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STANDARDIZATION PRACTICES

IN THE

CARISPLAN NETWORK

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UNITED NATIONS

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Standardization practises in the CARISPLAN Network

The increasing need for information services and the technical possibilities for handling this need, are stimulating international and regional cooperation and coordination and compatibility among information systems. Standardization becomes increasingly important to ensure greater effectiveness in all countries. The CARISPLAN network uses several standardized information procedures to analyse the economic and social development material of the region, submitted by all CARISPLAN participating centres in the twenty CDCC member countries. We will look in detail at the procedures and tools used in the development of the network and their possible adaptability to other information networks.

Design of CARISPLAN

In designing the CARISPLAN network, the international standard for bibliographic information interchange (ISO 2709) was adopted since there was widespread international agreement on this standard as the basic exchange format for computerized data bases. With regard to the compatible logical data structures the UNISIST standard was adopted. These data structures are the data elements to be included in the bibliographic record and the form in which they are to be entered. This decision to adopt the Reference manual for machine-readable bibliographic description, was based on the fact that there would be a high degree of potential international compatibility and provision of updating and maintenance. The record card used for CARISPLAN is virtually compatible with the second edition of the UNISIST Reference Manual.

Another factor considered in the design of the database was functional compatibility which involves the ability of users of two or more systems to store and manipulate essentially the same kinds of data elements and perform the same types of operations on the data. The choice of hardware and software was also based on functional compatibility. The CARISPLAN data is processed at ECLAC headquarters in Santiago, Chile on an IBM 370-I48 using the ISIS - Integrated Set of Information Systems - software package.

ISIS and MINISIS which are compatible are used by several international and national organizations, many of which deal with development literature.

Manual for the use of the Bibliographic Record Card (BRC)

The participating centres of CARISPLAN use the Bibliographic Record Card (BRC) for recording the bibliographic information for subsequent input into the computer. This is used in the absence of a computer terminal and telecommunications link which could provide data entry on-line. Although the BRC has been designed mainly for computerized information systems, it can be used in manual systems with a view to computerization of its operations at a later stage. It includes the minimum of information for the description of a document, each data element being assigned a definite field with specific characteristics. The Manual for the use of the Bibliographic Record Card has been produced to assist in the preparation of bibliographic records. Each card, although descriptive of a particular document, is made up of two basic parts: bibliographic description and content analysis. Standardization is achieved in the bibliographic description of each record that is entered in the system through the use of the Manual for the use of the Bibliographic Record Card which is largely based on the ECLA procedure manual for the use of the Bibliographic Worksheet designed for use in the Common Bibliographic System of ECLAC. The organization of the information of each document and the subsequent creation of the bibliographic record has been carried out in conformity with the UNISIST reference manual, second edition. The latter serves as a standardized format of communication for the exchange of bibliographic information among data bases or bibliographic information services whether the latter are documentation centres or libraries.

Anglo American Cataloguing Rules II

These rules are adhered to in the form of entry of all elements present in the bibliographic description of a document. Institutional author, personal author, serial titles, conference headings are all to be entered in accordance with this tool (AACR II) which has international acceptance.

Punctuation and abbreviations as stipulated by the AACR II are to be used when preparing records for CARISPLAN. This tool ensures compatibility with national, regional and international systems.

CARISPLAN procedure manual: institutional author record card and personal author record card

The Caribbean Documentation Centre, as part of its network activities, maintains institutional author and personal author authority files (see sample cards fig. 1 and 2) with a view to standardization in the forms of entry of regional and national institutions, government departments, consulting firms etc., and personal names. These are mainly verified by participating centres where possible. Entries are checked against this file to ensure that the accepted forms of institutions or personal names are used to avoid scatter of material that can occur should no standard be maintained. With regard to both files and especially the institutional author authority file, cross referencing is possible through the assigning of specific fields for other versions of the accepted forms of name, versions in other languages, former names and subsequent names. Output from these two files in the form of printed list are to be circulated to participating centres for updating on a regular basis.

Abstracting manual and Manual of indexing procedures

The indexing and abstracting manuals were designed and produced in house to serve as a guide to CARISPLAN participating centres to the methodology to be adopted when describing and analysing the contents of a document in terms of its subject concepts and the condensed version of their content. The manuals are used as well to ensure that certain defined rules of abstracting and indexing are observed.

OECD Macrothesaurus

The OECD Macrothesaurus is used in conjunction with the indexing manual and is the controlled vocabulary used for subject indexing and retrieval of material in CARISPLAN.

United Nations Economic Commission for Latin America
Subregional Office for the Caribbean
Caribbean Documentation Centre
List of Institutional Authors - Record Card

ISIS No.

Name of Institution	01								
Language	02	City	03	Country	04				
Parent Body	05	Used by	Versions in other languages	08					
Former Name	06		Other versions	09					
Subsequent Name	07								
UN Code	10	Participating Centre	11	Source of information	12	Verified by	13	Date	14

Figure 2

United Nations Economic Commission for Latin America
Subregional Headquarters for the Caribbean
Caribbean Documentation Centre
List of Personal Authors - Record Card

ISIS No.	01	
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Personal Author	02				
Country	03	Source of information	04		
Other Versions	05				
Participating Centre	06	Verified by	07	Date	08

Observations

As is stated in the introduction of the third edition its purpose is 'to provide a language which can process information relating to all aspects of social and economic development and at the same time give a common dimension to the more specific vocabularies corresponding to each of them.' This is a multilingual tool English, French, Spanish which is in use at several organizations, nationally and internationally, for the processing and retrieval of information. It has also served as the basis for several specialized thesauri. Given the dynamism in the field of socio-economic development, there is need for a controlled vocabulary which can easily accommodate new concepts and modify terms according to changes and developments. As such, the Macrothesaurus is maintained and updated by a Group of International Experts among which are representatives of the Regional Economic Commissions, with the Information Systems Unit of the United Nations Department of International Economic and Social Affairs as the coordinator of this exercise. Regional Economic Commissions within the United Nations system have the responsibility for the collection and evaluation of new terms, specific to the particular regions, which are then included in a continuously maintained Macrothesaurus.

List of proposed descriptors

In some cases the indexer will find that there is no appropriate descriptor to translate a given concept. We have found that the Macrothesaurus does not adequately cover

- a) concepts that are important to describing economic and social development issues in the region.
- b) agricultural produce and fruit of the region.
- c) regional institutions.

In such cases the new term is proposed (see the proposed descriptor form fig. 3) and submitted to the Caribbean Documentation Centre (CDC). These proposed descriptors require several background statements to assist in clarifying the scope of the term proposed. The 'source' of the term should be stated where possible. A 'scope note' is sometimes necessary to give the range of a descriptor's application.

Figure 3

United Nations Economic Commission for Latin America
 Office for the Caribbean
 Caribbean Documentation Centre – Proposal for New Descriptor

PROPOSED DESCRIPTOR		DESCRIPTOR	
SOURCE		No.	
SCOPE NOTE		SEMANTIC FIELD	
SYNONYMS		TERM NOT APPROVED	TNA
TRANSLATED FROM		BROAD TERM	BT
COMMENTS		NARROWER TERMS	NT
PROPOSING INSTITUTION		RELATED TERMS	RT
ELIMINATED DATE	ACCEPTED DATE	REVISED	DATE

The category 'semantic field' is designated by the indexer for approval at a later stage by the CDC. The section dealing with broad term, narrower term and related terms are all related to the proposed descriptor.

The CDC, as part of the OECD Macrothesaurus management project, accepts and evaluates new descriptors. These are later analysed by the Group of International Experts for possible inclusion in the revised version of the Macrothesaurus. A list of proposed descriptors is maintained at the centre and circulated to participating centres for use within the region.

