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General Periodical Indexes on CD-ROM.

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In public school, community college and undergraduate libraries the most frequently used print indexes are those that index general interest magazines. In fact, we suspect many library users know about only one index: H.W. Wilson Company's Readers' Guide to Periodical Literature. Indexes such as Readers' Guide are appropriate for the elementary or high school student, the undergraduate, the layperson or any member of the general public who wants access to the information and articles published in the magazines they read regularly and that are held in most library collections. Because general periodical indexes are undeniably an important way of providing access to the library collection and are so heavily used, they are a natural product for CD-ROM. This article will examine products from EBSCO Electronic Information, the H.W. Wilson Company, University Microfilms Inc. and Information Access Company.

USER'S NEEDS

The general non-specialist library user has several needs that will affect the evaluation and choice of an appropriate CD-ROM index. First, the index must be relatively user friendly and easy-to-use, requiring little in the way of training or practice.

Many people will not want to ask for help so the search procedure should be somewhat intuitive and follow a logical sequence. Their information needs may be infrequent and they may not want to spend lots of time looking for information so it should be possible to do a simple search quickly and easily.

Articles that are retrieved in an index search must be in magazines or sources that are understandable to the general reader and are not too technical or esoteric. Finally, the magazines must be readily available in local libraries or copies of the desired articles must be quickly and inexpensively obtainable. HISTORICAL BACKGROUND

General interest periodical indexes in paper form have been produced for libraries since 1882 when Poole's Periodical Index was first published. Later, the American Library Association took over the index and finally, in 1905, the H.W. Wilson Company assumed responsibility. Wilson's Readers' Guide to Periodical Literature has been published in print form continuously since that time, with very little serious competition until recently. The first online general periodical index was not Readers' Guide, but Magazine Index from Information Access Company.

Magazine Index, started in 1976 on the DIALOG system, filled in the empty market niche for non-specialist magazine material online. It was immediately immensely popular with searchers, many of whom had been hoping for a Readers' Guide-like product online. In 1984, Wilson began their online system WILSONLINE, making all of their indexes available online. Several other general periodical indexes have come (and some gone) online via DIALOG, BRS or other online systems, although none have touched the popularity of these two.

CD-ROM

Not surprisingly, the first general periodical index on optical disk was produced by Information Access Company in 1985. The pioneering efforts of Infotrac, at first a single Magazine Index-like product, are well known to the library community. Now a family of CD-ROM indexes, the InfoTrac system is still a major player in the growing CD-ROM general periodical product arena.

Four major companies with several different products now compete for libraries' General periodical index dollar. The four companies that publish general periodical indexes on CD-ROM (EBSCO, H. W Wilson, University Microfilms Inc. and Information Access Company) are all well known to the library community. The companies and their general interest products are listed in Table 1.

TARGET AUDIENCE

As shown in Table 2, producers target similar audiences. In addition to the general library audience, University Microfilms Inc. (UMI) and Information Access Company (IAC) provide subsets of larger indexes for the school library audience. Resource/ One is essentially a repackaging of Periodical Abstracts Ondisc (with fewer magazine titles covered and a selective index to the New York Times added), as TOM is derived from Magazine Index Plus. IAC does the most customization for specific audiences. General Periodicals Index -Academic Edition includes many of the more scholarly titles covered by their Academic Index, the Public Library Edition includes m Magazine Index titles. There is a fair amount of overlap because certain popular titles are included in all of the products. COVERAGE

Table 3 shows how many magazine titles are covered in each index and when coverage began. (Not all magazine titles are covered for the entire date range indicated. The date is for the earliest coverage.) All of the CD-ROM indexes include the H.W. Wilson Company's core list of approximately 200 magazine titles that Wilson and a committee of librarians decide should be in any basic library collection. The competing indexes use Wilson's core list as a touchstone and marketing ploy 'everything covered in Readers' Guide, plus more'').

General periodical indexing on CDROM is obviously a phenomenon of the 1980s. Backfiles for some indexes are available, but even backfiles take indexing back only in the 1980s. In some cases more retrospective information is available in online versions of the indexes, but users must rely on print sources for older information.

LICENSING

Updates and prices (without hardware) are given in Table 4. Many of the CD-ROM indexes offer educational discounts or multi-copy discounts as well, which are not reflected in these prices. The prices are usually for a single site license; if you want to have multiple workstation access to the disk on a Local Area Network you have to get special permission from the producer. EBSCO and Wilson do not charge extra for use on a network but UMI and IAC do.

Another aspect of licensing that affects pricing is the policy for outdated disks. Wilson will let you keep the old disks for use in a branch library. If your subscription to Wilson, EBSCO and UMI is ever canceled, you may keep old disks. UMI and IAC ask that outdated disks be returned or destroyed. TURNKEY SYSTEMS Turnkey systems, which include all the necessary hardware and software to operate the indexes, are offered by all four producers. Some examples of the single workstation hardware configurations and prices are shown in Table 5. All are IBM PC compatible, with some producers offering more than one system. For example, IAC will lease their hardware bundled with the CD-ROM and all software for $1000 per year for Magazine Index+. Shipping charges are not included in any of these prices and all prices are subject to change.

SEARCH FEATURES AND INTERFACES

While many operational differences exist among the four producer's systems, there are some commonalities. All of the products examined here feature extensive help screens, the EBSCO and UMI products offer online tutorials as well. All follow the standard convention of displaying the most recent citation first. Use of the escape Esc key to move up through the menu hierarchy is also common to all systems. Some of the more advanced search modes emphasize the use of Boolean AND but the user's manual or online help files must be checked to discover the OR function. Table 6 summarizes some of the important search characteristics of each index. Ease of use is a subjective criteria that may vary with each user or evaluation. It is, therefore, important to have a user population in mind when evaluating interfaces and search features. We will describe each system and relay some of our impressions, but we urge serious buyers to look before leaping into a purchase.

EBSCO

Magazine Article Summaries (MAS) offers a choice of three search interfaces. The Quick and Easy Menu is the default mode designed for the novice and is shown in Figure 1. The Advanced Techniques screen as shown in Figure 2 seems less cluttered, especially on color monitors, even to new users. The Expert Search mode is similar to the Advanced but allows searches to be saved and rerun later.

EBSCO emphasizes keyword searching with Boolean AND separate lines) and OR (words separated by a comma on the same line) in all search modes. The NOT function is available only on the advanced and expert modes.

The subject authority file (Figure 3) may be browsed by pressing the F8 key and either typing in a term or scrolling with the arrow keys. Queries may be saved and combined to form new queries. In the Quick and Easy search mode searches may not be restricted by field. Searches in the expert mode may, however, limit their search by field.

Once a match is found, the summary listing is displayed with the search term(s) highlighted. The detailed display can be viewed by pressing the Enter key at the appropriate summary listing. Results may be printed, spooled for later printing or downloaded to disk. A bibliography consisting of selected titles may be printed and interlibrary loan or reprint requests can be generated

H. W. WILSON

Wilson's Readers' Guide to Periodical Literature and Readers' Guide Abstracts share the same search software with all of the other Wilson indexes on CD-ROM, allowing patrons access to many databases while learning only one system.

The Wilsondisc products offer a choice of three different search modes: Browse, Wilsearch and Wilsonline. Figure 6 shows the search screen for the browse mode. Browse mode is designed for the novice searcher; no Boolean logic or keyword searching is

permitted. The user types in a subject and an alphabetic listing of subject headings nearest the input term is displayed, including cross-references (see Figure 7). The terms with an asterisk instead of a postings count indicate those that have related term listings. When an appropriate subject heading is found, the user highlights it and the first citation is given (Figure 8). Unfortunately, in Readers' Guide Abstracts the entire citation plus abstract will not always fit on the same screen so the user must know to hit the page down key to retrieve the rest of the abstract.

The Wilsearch interface is designed to incorporate more flexible search techniques such as Boolean logic and field specified searches. A template is displayed allowing key word searching in subject, author, title, journal name or organization name. Terms entered on separate lines are ANDed while those terms on the same line preceded by the word 'any" are ORed. Proper names can be entered in regular or inverted style.

The Wilsonline command mode is designed to offer many of the same capabilities of the Wilsonline online system, including Boolean logic, truncation (internal single, multiple and variable character and external) and field specific searches. Some online capabilities such as multifile searching, proximity searching and sorting are not yet available. Wilsonline mode allows the searcher access to the thesaurus Figure 12) and the inverted index. One of the major advantages of Wilsondisc for those who need up-to-date searches is that the purchase price of the CD-ROM includes free access to the corresponding online file. Searches can be saved on disk and uploaded online to get the most current citations.

UMI

Periodical Abstracts and Resource/one CD-ROM indexes use the same interface as University Microfilms'(UMI) other CD-ROM databases. Only one search mode is offered but its unduttered screen (shown in Figure 13) offers automatic searching for singular and plural word forms, fun Boolean logic (AND, OR, AND NOT) and a full range of proximity operations.

While UMI does not offer a subject browse capability, you can limit a search to any of the 14 fields and the word parsed inverted index can be displayed in a window over the search screen (see Figure 14). As a word is typed, the index will shift in a manner similar to the Wilson indexes to the corresponding portion of the listing. Pressing the Enter key will transfer the selected words to the search term line so other terms May be added or the search started. Unfortunately, while this is a useful feature, it is of little help when looking for multiple word concepts since it displays single words only.

When a search is complete the UMI system displays the number of postings (see Figure 15). The title list Figure 16) is displayed by hitting the return key; individual records are displayed by again hitting return. A complete citation is shown in Figure 17. One nice search feature is the ability to select any word in the citation by placing the cursor at the word and pressing the Ctrl and F3 keys. The system will then search for that word and create a new set of citations.

IAC

The Infotrac family of CD-ROM databases provides the least flexibility, but offers the easiest search interface. All searches use the browse subject mode for simple searching of subject headings only. Most Infotrac systems are sold as turnkey systems with color-coded function keys, making it very simple to use.

The search screen Figure 18) prompts the user to type in a subject. When the return key is hit, a list of subjects nearest the input word is displayed Figure 19). If queries are too broad, Infotrac will ask for a subheading to narrow the search or allow the user to search the original broad subject. Subject headings may be browsed by using the arrow and page up/down keys. A heading is selected by highlighting the term and pressing Enter.

Infotrac will display the first citation listed under the selected heading. If no citation exists for a particular heading, the cursor will jump to the next heading with a citation, and that citation will be displayed. As can be seen in Figure 20, most records are brief and subject headings are not displayed in the record.

VALUE-ADDED INFORMATION

As seen in the sample records shown in the searches above, the amount of value-added information in each index is not the same. Table 7 shows how much information is added by indexers or abstractors to a typical record in each database.

EBSCO gives complete bibliographic information in its summary listing, helpful for browsing or creating bibliographies. Wilson notes the presence of bibliographies, footnotes, Illustrations, maps and writes excellent informative abstracts. UMI provides searchable fields for journal group category, article type, company names and products mentioned in reviews and notes the presence of illustration, maps, etc. While the great majority of IAC citations have no abstract, some newer citations in the areas of computers/telecommunications and management/finance do have rather lengthy abstracts.

FULL-TEXT SUPPORT

One of the biggest challenges faced by libraries is having a periodical collection that can support information located through its general periodical indexes. Several of the CD-ROM indexes recognize this need and are offering some full-text article support. That support may take the form of CDROM or microform collections of articles, document delivery services or a software feature that allows a local library to indicate to a CD-ROM searcher which magazine titles are held by the library. Table 8 shows full-text support.

The most direct support is offered by IAC and UMI. Infotrac offers the Magazine Collection and Business Collection, microfilm

cartridge collections with articles filed by a number that is referenced in the CDROM indexes. UMI has announced its General Periodicals Ondisc, which will include indexing information and full article texts on CD-ROM. Eventually it will include 200 titles from 1988 onward; UMI plans to begin shipment of an abridged version (150 titles, 1989 forward) in August 1990. Prices for the turnkey systems, including AT compatible computer and laser printer, are approximately $13,000 for the full version and 10,000 for the abridged version plus a ten cent per printed page charge.

EBSCO is demonstrating ASCII searchable full text, without graphics, for 48 magazines.

INSTALLATION AND SUPPORT

The IAC indexes are the only ones that do not require a hard drive of at least ten megabytes because of their less flexible indexing and few abstracts. All products require MSDOS 3.1 or greater and all except Wilson require Microsoft Extensions. (Wilsondisc products will work with or without Extensions.) If you are operating a standalone workstation with just a single company's products running and you are satisfied with the system's default parameters, installation is fairly straightforward for all of these indexes. If you mix different products on a single machine, install a LAN or make significant changes in set-up parameters you will need to be familiar with DOS and have experience installing systems.

EBSCO offers the easiest installation with all software included on the CDROM which automatically creates its own subdirectory and batch file. Wilson offers the best documentation, including a complete manual and an installation videotape. Compatibility with other systems had been a problem in the past, but Wilson's releases from 1989 have solved that problem. Installation of UMI'S products is straightforward enough, but becomes more complicated if any of the default values need to be changed.

If you buy a turnkey system most companies will handle the installation for you. All of the products offer a trial installation plan. IAC'S liberal trial installation policy has been tried by many libraries who feel uncomfortable starting out on their own. (It is an excellent marketing idea, too; Infotrac leads all of the general periodical indexes in number of installations.) CONCLUSION

How can a librarian decide which of these many products to purchase for his or her library? Most are similar, but comparative information will help librarians reach a decision that makes sense for their situation. Comparative data are just a starting point, however. There is no substitution for trying out each product to get a feel" for the system. The search protocols, ease of use and esthetics of the systems vary considerably and, are in many ways, a matter of personal preference. After looking at all of the possibilities, buy what seems appropriate for your users and makes sense for you.

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