Introduction

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IN 1986, THE EDITORS WERE involved in a software study project at
the University of Florida (UF) Libraries. The goal of the project
was to establish guidelines for handling software at the UF Libraries.
For once we wanted to have guidelines in place before a need became
critical, and before we began providing a substantial amount of
software for patron use. Our work at the time was primarily
theoretical. There was a strong base from which to work, however,
since the UF Libraries had been pioneers in collecting data tapes
since the early 1970s, and had been using the NOTIS system since
1983. Additionally, the university computing center had been active
in providing microcomputing capabilities for the university
community.

While preparing these guidelines, the editors examined the
literature to see what was being done by other libraries and consulted
with campus computer specialists. Much had been written concerning
library automation and microcomputer applications for library staff
use, but little was documented about patron-use software. This lack
of documentation frustrated our efforts. We knew some libraries were
providing patron-use software, but, with a few notable exceptions
such as the Mann Library at Cornell (Chiang, 1986; Demas, 1985),
we had trouble identifying these libraries so that something could
be learned from their efforts. After intensive efforts to retrieve

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published and unpublished information, it was decided to share our findings with the profession. We published a report (Beaubien et al., 1988) and also were inspired to initiate this collection of writings.

The vision for this issue was to provide one comprehensive guide that covered all aspects of patron-use software in all types of libraries. Thus we provide some articles that detail specific issues and complement them with case studies that cut across all issues while treating each of the major types of libraries. The articles provide literature reviews in the areas of selection, intellectual access (e.g., cataloging and classification), physical access (e.g., circulation and preservation), copyright issues, reference, and staff training. The case studies illustrate how various types of libraries—academic, public, school, and special—cope with those areas. The literature reviews provide the base from which libraries can build policies and procedures. In addition, many of the articles provide some very practical advice. For example, the Brady, Rockman, and Walch article discusses how to clean damaged disks. Throughout this issue of *Library Trends,* the term *software* includes virtually anything in computer-readable form, including, but not limited to, laser or optical disks such as CD, CD-ROM, CDI; floppy or hard disks; tape, including cassette, reel, or cartridge; and various online applications. For an excellent discussion of the history of patron-use software, read the introduction to Sheila Intner's article in this issue of *Library Trends.*

The first five articles cover specific issues. Peggy Seiden discusses the selection process, sources of software information, methods of acquiring software, and collection evaluation. She presents an extensive array of sources for information on software which she labels as horizontal—covering broad genres of software—or vertical— covering specific subject areas. However, she points out gaps in coverage such as a lack of reviews of numeric data files and insufficient anecdotal information on actual use. Seiden concludes that collection development policies must be expanded to include methods of identifying patron needs for software, as well as the related identification and acquisition processes.

Sheila Intner stresses the desirability of using standardized guidelines in her article on intellectual access. In her discussion of "rules and tools," she recommends using AACR2R for descriptive cataloging; established subject headings for indexing, such as the Library of Congress Subject Headings (LCSH); the Dewey Decimal Classification (DDC), and the Library of Congress Classification (LCC); and the MARC Format for Computer Files for creating computerized bibliographic records. Alternatively, many libraries rely on printed lists of titles, and the Hall and Jackson article provides arguments for that approach. However, Intner's recommendations

provide thorough guidelines for libraries that wish to follow a formalized approach which she suggests will remain appropriate over the long run.

Issues of physical access are covered by Mary Lou Brady, Ilene Rockman, and David Walch. They discuss the circulation of software; the pros and cons of maintaining in-house hardware as opposed to circulating software; security issues, including viruses and other disasters; software preservation issues; and physical facilities. They also provide glimpses of applications in specific libraries. They highlight the importance of written policies and guidelines for dealing with materials in specialized and ever-changing formats and point out the need to make software, like any other library format, an easily accessible component of the collection.

Copyright and other legal considerations are the topics of Rosemary Talab's article. She provides guidelines for interpreting copyright law as it applies to patron-use software; discusses recent copyright case law; outlines producers' rights; answers some often asked questions concerning copyright issues; urges use of copyright notices profusely where appropriate; and covers legal aspects of new developments such as electronic bulletin boards, compact disk licensing, and the latest developments in copyright law as they apply to libraries. She emphasizes that, as with all technologies, copyright decisions evolve (often with a loosening of restrictions) as the marketplace determines the possible applications of each generation of new products for the electronic library.

Linda Piele examines issues in providing reference service and staff training for patron-use software. She divides her discussion by the following formats: software on diskette, bibliographic and full-text databases on CD-ROM, and numeric data files. Piele points out the widely held view that technology forces libraries to reevaluate their service roles. The levels of service to patrons and the training of staff are likely to vary from library to library, based on the needs and abilities of each library community. She identifies a trend toward an increased level of service for electronic media and suggests that librarians plan for methods of overcoming obstacles to providing appropriate quality service.

Articles in the second section provide case studies, one from each type of library—academic, public, school, and special. Halbert Hall and Kathy Jackson outline the services provided by the Learning Resources Department (LRD) of the Texas A&M Library as an example of a large and enduring academic library computing center. They emphasize a need for a clear understanding of the mission of any software collection. This understanding will eliminate costly mistakes such as the purchase of hardware that patrons do not choose to use.

Regardless of the mission of a unit that provides software to an academic community, many of the LRD's experiences will prove useful.

Patrick Dewey is a prolific author on computer applications in public libraries. His article in this issue focuses on the unique aspects of public library applications and provides case studies to illustrate the problems and solutions to many issues of patron-use software. Dewey provides a practical approach based on his wealth of experience in all aspects of the electronic library. He recommends developing a well-rounded collection through a variety of software packages and other electronic media to appeal to all ages and levels of interest or expertise.

June H. Schlessinger and Rachelle S. Karp have updated their regular survey of microcomputers in schools and school libraries and the preliminary report of the 1990 survey is included in this issue. The survey identifies trends in purchases and uses as well as the number of microcomputers held. In school library media centers, the same microcomputers tend to be used for both patron-use functions and library management functions. Trends include a shift toward increased use of the most popular brands of personal computers and an increase in the variety of uses per machine. Case studies confirm the tendency that microcomputers breed an interest and/or need for additional microcomputers.

Since few publications exist on the patron use of software in special libraries, Laurie Stackpole provides both the results of a survey of special libraries and a case study. The percentage of special libraries that provide software appears low, and Stackpole hypothesizes two explanations: (1) in some organizations, another unit provides software and microcomputer support, or (2) when an organization's environment does not support the use of software, its library is less likely to include a software collection. The case study of the Ruth H. Hooker Technical Library at the Naval Research Laboratory illustrates a proactive approach to the use of technology which has benefited both the library and its users. The unique relationship between a special library and its clientele, in which the library is attuned to the exact needs of its patrons, allowed the library to tailor its programs and its public relations efforts. However, the ideas presented have applications beyond the realm of special libraries.

These articles delineate the balance libraries are maintaining between treating software as "just another medium" of library material to be treated as any other medium, and allotting the attention and skills needed to accommodate software's peculiarities. For example, selectors in all library types are advised to follow alternative

hardware issues. As patron needs become more specialized, from public to academic to special library users, the selection recommendations narrow: Dewey advises maintaining a well-rounded collection but never losing sight of the hardware and function needs of public library patrons; Hall and Jackson emphasize the need to purchase the packages and hardware that are assured of being used by academic library patrons; and Stackpole recommends purchasing only the titles that have been requested by a special library's patrons. As librarians have learned, selection "mistakes" concerning electronic materials prove very costly and very visible, thus great care in selection is stressed.

Concerns with patron-use software are notable because they cut across all facets of library operations in all types of libraries. A common theme throughout the articles in this issue of *Library Trends* indicates that policies, procedures, and services must expand to include the new formats housed within the library and also those items to which the "library without walls" has access. As the technology evolves, the editors encourage library decision-makers to take a proactive stance in providing software collections and services to eager patrons.

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