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# INFOPLAN

MANUAL FOR THE REFERENCE FILE  
SPECIALISTS/STUDENTS

Preliminary version



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MANUAL FOR THE REFERENCE FILE

SPECIALISTS/STUDENTS

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## FOREWORD

This Manual has been prepared within the INFOPLAN Project, which is financed by the International Development Research Centre (IDRC) of Canada, and carried out by the Latin American Centre for Economic and Social Documentation (CLADES) of the Economic Commission for Latin America and the Caribbean (ECLAC).

It constitutes a support element for the entry of data into the reference archives on specialists/students developed experimentally for use in ILPES training and advisory services activities. The archives, created in the CARDBOX programme, is part of a reference information system for storing and recovering information on people and comes under a broader programme to create a system, which will include information on institutions, training courses and other bibliographical and statistical data bases.

In the preparation of this Manual consideration was given both to the experience acquired by ECLAC itself with similar archives and the experience of other regional institutions. However, since it is part of a pilot experience, it is likely that its experimental use will give rise to changes which will be reflected in a final version to be published in the future.

The information on each specialist has been arranged in 25 items, which in turn are recorded in the 25 fields of which each register is composed.

Each field contains:

- (a) The definition of the data.
- (b) The specific purpose for which the field was created.
- (c) Its basic characteristics, in which it is explained whether the number of characters is fixed (for example Field B. - Nationality -, which always consists in two characters) or variable (for example, Field A.

- Name of student); in the case of the variable fields, the Manual indicates a maximum number of characters which may be used for each one. It also tells whether it is possible to repeat the information corresponding to the field or whether there is only one possibility; as an example of a non-repeatable field mention may be made of Field L; since this field relates to the controlling entity to which a given specialist belongs or is associated, so that it was decided to provide for only one possibility. On the other hand, in the case of Field I. - Private address - it was deemed necessary to provide for the possibility of recording more than one.

For purposes of seeking information in the data base, some terms are more significant than others; thus, for example, it would be difficult to use the cable address for purposes of selection within the base. On the other hand, a person's nationality and specialization are sure to constitute significant variables for selecting information. The fields containing information which is relevant for organizing searches in the data base are automatically indexed by the computer programme at the time the data is entered in the system, thereby making it possible to carry out a more rapid search. Those not indexed automatically may at times be used for search purposes although the process will be much slower.

The field definition table, showing all the fields used in the system, their names and relevant characteristics, appears below.



# FIELD DEFINITION TABLE

No. of field	Name	No. characters	Characteristics	Mode of indexing
A	Name of specialist/ student	46	Variable length	Automatic
B	Nationality (country)	2	Fixed length	Automatic
C	Country of birth	2	Fixed length	Manual
D	Type of entry	1	Fixed length	Automatic
E	Professional title	40	Variable length. Repeatable	Automatic
F	Working language	13	Variable length	Manual
G	Year of birth	2	Fixed length	Manual
H	Speciality	80	Variable length. Repeatable	Automatic
I	Private address	56	Variable length. Repeatable	Manual
J	Academic degree	80	Variable length. Repeatable	Automatic
K	Private telephone	28	Variable length. Repeatable	Manual
L	Main institution	75	Variable length	Automatic
M	Subsidiary unit	75	Variable length	Automatic
N	Post	75	Variable length	Manual
O	Function	75	Variable length	Automatic
P	Address	53	Variable length	Manual
Q	Juridical or legal status of the institution	8	Variable length	Automatic
R	Name of city and country	29	Variable length	Automatic
S	Office telephone	35	Variable length	Manual
T	Postal address	29	Variable length	Manual
U	Telegraphic address	19	Variable length	Manual
V	Cable address	11	Variable length	Manual
W	Observations	150	Variable length	Manual
X	ECLAC courses	150	Variable length	Automatic
Z	Date and source of information	75	Variable length	Manual



**A. NAME OF SPECIALIST/STUDENT**

- DATA DEFINITION:** Complete name of the specialist/student who is acting as consultant and/or instructor or of the person who has attended one of the ILPES courses or other ECLAC courses.
- PURPOSE OF FIELD:** This field is used to register the name of the specialist, consultant, ex-student, candidate or student.
- BASIC CHARACTERISTICS:** Variable length. Maximum 46 characters. Auto.
- DESCRIPTION OF ELEMENTS:** The elements of this field are:
- a) First name(s) and surname(s) of the specialist/student. The personal names should be registered in accordance with the Anglo-American Rules, 2nd ed. The name of the specialist/student, whatever his status, should be recorded in full, if the information is available, in the following order:
    - Surnames and/or initials if only this information is available.
    - First names or initials if only the initials are known.

In order to standardize the register of persons, the corresponding authority list should always be consulted.
  - b) Status or category of: candidate for the ILPES courses or other ECLAC courses, student of the ILPES courses or other ECLAC courses, ex-student of the ILPES courses or other ECLAC courses, consultant, instructor.

The category is recorded in abbreviated form following the name after a comma and a space. The indication of category is entered as follows:

Candidate....cand.  
Student.....stud.  
Ex-student...ex-stud.  
Consultant...cons.  
Instructor...instr.

In cases where the specialist/student has more than one category the second will be indicated after the first separated by a comma and a space.

**EXAMPLES:**

HOWARD, George, cons.  
RODRIGUEZ PINTO, Juan Carlos, cons., ex-stud.  
MARTIN, G., instr., stud.

**B. NATIONALITY (COUNTRY)**

**DATA DEFINITION:** Nationality (country) of specialist/student.

**PURPOSE OF FIELD:** To record the nationality (country) of the specialist/student.

**BASIC CHARACTERISTICS:** Fixed length. Maximum 2 characters. Auto.

**DESCRIPTION OF ELEMENTS:** The element of this fields is:

ISO Code which represents the country of nationality of the specialist/student.

**EXAMPLES:** CL  
BO  
UY  
GB

## C. COUNTRY OF BIRTH

**DATA DEFINITION:** Country of birth of the specialist/student.

**PURPOSE OF FIELD:** To record the country of birth of the specialist/student.

**BASIC  
CHARACTERISTICS:** Fixed length. Maximum 2 characters. Manual.

**DESCRIPTION  
OF ELEMENTS:** The element of this field is:

ISO Code which represents the country of birth of specialist/student.

**EXAMPLES:** CL  
AR  
BR

**D. TYPE OF ENTRY**

**DATA DEFINITION:** Numerical code representing the classification of the information entered into the system.

**PURPOSE OF FIELD:** This field is used to register the numerical code which represents the classification of the information entered into the system.

**BASIC CHARACTERISTICS:** Fixed length. 1 character. Auto.

**DESCRIPTION OF ELEMENTS:** The elements of this field comprise one of the following codes, as applicable:

- a) Students of the regular courses of ECLAC/ILPES Code 1.
- b) Instructors Code 2.
- c) Consultants Code 3.

**E. PROFESSIONAL TITLE**

**DATA DEFINITION:** Professional title or titles of the specialist/  
student.

**PURPOSE OF FIELD:** To record the professional title or titles that  
the specialist/student has obtained.

**BASIC  
CHARACTERISTICS:** Variable length. Maximum 40 characters.  
Repeatable.

**DESCRIPTION  
OF ELEMENTS:** The element of this field is:

The name of the professional title or titles  
acquired by the specialist/student.

If he should have more than one, they should be  
registered separated by the sign #.

**EXAMPLES:** Lawyer  
Architect  
Economist#Lawyer



**F. WORKING LANGUAGE**

**DATA DEFINITION:** Mother tongue and working languages in which the specialist/student is proficient.

**PURPOSE OF FIELD:** To record the mother tongue and other working languages of the specialist/student.

**BASIC CHARACTERISTICS:** Variable length. Maximum 13 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) ISO Code which represents the mother tongue of the specialist/student.
- b) ISO Code corresponding to other languages in which the specialist/student is proficient (with a maximum of two languages). The different codes should be separated by commas.

**EXAMPLES:** Es, En, Pt  
En, Fr, Es

## G. YEAR OF BIRTH

**DATA DEFINITION:** Year of birth of specialist/student.

**PURPOSE OF FIELD:** This field is used to register the year of birth of the specialist/student.

**BASIC CHARACTERISTICS:** Fixed length. 2 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The elements of this field are the two last digits of the year of birth of the specialist/student.

**EXAMPLE:** 1947 47

## H. SPECIALITY

**DATA DEFINITION:** Field or fields of knowledge or subject area or areas of development in which the specialist/student has preferentially worked.

**PURPOSE OF FIELD:** To record the field of knowledge or subject area of development in which the specialist/student has greatest experience.

**BASIC CHARACTERISTICS:** Variable length. Maximum 80 characters. Auto. Repeatable.

**DESCRIPTION OF ELEMENTS:** The elements of this field is:

The field or fields of knowledge and/or the subject area or areas of development.  
The specialities should be recorded separated by the sign #.  
The classification of the specialities should be standardized.

**EXAMPLES:** Economic Policy and Fiscal Budget  
National Information Policy  
Export Promotion#External Trade

## I. PRIVATE ADDRESS

**DATA DEFINITION:** Private or home address of the specialist/student.

**PURPOSE OF FIELD:** This field is used to register the name and the number of the street of the private or home address of the specialist/student.

**BASIC CHARACTERISTICS:** Variable length. Maximum 56 characters. Manual. Repeatable.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Name of the street and number or number and name of the street according to the usage of the country.
- b) Name of building and number of floor where applicable.
- c) Area or sector of the city if necessary. The sector may correspond to a suburb, settlement, community, geographical area, etc.
- d) Name of the city and ISO country code. All details should be separated from each other by a comma. It is possible that the specialist may have more than one private address in one or more cities or in one or more countries. In this case those should be recorded which are considered necessary to be able to locate him, separated from each other by the sign #.

**EXAMPLES:** 3125 Chain Bridge Road, Port-of-Spain, TT#324 Riverside Avenue, Vancouver, CA  
6108 Dorset Avenue, Chevy Chase, Maryland 20015, US  
30, Bracken Road, Winchmore Hill, London N21 30J, GB

**J. ACADEMIC DEGREE**

**DATA DEFINITION:** Academic degree or degrees obtained in post-graduate courses through formal education and/or in internationally recognized organizations.

**PURPOSE OF FIELD:** To register the academic degree(s) obtained by the specialist/student in post-graduate courses.

**BASIC CHARACTERISTICS:** Variable length. maximum 60 characters. Auto. Repeatable.

**DESCRIPTION OF ELEMENTS:** The element of this field is:

The academic degree(s) obtained by the specialist/student. If he should have more than one, they should be registered separated by the sign #.

**EXAMPLES:** Master in Regional Planning  
Doctor in Economics Master in Development Studies

## K. PRIVATE TELEPHONE

**DATA DEFINITION:** Telephone number or numbers of the private addresses of the specialist/student.

**PURPOSE OF FIELD:** This field is used to register the telephone number(s) of the private or home addresses of the specialist/student.

**BASIC CHARACTERISTICS:** Variable length. Maximum 28 characters. Manual. Repeatable.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Telephone area or code according to the usage of each country.
- b) The actual telephone number.
- c) Name of the city and ISO country code to which it corresponds. The elements of this field should be recorded separated by commas. It is possible that the specialist/student may have more than one private telephone in one or more cities or in one or more countries. In this case those should be recorded which are considered necessary to be able to locate him, separated from each other by the sign #.

**EXAMPLES:** 2228426, Santiago, CL  
(061) 235582, Bogotá, CO  
2236041, Santiago, CL#484065, Montevideo, UY

## L. MAIN INSTITUTION

- DATA DEFINITION:** Main institution or organization in which the specialist/student work.
- PURPOSE OF FIELD:** This field is used to register the main institution in which the specialist/student works and the year of his entry into it.
- BASIC CHARACTERISTICS:** Variable length. Maximum 75 characters. Auto.
- DESCRIPTION OF ELEMENTS:** The element of this field are:
- a) Main or principal name of the institution.  
The name of the main institution should be registered in accordance with the Anglo-American Rules, 2nd ed.  
The international or regional bodies known throughout the world by their acronyms should be registered under those acronyms.  
In order to standardize the names of the institutions the Archives of Institutions should always be consulted.  
If the specialist/student works in more than one main institution the one considered most important should be recorded.  
If the specialist/student works only as a consultant, the main institution may be considered that with which he has worked most frequently.
  - b) Year of entry into the main institution.  
The year of entry should be recorded after the name of the principal or main institution separated by a comma.
- EXAMPLES:** Pontificia Universidad Católica de Chile, 1980.  
Chile. Ministry of Housing and Town Planning, 1974.  
United Nations, ECLAC, 1973.

## M. SUBSIDIARY UNIT

**DATA DEFINITION:** Subsidiary unit or entity in which the specialist/student works.

**PURPOSE OF FIELD:** This field is used to register the name of the subsidiary unit or entity in which the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. maximum 75 characters. Auto.

**DESCRIPTION OF ELEMENTS:** The element of this field is:

The name of the subsidiary unit of the main institution.

The name of the subsidiary unit should be registered in accordance with the Anglo-American Rules, 2nd ed. In order to standardize the names of the subsidiary units or entities of the main institutions, the Archives of Institutions should always be consulted. If the specialist/student works in more than one subsidiary unit the one which he considers most important should be recorded.

In the case of universities, mention should also be made of the Faculty to which the subsidiary unit belongs, separated by a full stop.

**EXAMPLES:** University of the West Indies. Research Planning  
Institute  
Regional Administration Office



## N. POST

**DATA DEFINITION:** Title of post held by the specialist/student.

**PURPOSE OF FIELD:** This field is used to register the title of the official post held by the specialist/student in the institution in which he works.

**BASIC CHARACTERISTICS:** Variable length. maximum 75 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The element of this field is:

The official name of the post. The title of the post should always be written in full. The first letter of each word of the title should be written in capitals and there should be no full stop.

**EXAMPLES:** Dean, Law Faculty  
Regional Advisory

## O. FUNCTION

**DATA DEFINITION:** Main activity or activities carried out by the specialist/student in his post.

**PURPOSE OF FIELD:** This field is used to register the activity or activities carried out by the specialist/student.

**BASIC CHARACTERISTICS:** Variable length. Maximum 75 characters. Auto.

**DESCRIPTION OF ELEMENTS:** The element of this field is:

The description of the activity or activities carried out by the specialist/student in the performance of his official duties.

**EXAMPLES:** Formulation and evaluation of the economic and financial aspects of settlement projects of the provincial government. Supervision of the preparation of budgets.

## P. ADDRESS

**DATA DEFINITION:** Name and number of the street of the institution where the specialist/student works.

**PURPOSE OF FIELD:** This field is used to register the name and number of the street of the institution where the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. Maximum 53 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Street and number or number and street according the usage of the country. The name of the street should always be written in full.
- b) Name of the building, floor and office if they exist.
- c) Name of the city, if necessary.  
All details should be separated by commas.  
If the address of the institution where the specialist/student works is the same as that of the main institution, record this; if it is not the same, record the address of the subsidiary unit. The name of the area or sector of the city is also recorded in this field if it is usual. When applicable, the name of the building and the numbers of the floor and office will also be recorded.

**EXAMPLES:** Vitacura 3030, Las Condes  
University City  
Carretera Suyapa  
Calle 7 esquina 1a. Avenida.  
Murray Building, 10th Floor, Office No. 1014.

## Q. JURIDICAL OR LEGAL STATUS OF THE INSTITUTION

**DATA DEFINITION:** Juridico-institutional classification of the institution where the specialist/student works.

**PURPOSE OF FIELD:** This field is used to register the juridico-institutional status of the institution where the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. Maximum 8 characters. Auto.

**DESCRIPTION OF ELEMENTS:** The element of this field comprises one of the following categories as applicable, which will be recorded according to its code.

- |  |       |
|--|-------|
| a) Centralized public entities (Entidades públicas centralizadas)                            | EPC   |
| b) Decentralized public entities (Entidades públicas descentralizadas)                       | EPD   |
| c) Non-profit-making private entities (Entidades privadas sin fines de lucro)                | EPPSL |
| d) Profit-making private entities (Entidades privadas con fines de lucro)                    | EPPCL |
| e) Intergovernmental international entities (Entidades internacionales intergubernamentales) | EIN   |
| f) Non-governmental international entities (Entidades internacional no gubernamentales)      | EING  |

**R. NAME OF CITY AND COUNTRY**

**DATA DEFINITION:** Name of the city and country in which the institution where the specialist/student works is situated.

**PURPOSE OF FIELD:** This field is used to register the name of the city and country of the institution where the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. Maximum 29 characters. Auto.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Name of the city. This should be recorded in full followed by the code or name of the province or state to which the city belongs. If the city where the specialist/student works is the same as that in which the main institution is located, record this; if it is not the same, record the city where the subsidiary unit is located.
- b) The ISO Code which corresponds to the country where the city is situated. The ISO country code should be written after the city, separated by a comma.

**EXAMPLES:**

Buenos Aires, AR  
México D.F., MX  
Cali, Medellin, CO  
Santiago, CL  
Cambridge, GB

## S. OFFICE TELEPHONE

**DATA DEFINITION:** Telephone number or numbers of the office of the subsidiary unit where the specialist/student works.

**PURPOSE OF FIELD:** This field is used to register the telephone number or numbers of the subsidiary unit where the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. maximum 35 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Code of the telephone area if there is one.
- b) Telephone number or numbers of the subsidiary unit.
- c) Telephone annexes or extensions if there are any. The code of the telephone area should be entered in accordance with the usage of each country. If there is more than one telephone number, they should all be given, separated by commas.

**EXAMPLES:** 485051 extension 429  
(061) 2738077  
21-35278, 21-36448

## T. POSTAL ADDRESS

**DATA DEFINITION:** Postal address of the institution where the specialist/student works.

**PURPOSE OF FIELD:** This field is used to register the postal address of the institution where the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. Maximum 29 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The element of this field are:

- a) Name by which the postal address in each country is designated (P.O. Box; casilla de correos; apartado postal; etc.).
- b) Number or letter, or combination of both, which identifies it. In this field, if necessary, the name and/or number of the physical or postal sector of the city of the postal address is recorded.

**EXAMPLES:**

- P.O. Box 7180
- Casilla de Correos 179-D
- Código Postal 391
- Casilla de Correos 507, 5500 Miraflores
- Apartado Postal 1445, Caracas 101
- Casilla de Correos 267, La Reina
- Casilla Postal, Correo 21, Santiago

## U. TELEGRAPHIC ADDRESS

**DATA DEFINITION:** Telegraphic address of the institution where the specialist/student works.

**PURPOSE OF FIELD:** This field is used to register the telegraphic address of the institution where the specialist/student works.

**BASIC CHARACTERISTICS:** Variable length. Maximum 19 characters. Manual.

**DESCRIPTION OF ELEMENTS:** The element of this field are:

- a) Telex identification number.
- b) Alphabetical code if there is one.

**EXAMPLES:**  
22068  
BIREME SPO 01122143  
21061 LE\$.F



## V. CABLE ADDRESS

DATA DEFINITION: Cable address of the institution where the specialist/  
student works.

PURPOSE OF FIELD: This field is used to register the cable address of  
the institution where the specialist/student works.

BASIC  
CHARACTERISTICS: Variable length. Maximum 11 characters. Manual.

DESCRIPTION  
OF ELEMENTS: The element of this field is:  
  
The cable acronym corresponding to the institution,  
which should always be written in capitals.

EXAMPLES: UNATIONS  
UNITERRA

## W. OBSERVATIONS

DATA DEFINITION: Additional information on the background of the specialist/student.

PURPOSE OF FIELD: To record any additional information considered relevant or to amplify the background data on the specialist/student.

BASIC  
CHARACTERISTICS: Variable length. maximum 150 characters. Manual.

DESCRIPTION  
OF ELEMENTS: This field has no specific elements.

## X. ECLAC COURSES

**DATA DEFINITION:** ECLAC course, seminar or training activity attended by the specialist/student.

**PURPOSE OF FIELD:** To register the ECLAC course, seminar or training activity attended by the specialist/student.

**BASIC CHARACTERISTICS:** Variable length. Maximum 150 characters.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Name of the ECLAC unit sponsoring the course or training activity.
- b) Name of course or training activity.
- c) Year of course.  
The information registered should not exceed 100 characters.  
The different elements should be separated by comma.  
The different courses should be separated from each other by a semi-colon and a space.

**EXAMPLES:** ILPES, Social Planning, 1983  
CELADE, Master's Course in Population, 1975.

## Z. DATE AND SOURCE OF INFORMATION

**DATA DEFINITION:** Date and source of the information obtained on the specialist/student.

**PURPOSE OF FIELD:** To register the date and source of the information obtained on the specialist/student.

**BASIC CHARACTERISTICS:** Fixed length. 75 characters.

**DESCRIPTION OF ELEMENTS:** The elements of this field are:

- a) Month.
- b) Year.
- c) Person, institution or document that supplied the information.  
The persons, institutions or documents are registered after the year, separated by a comma.  
The month is recorded by two digits from 01 to 12.  
The year is recorded in full using four characters.

**EXAMPLES:** 041984,United Nations application form  
111983,George Brown



