TRAINING USERS TO ACCESS SCIENTIFIC AND TECHNICAL INFORMATION

LA FORMATION DES USAGERS A L'ACCES A L'INFORMATION SCIENTIFIQUE ET TECHNIQUE

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ABSTRACT

The objective of the training activites of the Canada Institute for Scientific and Technical Information (CISTI) is to provide users with the knowledge and skills necessary to effectively use CISTI's national services. This paper defines the scope of CISTI's programme in training users of two online networks, CAN/OLE ® and MEDLARS ®, and its current awareness service CAN/SDI ®. The increasingly strong link between training users of these national information retrieval services and accessing document delivery services is also discussed.

RESUME

Le but des activités de formation de l'Institut canadien de l'information scientifique et tecnique (ICIST) est de fournir aux usagers les connaissances et la compétence requises à l'utilisation efficace des services nationaux de l'ICIST. Dans cet exposé l'on précise la portée du programme de l'ICIST, qui consiste à former les usagers dans l'utilisation des deux réseaux d'accès direct, CAN/OLE ® et MEDLARS ® et de son service de mise au courant CAN/SDI ®. L'on aborde également le lien de plus en plus étroit entre la formation des usagers de ces services nationaux de repérage de l'information et l'accès au services de livraison de documents.

TRAINING USERS TO ACCESS SCIENTIFIC AND TECHNICAL INFORMATION

The Canada Institute for Scientific and Technical Information (CISTI), just as most large libraries and information centres, has always sought to educate or 'train' its clientele to better use its resources and services. In 1969, however, the introduction of CAN/SDI, CISTI's national computerized current awareness service, necessitated development of a formal training program. The objective of this first program was to train "search editors", information specialists in organizations across Canada who, through personal contact, could assist CAN/SDI users in constructing their interest profiles and forward these to Ottawa for processing through the SDI system.

During these last 10 years, CISTI has expanded its CAN/SDI service, has dveloped the Canadian on-line bibliographic retrieval system CAN/OLE, and has entered into a quid pro quo agreement with the U.S. National Library of Medicine to enable Canadians to access the MEDLARS system. In support of these rapidly expanding national services, an extensive training program has been developed. The objective of CISTI's training activities is to provide users with the knowledge and skills necessary to effectively use these national services. It is most important to note that these services do not stand alone as information retrieval systems, but are elements of the total STI (Scientific and Technical Information) program. Those who train users to access the systems must also provide interface between those users and all CISTI resources and services, e.g. document delivery, union list, reference, and so on. In FY 1980/81, CISTI trained a total of 677 users in 76 seminars in Ottawa and major cities across Canada.

CAN/SDI

In the earlier years, training of search editors across the country was intensive. The CAN/SDI system was a new tool for library and information specialists, and quickly proved to be an effective means of supplying a user's need to be kept up-to-date in his/her field of interest. By 1975, use of the system had grown to nearly its current level, and specialists trained in profile design had reached over 600.

CAN/SDI Training

YEAR	SEMINARS OTTAWA	SEMINARS REGIONS	TOTAL TRAINED
1976/77	7	5	84
1977/78	6	6	95
1978/79	6	-	27
1979/80	6	-	31
1980/81	3	5	68

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Of the three programs to be described, the training required for CAN/SDI is the most straightforward. CAN/SDI is a batch, or off-line, computerized system. Further, all databases are bibliographic. This year, CAN/SDI processed 3210 interest profiles on 19 databases. Most profiles are maintained by CISTI staff or by staff or library or information centres trained in using several computerized bibliographic systems who act as intermediaries between the system and the end user. Thus, those to be trained are a more homogeneous group than users of online systems. In 1980/81, only 8 of the 68 trained were non-library staff.

The CAN/SDI workshop is a 1 1/2 day program including:

- Organization Overview: CISTI services, CAN/SDI Centres, CAN/SDI CAN/SDI databases
- Profile Construction: role of search editor, user interview, concept maps, Boolean logic, profile coding interface with CAN/SDI centre
- Practice Session: step-by-step profile construction, profile updating, evaluating feedback
- Administrative Details: cost and billing, outputs, print options, document delivery
- CAN/SDI Update and Special Features: new or changed databases, weighting, software changes

After completing the formal training, students are allowed to submit test profiles which will be checked by CISTI staff and run on the system with its periodic updates up to three times. The CAN/SDI Profile Design Manual serves as the complete guide to the system and available databases.

Demand for the training seminar is expected to continue at the 1980/81 level to maintain the more than 3000 profiles. This forecast is substantiated by the fact that despite the cost increases introduced in 1979 to effect cost recovery for CAN/SDI, and the introduction of online SDI services by the major vendors, CAN/SDI usage has remained steady.

CAN/OLE R

Since its inauguration in 1974 as a national online system for scientific and technical information, CAN/OLE has become as well a Canadian vehicle for information supporting library operations.

Shortly after the initial four large scientific files (COMPENDEX, INSPEC, Condensates, BIOSIS, etc.) the Union List of Scientific Serials Held in Canada was made available through CAN/OLE to facilitate location of documents. This first link to the collections of CISTI and other major Canadian libraries has been followed by the addition of the database of CISTI's holdings

and the collections of Transport Canada, Environment Canada, CAN/MARC (Canadiana), CODOC and most recently, the MICROLOG file of Canadian government documents.

Through CAN/DOC, the online ordering facility, CAN/OLE users have direct access not only to CISTI's collection for document backup for files in science and technology but also to the documents cited in the specialized files sponsored by organizations such as Transport Canada, National Library, Environment Canada and Energy, Mines and Resources (CANMET). This year, some 23,000 orders were placed through CAN/OLE, or 12.5% of all requests received by CISTI for loans and photocopies.

CISTI staff involved in the training program must make users aware of the resources which can be accessed directly through CAN/OLE. Using the ILL policy file, the user can discover the policies and charges of a given library, such as Transport Canada or the National Library and direct the online order to that library.

The CAN/OLE training program has evolved in concert with the broadened scope of the database and software facilities, but has as well expanded with the growth in the number of centres and usage across Canada.

CAN/OLE Training

YEAR	CENTRES	SEMINARS OTTAWA	SEMINARS REGIONS	TOTAL	TRAINED
1974/75	34	2	1		34
1975/76	42	12	5		157
1976/77	87	13	9		205
1977/78	136	8	12		179
1978/79	198	13	10		194
1979/80	269	23	30		534
1980/81	353	18	23		394

In 1980/81, the number of CAN/OLE subscribers grew to 353. 394 persons were trained in 41 seminars, 18 in Ottawa and 23 in major cities across Canada.

CAN/OLE Training

LEVEL	LOCATIONS	NUMBER
INTRODUCTORY SEMINARS	CISTI	18
	CHARLOTTETOWN	1
	HALIFAX	1
	MONTREAL	2
	TORONTO	2
	WINNIPEG	3
	REGINA	1
	EDMONTON	1

	CALGARY	2
	VANCOUVER	1
	VICTORIA	1
	TOTAL	34
UPDATE SEMINARS	CISTI	1
	CALGARY	1
	REGINA	1
	TORONTO	1
	MONTREAL	1
	HALIFAX	1
	ST. JOHN'S	1
	TOTAL	7

The training program at present includes 2 types of seminar. The 1 1/2 day introductory seminar and the one day update seminar.

The Introductory Seminar of 1 1/2 days, encompassing these major areas:

- Introduction to CISTI: where CAN/OLE fits in with Cataloguing, ILL and Information Services
- Introduction to online searching: theory of concept maps, search strategy and preparation
- Telecommunications and equipment
- CAN/OLE system: details of software features, commands and databases
- CAN/DOC, document delivery, bulk delivery systems
- Online practice: average one hour per trainee

This first training is supported by the CAN/OLE Manual, which includes the User's Manual to the system, and the Database Manual, the comprehensive online Message File, and most importantly, the hot-line service where the user can obtain personal assistance in solving any CAN/OLE related problem, formulating search strategies and so on. Training, as well as all documentation and services, are offered in both French and English.

The Update training is a 1 day seminar which emphasizes:

- New information or changes at CISTI: Document Delivery, charges, Information Services
- System optimization: using the more complex commands for efficient and effective searching
- New databases or new features available on existing files
- Online demonstration: related to questions from attendees

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Training is one of the major activities of the CAN/OLE support staff. Nearly 1 person-year is dedicated to offering the regularly scheduled seminars in our training facility in Ottawa and seminars in and other major centrees at least once a year.

MEDLARS

CISTI has had, since 1968, a bilateral agreement with the U.S. National Library of Medicine (NLM) to provide MEDLARS services to Canadians. Under the terms of this *quid pro quo* agreement, CISTI serves as the Canadian MEDLARS Centre, one of 12 "foreign partners" working with the NLM to build the MEDLINE database by providing indexing, abstracting and keyboarding in exchange for Canadian usage of the system. As the national centre, CISTI, through its Health Sciences Resource Centre, is responsible for coordinating all aspects of Canadian access to the system, including both administrative and customer services for Canadian users. In addition, CISTI provides a supporting bibliographic system, by ensuring that material cited in the 18 databases currently available on the MEDLARS system is available at CISTI or in other major medical libraries in Canada.

MEDLARS Training

	CENTRES	SEMINARS	TRAINED
1977/78	55	8	73
1978/79	67	14	99
1979/80	86	16	125
1980/81	110	27	215

CISTI's training program began with online access to MEDLARS in 1974. Initial access was limited, and the first Canadian users of Medline were the libraries in the medical schools and Health and Welfare Canada. With open access to Canadians since 1978, use of the MEDLARS system has increased an average of more than 25% a year, and, most significantly, its use has extended far outside the medical school library to the hospital library and the industrial information centres concerned with health, safety and toxicology. This expansion has resulted in the demand for more training, and this demand from a more heterogeneous group of users.

As the Canadian vendor for the MEDLARS system, CISTI must provide training for Canadians in both system capabilities as well as file content. CISTI staff receive extensive training in each database provided by NLM. In the case of both CAN/OLE and CAN/SDI, CISTI training emphasizes system capabilities, while database suppliers, such as BIOSIS, provide separate training related to database content.

CISTI trainers receive advanced training at NLM, attend the annual technical seminar for system and vocabulary updates,

and cooperate with NLM MEDLARS Management Section throughout the year to keep Canadian users abreast of technical changes.

In 1980/81, HSRC staff trained 215 users in 17 seminars, more than doubling its activity in just 2 years.

The Introductory Medline course is now 4 days, covering these areas:

- System capabilities and commands
- Features and use of controlled vocabulary in search formulation We. File structure and content: Medline, Toxicology files, Cancer files and Technical Services files

The online practicum during this 4-day course is 3 hours per trainee. Until 1981, all introductory courses were held in the training facility at CISTI. Seminar size has been held to a maximum of 8 students to ensure terminal availability for this extensive online practice time. With the increasing number of multi-terminal facilities in universities and other organizations, together with the increased demand on a regular basis, introductory courses are being offered regionally in 1981.

Update courses are given in major cities at least once per year, following the annual MeSH vocabulary changes and system enhancements. These updates emphasize file content, especially as new databases become available to Canadians. During this last year, emphasis was placed on searching the toxicology related files, including the very unique file Toxicology Data Bank (TDB) which was made available in August 1980.