

Indexing Manual

O P D

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IACI - ***Inter-American Children's Institute*** - ***OAS***

ANALYSIS AND REGISTRATION OF
BIBLIOGRAPHIC INFORMATION

1. Considerations on the Identification and Classification of Documents

1.1 PERIODICALS

Definition:

A periodical is a publication bearing a distinctive collective title, issued in successive parts or numbers at given or irregular intervals, usually for an indefinite period of time. It is made up of a series of contributions from different authors, having to do with the subject covered by the publication. This group of articles composes the various numbers.

Typology:

This category covers Newsletters, Journals, Yearbooks, Magazines, Gazettes, Newspapers, etc.

Each article will be recorded on the form that has been designed especially for this kind of material, and each contribution included in that number will be analyzed.

This form was used for the various types of periodicals or articles contained in those periodicals. Below are the applicable criteria and when they should be used:

- a. When the periodical is fully relevant and is received on a regular basis.
- b. When the periodical is not consistent with the objectives pursued, but does sporadically publish relevant information, use this form, considering the article an offprint.
- c. Offprints of periodicals will be recorded on the form, using the standards established in point 3. of this Manual, under the title field.
- d. With respect to photocopied articles of periodicals that arrive at the Centers to be entered into the system, you must determine whether this form is applicable or not.

Below are some guidelines:

- On the form, write a description of the article. Use the side note, which allows you to correctly identify the title and date of the publication containing the article, dealing with it as an offprint; the physical location of the publication is to be determined by the Center.

- If the photocopy does not contain sufficient information to identify the publication containing the article, then the article must be registered as a non-periodical, using the non-periodicals registration form. The fields for which you do not have information should be left blank.
- e. The supplements of a periodical must be identified in the same way as a periodical, and the designation “SUP” must be entered in the field marked “month.”
 - f. If an article title has been published in various different periodicals or under the same title but in different numbers, you must enter them all.

1.2 NON-PERIODICALS

To describe a non-periodical, you must first classify it according to the bibliographic characteristics mentioned below, using the corresponding form.

Conference

Definition:

It is used for meetings, conferences, seminars, congresses, workshops, courses, etc. This category is used to identify documents presented originally and individually at a conference (conference papers) as well as the official publication containing all of the papers (conference report).

Use the following criteria according to how the information in the document is shown:

- a. The official publication of the conference (e.g. final report, etc.): If deemed necessary, all of the documents it contains will be analyzed, one by one.

The title and author of the work must be recorded in their respective fields. In the field marked “Institution Responsible,” you must record the information pertaining to that conference. Since this is a retrievable field, you may print out bibliographic lists of the various conferences, meetings, etc.

- b. The original Document distributed at, or for, the conference, must be described as an individual work. However, if you have the information, it is important to record, in the “Institution Responsible” field, the Conference(s) at which it was presented.

- c. Wherever relevant, final reports, resolutions, proceedings must be recorded on this form, and you must register their type, in the corresponding field, according to the data you have available.
- d. Documents from different panels of a conference must be treated as independent works. In the “Institution Responsible” section, you must register the conference, the author and the title of the document, in their respective fields. Clarification with respect to the panel to which the document was presented must be recorded in the field Subtitle or Title Clarification.

Booklet

Definition:

A pamphlet is a short printed work consisting of less than fifty pages.

Pamphlets may be entered into the system only if the information they contain is relevant to the goals and purposes of PIINFA. No pamphlets or booklet of an ephemeral nature may be entered. The bibliographic description of a booklet must be consistent with the amount of information available.

Monograph

Definition:

A monograph is a treatise on a particular topic by one or several authors. It may be composed of one or more volumes, which would make it a monograph series.

Each volume must be analyzed independently, if pertinent. Mimeographed scripts, typescripts or manuscripts are not to be considered in this category, but rather must be registered as non-conventional publications.

In monographs, you may use the “Institution Responsible” field, or you may leave it blank. If the monograph you are entering is part of a monograph series, you must record the title of the series in this field, just as it is done in the description for the Series Area in the RCAA2.

Books and documents with ISBN or Copyright are to be included in this category. An indication (**Not for Reproduction**) must be inserted in the “Publisher” field immediately after the name of the publisher.

Different editions of a single document must all be treated as individual works, and the title must be entered into the system as many times as there are editions. If necessary, you may use the “Subtitle or Title Clarification” field to specify the edition and to clarify that it has been revised or updated.

Two types of publications are to be included in this category:

- a. A single book that contains contributions from different authors, all under one title. You must analyze each contribution, describing it in the pertinent fields.
- b. If a document is part of a series, register the series in the field “Institution Responsible,” according to RCAA2.

Thesis

<p>Definition:</p> <p>A thesis is the result of original research done as a requirement to obtain an academic or professional degree.</p>

Some data that will enable you to know more about a thesis:

- a. The University or Institute where the thesis was presented. Record this information in the “Institution Responsible” field.
- b. The degree sought by the author of the thesis. Record this information in the “ Subtitle or Title Clarifications” field.

Non-Conventional Documents

<p>Definition:</p> <p>Non-conventional documents are those that have no publisher and/or that, because of their external characteristics, may not be included in other categories. Non-conventional documents include typescripts, manuscripts, forms, etc.</p>

Because of the above definition of this kind of material, it is impossible to list current examples. The description of these materials may depend on the individual interpretation of each documentarian. Therefore, we emphasize the use of the RCAA2, in order to identify each element appropriately.

2. Data Registration Forms

2.1 OBJECTIVE OF DATA REGISTRATION FORMS

Bibliographic description forms have been designed to register any information that allows us to identify the document as a bibliographic unit. The form contains essential information for describing the document, according to the second description level of the Anglo-American Cataloguing Rules II (AACR2), thus preparing each bibliographic entry in the Document Database.

2.2. GENERAL CHARACTERISTICS

Two data collection forms were designed, using a subgroup of the information fields defined in the Bibliographic Description sheet of the ECLA system: the first to record articles from periodicals, and the second to record non-periodicals.

As you will see, these forms are divided into three sections of information. The third section of information, which is common to both these forms, will be discussed in “2.3 General Aspects Applied to Any Kind of Document.”

A. Registration Forms for Periodicals

The description of an article found in a periodical is divided into two information sections (Appendix I), as shown below:

A.1 Data Identifying the Periodical to be Analyzed

- a. Title of the Periodical.
- b. Volume, Number, Month and Year.
- c. Number of Pages.
- d. Physical Location of the Publication.

A.2 Data Describing the Indexed Bibliographic Unit (Article of a Periodical)

- a. Title, Subtitle.
- b. Authors.

B. Registration Forms for Non-Periodicals

As in the previous example, there are two different information sections:

B.1 Data Describing the Bibliographic Unit

- a. Type of Document.
- b. Institution Responsible.
- c. Title, Subtitle.
- d. Authors.

B.2 Data on the Publication of the Document

- a. Country of Publication.
- b. Publisher.
- c. Year of Publication.
- d. Number of Pages.
- e. Location.

2.3 GENERAL ASPECTS APPLICABLE TO ANY KIND OF DOCUMENT

The third information section, “Data Describing the Intellectual Content of the Article or Document,” is applicable to both forms.

The data describing the intellectual contents of the documents are:

- a. Subject Areas, Main Area and Secondary Related Area.
- b. Age Group.
- c. Country Described.
- d. Keyword KW1 - KW8 (up to 8 descriptors).
- e. Time Frame.
- f. Languages.

3. Form for Periodicals

Field: **TITLE OF THE PERIODICAL**

Definition: A periodical is a publication bearing a distinctive collective title, issued in successive parts or numbers at given or irregular intervals, usually for an indefinite period of time. It is made up of a series of contributions from different authors, having to do with the subject covered by the publication. This group of articles composes the various numbers. An article is each individual work contained in each number of the journal, newsletter, etc.

Characteristics: 45 characters long.

Description of the Elements:

- a. Record the title (omitting the articles) and, in brackets, the ISO Code of the country where it was published.
- b. If the number of characters given is not sufficient, you must reduce the title, following the abbreviation techniques used in the system.
- c. If necessary, abbreviations will be done using ISO standards. When sending information for updating the Database, the CIC will be informed of the new abbreviations used.
- d. If the article of a periodical is considered an offprint, you must register "OFFPRINT" after the country code. E.g.: SOCIAL CASEWORK (US) OFFPRINT

Related Tables:

ISO Country Code.

Table of Abbreviations.

Table of Periodicals Displayed by OPD.

Field: **VOLUME**

Definition: The numbers of times a periodical is issued within a given period of time (usually yearly or bi-yearly). These numbers are issued under various denominations: volume, year, tome, etc.

Characteristics: 5 characters long.

Description of the Elements:

- a. Register the number as it appears. If it appears in Roman numerals, you must change the number to Arabic numerals.
- b. If a volume or year exist simultaneously, you must choose the one that is the most significant.

Field: NUMBER

Definition: Correlative number identifying one of the runs.

Characteristics: 5 characters long.

Description of the Elements:

- a. Register the number of the analyzed periodical. If the publication corresponds to two or more numbers, record them, separating them with a bar.

Field: MONTH

Definition: The month(s) covered by the publication.

Characteristics: 7 characters long.

Description of the Elements:

- a. Register the months based on the table of abbreviations, in small letters and in the language of the publication.
- b. In the case of bi-monthly or tri-monthly publications, etc., you must record the first and last month, separated by a bar.
- c. In this field, enter the supplements to a volume.
 - You must record the first month followed by “SUP” (supplement).
 - If there is only one supplement, without month of publication, simply enter “SUP.”
 - If the period covered is a season, record it in this field. E.g.: summer.

Field: **YEAR OF PUBLICATION**

Definition: The year in which the periodical was published.

Characteristics: 4 characters long.

Description of the Elements:

- a. Record the full year.
- b. If the publication covers several consecutive years, choose the last year.

Field: **PAGES**

Definition: Total number of pages “from” and “to” of an article.

Characteristics: 9 characters long.

Description of the Elements:

- a. Record the first and last page of the article, separated by a hyphen.
- b. For articles not ending after successive pages, record the first, and record in brackets the total number of pages. E.g.: 7(8).
- c. For one-page articles, record the number of the page where it is located, followed by a number one in brackets. E.g.: 24 (1).

Field: **LOCATION**

Definition: The physical location of the document.

Characteristics: 12 characters long.

- a. The first consists of 2 characters, this represent the code of the Center

- b. The second consists of 10 characters, this represent the physical location into the Center

Description of the Elements:

- a. The first two characters identify the information unit involved, through a code devised by the CIC.

00 CENTRO DE INFORMACIÓN Y COORDINACION (CIC)
10 FUNDACIÓN RAFAEL POMBO (FRP)
20 UNIVERSIDAD NACIONAL (UNA)
30 INSTITUTO NACIONAL DEL NIÑO Y LA FAMILIA (INNFA)
40 COMITE PARAGUAY-KANSAS
50 SERVICIO NACIONAL DE MENORES (SENAME)
60 INSTITUTO HONDUREÑO DE NIÑEZ Y FAMILIA
70 INSTITUTO SALVADOREÑO DE PROTECCION AL MENOR
80 CONSEJO NACIONAL DEL MENOR Y LA FAMILIA
90 MINISTERIO DE PROMOCIÓN DE LA MUJER Y DESARROLLO HUMANO
B0 SUBSECRETARIA DE ASUNTOS GENERACIONALES
C0 CASA ABIERTA
D0 COMISION NACIONAL DE PROMOCION Y DEFENSA DE LOS DERECHOS DEL NIÑO Y LA NIÑA
E0 UNIVERSIDAD ESPECIALIZADA DE LAS AMERICAS
F0 DIF

The code of the Subcenters or User Centers of the various Focal Points will be made up of the first character of the country in which it was created, then a consecutive number, and then letters in alphabetical order.

- b. Code, topographic signature, or any other element that may identify the physical location of the document within the CIC or Participating Center. This field may be used by each Center according to how each has decided to arrange its own material.

Field: TITLE OF THE ARTICLE

Definition: Words or phrases that identify the article. The title of the article in its original language and in the way it is shown in the periodical.

Characteristics: 100 characters long.

Description of the Elements:

- a. Transcribe the title proper with total accuracy as to language, text, order and spelling (but not necessarily punctuation).
- b. You may abbreviate a long title only if you can do so without leaving out essential information. If necessary, and for the sake of space, you may eliminate conjunctions, adverbs, etc., as long as this does not distort its meaning. Indicate omissions by using the omission sign (“...”).
- c. If the title proper is in two or more languages, you must record the title in the language of the principal contents of the document. If this rule does not apply, you must choose the first mentioned in the main source of information.
- d. If a document cannot be identified with a title, the documentarian will assign a title to it, in keeping with the subject matter covered by the document.

Field: SUBTITLE

Definition: Words or phrases that complement the information contained in the title proper, or that help to describe the document. This information must be recorded in the original language and in the way it is shown in the document.

Characteristics: 75 characters long.

Description of the Elements:

- a. Apply the same instructions given for titles.
- b. The data may be:
 - Title in another language.
 - Dates of the time frame covered by the information.
 - Clarifications of the title proper.

Field: AUTHOR OF THE ARTICLE

Definition: Individual(s) responsible for the intellectual contents of a document or that contribute to its creation.

Characteristics: 40 characters long.

The entry of authors will display the OPD table containing the standardized form of writing the authors' names. When entering new authors, follow the rules below.

Description of the Elements:

The elements in this field may be:

a. Individual Author Responsible

If you have all of the information, you must record it in full and in the following order:

- Surname(s) and/or initials followed by a comma.
- Name(s) and/or initials.
- If there are several authors, record up to two of them.
- Apply the Anglo-American Cataloguing Rules II (AACR2), Chapter 22, for headings of persons.
- If there are more than three authors, the remaining authors are to be included in “et. al.”

b. Institutional Author Responsible

- Record the name of the institutional author just as it is shown in the document, separating, with dots, the various levels of hierarchy, in decreasing order. Eventually it may be possible to omit intermediate levels, using to the Anglo-American Cataloguing Rules II (AACR2) chapter 24.
- International or regional organizations, known worldwide for their acronyms, must be recorded under that acronym.
- The remaining authors are to be included in “et. al.”

4. Form for Non-Periodicals

Field: TYPE OF DOCUMENT

Definition: Classification of a document according to its bibliographic characteristics and for cataloguing purposes. The categories are:

Conference ()

It is used to name meetings, conferences, seminars, congresses, workshops, courses, etc. This category is used to identify the papers presented originally and individually at a conference, as well as the official publication containing all the works.

Booklet ()

A short printed work consisting of less than fifty pages.

Monograph (*)

A treatise on a particular topic by one or several authors. Books will be included here.

Thesis (*)

The result of original research completed in order to obtain an academic or professional degree.

Non-Conventional Documents()

Documents that have no publisher and/or documents that, because of their external characteristics, may not be considered under other categories. This includes typescripts, forms, etc.

Characteristics: Table of types of documents

Description of the Elements:

- a. Record the document according to the abbreviations above. The documents may have two categories, as in the case of non-conventional documents, which are presented to a conference.

* For a better classification of the documents, carefully read item 1: "Identification and Classification of Documents."

Possible combinations are:

Conference Monograph – Monograph as conference paper

Non-Conventional Conference – Non-conventional document as conference paper

Booklet as conference paper

- b. Use the table established by OPD to make the selection.

Field: INSTITUTION RESPONSIBLE

Definition: Institution(s) or entity(ies) responsible for or sponsoring the document. Include here the series to which the analyzed document belongs.

Characteristics: 200 characters long.

Description of the Elements:

Use the Standards of Cataloguing, 2nd. Edition, Chapter 24.

- a. Separate the various entities or institutions with a hyphen (-).
- b. Separate the various hierarchy levels of the institutional author with a dot (.).
- c. When the document has the form of a conference, meeting, etc., then you must record, in this field, the title of the conference in keeping with Chap. 24 of Headings of Entities of Anglo-American Cataloguing Rules II (AACR2). Do not record the organizers, sponsors, etc., of the conferences and meetings in this field. If necessary, record this information in the “Publisher” field. Information is to be recorded as follows:

Name of the Conference (number : date : place)

- d. If the institution responsible has acronym that is not recognized internationally, you should record the full name of the institution, immediately followed by the institution's initials or acronym in brackets.
- e. Hierarchize the institutions responsible according to the document analyzed. Do the same for all the entries.
- f. In this field, record the series (title and number) to which a document belongs.

Use the table displayed by OPD to select the Institution Responsible.

Field: TITLE OF THE DOCUMENT

Definition: Words or phrases that identify the work or document. Title of the document in its original language and in the way it is shown in the document.

Characteristics: 100 characters long.

Description of the Elements:

- a. Transcribe the title proper with total accuracy as to language, text, order and spelling (but not necessarily punctuation).
- b. You may abbreviate a long title only if you can do so without leaving out essential information. If necessary, and for the sake of space, you may eliminate conjunctions, adverbs, etc., as long as this does not distort its meaning. Indicate omissions by using the omission sign (...).
- c. If the title proper is in two or more languages, you must record the title in the language of the principal contents of the document. If this rule does not apply, you must choose the first mentioned in the main source of information.
- d. If a document cannot be identified with a title, the documentarian will assign a title to it, in keeping with the subject matter covered by the document.

Field: SUBTITLE

Definition: Words or phrases that complement the information contained in the title proper, or that help to describe the document. This information must be recorded in the original language and in the way it is shown in the document.

Characteristics: 75 characters long.

Description of the Elements:

- a. Apply the same instructions given for titles.

b. The data may be:

- Title in another language.
- Dates of the time frame covered by the information.
- Clarifications of the title proper.
- If it is a thesis, record the degree sought by the author.
- With respect to congresses, meetings, etc., record the panel in which the document was analyzed.
- If a document comes with special materials (cassette, printed material, etc.), record the information in this field.
- If it is an analytic of a document, insert here the In: note and enclose the title of the work that contains it.
- Describe the material attached to the work analyzed.

Field: AUTHOR OF THE DOCUMENT

Definition: Individual(s) responsible for the intellectual contents of a document or that contribute to its creation.

Characteristic: 40 characters long.

Use the table displayed by OPD for the selection of the author. If there is no author, you must create one.

Description of the Elements:

The elements in this field may be:

a. Individual Author Responsible

If you have all of the information, you must record it in full and in the following order:

- Surname(s) and/or initials followed by a comma.
- Name(s) and/or initials.
- If there are several authors, record up to two of them.
- Apply the Anglo-American Cataloguing Rules II (AACR2), Chapter 22, for headings of persons.
- If there are more than three authors, the remaining authors are to be included in “et. al.”

- You may incorporate the author's position, if necessary.

b. Institutional Author Responsible

For these information use only Institutional Responsible field.

- Record the name of the institutional author just as it is shown in the document, separating, with dots, the various levels of hierarchy, in decreasing order. Eventually it may be possible to omit intermediate levels.
- International or regional organizations that are known worldwide for their acronyms must be recorded under that acronym.
- Apply the Anglo-American Cataloguing Rules II (AACR2), chapter 24.
- With the table for selection of authors, include the remaining authors in et. al.; see also the last option of the item “a” in this field.

Field: COUNTRY

Definition: Country in which the document was issued.

Characteristics: Table of countries displayed by OPD.

Description of the Elements:

- a. Record the country of publication according to the table displayed.
- b. If there is no information on the place of publication, register it as “Desconocido/Unknown.”

Field: PUBLISHER

Definition: Institution or publishing house responsible for the publication of the document.

Characteristics: 40 characters long.

Table of countries displayed by OPD.

Description of the Elements:

- a. Record the name of the publishing house in the shortest possible way that can be understood.
- b. If the name of the publisher is written in a recognizable way in the “Institution Responsible” field, then simply abbreviate it in this field.
- c. If you do not know the name of the publisher, type in “s.n.” This means *sine nomine* (no publisher).
- d. In this field, Focal or associated Centers may record the city of publication, followed by a colon (:), and then the name of the publisher (as established in the cataloguing rules). E.g.: Bogota: ICBF.
- e. Immediately after the name of the publisher, indicate whether the material is available, and if its reproduction is not permitted. Type in this information between brackets, using capital letters and small letters. E.g.: (Not for Reproduction). If there is not enough space, you may abbreviate this notice as "**not reprod.**", so that the system will recognize it for the document request list.

Field: YEAR OF PUBLICATION

Definition: Date of publication of the document.

Characteristics: 4 characters long.

Description of the Elements:

- a. Record the date as it is shown in the publication.
- b. If you do not know the exact date, type in an approximate date.

Field: **PAGES**

Definition: Total number of pages of a document.

Characteristics: 9 characters long.

Description of the Elements:

- a. Record the last numbered page.
- b. If the document does not have page numbers, count the pages.
- c. Record the first and last page of a document contained in a work, such as in the case of the documents in the Report of a Conference. Separate the first and last page numbers with a hyphen.
- d. For documents that do not have consecutive page numbering, type in the first page, then, in brackets (), type in the total number of pages. E.g.: 7(8).
- e. If the document is only one page long, type in the number of that page, and, in brackets, type in the number one (1), which indicates that it is the only page to be photocopied.

Field: **LOCATION**

Definition: Physical location of the document.

Characteristics: 12 characters long.

It is divided into two parts:

- a. The first consists of 2 characters.
- b. The second consists of 10 characters.

Description of the Elements:

- a. The first two characters identify the information unit involved, through a code devised by the CIC.

The code of the Subcenters or User Centers of the various Focal Points will be made up of the first character of the country in which it was created, then a consecutive number, and then letters in alphabetical order.

- b. Code, topographic signature, or any other element that may identify the physical location of the document within the CIC or Participating Center. This field may be used by each Center according to how each has decided to arrange its own material. E.g.: CA14F57p. To classify a document on evolutionary psychology of Jean Piaget.

5. Data Describing the Intellectual Contents of the Document

Field: **LANGUAGE OF THE ARTICLE ANALYZED**

Definition: Language or languages in which the document was published, according to the table provided by OPD.

Characteristics: The names of the languages managed by the Database.

Description of the Elements:

- a. The accepted languages are: English, French, Italian, Portuguese and Spanish.
- b. For publications in more than one language, first select one, and then the other.

Field: **AREAS***

Definition: Subject area of the document. This area must:

- Be the first element in indexing, represented in the general subject matter of the document.
- Organize bibliographic entries within the series of the Reviews published by PID. These areas are (in alphabetical order):

Disability
Drug Abuse
Education
Health
Legal
Social

- Quantify the information by subject areas contained in the Database.

Characteristics: 2 fields.

Description of the Elements:

* For more information, see item 6: "Analysis of the information."

- a. Record up to two areas related to the document, one in each field. In the first field, enter the specific area; in the second, enter the related area, using the above-mentioned codes.

Field: **AGE GROUP***

Definition: Age of the individual or group to which the document refers.

Characteristics: Table of age groups supplied by OPD.

Description of the Elements:

- a. Apply the descriptors shown in the “Age Group” category in the Dictionary of Keywords, maintaining the punctuation and format of each. For a second age group, use the same fields in a second position.

Related tables: Controlled Vocabulary, and Age group table.

Field: **TIME SPAN***

Definition: Initial and/or final year to which the information contained in the document pertains.

Characteristics: 2 fields. 4 characters long.

Description of the Elements:

- a. Record the first and/or last year to which the information contained in the document pertains.
- b. If the information pertains to a given year, record this information in the first field, and leave the second field blank. Example: the year in which a law or decree was enacted, etc.

* For more information, see item 6: “Information Analysis.”

Field: **COUNTRY***

Definition: Code of the country (ies) or region referred to in the document.

Characteristics: Country Table.

Description of the Elements:

- a. Record the country, region or continent to which the document refers, according to the table established by OPD.
- b. If the information pertains to more than one country or region, type in the one that is given more emphasis.
- c. If the information pertains to several countries that may be grouped into a single region, type in this region.

Field: **MAIN KEYWORD and KEYWORD***

Definition: Terms made up of one or more words that unambiguously denote a concept, describing the contents of the document. These terms are taken from the Controlled Vocabulary, in order to facilitate document retrieval and to allow each reference to be suitably described.

Characteristics: Each field is 30 characters long.

Description of the Elements:

Always use the most recent version of the Controlled Vocabulary.

- a. Record up to 8 descriptors or keywords that allow you to identify the contents of the document.
- b. Record descriptors according to the following criteria:
 1. Make KW1 the central subject of the document, according to the table of Main Keywords 1 of the Controlled Vocabulary. We define Main Keyword or KW1 as:

* For more information, see item 6: "Information Analysis."

"a category that, because it covers a considerable number of subjects, must be considered the central subject of a document and as a chapter for the organization of the Informative Review." Because of its definition and scope, Keyword 1 will be the used when selecting documents to be entered into the Database.

2. Make KW2 the second most important descriptor of the document.

c. Maintain the punctuation and form of the descriptors of the Controlled Vocabulary.

Related Table:

- OPD Vocabulary.
- Definitions and Scope Notes of the RIIN Vocabulary.

Field: FREE TEXT*

Definition: Terms that do not exist in the Controlled Vocabulary, as they were extracted from the natural language of the document analyzed, used for the immediate communication of a concept.

Characteristics: OPD Table.

Description of the Elements:

- a. The use of this field will be restricted to terms that have not been standardized by the Vocabulary, but are important for complementing the document's description.
- b. They must be assigned one by one.
- c. **NO SENTENCES MAY BE INCORPORATED** as a summary of the document.
- d. For further management of the terminology applied, try to always write concepts in the same way, avoiding the use of synonyms. This will make it possible to detect repetitions of some terms that will be evaluated for entry into the Controlled Vocabulary.

* For more information, see item 6: "Information Analysis."

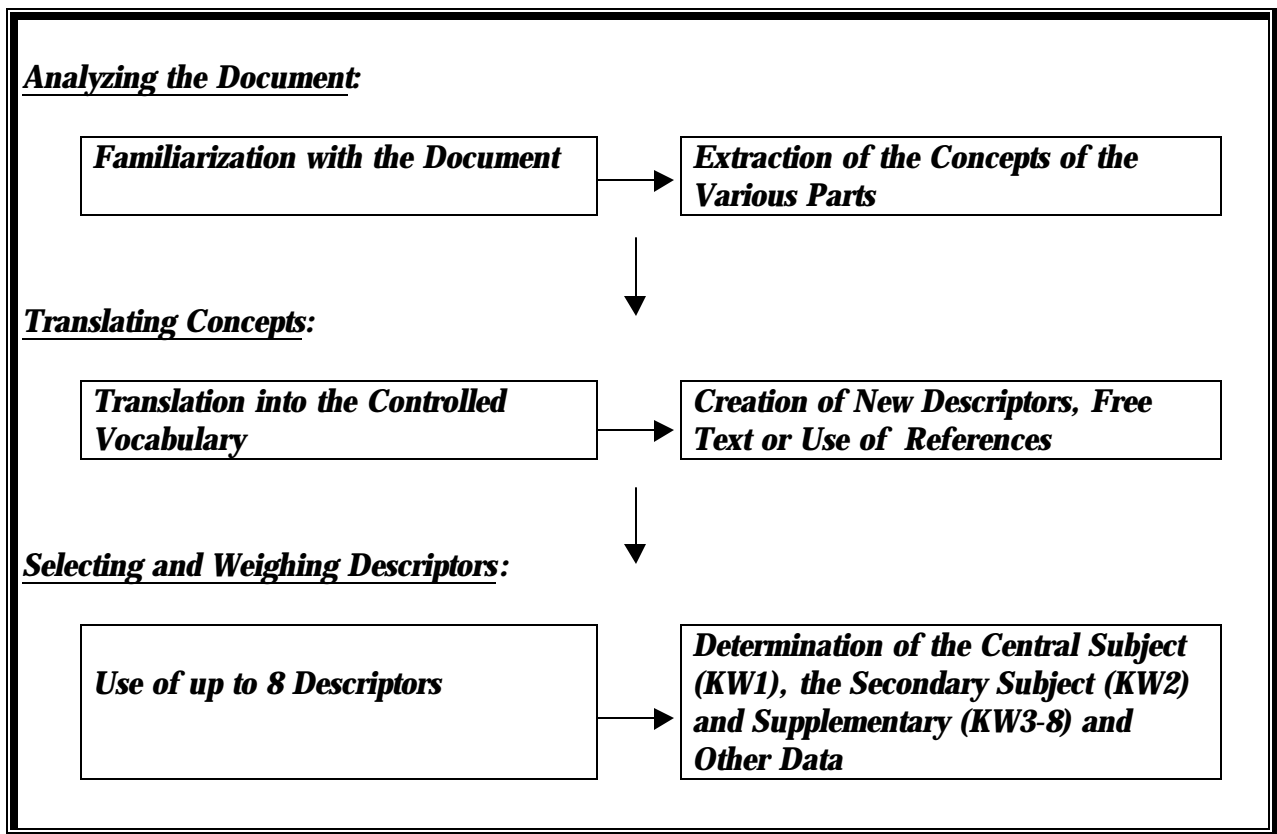
6. Information Analysis

6.1 INDEXING

Indexing means to describe and identify the main contents of a document, in controlled terms. In the indexing process, concepts are extracted through a process of analysis, and are translated into descriptors found in the Controlled Vocabulary.

The importance of indexing lies not only in translating the intellectual contents of a document into a controlled language, but also in the fact that the descriptors used will be the terms used later for making the query. Any concept extracted from a given document or query is analyzed individually, bearing in mind its close relationship with the secondary concepts found in the analyzed document or in the query made.

Indexing is done in 3 stages:



DOCUMENT ANALYSIS

Determining the subject of the document includes the following steps:

- a. **Carefully read the document.** This will allow you to understand the ideas contained in it and identify the objective(s) of the author.

- b. **Determine the concepts that represent the objectives and ideas in the document.**

- c. **Select the most suitable controlled terms for further retrieval.**

In document analysis, you must consider not only the text, but also other elements that influence the analysis:

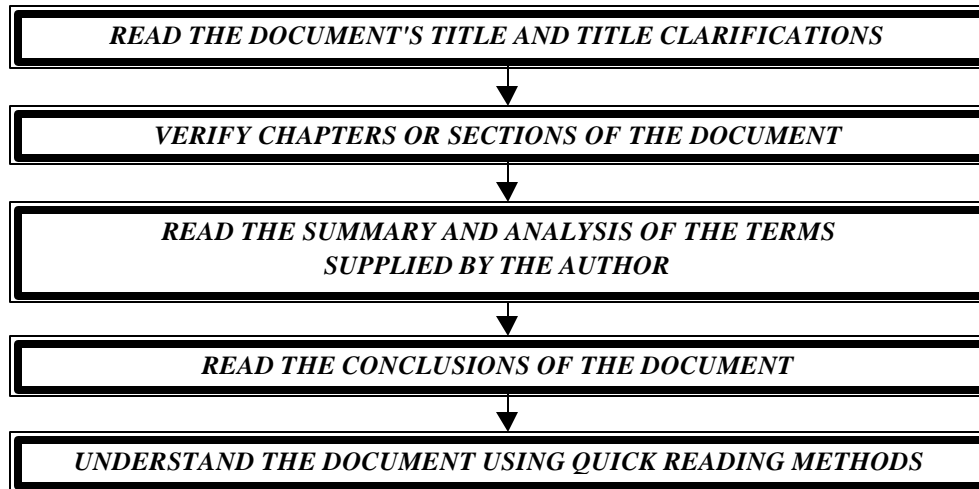
- Title.
- Subtitle.
- Summary and Descriptors Used by the Authors.
- Introduction.
- Conclusions.
- Appendix.
- Others.

We stress that indexing based on these elements alone is not complete or correct. Titles of scientific publications, for example, are often very meaningful, as they synthesize the subject. However, the disciplines included in the Inter-American Child and Family Information Program are not exact sciences, thus document titles can be vague.

Follow this analytical process:

- a. Read the title and subtitle of the document.
- b. Verify the titles of chapters or sections of the document.
- c. Read the summary (if any).
- d. Find out and note the conclusions.
- e. Familiarize yourself with the text, using quick reading methods.

Process for Analyzing a Document:



In indexing, you must have an exact knowledge of the subject matter, in order to decide on the depth or extension of the analysis, and the specificity of the subjects. However, bear in mind that non-indexed information will not be accessible to users.

By following the previous steps, you will obtain a series of concepts written in their “natural language,” transcribing the contents of the document being analyzed. These concepts may then be classified by:

- a. Concepts expressing general ideas, which serve as boundaries between the large phases of the author’s thinking.
- b. Major concepts resulting from the division of these general ideas, which will constitute the key argument.
- c. Secondary concepts intended to explain and illustrate these major ideas. These concepts respond to specific questions: “How?,” “Why?,” “For what purpose?” etc. It is very useful to try to hierarchize them, in order to correctly select them.

Translating the Concepts into the Dictionary of Keywords

Once all of the concepts have been obtained in the language of the document, you must translate them into the language of the OPD system.

Each descriptor will allow you to assemble a group of documents that have identical subject matter but different terminology. A clear example of this is the descriptor VOCATIONAL GUIDANCE; this term includes what is currently called VOCATIONAL GUIDANCE and what was used to be called VOCATIONAL ORIENTATION. Therefore, both descriptors will be included in the Controlled Vocabulary: VOCATIONAL GUIDANCE as descriptor and VOCATIONAL ORIENTATION with a notice that says “USE *VOCATIONAL GUIDANCE*.”

Selecting Descriptors

For good indexing, you must select each descriptor according to its importance in the document; you must make the best of that information, choosing the most specific descriptors.

In selecting the terms, you must also bear in mind that these descriptors will be used later on to make queries and retrieve documents. They also will be part of the rotated index published in the various Reviews.

We often need to include concepts that are not yet part of the Controlled Vocabulary. In these cases, you must verify that the Controlled Vocabulary does not already contain the term, or a synonym. If not, you must standardize the term and incorporate it into the Free Text.

The use of a term may become obsolete and, in time, be replaced by another term. This would justify making a modification and creating a “USE” reference in the Controlled Vocabulary.

Indexing is not only used to describe the contents of a document; it is also used in queries. Thus, you must be careful to make the indexing compatible with the descriptors that will be used in queries.

Weighing Terms

Once the terms have been selected and recorded on the form, you must weigh them in order to make them more specific. The weighing process is as follows:

1. Determining Areas.
2. Determining Main Keyword number 1.
3. Determining Keyword 2.
4. Hierarchization and Orderly Arrangement of Keywords 3-8.

Item 1: Determining Areas

Although this has nothing to do with the weighing of the terms, it does have to do with weighing the subjects. Therefore, it is essential to this process to be able to determine and hierarchize the area(s) affected by the subject matter of the document. The main area registered in the first place,

will give you immediately a subgroup of KW1(s) which are specific to them, while area 2 is associated with the descriptors marking the relations.

Item 2: Determining Main Keyword (number 1)

“Main Keyword” is the descriptor or keyword that, because it covers a large number of subjects, has its own chapter in the **Informative Review**. “Main Keywords” are a subgroup in the Controlled Vocabulary.

In terms of indexing, this “Main Keyword” is the general concept contained in the indexed document, with its own chapter in the **Informative Review**. In order to eliminate ambiguity, scope notes have been incorporated for each Main Keyword. You will see these scope notes in the system, or in the document distributed during the training course.

The general provisions for the use of Main Keyword are:

1. Use only keywords in the area of the child and the family.
2. Use the descriptors based on the definitions supplied for each Main Keyword.
3. For a better description of the document, record in Keyword 2 the term most specific to the subject discussed.
4. To determine the focus of the document, and when one Main Keyword focuses on several, more general, subjects, record the most general or top subject in Area 1. Example: legal aspects of child abandonment. Area 1 would be Legal, Main Keyword would be CHILD ABANDONMENT/NEGLECT.
5. For self-defined keywords, you will not include scope notes (see the appendix on scope notes).

Complementing the definition and the scope note is a utilization table:

1. It is used only if related to social, educational, health, legal, or drug abuse aspects.
2. It does not include technical aspects which are inherent to the subject, except when they have an impact on the child and the family from a social, legal, educational, etc. perspective.
3. It is used in relation to the specific subject area. Example: Social (social affairs).
4. It is used in its full context in relation to the child and the family.

Item 3: Determining Keyword 2

The main concept of the document must be registered in the second place. This keyword may be any of the terms contained in the Controlled Vocabulary.

Item 4: Hierarchization and Orderly Arrangement of Keywords 3-8

Registration of remaining descriptors complementing the indexing process.

Indexing is not only made up of the descriptors found in the Controlled Vocabulary. It is complemented by:

a. Age Group

The age of the persons to which the document refers. This descriptor will be taken from the age group category, in which all of the age groups used in the system will appear. Because these age groups belong to the Controlled Vocabulary, their punctuation and form must stay the same.

If an age group is the central subject of a document, this should be registered in the field "Age Group." If the document deals with more than one group, record one in the specific field and the other in Keywords 3 to 8.

b. Time Frame

This information may be recorded only if it is implicit in the text. You may enter information such as the date or year of the information, the date on which the research work began, or the year in which the law, decree, etc. came into effect.

c. Country

This information is also standardized, not by the Controlled Vocabulary but by the international list of "ISO Country Codes." Assign a country or region as follows:

* If the document refers to just one country, you must record this country.

E.g.: "General information about child abuse in Costa Rica " Country: Costa Rica.

* If the document refers to more than one country, proceed as follows:

- If the document refers to 2, 3 or more countries from different geographical areas, register the one that is given the most emphasis in first place. For our purposes, it is a higher priority than the other countries, and then select the second country or region, always in the field Country.

E.g.: "Drug Abuse in Uruguay and Mercosur"
Countries: Uruguay, Brazil, Argentina, Paraguay.

- If the document refers to several countries that could be grouped in a single geographical region, type in the region.

E.g.: "The indigenous education in Colombia, Chile y Ecuador"
Countries used: Colombia, Chile y Ecuador.

- If the document contains information on various geographical regions, record the first or most important region.

E.g.: "The appropriated technology and its applied in Latin American, comparative study between Latin American and Europe"
Region used: Latin American and Europe

- If the document gives equal importance to several geographical regions, qualify it as "Worldwide."

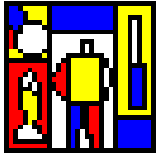
E.g.: "The poverty in developing countries in the world"
Region used: World

d. Free Text

This applies to concepts that have no equivalents in the Controlled Vocabulary and that are relevant for understanding the subject of the document. This section should not be used as an area for summaries or remarks. According to the frequency of use of each term, this area will permit updating of the Controlled Vocabulary. Therefore, try to represent a concept as we explained above, avoiding synonyms.

APPENDIX I

Data Entry Forms



R I I N
Non-Periodical Publications*

Type of Document

Location

Title

Title Clarifications

Author

Author

Country Concerned

Main Descriptor

Age Group

Languages

Keywords

Free Vocabulary

Thematic Area

Time Frame

From to

Type of Document*

Institution Responsible

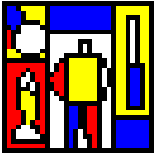
Publisher

Pages

Year

Country of Publication

* The fields marked with an asterisk are automatically filled during the entry process, as they are repetitions of fields in which you will have already typed information.



R I I N
Periodical Publications*

Publication

Volume

Number

Location

Title

Title Clarifications

Author

Author

Country Concerned

Main Descriptor

Age Group

Languages

Keywords

Free Vocabulary

Thematic Area

Time Frame

From	<input type="text"/>	to	<input type="text"/>
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Type of Document*

Institution Responsible

Publication*

Pages

Year

Volume*

Number*

Month

Country of Publication*

* The fields marked with an asterisk are automatically filled during the entry process, as they are repetitions of fields in which you will have already typed information.

APPENDIX II
ISO Language Codes

Language

English	En
French	Fr
Italian	It
Portuguese	Pt
Spanish	Es

APPENDIX III

Abbreviations

MONTH

January	Jan
February	Feb
March	Mar
April	Ap
May	May
June	Jun
July	Jul
August	Aug
September	Set
October	Oct
November	Nov
December	Dec

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