University Librarians Association*

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## **IUCat, A Reference Manual, Eight Librarians and the Gopher...**

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**O**nce upon a time, eight Indiana University Librarians were appointed to the IO End User Education Committee. This group was charged with developing printed documentation that IU Libraries' public services staff throughout the system could use as classroom teaching aids as well as point-of-use handouts. Another project assigned to this group was the development of an IO reference manual, something that would answer public services staff questions about searching the IO database. Even in the old days, this was harder than it sounds; IO was (is) a constantly changing, evolving system; by the time something came hot-off-the press, it was also out-of-date.

The committee worked hard, holding monthly —sometimes twice-monthly—working meetings in Bloomington and Indianapolis supplemented by telephone meetings and massive numbers of e-mail messages. Time passed, handouts were developed, went out of date, were revised and rewritten. IO grew, IUCat emerged and evolved. The IO, now the IUCat Reference Manual, was printed and released as an “incomplete working draft.” The committee began to despair of ever keeping up with IO/IUCat's dynamic growth.

Then the Internet happened. Putting this Reference Manual up on a Libraries' staff Gopher seemed the answer. But could eight very busy librarians with varying technical skills and widely varying access to the Internet, located on four different IU campuses, work

together to create an electronic information system... a Gopher? And the Gopher would be developed using an operating system that not one person in the group had ever used before. To make things even more challenging, we were guaranteed that things would be changing even faster than they had in the old days! However, we had five years of productive group work under our belts, trusted each other's abilities and intentions, and knew there were many other colleagues who would lend their talents to this Mission Impossible.

### **PROBLEMS, DECISIONS, SOLUTIONS**

Our first decision was what format to use. The World-Wide-Web was gaining fast in popularity when we first got started, but we decided to create our manual on a Gopher first and then convert it to WWW later. Why? Because we had immediate access to Gopher software and support (in the person of Jian Liu); because we considered the search software for Gopher to be superior to WWW software; because we believed (oh so mistakenly) that it would be simpler to take the files we already had (remember the printed incomplete first draft of the Reference Manual) and convert them to ASCII for the Gopher server rather than deal with HTML markup.

Our lack of technical knowledge in how to go about setting up the gopher was another problem. We had all used Gophers to tunnel through the Internet, but to actually set one up was a new experience. As we anticipated, someone stepped up to help: Jian

Liu, formerly in the Library Automation Office, now an IU-B Reference Department Librarian, taught us the rudiments of UNIX commands and of FTP. He also made valuable suggestions for organizing our files.

Another frustration was the varying access we eight had to the Internet; so much depended on the workstation configuration each of us had. We spent a great deal of time trying to work around obstacles posed, not just by technological differences and insufficiencies, but also by our lack of technical expertise. Faced with a long and steep learning curve, we decided to stick to what we could do best: create and edit the contents of the Reference Manual, and to let a UNIX expert put the files on the server. Aaron Moore, the computer specialist at IPFW, generously volunteered his expertise. We now e-mail our files to Aaron and he places them in the proper section of the Gopher.

After confronting and resolving the problems described above and many, many others, what have we learned from this still-in-progress project? It would take a book to thoroughly answer that question! Here are some highlights.

### **FIRST THINGS FIRST**

Most of the problems we encountered were in the realm of planning: what did we want to mount on a Gopher? How long should our documents be? What about standardization of "style" for format and presentation? How would we update files? It would be nice to say that we answered all these questions and developed an organizational plan; it would be nice to say we had this all figured out from the beginning and that we followed that plan throughout the process. But we won't lie. Fortunately, we did make what turned out to be the two most important decisions very early on in the development process and these decisions continue to serve as guideposts.

Determine the purpose of the project. In our case, we wanted to provide an accessible, easy-to-understand document that would provide end users with background information, basic concepts and techniques, tips and strategies for searching IUCat and for interpreting the results of a search. We wanted to make extensive use of examples and sample screens.

Determine your audience. We determined early on in the project that the Reference Manual's primary audience is IU Libraries public services staff using IUCat in OPAC mode. We are not so

naive as to believe only reference staff will have or want access to this information, especially when it's up on the Gopher. However, we do base our decisions on what to include on the needs of our primary audience. Our decisions are also informed by the realization that reference staff includes veteran Librarians who have been instrumental in the development and evolution of IUCat as well as new student Reference Assistants whose experience beyond doing very standard, simple database searches is quite limited.

### **GOPHER ORGANIZATION**

Although we started with an almost completed and sensibly organized print document, we knew this was not going to be just a matter of putting the print document into Gopher. Even if we didn't have to deal with the technical aspects of mounting files, the very focus of our Manual—IU/IUCat itself—was evolving and changing.

We developed the menu structure first, then added the text. We decided on the type of menu structure (layered) and then reorganized, often rewrote, the text of the print manual in a way that made sense on the Gopher. We ended up with 12 "Chapters" on the Main Menu: About the IUCat reference manual, What is IUCat, Searching IUCat, Other library catalogs, IU system wide databases, Help, Locating materials, Access and availability of IUCat, Staff mode searching in IUCat, Glossary, Search words in menu headings, Search words in documents. Each chapter breaks down into more detailed directories and files. Our hope is that, while more information may be added to the files, and while new items may need to be added to subdirectories, the Main Menu will not change.

IO and IUCat, unlike our Gopher's Main Menu, will change. And as we worked on our files, we realized that we needed a way to review and remove old files as well as a way to search for information on our Gopher. We created a header (which later became a footer) that includes the title of the file, keywords in addition to title words, the name and e-mail address of the file editor, the Committee name, and the date the file was created for the Gopher. The date is used in a program that will automatically return the file to the editor (via e-mail) for review every year.

### **CONSISTENCY**

Even a single writer finds it difficult to maintain consistency in matters of punctuation, capitalization and spacing. When there

are eight people compiling a manual such as this, some sort of style sheet is essential. There were no established manuals that met our needs when we were getting started so we developed our own informal style sheet—which became more formal as time passed; we now have a document so that we don't have to refer to individual meeting reports spanning the last five years!

We were able to adapt many of the guidelines we'd developed for our printed documents to the Gopher format. However, we also discovered that a great format in print is often confusing when viewed on a computer monitor. Electronic formats such as Gopher introduce new concerns such as ease of viewing the screen and ease in navigating the relationships within the document.

Conventional print indications of emphasis (italics, boldface, varying type size) cannot be used in Gopher. We learned to use extra spaces within a line and between lines, quotation marks or capitalization of an entire word. The use of these devices is standardized and prescribed for specific situations in our style manual.

Overall length of file became more important than in the case of printed material. We try to limit directories to a single screen and to keep files under three-screens in length.

The style manual also provides guidelines for incorporating examples used to illustrate the variety of search options. Space constraints have made it difficult to include as many examples in our Gopher document as we would like and have made it even more difficult to reproduce actual IUCat screens. We continue to wrestle with these questions of style; reactions from users of our first Gopher version will guide us in making revisions and additions. Like IO and IUCat, this is an evolving document that responds to change and to the needs of its users.

#### NEXT STEPS

Each member of the Committee realizes that once the Gopher is mounted and released, even as we complete, review and revise files, we will be exploring other options for making this information available. Gopher may be today's answer, but what about tomorrow?

Gopher software has limitations. One is its linear nature. Information is structured by the program in terms of a hierarchy.

When the reader enters that hierarchy, she/he is at the mercy of the authors' perceptions of the relationships among the concepts contained in the text. A second limitation of Gopher is its textual nature. Gopher cannot display graphics.

The World Wide Web has the potential to resolve both problems. Hypertext links in the Web can show multiple relationships among ideas and pieces of data. It allows the reader to pursue those relationships in ways useful to his/her needs and learning styles. Many Web browsers, such as NetScape and Mosaic make it possible to use graphics to enhance text explanations. The Committee's next step will be to explore ways to exploit the Web to make the Reference Manual information available.

#### CONCLUSION

The IO End User Education Committee's experiences with the Gopher demonstrate that group projects involved with Internet resources are manageable with proper planning and perseverance.

What can you expect if you embark on a similar project? Expect to spend time planning, expect to spend time learning about things you never dreamed you'd need to know, expect to get bogged down and hope that your fellow committee members can help you take the next step out of whatever information-overload, job responsibilities-overload you get bogged down in, expect to spend TIME! And know that sooner or later you'll just have to DO IT!

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overload, and in my opinion, does not speak highly of libraries within the information flow. One intriguing idea contained in American Vista is the inclusion of audio from regions of the United States such as the New York Taxi Driver. The choices are too limited but the idea of recording voices of regional accents is delightful.

InULA seems to be seeking a role within the new framework. It is an organization that everyone appreciates yet few get involved. The theme for InULA this past year was "Librarians: Innovations and Traditions". Maybe the tradition of sharing information with colleagues through short reviews about services, products and research could be continued with InULA Notes. I hope that colleagues will volunteer to contribute information about their favorite new, innovative product in future issues.

## Valuing Old and New Resources By Lou Malcomb

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*"You gain strength, courage and confidence by every experience in which you really stop to look fear in the face." Eleanor Roosevelt*

Electronic technology has heightened the awareness of people's need for information, personified information's complexity, and the ease of sharing it with each other and the world. Librarians have wrestled successfully with these challenges since Dewey. At IU, we receive access to new resources everyday; some at one specific library, others shared by all systemwide, still others shared internationally. An IUCAT search for computer files (as of July 1, 1995) yielded 2257 entries. At the IUB Main Library, which I am most familiar with, there are more than 200 electronic resources available. This article looks at three of my favorite cd-roms but more importantly I hope it will inspire others to share bits of wisdom about their favorite new, old, and reconfigured resources in future issues of InULA Notes.

During Spring 1995, IUB mounted Statistical MasterFile on the LAN for access throughout Main Library. It provides access to American Statistics Index, Statistical Reference Index, and Index to International Statistics. These indexes seem to be available around the system in one form or another. The reason it is one of my all time favorite databases rests with the fact that I am familiar with its terminology. The abstracts are incredibly long, but filled with typical statistical terminology identical with table names and jargon which have appeared throughout the long runs of numerous government statistical products. Statistical MasterFile, like its Congressional counterpart Congressional MasterFile, includes a thesaurus which may indeed help the novice but by no means makes searching intuitive. Both, like most other databases, allow the use of field searching, truncation, downloading, keyword in context, and various operators. However, in many respects, there is still an awkward feeling. Statistical MasterFile and Congressional MasterFile permit a great deal of precision, yet because of the nature of the information, i.e. its terminology and structure, non-documents people sense that they are being flung into a governmental-information jungle containing only the skeleton of the information. Undaunted, some plunge forward with great success only to "crash and burn" when confronted with the question: "where can I actually find the flesh" or fulltext?

No one should overlook Statistical MasterFile! It is interdisciplinary, international, current and retrospective. Most of the items are owned within the IU system, either in print or on the microfiche, which can be purchased with either Statistical MasterFile or Congressional. The strength of any access tool remains with its content. Statistical MasterFile especially merits high use. Its utility in economics, business, and demographics is matched in fields of education, criminal justice and health for current as well as historical data. [Note: Congressional MasterFile is my favorite for history since it covers Congressional information since 1789.]

Recently the government has announced major changes in how much of its information will be issued, i.e. most will only be available electronically through the World Wide Web. Does this make a product like Statistical MasterFile useless? I do not believe it does chiefly because of terminology and the specificity of government information. The abstracts definitely assist in identifying, especially for the novice user, what government agency is responsible for issuing the information and the terminology used in describing the tables and charts. The web is much easier to search armed with this knowledge.

Statistical MasterFile and Congressional MasterFile are basically old products available in new form. It is with confidence that I approach these datafiles. But I must shift into first gear when looking at some old titles in new flashy multimedia format which UGLS has recently acquired for the Interactive Information Center. Funded by a special grant from the IU Parent's Fund, we have mounted some products of traditional utility, others are merely entertaining innovations. The new release of Street Atlas, our first multimedia type product, has greatly improved its printing/downloading capabilities. Information USA and American Vista are two other products which offer innovative ideas, positive and negative. Many reference librarians recall the title, Information USA by Mathew Lesko, when it was published in print years ago. The CD-ROM version discusses information

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