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# Meeting the Patron at the OPAC Crossroads: The Reference Librarian as an Online Consultant

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## Meeting the Patron at the OPAC Crossroads: The Reference Librarian as an Online Consultant

Reference librarians play an important role when users interact with online catalogs. As consultants at the point of interaction they must educate patrons in the use of the machine and demonstrate their role in finding and providing information. Specific areas of consultation are discussed as is the relationship of formal instruction to point-of-use instruction. The librarian's efficiency and filtering roles are emphasized.

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As libraries have converted their card catalogs to machine-readable formats and given patrons access to their holdings through terminals located in the library and at various remote sites, the role of the reference librarian in this new environment has often been ignored or only defined in terms of preuse training. In fact, many see the online public access catalog (OPAC) as a substantial threat to the public services librarian. Some libraries brought in automated systems to "provide for a reduction in total staff."<sup>1</sup> A less active role for librarians is explicit in the RASD's "Library Users and Online Systems: Suggested Objectives for Library Instruction":

*In libraries, many of these automated information systems are used directly and do not require the personal assistance of librarians as intermediaries between the library user and the information. Librarians want the users of those systems to be self-reliant and successful in accessing needed information.*<sup>2</sup>

Others have suggested that the OPAC "is

simply a new version of an old tool, and ought to be treated as such."<sup>3</sup> This ignores the added complexity of the fluid, flexible nature of information in an online environment (as opposed to the more static organization of data in a card file).

One of the many things OPACs do is *broaden* access to the information within a library. Access to information beyond a given library is increasing, too, as a variety of online tools becomes available through either single terminals or multiple workstations (e.g., CD-ROM; OCLC; RLIN; state, regional, national, and international networks; Dialog, BRS, ORBIT, Wilsonline; various gateways). A consequence of this broadened access is not simplification. Broader access requires sophisticated skills—the application of Boolean operators and the understanding of the relationships of various fields in an online record—to manipulate and filter the available information to locate useful material effectively and efficiently. Reference librarians are the skilled professionals who should bring their knowledge and experience to bear on behalf of their patrons.

Many librarians must alter the role they play as patrons interact with OPACs—they must change from passive desk-sitters to aggressive consultants.

Much of the activity at a typical reference desk involves instruction: a patron brings a periodical index to the desk to ask how to interpret a citation; another asks where to find information on a specific topic, is led to a number of sources, told each item's unique coverage, and instructed in its use. What happens, though, when an OPAC user runs into trouble? Many who discuss online access expect most of the answers and assistance to come from the machine. This is Crawford's vision; he feels "[m]ost libraries won't have librarians near each terminal, and many patrons will be reluctant to ask for help."<sup>4</sup> Well-designed systems with clear help statements often solve users' problems, as do various instructional sheets and booklets near OPAC terminals. Yet many users ignore these aids. Many "lock-on" to the screen, much as a viewer does with a TV screen. Others who have used computers in other capacities (from video games to word-processing to programming) feel they already know computers and therefore plunge right in. But the key to using OPACs effectively is not computer literacy; it is knowing how to access information.

Several studies show that users are highly satisfied with OPACs.<sup>5</sup> When one observes them using the machines, however, one realizes satisfaction does not equal proficiency. Yet users often prefer OPACs to the card catalog. One user even commented, "I know I do better in the card catalog, but I still prefer the online."<sup>6</sup> The librarian who stays at the reference desk as the terminals sprout around the reference room will not notice the misuses patron misconceptions will cause. It is therefore necessary to leave the desk and become an active consultant at OPAC terminals.

When the University of Kentucky brought up its LS/2000 OPACs in 1985, terminals were placed within sight of the traditional reference desk layout. Very quickly it became clear that patrons were running into problems in spite of handouts, flip charts, open and departmental instructional forums, classroom instruc-

tional sessions, computer-assisted instruction, and function-specific help statements on the OPAC screen. Of the many differences one notices between a card catalog and an OPAC, one of the most significant is that when a patron "misenters" a request on an OPAC, it is sometimes left on the screen. Often when we spotted these errors, the patron had already given up and left the terminal. We realized we needed to reach these patrons before they gave up so we could show them how to use the system.

With portable phone in hand and another librarian still at the desk, we began floating among the terminals. OPACs make intervention easier because the patrons' needs and thought processes, to some extent, appear on the screens in front of them. It is therefore possible to analyze quickly how effective a user's strategy might be by unobtrusively observing over a shoulder. After more than two years of using this approach, we have not had one patron complain about this observation. In fact, patrons began finding ways to get the librarians' attention when they realized we were there to offer assistance. Markey found that patrons sometimes do not realize the reference librarians can or will help at OPACs.<sup>7</sup> She also found some users described librarians as "an indispensable component of computer catalog service."<sup>8</sup> I suspect this happened where librarians were aggressive consultants rather than remaining tied to the reference desk.

As we observed patrons at OPACs, we saw quickly that they turn to CRTs as all-knowing entities. A few examples will illustrate. One patron typed in the keyword *flag*. When asked if he was finding what he wanted, he said, "No, I want to find companies that make flags so I can order one." Another user typed in *marriage* and combined it with *honeymoon* to see if he could find a honeymoon spot for his impending marriage. Terminal screens often cause library users to forget the rest of the reference collection (as well as the librarian) as quick, useful access points to the information they need.

Besides referring patrons to appropriate reference tools and providing them with specific information, librarians find they also need to guide users through difficult strategies when the OPAC is the most ap-

propriate tool. This occurs not because patrons lack understanding of the system's command protocol but because they do not understand the subtleties and complexities of information arrangement and access. In addition, users often need guidance in using shortcuts like special search codes and truncation and in dealing with punctuation, stopwords, serial entries, abbreviations, one-word titles, numerals, diacritics, and authority control. Regular users retain awareness of system idiosyncracies, but most users will not use the system often enough to remember all aspects of system protocol.<sup>9</sup> Moreover, each new information need is likely to present a new strategic obstacle.

Users are often inefficient, yet they are very time-conscious. They have little time to devote to detailed instruction in the use of online systems. (They do not want to be librarians, a fact taken advantage of by many information brokers.) I have seen patrons scroll through 2,000 titles rather than fool around with *Library of Congress Subject Headings* or Boolean searching. Even when subject access is the main concern, terminology and use of *LCSH* is difficult for the patron (as it was in the card catalog). The distinction between subject and keyword access is often not clear. The structure of any subject heading scheme can be confusing, and the application of subdivisions (particularly free-floating ones) is often unclear. Since each item has a small number of subject headings (1.5 on average according to Dwyer), users often get no matches when they use a Boolean AND operation to combine two subject headings.<sup>10</sup> (Compare this access to the use of Wilsonline files, where a few general descriptors are used, and then to databases like *ERIC* and *PsycInfo*, which use a generous number of more specific descriptors.) Users expect specific access, but often LC subject headings are too general to answer their specific needs, so they need direction to more detailed access tools. They also often overnarrow simply because the narrowing function is there.

Many users find the librarian's role unclear, particularly in conjunction with the new technologies. By using the contact point to demonstrate their efficiency to users, librarians will be able to reveal their role in the information access process.

They can provide information or guidance when necessary and evaluate skill levels individually so that users can be taught techniques and strategies when they are ready to learn and can immediately apply them. If they are helped to succeed with one search, they will try again and also seek out a librarian when they need one. Librarians can also analyze and critique the system in action for possible modification (although many systems are presently rather unflexible). And they can see how users learn and transfer that knowledge to more formal teaching situations.

These formal situations are effective in introducing the system but fall short in preparing users for specific encounters with the machine. Instructional sessions, even hands-on and computer-assisted instruction, if enough terminals are available, have limited carryover, particularly with sophisticated applications like keyword and Boolean. After a while, the wide range of skill levels users attain makes it difficult to target an audience, so most sessions continue to stress basic skills.

If instruction is part of the goal at the OPAC encounter, the librarian should *not* perform the search but instead guide the user through the search. Talking a user through a search involves the three learning modalities: kinesthetic (hands-on use of the keyboard), visual (seeing the outcome on the screen), and auditory (hearing the instructions and explanations of the librarian).<sup>11</sup> Since people differ in the modalities through which they learn best, combining all three increases the likelihood the user will understand and retain the process.

As information grows and the technology to access it becomes more powerful, our role as filter will become even more critical. (See William Marsterson's excellent discussion of this filtering role in his *Information Technology and the Role of the Librarian*, London, Croom Helm, 1986.) Some observers feel instruction is the primary role: Lewis worries that we should either "increase instructional efforts or make the bibliographic structures more transparent."<sup>12</sup> Both of these steps will help with basic access, but beyond that we need to demonstrate the librarian's willingness to manipulate and interpret bibliographic structures for the information

seeker. Neway, in her provocative *Information Specialist as Team Player in the Research Process*, makes the following points that seem particularly appropriate at the OPAC crossroads: "Information transfer and hence information services need to be personal and informal in nature. The informational professional must be willing to

maintain an active role in initiating and maintaining communications with the user."<sup>13</sup> By making contact at the OPAC crossroads, librarians can guide and encourage the user, applying their skills in both instruction and information access and using their expertise to save the user time and effort. ■■

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