

# Euronet-DIANE: a study on the harmonisation of user manuals

*Michael Casey*

**Abstract:** Up to 25 hosts will eventually make approximately 150 databases available on Euronet-DIANE. If European users are to benefit from, rather than be totally confused by this massive store of information they must be educated, trained and supported in their efforts to exploit it. The common command set is already with us, as are multilingual thesauri and many other user aids for bibliographic retrieval systems. User manuals, however, present a confused picture to the user because they exhibit such a wide variation in content, structure and design. This paper summarises the recommendations of a study on the harmonisation of user manuals carried out under contract to the Commission of the European Communities as part of the Euronet-DIANE project.

## Introduction

The ever increasing demand for information, particularly by the scientific and technical community, has led to the development of a wide range of online computerised information services. Although the retrieval systems on which these services are based operate on similar principles user manuals show a wide variation in content, structure and design. The need for harmonisation of user manuals was identified by the Committee on Scientific and Technical Information and Documentation (CIDST) and the Commission of the European Communities (CEC) as an area for study in the Euronet-DIANE project (Direct Information Access Network for Europe). In November 1977 a contract was awarded by the CEC to the Institute for Industrial Research and Standards, Dublin, Ireland. The project was undertaken by the author as an employee of the Institute and was completed in October 1978.

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## Objective and scope of the study

When DIANE became commercially operational late in 1979 a wide range of interactive bibliographic retrieval services were made available to users in the European community. Most of these services were already available, on a limited geographical basis, by means of national and international telecommunications networks. The objective of the study was to prepare a set of guidelines for an agreed harmonised format for user manuals for all interactive bibliographic retrieval systems to be made available on DIANE (approximately 150 databases will be offered by up to 25 hosts). It is hoped that the eventual adoption of an agreed harmonised format by all DIANE hosts will assist users in retrieving information from online bibliographic systems and enable them to change more easily from one system to another, thereby ensuring maximum and efficient use of DIANE databases.

The study was restricted to the preparation of a harmonised format for the two types of manual defined in the contract specification — a comprehensive reference



## About the author

### Michael Casey

Michael Casey is currently a lecturer in the Department of Library and Information Studies, University College Dublin (U.C.D.). He took a B.Sc (Hons.) Chemistry in 1967 and a PhD in 1970 at U.C.D., followed by a Masters degree in Information Studies at the University of Sheffield in 1974. Before joining U.C.D., he spent six years in technical information work at the Institute for Industrial Research and Standards, Dublin, two of which were taken up in consultancy work for the Commission of the European Communities. He has also had two years industrial experience in chemical research and production with I.C.I. Plastics Division.



manual and a quick-reference manual for searching bibliographic databases on interactive retrieval systems. Detailed recommendations on additional services offered by some hosts are not included – for example, online editing of records and production of library catalogues are not covered in the report. However, detailed information on these operations may be inserted by hosts as necessary in both manuals (e.g. see Appendix – section 5.12).

The first phase of the project consisted of an analysis of the content and structure of existing user manuals. All relevant manuals were collected and examined but only those of major European and American hosts were analysed in detail. These included the BLAISE manual (British Library), the DIALOG manual (Lockheed), the DIRS 2 manual (Deutsches Institut für Medizinische Dokumentation Information-DIMDI), the ORBIT manual (Systems Development Corporation-SDC), and the RECON manual (European Space Agency-ESA). Two hosts, the British Library and the European Space Agency, were visited to discuss their existing information retrieval systems, user manuals and possible future developments in online services.

The second phase of the study involved the preparation of general and detailed recommendations on the content, structure and design of a harmonised reference and quick-reference manual for interactive bibliographic retrieval systems to be made available on DIANE. The interim and draft final reports were circulated for comment to major DIANE hosts and to members of the Economic and Technical Aspects Working Group of CIDST. The comments of all interested parties were taken into consideration in preparing the final report [1].

### Guidelines on the preparation of a harmonised reference manual

The proposed content of a harmonised reference manual is based on the type of information required by a user to make efficient and effective use of an interactive bibliographic retrieval system. The detailed analysis of existing user manuals was an essential prerequisite to the preparation of a comprehensive list of concepts to be covered in a harmonised manual. The recommended order for the presentation of concepts is shown in the Appendix.

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CHAPTER 1 (Introduction) should briefly introduce the user to the host, the retrieval system and the contents and layout of the manual. (For convenience, the term ANYHOST is used throughout the report to represent the full name, acronym or abbreviated name of a host, i.e. an organisation or part of an organisation responsible for the provision of an interactive bibliographic retrieval service. The term ANYSYST is used to denote the acronym or abbreviated name of an interactive bibliographic retrieval system, e.g. BLAISE, DIALOG, etc. See Appendix.)

CHAPTER 2 (Summary of Services) should include an outline of subjects searchable on the retrieval system, a summary of all online and off-line services offered by the host and a brief outline of pricing and billing policies and procedures.

CHAPTER 3 (The ANYSYST System) should consist of a description of hardware and software and a brief explanation of the manipulative procedures executed by the retrieval system, at unit record level and linear and inverted file level, in response to commands by a user operating a terminal.

CHAPTER 4 (Principles and Techniques of Searching on ANYSYST) should be designed to assist inexperienced users in understanding the general principles and techniques of searching on the retrieval system.

It is proposed that the main body of information in a harmonised reference manual be contained in CHAPTER 5 (Operating instructions). It should consist of a comprehensive set of instructions on carrying out operations on the retrieval system, e.g. logging on and off; general

operations such as erasing, interrupting input/output, requesting assistance or information online; basic online searching operations, e.g. displaying a list of databases, selecting a database, searching a database etc., outputting data; saving a search and using saved search formulations; off-line searching; using special packages (see Appendix); and other online operations. It should also contain a list of program messages, details of the service schedule, a summary of commands, tips on retrieval techniques and worked examples of online and off-line searches.

It is recommended that operating instructions be presented under 'operation' headings (e.g. 'Displaying Descriptors') rather than 'command' headings (e.g. 'The DISPLAY Command'). This approach would facilitate the adoption of a harmonised format since the same heading would be used in all DIANE reference manuals for instructions on a particular operation. If 'command' headings were used instructions on a specific operation would appear under different headings in different manuals, each heading being determined by the command language of the particular retrieval system. However, it should also be possible to gain access to information under 'command' headings by consulting a tabulated summary of commands with appropriate cross references to 'operation' headings (see Appendix, section 5.4.1).

The sequence in which operating instructions are presented should be on a 'need to know' basis and be as close as possible to the order in which most users would be expected to use and learn to use a bibliographic retrieval system. Thus, instructions on carry-

*'The sequence in which operating instructions are presented should be on a 'need to know' basis and be as close as possible to the order in which most users would be expected to use and learn to use a bibliographic retrieval system.'*

the study involved general and detailed content, structure and format for interactive systems to be made in interim and draft form for comment and discussion by members of the project Working Group. Comments of all kinds were taken into consideration in the final report [1].

#### Preparation of a manual

It was decided that the format of a harmonised reference manual should be based on the type of system to be used by a user to make use of an interactive retrieval system. The detailed format for the preparation of a manual was an important concept to be covered. The recommended sequence of concepts is



ing out an elementary search should precede instructions on what new or inexperienced users might consider to be more sophisticated operations such as saving a search, executing a saved search, using 'special packages' and so on. Another proposed feature of Chapter 5 is that it should include a generalised flow chart representing online information retrieval and other related operations available on a retrieval system. This chart should be reproduced with all instructions on basic searching and outputting operations and be designed to alert a user to all options available to him or her at the various stages of an online session.

CHAPTER 6 (Databases) should include a tabulated summary of all databases available on the retrieval system, listing subjects covered, searchable and printable fields and output formats for each database. This introductory summary should be followed by more detailed information on each individual database (See Appendix).

The penultimate section should contain an explanatory list of terms relevant to online bibliographic retrieval systems, and it is recommended that a standard glossary of terms be adopted by all DIANE hosts for inclusion in their manuals. The final section of the manual should consist of a keyword index based on chapter, section and sub-section headings and specific concepts covered in the text.

General design recommendations include the use of a Univers (or alternatively Helvetica) typeface on A4 135 gram cartridge paper, bound by a good quality three-ring binder. It is suggested that Chapter 6 (Databases) should be printed on coloured (yellow) paper to distinguish it from the rest of the manual. If this chapter is excessively large the possibility of binding it in a separate loose-leaf binder should be considered. The use of thumb tabs, positioned 13mm to the right-hand side of A4 pages, is also proposed.

Efficient access to information in the manual should be achieved by means of a general contents page (see Appendix); a separate detailed contents page for each

chapter; a paragraph numbering system (see Appendix); cross references linking Chapters 1-6 and also relating concepts and operations described within individual chapters; page indexing (i.e. keywords, printed on the top of each page, to indicate the contents of the page); a keyword index; and good physical layout, graphic design and typography.

The need to update the manual should be facilitated by loose-leaf binding, the inclusion of an update/amendment record sheet and the use of the paragraph numbering system for pagination. Certain sections which are likely to require frequent updating (e.g. Service Charges) should be isolated for easy replacement (i.e. it should be possible to remove the section to be updated without removing parts of other sections).

Finally, it is recommended that DIANE reference manuals be prepared in more than one language, one of which should be English. This would encourage international use of hosts' online information services.

#### Guidelines on the preparation of a harmonised quick reference manual

Quick reference manuals are produced in a wide range of formats varying from single or foldable cards to relatively large bound or loose-leaf volumes. In this study the proposed harmonised quick reference manual was designed on the basis of the function it is intended to serve, namely, to provide an easily accessible summary of the basic information required to use an interactive bibliographic retrieval system. As it is assumed that users of quick reference manuals will be experienced and/or familiar with the commands and command functions of a particular retrieval system, it is not considered necessary to present information under 'operation' headings.

The manual should provide information on the following topics in the following order: host contacts; a brief overview of the retrieval system; service schedule; telephone

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#### Harmonisation training

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*'Many users are still confused by the plethora of online systems, each having different command languages and documentation formats and often providing the same databases under different names.'*

numbers; terminal identifier codes; passwords; logging on and off procedures; commands and command functions; output formats; special packages; miscellaneous online operations; tips on retrieval techniques; requesting assistance; and databases.

The use of Univers (or Helvetica) typeface on A5 135 gram cartridge paper is recommended (copy on right hand pages only) bound by a good quality three ring binder. Quick access to information should be achieved by means of a contents page, page indexing (as described in the case of the reference manual) and good physical layout, graphic design and typography.

Updating should be facilitated by the use of a loose-leaf binder and by printing copy on right-hand pages only (long copy may be run onto the back of a page). A paragraph numbering system and pagination are not considered necessary. The quick reference manual should also be prepared in several languages including English.

#### **Harmonisation and user education and training**

All hosts are keenly aware of the need for user education and many devote considerable resources to training both new and experienced users. The emergence of user groups has contributed significantly to advances in this field and has resulted in improved communication between database producers, hosts and users. However, despite laudable efforts by individual hosts to maintain high standards in user education and training programmes, many users are still confused by the plethora of online systems, each

having different command languages and documentation formats and often providing the same databases under different names. An international cooperative venture such as DIANE, offering common services to European users, affords a unique opportunity for a common approach by hosts to user education and training. The option of a common command set is an obvious step forward, and this was offered by some hosts in 1979. The availability of user manuals, presented in a harmonised format, would be another significant advance in the provision of common services and would benefit both hosts and users. Hopefully this study will contribute in some measure towards this objective. It may not be possible for all DIANE hosts to implement each recommendation to the letter but, at the invitation of the Commission, the report may be used by hosts as a set of guidelines for preparing harmonised user manuals. In the short term it will assist new hosts who are presently preparing manuals for online services which they propose to make available on DIANE. Major hosts will hopefully adopt the proposed format when revising existing manuals.

The harmonisation of user manuals is only one of many studies sponsored by the Commission for the development and improvement of online information services in Europe. For example, other areas of study include the common command set already referred to above, enquiry and referral services concerning DIANE hosts, document delivery services, improved user training methods, multilingual aids and the harmonisation of password and billing procedures. A central user forum has also been established



to represent the interests of DIANE users.

As far as the future is concerned, there will inevitably be initial problems, delays and frustrations as the DIANE project develops to maturity, but it has already acquired sufficient momentum to promise an exciting future for online users, optimists and pessimists alike.

Reference

[1] M. Casey: 'Study on the Harmonisation of Host Manuals (Mark 2 Project.) Final report on a study carried out for the Commission of the European Communities DG XIII, October 1978. Institute for Industrial Research and Standards, Dublin, Ireland.

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D1 – Acronym/abbreviated name of database D1

*Example:*

D1 – CHEMABS

D2 – Acronym/abbreviated name of database D2

*Example:*

D2 – COMPENDEX

GLOSSARY OF TERMS

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## 1. Introduction

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# DIANE

## europaean notes

by L.J. Anthony, BA, FLA, M.I. Inf. Sci,  
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### EURONET/DIANE

There are now 35 host computers connected to the Euronet network, of which 29 are in full service. Recent tests have indicated a network availability of over 96%, and the 1981 revenues were about 30% up on those for 1980 so the Commission's efforts to boost the online market in Europe are beginning to pay off. Greece will have the technical facility for connection to the network early in 1982 and both Finland and Sweden have signed connection agreements. Steps are being taken to relax the present Community rules in order to allow easier connection with CEPT countries outside the EEC where suitable technical facilities exist.

Network usage is now running at over 4,000 hours per month, of which about 800 hours is third party use, i.e. organisations, mainly multinational, using the network for private transfer of data. New databases continue to appear in significant numbers. IRRD, the International Road Research Documentation file which covers the international literature on road research, also lists current research projects and computer programs relevant to road research, and is available on ESA-IRS. Other databases being offered on Euronet through IRS include the two international bases INIS (nuclear energy) and AGRIS (agriculture) and a British base called HSELINE, a bibliographical database compiled by the Health and Safety Executive of the Department of Employment, covering publications, conference papers, legislation and patents relating to health and safety.

Chemical Engineering Abstracts (CEA), com-

plied by the Royal Society of Chemistry, is available for batch searching by the RSC and will shortly be online on Euronet, the probable host being Pergamon-Infoline. Other services to be offered by RSC include Laboratory Hazards Bulletin in 1982 and Analytical Abstracts probably in 1984. Pergamon-Infoline are now offering Compendex and are planning to include Geomechanics Abstracts (compiled by the Rock Mechanics Information Service of Imperial College), PIRA Abstracts, Management Marketing Abstracts, Pack Legis (a new database from PIRA on packaging legislation) and Fine Chemicals Directory (compiled by Fraser Williams in the UK) which lists research chemicals that can be purchased in small quantities and their suppliers.

Derwent-SDC has set up a new host in the UK using software identical to that used by SDC in California. All the Derwent databases will be available on the new host which is accessible through PSS in the UK and through Euronet.

INKA has added Geoline, a database on earth sciences, and Hydroline, on water sciences, but have dropped INKA-CONF and INPADOC-PATFAM.

### ONLINE ECONOMICS

1982 has seen a spate of increases in online search charges following those made in 1981 for a number of the files on DIALOG and ORBIT. BLAISE has made no change in the charges for search time or offline prints but has raised the annual subscription to about \$85. INKA prices



now range from about \$40/hour to \$80/hour replacing the previous standard charge of about \$47/hour across all files. On IRS some files are slightly cheaper but, overall, prices seem to have risen with substantial increases for AGRIS, INIS and Compendex. On the other hand Pergamon-Infoline has reduced the charge for CA Search to \$80/hour but print charges have been increased.

There are likely to be further increases in telephone charges in a number of European countries in 1982 although these may be offset to some extent by the introduction of packet switching networks. EUSIDIC is at present undertaking a study to obtain figures for comparative costs of searching in European countries, the comparison sought being the costs of carrying out a specified search on a chosen database but using different hosts and different networks. In the European situation this is not as easy as it sounds because of the large number of variables in the charging systems.

For example, taking a user in the UK wishing to use CAS, three telecommunications networks are available; IPSS, Euronet and Dialnet. Both IPSS and Euronet are packet switching systems and costs are levied on both the duration of the call and the number of packets transmitted. Aslib's records show transmission rates of approximately 10.4 segments per minute (2 segments = 1 packet) for Euronet and approximately 16.7 segments per minute for IPSS, the corresponding costs being about \$3.75/hour and \$19.00/hour respectively, including the duration charge. Against this the charge for Dialnet is \$15.00/hour. To these charges must be added the cost of the local telephone call to the node, which varies from \$0.50 to \$2.25 per hour. To those users outside the local call range there may be an additional telephone charge in some European countries but not in others. Users in London may well use Dialnet to gain access to DIALOG because it is cheaper than IPSS but users in Glasgow may use IPSS since this is available through PSS (the internal packet switching service which is no more expensive than a local call) whereas Dialnet is not.

The other factor which affects the economics of online searching in Europe is the amount of government support made available to hosts in certain countries. Whereas the Commission of the European Communities is anxious to encourage the development of new databases it is prepared to leave host survival to market forces and national policies, so that any reduction in national support is likely to lead to a decrease in the number of hosts surviving. The first signs of this happening are in Germany where it seems likely that the four major hosts, which include INKA and DIMDI, will be amalgamated in the not too distant future.

## EEC ACTIVITIES

In the European situation there is a growing need for a more effective means of communication between EEC institutions and the counterparts in member states and the Commission is beginning to give serious attention to this problem. The objective would be a communications and information network which will link together Community institutions such as the Commission itself, the Council of Ministers, the European Parliament, the Court of Justice, etc with the national counterparts in EEC countries, e.g. parliaments, ministries, government departments and agencies and so on, and which is sufficiently flexible to be extended to embrace other agencies such as UNESCO and even industrial conglomerates.

Under the acronym INSIS (Integrated Services Information System), studies have been made of the needs of users of such services. There are already over 116,000 of these in existing European institutions, including over 16,000 in the EEC itself, and this number could rise to over 180,000 by 1985. Agreement is being sought from the Council of Ministers for a four-year action plan covering 1983-86, to develop an advanced information and communications system which will also create a prototype for new PTT telematics services and strengthen the European telematics industry by opening up wider markets using common standards. The intention is to integrate existing services, e.g. telephone, telex, data transmission, facsimile and audio conferencing, and then to introduce into this integrated system new services such as electronic mail, video conferencing, word processing exchange and telemetry.

The scenario envisages one physical network carrying a complex range of services using high data transmission rates and designed in such a way that any piece of equipment or device can be plugged into the network and be able to communicate with any other device elsewhere in the network. The advantages of such a system are that it allows industry to develop all kinds of devices which would not be compatible under present conditions but which by incorporating certain basic standards could be translated into compatibility by the network itself. Over \$1.1M has been allocated for studies to be undertaken in the next two years covering such areas as user requirements, technology and standards, economics and finance, human and organisational aspects and the Community's database policy.

## TRAINING USERS

DATA-STAR has announced a new approach to user training, replacing the traditional formal



training courses with a new system of self-tuition. The system involves a series of teach-yourself booklets in English, French and German, concentrating on business, chemical, biomedical and engineering information; free training files for practice in each subject; a telephone service to discuss and plan searches; and fairly frequent user meetings.

On the face of it, such a training scheme would seem to have much to recommend it since it enables the potential user to learn at his convenience without being tied down to specific times and places and it should cut the training cost for both user and systems operator. Results will be awaited with interest!

#### SIGLE

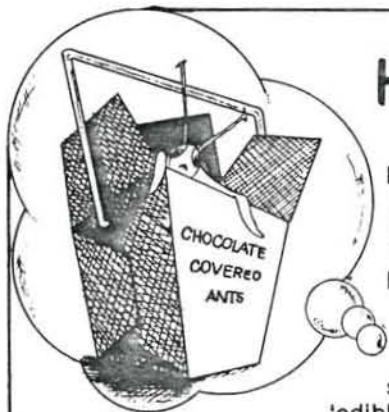
The System for Information on Grey Literature in Europe, first noted in this column in October 1980, is now in the middle of its two year experimental period. The term "grey literature" refers to material not issued through conventional publication channels such as reports, theses, conference papers, translations, technical specifications, and official documents issued in limited numbers. Little of it finds its way into the bibliographic databases and detection, identification and accessibility of this

material has always been a major problem.

In February 1980, agreement was reached on a French proposal to initiate a European referral system for grey literature and to ask for financial support from the Commission of the European Communities. Five countries, Belgium, France, Germany, Ireland and the United Kingdom, signed the original agreement and will shortly be joined by Italy and the Netherlands. Other countries which have expressed interest include Canada, Israel, South Africa and Sweden.

The main objectives are to establish bibliographical control over this material through the setting up of a European database which will be available on Euronet and to provide document delivery services through a nominated centre in each country. These are the British Library Lending Division in the UK; the Commissariat à l'Energie Atomique, CEN, Saclay, in France; the National Board for Science and Technology in Ireland; Laboratoire Belge des Industries Electriques and Louvain University in Belgium; and Fachinformationszentrum Energie Physik Mathematik GmbH in Germany. The data processing is being carried out by the CEA-CEN in France.

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# Online survey confirms potential interest, suggests improvements

The development of a common command language is the single most important development that could encourage more use of hosts by existing online users. Easy switching from host to host and the possibility of multiple file searching would be welcomed and would increase the use of services among a substantial number of users.

These are two of the conclusions of a private market survey undertaken for the European Commission.

Other conclusions from the survey deal with the cost of online services. Although costs are an important factor in the initial choice of host, they are not a major barrier to the increased use of services. Many users would, however, like to see an improved invoicing system which would give a clearer and more prompt statement of what the service is costing them.

## Easiest Improvement

Probably the most readily implemented improvement that can be made is in the area of communicating to users or potential users what services are available and how they can help them. Both Euronet users and non-users want more information both from hosts and on Euronet DIANE. French people in particular stress the need for more information.

The survey took place at the end of last year and covered 515 statistically sampled people across Europe and equally divided between users and non-users.

Euronet users showed themselves more internationally-minded than non-Euronet users. Amongst the latter, the French in particular often restricted themselves to national hosts, such as Télésystèmes. On the other hand, nine out of

ten Euronet users use other hosts; in the United Kingdom practically all users went to other hosts as well. US hosts were used in four out of five cases.

In general more industrial users call on other hosts (97%) than the public sector (88%) or services (67%).

Users on the Euronet system on average call on more than five hosts, of whom about half are Euronet hosts. For those who don't use Euronet, the number of hosts used is 2.3.

## Most Popular Hosts

Of the Euronet DIANE hosts used, other than those based in the user's own country, the following were most popular, ESA, Télésystèmes, Datastar, Dimdi, Inka, Pergamon, and Echo.

The average Euronet user is likely to spend perhaps half as

much again on online information as the non Euronet user. The mean figure for expenditure for a Euronet user was in the region of 5000 to 7500 ECU's at 1982 prices.

## High awareness of potential

An unusual feature of the survey was the high number of people who made unprompted suggestions about improvements. This perhaps indicates the high degree of awareness of, and interest in, the barriers to greater use. Seventeen out of twenty Euronet users had suggestions and seven out of ten of the other online users. In place of the predominant suggestion for harmonization of command languages, two respondents had another solution: a "front-end language converter" would overcome the difficulty of the common command language not being powerful enough.

Besides pleas for dropping entrance fees, other ideas on subscriptions included centralized invoicing, reduced costs for students and collec-

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