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## Searching With Menus

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# □ ONLINE DATABASES □

BY CAROL TENOPIR

## Searching with Menus

MOST INTERMEDIARY searchers use commands for online searching. Commands offer power, are efficient, and allow the searcher to control the search process. On the other hand, they require extensive training, good user manuals, and ongoing practice. Now three major online systems—BRS, DIALOG, and OCLC's EPIC—offer menu searching in addition to their command interfaces. Although the menus are designed especially for end users, intermediaries may wish to use them as well if they search a system infrequently or if they haven't yet had a chance to attend system training sessions.

### BRS

BRS has offered a menu mode for over eight years. Originally developed for its BRS/AfterDark and BRS/Colleague end user services, BRS menus can also be selected as an option in its full online system. In this case menu searching is charged at the same rates as full-command searching.

To enter menu mode on BRS, simply enter "MENU" instead of a database name when the logon screen asks you to specify a database. In AfterDark and Colleague, menus are automatic.

Once menu is selected in the full system, the first menu screen asks you to choose either to enter the Search Service, to view an update file, see a tutorial, or get customer service information. If search service is selected, the "Libraries" screen appears next.

All BRS databases are categorized into eight broad subject categories, such as Business & Finance, Medicine & Pharmacology, Education, Social Science & Humanities, etc. For topics that fit nicely into one of these categories, this is easy. (The

menus are different on Colleague, reflecting the limited number of databases.)

I ran a search on the relationship between cholesterol and exercise. Unlike most novice end users, I knew I wanted the Sport, Medline, and Magazine Index or Magazine ASAP databases, but I tried to get to them (or to other appropriate databases) through the menu screens.

Where would you expect to find Sport? I tried Reference & Multidisciplinary, Social Sciences & Humanities, Physical & Applied Sciences, and finally found it on the fifth of five database screens under Medicine & Pharmacology. Magazine Index and Magazine ASAP are on the second of two Reference & Multidisciplinary screens.

There is no multifile searching in BRS, so you are asked to select a database title right away after the initial libraries screen. Each category contains 20-30 titles, with descriptions available for each. Once a database is selected, BRS is really a quasi-command system. Users enter one of ten or so basic commands to search (S), display (D), change files (C), etc. The BRS/Menu Quick Reference Card is a definite asset to effective searching. It not only reminds users of the basic commands, but lists more powerful features such as Linking to full text and Zooming to cited references. I recommend attaching the card to the search computer.

Help is available at any time. Often when Help is requested, the master help screen appears and you must decide which help category is likely to hold the answer to your question. (Going through the master Help screen point by point is almost like a tutorial.)

Other times there is context-sensitive help. This is not always useful, such as the Help screen that appears after entering C to change databases. It reads, "To choose a database, you must enter the correct four-character label. Detailed database descriptions appear in the database aidpages, or check the FILE database for information on BRS

databases." To get a list of databases you have to return to the Main Menu (although the Help message doesn't tell you this).

Other times the context-sensitive help assists with search strategy. On Medline, for example, when my search yielded over 600 hits, the Help screen offered me a choice for "Too Few Documents Found?" or "Too Many Documents Found?" in addition to information on how to search specific fields.

Choosing "Too Many Documents Found?" resulted in a three-screen tutorial on reducing hits by adding a concept, using a more restrictive connector, restricting by field, or using limits. After exiting this help message, I entered the command for limits (LT) and was given a menu choice of limiting to English, human, years, or all of the above. Specific limits vary with the database and the screens choices substitute for printed BRS AidPages.

One of the frustrating things about BRS menus is the system's insistence that the poor user do things right. When I was trying to change databases, it kept telling me to enter the correct four-character label or enter H for help. I entered an incorrect label several times, got the same message, and finally got locked into a loop that wouldn't even respond to H. (Entering M for main menu rescued me.) BRS/Colleague has a 100-page user manual and the BRS/Menu Quick Reference Card is good for all menu versions. For more information, contact BRS, 800-289-4277.

### DIALOG

DIALOG Menu<sup>TM</sup> was announced at the Online/CD-ROM '90 Conference last November. Introduced in 1989 on DIALOG's Corporate Connection end user system, it is now available as an option to all DIALOG customers. By the end of this year, almost all of DIALOG's more than 400 databases will be accessible with Menu.

If HOMEBASE is your default file, simply select item #9, "Begin DIALOG Menu" from the HOME-



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BASE welcome screen. If you have another default file, specify BEGIN MENUS at the opening prompt.

The DIALOG Menus Main Menu appears next. Users are asked to choose by number from a screenful of choices (22 in all). At any time, instead of making menu number choices, you can switch into command mode by BEGINning in a DIALOG database by file number, get help, or logoff.

Nineteen of the 22 categories represent broad subjects for databases such as Chemistry, Company Information, Law, News and Fulltext Publications, or Social Sciences and Humanities. Other categories include DIALMAIL, Help in database selection, and DIALOG news. Twenty-two choices seem a bit intimidating, but the trade-off would be to have broader subject categories with an extra menu screen to limit the choices.

I first chose category #17, "People, Books & Consumer News," to do my cholesterol and exercise search. I was shown a screen with six narrower subject categories and told, "Each category consists of a list of databases containing information relevant to that subject." Entering D at this screen will provide a short description of each subject category; entering S [category number] will allow you to do a multifile search on all databases that DIALOG has put in the category; entering just a category number will bring up the list of databases in that category.

From the Leisure, Recreation & Travel category, I first selected the Sport database. The next menu asked me to select a subject search, an author search, a journal search, or an author's organization search. If I had been doing a multifile search on all the Leisure, Recreation & Travel databases, this intermediate step is skipped and the system assumes a subject search.

A brief help message appears automatically at the enter search screen, telling you to "Enter term(s) which describe your subject. Logical OR, AND, or NOT may be used to separate your terms. A question mark may be used for truncation or pluralization (e.g., MICROCOMPUTER? OR PERSONAL COMPUTER?)."

CHOLESTEROL AND EXERCISE? retrieved 339 records, so on the next menu screen I took advantage of option 1—Modify your search. There were six modifying options given for

this database; other databases have different options depending on their record and field structure.

I could "1. Narrow subject concepts (logical AND); 2. Widen subject concepts (logical OR); 3. Replace subject concepts; 4. Select limits; 5. Select author (logical AND); or 6. Select journal (logical AND)." Selecting limits gave me the choice of limiting by publication year, abstracts, or English language. I chose all three and had to respond to one more menu to choose a data range. My search was reprocessed and retrieved 47 records.

This time at the choice menu I selected "display records at your terminal" to see a list of truncated titles. Full records were then displayed for each title number I input. The truncated title display works well with databases like Magazine Index that tend to have short article titles. With research literature, however, information important for relevance judging is often chopped off.

For example, the title display showed, "Influence of exercise and cholesterol feeding on lipids and lipoproteins," but when the full record was displayed the last two title words were revealed: "in rats." Another didn't have room to display the qualifier, "in men over 50 years of age." In full-text newspaper databases, the title display claims to show record length, but does so only if the titles are short enough to leave room for this extra information.

On the whole, DIALOG's Menus is a well-designed interface that can be used without reading a searching manual or referring to any printed documentation. Menus are presented in a logical order, meaningful help is always available, most menus offer a reasonable number of appropriate choices, and Bluesheet-type information about each database is incorporated into menu choices. It unobtrusively offers quite a bit of power such as multifile or single database searching, restricting by LIMITS, additional index searching, and automatic word proximity.

DIALOG Menus is not an expert system interface—some knowledge of searching is needed and not all broadening or narrowing techniques used by experienced searchers are available on Menus. It does a good job, however, of helping the novice searcher exploit the narrowing capabilities of each database with limits and additional indexes. By presenting

a menu choice for modifying a search, the user doesn't have to know much about search strategy or remember the idiosyncrasies of each database.

DIALOG publishes a good (and free) user guide called *Searching DIALOG: The Guide to Menus*, plus a menus quick reference card and a special "On the Menu" newsletter. Connect and display charges are the same for searching Menus as they are for command searches. For more information, contact DIALOG, 800-3DIALOG.

### EPIC

EPIC's menu interface FirstSearch was developed as a way to bring OCLC searching to the end user in the library. Scheduled to be available this summer, it has been beta-tested in 16 OCLC libraries all spring. It was not available for full review as of this writing.

FirstSearch initially offers access to the Online Union Catalog (one-half at a time) and to ERIC. Other EPIC databases will be added. Searches can include Boolean AND and NOT operators (no OR operators), or users can SCAN all indexes to browse and select a term or phrase from the scan. A preliminary display screen shows a one-line display for six records at a time. The short display includes truncated title, author, and publication year. When an item number is selected from the short display, the full bibliographic record, including OCLC holdings information, is displayed.

Pricing for menus is different than on the connect-hour-based EPIC command mode. Instead of connect-time pricing, libraries will purchase blocks of 500 searches and pay at the time they order. Fees per search are on a sliding scale according to the number of searches purchased. These range from 90¢ per search with one 500-search block (\$450), down to 45¢ per search when 160 or more blocks are purchased (80,000-plus searches or \$36,000-plus per year).

Libraries can carry over unused searches to the next fiscal year, return unused searches for refund, or purchase additional search blocks during the year. Telecommunications charges still apply in addition to search costs. The menu system is available only to full OCLC participating libraries that qualify for EPIC discount pricing. For further information, contact Tamsen Dalrymple, OCLC, 800-848-5878.



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