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Ministry of State

Ministère d'État /

Science and Technology

Sciences et Technologie

Research and Information Services

Services de recherche et d'information

SCIENCE POLICY INFORMATION REFERENCE SYSTEM STATUS REPORT

JANUARY, 1976

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> MINISTRY OF STATE MINISTÈRE D'ETAT BIBLIOTHÈQUE

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approved by approuvé par

M.S. Lipsett

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SUMMARY

This report presents a brief review of the results of Phase I of the pilot project to develop the Science Policy Information Reference System (SPIRS) containing references to science - policy - relevant documents within the Ministry.

Work on the first phase was authorized by the Secretary on April 16, 1975.

Methodology has been developed, a computer readable data bank of some 1,200 references has been built up and the technical feasibility of SPIRS has been demonstrated.

Recommendations include:

- Phase I of the pilot project be considered as completed.
- Further work not be undertaken at this time.
- This report be tabled at a PMC meeting to inform Ministry management of the results of the project and the capabilities of the pilot data bank for future reference as appropriate.

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Status Report: Science Policy Information Reference System

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Status Report:

Science Policy Information Reference System (SPIRS)

1. Overall Objectives of the Pilot Project

The Secretary on April 16th 1975 approved an allocation of four man years and \$5,000. to conduct the first phase of a pilot project intended to develop an improved capability to access documented science policy information.

The objectives approved for Phase I of the pilot project were:

- to set up methodology and test it within the so-called Resources and Information Branch, and to determine what assistance the proposed facility could provide for the Ministry's managers;
- to determine objectives and requirements of a possible

 Phase II in which the experience gained in Phase I

 would be used in another branch to further test

 feasibility and acceptance of the proposed reference

 system and to report the findings.

2. Purpose of this Document

This document reports the results of Phase I of the SPIRS pilot project to September 5th 1975, at which time the summer students and other casual staff allocated to the project were disbanded.

results

purposes

procedures recommendations

This report also discusses the specific objectives of the pilot project and of the Science Policy Information System, the specific operational objectives and design criteria for the system, the size and composition of the data bank, and information capture and assessment procedures. Conclusions are drawn and next steps recommended.

3. Purpose of SPIRS

a tool

Briefly, the Science Policy Information Reference System was intended to provide MOSST officers and others with a tool for the timely location of documents relevant to their particular areas of interest. The system was expected to be of greatest assistance to those not expert in a given area, by providing initial pointers to relevant documents and, through them, to sources of specific expertise and assistance both inside and outside the Ministry.

- 4. Operational Objectives Set for the Pilot Project
 Within the overall objectives approved by the Secretary,
 the operational objectives of the pilot project were:
 - to develop design criteria for a computer-accessible data bank, and
 - to develop and test methodology to capture, and assess science-policy-relevant documents, and to enter references in the data bank for subsequent distribution, all within the then Resources and Information (R&I) Branch.

expected outcomes

The project was also to engender staff participation and commitment to the extent possible, and to satisfy the needs of managers.

5. Criteria for Design of the System

bilingual

versatile retrieval

low capital cost

simplicity

Service Bureau used The requirements was for a bilingual document reference system for documents relevant both to science policy and of interest to MOSST. References were to be retrievable through such document attributes as policy areas, involved organizations, type of document, date of document, and generally on as wide a variety of indices as possible. The system was to be as versatile as possible and not require a large initial investment. It was to be directly accessable by users and searches were to be as simple to perform as possible. Also the assembly of a pilot data bank was to begin as soon as possible.

With these in mind several basic points of the system and the pilot project follow. In order to keep initial investment to a minimum a service bureau was engaged. The bureau chosen, "Com Share", was that recommended by P.S. Ross & Partners in a report (Annex I) prepared on the development of a science policy information system for MOSST, as being the one best able to provide an "off the shelf" package with the required versatility.

prerequisite requirements In order to comply with the request to begin as soon as possible and to develop experience and expertise in characterising documented science policy information, the capture, screening and indexing of documents was begun as soon as a preliminary list of words to be used for retrieving references by subject matter (subject search terms), a list of essential document attributes and instructions for indexers were developed. (Annexes II, III, IV).

6. Information Capture and Assessment

There were three aspects to be considered: document capture, assessment of significance or suitability for inclusion, and procedures for consistent abstracting/indexing of documents selected for inclusion.

6.1 Document Capture

For the pilot project, two sources of documents were used: mail to the R&I Branch, and selected Central Registry files.

from the mail

Incoming mail was screened just before delivery to the addressee and after the mail had been processed by Central Registry. Non-relevant material was immediately sent on its way, often with no more than a few minutes delay. Relevant material marked or otherwise indicated as urgent was delivered to the addressee by hand immediately the indexing process was complete. Non-urgent mail

was all processed in time for inclusion in the next "mail run". Substantial publications from organizations such as the OECD and UNESCO occasionally were delayed longer, though never more than 24 hours.

from registry

Central Registry files selected for the pilot project were primarily those used mostly by the International and Domestic Divisions of R&I Branch with files related to particular areas such as oceans, transportation, HQM and STI policy being added as time permitted. File contents for the last one or two years were examined.

screening for inclusion

6.2 Assessment of Suitability for Inclusion

Each document was screened for such factors as perceived relevance to science policy and continuing importance. Screening was done primarily by students hired for the summer with guidance from officers assigned to oversee aspects of the project. A rather liberal interpretation was used for the pilot project; a "when in doubt put it in" philosophy. About one-quarter of all documents examined were considered relevant.

6.3 Abstracting/Indexing of Documents

document attributes

Each document to be referenced in the data bank
was indexed by subject matter, author, recipient,
type of document, report number, date of issue and
central registry file number. An abstract was

key words

prepared and entered and in addition, information such as title, meeting or conference information, and publication reference was appended. This was all done in the same language as the document.

7. The Data Bank

As of September 5, 1975, there were 1197 document references stored in the computer data bank. About $14\frac{1}{2}$ man-months of effort and \$3530 were used in assembling this resource, but a significant proportion of effort was expended in prerequisite developmental activities such as design of indexing methodology.

8. Information Distribution

Output Lists Output from the computer system consists of document references relevant to enquiries expressed as combinations of such document attribures as subject search terms and year of origin. A couple of examples might be: correspondence with Statistics Canada regarding HQM; or cooperation with other countries on topics related to communications.

As of September 5th there has been no actual output from the system other than for members of the project team for testing purposes.

9. Capabilities of the Present System

Current Status The current system can indicate the existence and location of documents in response to queries based on subject matter, author, recipient or any of the other document attributes mentioned in section 6.3. Documents encompassed were those appearing in the incoming mail to the R&I Branch from early June to late August 1975, or in particular registry files, as outlined in 6.1. The subject matter search terms used are those in the controlled list in Appendix II. At this point in the development of the system, searches are best performed by a member of the SPIRS project team familiar with the list of search terms and with possible inconsistencies and errors that have crept into the developing system.

10. Development of SPIRS - Technical Aspects

The work to date has brought to light some points which will require attention in any future extension of the project.

need for client involvement In order to improve the quality of the SPIRS data bank, improved selection procedures and criteria need to be developed incorporating a much greater measure of client participation in monitoring and improving selection decisions.

thesaurus

search routines

team needed

atypical

period

clients preoccupied To improve indexing a subject search term thesaurus is required, consisting of word groupings which will guide users to all words related to a given explicit concept. On the output side, some simplified search routines are required to enable users to browse through the data bank in person. In addition, planned provision for automatic bilingual search capability could be implemented.

To continue the project a new team will have to be assembled. The minimum needed would be a project coordinator, one indexer/analyst, one indexer and a machine operator/proofreader. Additionally, in the early stages there is a need for one and a half to two people to implement the improved bilingual capability and small refinements and to develop the thesaurus.

11. Development of SPIRS: Needs of the Ministry

While Phase I of the SPIRS project was under way, the Ministry entered a period of reorganization. Thus the activities of the R&I Branch monitored during the project were atypical in nature and intensity. This reduced the quantity and quality of the information captured in the data bank, and the potential "market" for the system evaporated. The system's clients (and particularly the managers to be assisted by it) were in transition and not in the best position to contribute either to the development of the system or its evaluation.

Thus, the managers' needs addressed by the project were solely those identified in the P.S. Ross report (Annex I).

12. Conclusions

technical objectives met...

In the now concluded Phase I of the SPIRS pilot project, methodology for information capture, selection, indexing, and storage and retrieval has been developed and tested. In this process requirements for additional developmental work (e.g. a bilingual capacity) have been identified. Thus technical aspects of the Phase I objectives were met within the available resources.

...but
user needs
no longer
evident

The concurrent organizational changes in MOSST have militated against assessment of the extent to which the SPIRS facility could serve the needs of the managers and officers of the Ministry. It is evident, however, that a clearer definition of need should precede further work in this area.

13. Recommendations

In light of the above considerations, it is recommended that:

- (i) Phase I of the pilot project be considered as completed.
- (ii) Further work not be undertaken at this time.
- (iii) This report be tabled at a PMC meeting to inform Ministry management of the results of the project and the capabilities of the pilot data bank for future reference as appropriate.

THE DEVELOPMENT OF

A SCIENCE POLICY INFORMATION SYSTEM

AT THE MINISTRY OF STATE

FOR SCIENCE AND TECHNOLOGY

P. S. ROSS & PARTNERS

MANAGEMENT CONSULTANTS 90 SPARKS STREET, OTTAWA KIP 584, CANADA, 236-9662

March 27, 1975

Dr. G.Y. Tremblay
Assistant Secretary
Resources and Information Branch
Ministry of State for Science & Technology
Room 1221 Martel Building
270 Albert Street
Ottawa, Ontario

Dear Dr. Tremblay:

We are pleased to submit our report on "The Development of a Science Policy Information System at the Ministry of State for Science and Technology". This report describes the requirements for policy information in the Ministry and outlines our suggested approach to providing a computerized document storage and retrieval capability. Additionally, we have developed a work program for the implementation of such a system at the Ministry.

In submitting this report we wish to thank the Ministry for the co-operation extended to us, and in particular to the assistance provided by Drs. Quadling and Guttormson.

We have appreciated this opportunity of working with you on the first phase of this program to develop a computer based documentation storage and retrieval system and look forward to being of continued assistance to you. If you wish to discuss any aspect of this report or the work it represents, we will be pleased to do so at your convenience.

Sincerely,

P.S. ROSS & PARTNERS

A.P. Bogie Principal

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HALIFAX QUEBEC MONTREAL OTTAWA TORONTO WINNIPEG CALGARY EDMONTON VANCOUVER

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I. INTRODUCTION

The Ministry of State for Science and Technology was established in 1971 for the purpose of assessing and developing policies for the Canadian Government in the fields of science and technology. Since that time, the Ministry has evolved through a series of organization formats to the present structure which comprises the following principal functions:

- * Policy Formulation
- * Program Review and Assessment
 - * Resources and Information
- * Personnel, Finance and Administration

The Resources and Information Branch includes, among its responsibilities, a role in the functions of policy making and review and assessment. As part of this responsibility, the Branch recently undertook a preliminary review of the requirement for computer-based systems to support information requirements within the Ministry. This review involved preliminary research of the types of information within the Ministry that were appropriate for some form of mechanized storage and retrieval, along with an exploration of the types of approach that could be considered in such a computerization process. This research resulted in a decision to undertake a more complete study of the feasibility and approach to a computer-based information storage and retrieval system, and accordingly, P.S. Ross & Partners was asked to undertake the work.

It is envisaged that such a system initially will meet internal Ministry needs and provide prompt access to a broad range of Ministry data related to the development, monitoring, and understanding of policy related topics in Canada and around the world. It is foreseen that the system subsequently will be made available for use by other federal government departments, providing them access to selected information and facilitating the creation of their own collections of policy related information.

Other parts of the information coordination process relate to the provision of information available from external sources including other library collections, statistical data, and data analysis services provided by agencies such as Statistics Canada. Our work has involved an examination of the nature of the data flowing into the Ministry, and has identified a number of such data sources including federal government departments, provincial governments, industry organizations, universities, research organizations, and foreign governments. Further, we have conducted interviews with a significant number of senior professional staff in the Ministry to gain an appreciation of their functions and of their storage and retrieval requirements. Additionally, consideration has been given to the planned availability of the PDP-11/45 computer as a basis for supporting this system.

This report describes the scope of the work conducted, and the requirements of Ministry users. A review of systems that would reasonably satisfy these requirements is provided and followed by our recommendations.

Finally, the report outlines a suggested plan for establishing such a capability for the Ministry and provides some preliminary estimates of the related costs and timing.

II. OBJECTIVES

The objectives of this study are:

- * To determine general systems requirements of the Ministry in regard to the filing and retrieval of science policy information;
- * To identify the systems available to meet immediate needs;
- * To identify costs of alternative systems; and,
- * To outline the activities involved in the implementation of such systems.

III. POLICY INFORMATION REQUIREMENTS

A major part of our work program focused on the users of information in the Ministry. Accordingly, an extensive interview program was undertaken with some twenty senior managerial and professional staff. The interviews were designed to obtain a good understanding of the functions of each user and his perspectives, the kind of documentation and material available to him and the way it is used. During the course of each interview, we attempted to prompt the users with ideas and to elicit suggestions on alternative approaches to satisfy anticipated future requirements.

As a result of this work, we have been able to draw some conclusions on the nature of the major categories of information and documents required by the Ministry personnel. This section of our report documents our analysis of requirements, and provides an assessment of the resulting implications.

A. INFORMATION REQUIREMENTS

Our analysis of information and documents used by the Ministry determined that there are two broad classes of information available to the Ministry:

- (i) Documents filed or retained at the Ministry; and
- (ii) Documents available from external organizations.

The various categories of documents and materials are described briefly in the following sub-sections.

1. General Documents

This category embraces a range of documentary material processed by the Ministry including memoranda, letters, position papers, cabinet decisions, policy statements, and press releases. The materials are derived from the activities of various science and technology groups in the federal and provincial governments, universities, industry and private sector groups. The volume

of such materials in the Ministry is considerable and concerns were expressed by many individuals that it was becoming increasingly difficult to be fully aware of all such documents available in the Ministry.

2. Personal Data Collections

Many of the types of material in this broad class of information are available as part of personal files, data collections, or personal knowledge. In certain cases the systems are quite extensive and comprise a useful collection of selected documents.

3. Scientific Activities

This category of information relates to the knowledge of scientific activities in Canada (including such items as research programs), and the level of expenditures associated with them. These science and technology activities relate to federal and provincial government programs, private industry programs, and bilateral programs where other countries may be involved. The information is required to support the policy formulation and review and evaluation processes of the Ministry.

4. Policy Inventory

Knowledge of existing policies in federal and provincial governments emerged as an item of significance in policy formulation activities. The knowledge of such policies assists the Ministry in the avoidance of conflicts in policies under development and in the identification of areas where policies are indistinct or non-existent.

5. <u>International Information</u>

The Ministry policy formulation processes require that information on the policies of foreign governments and other organizations be available. It would also be beneficial to the Ministry to understand the framework within which foreign policies are developed. Additionally, the policy makers

and the Ministry must be aware of decisions taken by international organizations such as the UN and the OECD which may impact on Canadian policy, and must also be aware of the related view points of key groups within these organizations.

6. Who's Who

This category of data refers to key persons and key organizations involved in specific functional areas of science and technology who are involved in the policy formulation process. Availability of the names of these people and their areas of relevance is particularly useful to individuals new to the organization.

7. Quantitative Data

This requirement is for access to quantitative data collected by other departments and agencies such as Statistics Canada, both directly and on behalf of the Ministry. MOSST accumulates and analyzes financial data on federal departmental programs in the area of science and technology. Descriptions of the type of data and analyses that are available would be a useful component of a data base.

8. Published Documents

Published documents cover the broad category of both materials produced by universities, governments, research institutions and private sector organizations in the form of books, journals, conference proceedings and published research papers, etc. The Ministry makes extensive use of such materials as they relate to the areas of science and technology. The awareness or knowledge of the Ministry staff of specific materials in this category are brought about, in addition to the Ministry library staff function, by personal efforts and as a result of references from other contacts in the. field. While this process provides reasonable access to a certain range of materials in this category, there are distinct limits on the extent of an individual's awareness of publications in the wide ranging application areas with which the Ministry is concerned.

Over recent years, several organizations have undertaken the development of extensive and comprehensive data bases of publications, references, and literature in certain fields of endeavor. Examples of such data bases are those developed through the efforts of the National Research Council and the CAN / SDI Program. The library and other Ministry staff are aware of the availability of certain of these data bases. It is likely that the availability of such data base information will expand considerably over the next few years. A requirement emerging from our interview program was for a better and more complete awareness of such systems and reference materials, and the provision for access to them by Ministry staff to support their generally expanding requirements.

9. Other

Other general categories of information requirements within the Ministry have been expressed as follows:

- * Policy Review and Assessment in this area certain information types could be developed to support the process, depending on the categories of information pertinent to any particular topic of science policy that is current at a specific point in time. As part of this process, it would be useful to consider the development of impact and effectiveness indicators.
- * Internal Staff Skills it was suggested that in view of the varying technological and science disciplines and experience required in the Ministry, combined with the factors of high skill level required and a relatively high rate of replacement as new areas of of interest emerge, that an inventory of staff skills and experience would be useful.

B. OPERATIONAL ENVIRONMENT

In accordance with Federal Government policy on bilingualism, due consideration was given to the needs in this area. As well, the sensitive nature of the material involved has been appropriately considered so that provision may be made for adequate security arrangements.

1. Bilingual Capability

An important factor that emerged relative to a data storage and retrieval system is the requirement to interrogate the system in either English or French. There are two requirements to be considered:

- (a) English and French interactive capability for the operations staff using the system.
- (b) Provision of automatic translation equivalents for selected keywords.

2. Security Requirements

The question of security arose in a number of areas, and it is clear that, in the long term, any storage and retrieval system must provide an adequate level of security. Greatest security can be assured by storing information and materials on the Ministry's premises and making use of the PDP 11/45. This approach necessitates the development of new computer software with implied higher initial costs.

- 3. It is foreseen that the computer-based system will be accessed by the user in two alternative ways:
 - (a) Directly in this mode, the user personally will enter requests for data directly through computer terminals. The physical operation will not be difficult to learn, but it may take time for the user to access the material required in the most effective manner.
 - (b) Through the Information Exchange function in this mode, the user will relay his requirements to the Information Exchange function
 who will, in turn, enter requests through the
 computer terminals, obtain the required results,
 and relay them back to the user.

C. GENERAL IMPLICATIONS

The analysis of requirements described in the first part of this section of the report confirms the need for:

- * The creation of a computer-based information system to provide storage and retrieval capability for document abstracts and bibliographies for the categories of material and documents identified in this section of the report that are not otherwise available through other services;
- * The development of adequate manpower resources to maintain the information data base and to assist the staff to access the information; and,
- * The development of a system to provide a framework for the classification of science policy related documents.

 This will enable the retrieval system to function effectively in the storage and retrieval of data and documents.

environment for the processing, transmission and storage of data, by external service bureau organizations. Those who merit serious consideration for the processing of the Ministry's data take extensive security precautions which, in some cases, have been approved by the RCMP and the Department of Supply and Services.

Our survey of some twenty organizations who indicated a capability to provide the services found that the most suitable, satisfying all the identified requirements, is the VIP system provided by COMSHARE Limited. The requirements indicated were for a general purpose storage and retrieval system able to store document abstracts with related key words and bibliographic and classification information. The system would operate on an interactive environment with data searches occurring by use of combinations of specific references and key words. The system would be flexible and able to support the variable quantities and formats of bibliographic data for the different storage requirements represented by each different category of documents.

The VIP system would enable the Ministry to implement a selected portion of its overall documentation storage and retrieval system requirements in a relatively short period of time. While permitting the Ministry to move rapidly in this area, it would also provide experience in the use of such systems. Furthermore, this option would allow the conversion of the Ministry's present files and documents to a computerized form that could also be converted to operate on an "inhouse" system.

Another option, the use of the PDP-11/45 computer, is more suitable to the Ministry in the longer term because reference and abstract information can be retained entirely on the Ministry's premises. This provides the most secure environment for sensitive material and documents which the Ministry has in its possession. However, despite an extensive survey in Canada and the U.S., our study was unable to locate any software available for use on the PDP-11/45 which satisfies the range of requirements defined above. However, a number of developed programs that satisfy some of the requirements were identified.

In addition, there are a number of organizations with experience in the development of software systems of the type described. Preliminary estimates indicate that the requisite software can be developed for application on the PDP-11/45 in 9 to 18 months for a cost of \$45,000 to \$150,000, depending on the ultimate degree of sophistication required. Some of the factors that would impact on the cost and timing are:

- * the extent to which the software is parameterized for general application;
- * the incorporation of a "key word in context" capability for the abstracts;
- the inclusion of a technical synonyms capability; and,
- * the degree to which a bilingual capability is incorporated.

B. DOCUMENT RETRIEVAL TECHNIQUES

The retrieval of documents ideally is effected by the use of key words in combination with a policy classification system. The key word system searches the data files for documents which contain the words specified in the search criteria. The policy classification system enables the user to obtain all references to documents in a particular area of policy.

C. MANPOWER DEVELOPMENT

Whatever approach is selected, there is a need within the Ministry, to upgrade the capability of the information gathering and dissemination function to meet the increased demands inherent in the planned system development. Such a function would develop and maintain an awareness of external data bases and provide the capability to obtain data from the data base. Systems already available would include major data bases in use by the federal government such as the CANOLE and WATDOC bibliographic access systems.

Manpower will also be required to provide the staff of the Ministry with assistance in submitting data to the data base and performing data retrieval searches on their behalf. The facility also should exist for the staff to carry out these functions on their own behalf, although not all staff members will wish to operate in this manner.

As part of the overall data gathering function for the total system, primary responsibility for the content of portions of the data base may reside with selected individuals or groups. For example, foreign government intelligence information may be the responsibility of one group within a branch. The central function must support and coordinate these groups in their use of the system.

The approaches identified in this section incorporate the use of the latest computer hardware equipment in combination with state-of-theart software development. The implementation of such a system is well within the capabilities of the services available to the Ministry. responsibility for the ongoing operation of the information storage and retrieval capability.

The information exchange function will provide the services associated with abstracting, document storage, computer input and document searches. The function also will have responsibility for maintaining awareness of other documentation systems available to the Ministry from other sources.

* An indexing system of keywords should be developed.

This task should be undertaken early, since the availability of a suitable thesaurus will significantly affect the success of the storage and retrieval system. The development of the thesaurus must take account of the requirements for bilingual capability, and accordingly, synonyms should be developed for application in both languages.

The indexing system would make use of keyword and bibliographic data based on policy classification, for data storage and retrieval purposes.

VI. A PLAN FOR IMPLEMENTATION

This section of our report details an approach to implementation that will provide a sound basis for implementing our recommendations and a framework for the management of the process. Exhibit l overleaf, shows a phased work program with parallel activities on which the approach is based, identifies whether the activity is carried out by MOSST or externally, shows the man-time requirements, and identifies likely external costs and the time frames involved.

Inherent in the approach is the need to provide capability for document storage and retrieval at an early stage while at the same time making it part of the longer term process to establish a computer software system that will operate on the Digital Equipment Corporation, PDP-11/45, which is planned for installation at the Ministry. The approach has seven major activities which are outlined in more detail in the remaining part of this section.

1. Project Management

It is important in a project of this kind that an integrated approach to the overall management of the work program be established to ensure adequate control and supervision throughout all the phases. The project manager should be familiar with both the user environment and the technologies involved in view of the on-going requirement for liaison and supervision with MOSST officers, and with computer/technical personnel. Additionally, the project manager will participate in other activities inherent in the program, including the development of the information exchange organization.

2. User Coordination

In order to provide ongoing MOSST involvement and increasing responsibility, the primary user team interface should involve a responsible staff member from MOSST. This will also ensure that an adequate knowledge of the system and its development remains with MOSST throughout the implementation phase, as well as ensuring maximum co-operation and participation of MOSST branches in the development program.

3. Detailed Systems Design

During this activity, a conceptual design should be prepared after having examined and analyzed the details of existing systems. Following this, an assessment can be made of the implications on the computer hardware/software systems and on the user operations. Finally, detailed specifications can be developed for computer software development.

4. Computer Software Development

Using the specifications developed in activity 3, the computer programs should be developed and tested. Maximum advantage should be taken of utilizing existing techniques, methodologies and logic for storage and retrieval.

5. Classification System and Thesaurus Development

The classification system should be conceived and examined against the framework of general criteria developed to assess its viability. Following this, a detailed design should be developed and an acceptability test conducted. Instructions can then be prepared for using the system.

The thesaurus concept should be developed having regard to the maximum desirable size, and the approach adopted to French/English equivalents. A search should be made of other available thesauri which relate to the science and technology field, and also to the type of documents in use by MOSST.

6. Implementation

This process relates to a number of objectives, including the implementation of the system on an external computer service bureau using existing software, the training of staff, the preparation of procedure documentation required to implement, operate and use the systems, and the subsequent conversion of the system to the Ministry's PDP-11/45 computer. The process will be ongoing from the inception of the project, and will initially include data gathering for document analysis and for eventual system definition.

7. Organization Development

This activity is concerned with the ongoing and staffing of, the information exchange for will be responsible for the operation of the is envisaged that this group will be involveding and searching the document data bank of staff of the department and, where required staff to carry out this function on their own, detailed description of the functions of this or is contained in Section IV of this report.

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S. P. I. R. S.

SUBJECT

SEARCH

TERMS

.5 September 1975

Abstract Résumé Access Accès Comptabilité Accounting Précision Accuracy Achieve Réaliser Achievement Réalisation Acknowledge Reconnaître Acronyme Acronym Act Loi Intérimaire Acting Action Action Activité Activity Addition Addition Adresse Address Adéquat Adequate Ajustement Adjustment ADM Sous-ministre adjoint Administrer Administer Administration Administration Admission Admission Advertising Publicité Advice Conseil Advise Conseiller Adviser Conseiller Advisory Consultatif Aeronautics Aéronautique Africa Afrique Agency Organisme Agenda Ordre du jour Agreement Accord Agriculture Agriculture Aid Aide Air Canada Air Canada Λlaska Alaska Alberta A¹berta Algeria Algérie Alienation Alienation Alliance Alliance Allocation Allocation Alphabet Alphabet Alternatif Alternate Alternative Alternative Altitude Altitude . Amendment Modification Américain American Analogue Analog Analysis Analyse Announcement Annonce Ann**ual** Annuel Antarctique Antarctica Appeal Appel Application Application Applique Applied Appointment Nomination Approbation Approval Avril April Architecture Architecture Arctic Arctique Area Région Argentina Argentine Arts Arts Article Article Asia Asie Assessment **Evaluation** Tache Assignment Assist Assister Assistance Assistance Association Association Astronomie Astronomy Atlantic Atlantique

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Changement

Chapitre

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Contrat

contract

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Directive

Directeur

Discipline

Directive

Discipline

Director

Discret Discrete Discussion Discussion Congédier Dismiss Disparity Disparite Affichage Display Disposer Dispose Diffusion Dissemination Distribution Distribution Division Division DND DN MCC DOC Documentation Documentation Document Document Dcllar Dollar République Cominicaine Dominican Republic Donation Donation \mathtt{DOT} MDT Draft Avant-projet CRD DRB DREE EER DQ: Due Duplication Duplication Durée Duration Dynamic Dynamique Terre Earth Eastern de l'Est Ecologie Ecology Econometrics Econométrie Economic Economique Economics Economique Economie Economy Editing Rédaction Edition Edition Edmonton Edmonton Educat.ion Education Egypte Egypt Electrique Electrical Electronics Electronique Eligible Eligible Emergency Urgence Employé Employee Employment Emploi Enclosure Pièce jointe Endorsement Endossement Energie Energy Engineer Ingénieur Génie Engineering Enrôler Enlist Enrôlement Enrollment Entreprise Enterprise Enveloppe Envelope Environnement Environment Ega1 Equal Equiper Equip Matériel Equipment Error Erreur Esquimau Eskimo Establish Etablir Estimation Estimate Ethique Ethics Ethiopia Ethiopie Europe Europe Européen European Evaluation Evaluation Evolution Evolution Exact Exact

Exemple

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Exclusif

Executif

Example Excellent

Exchange

Exclusive Executive

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Français

Fréquence

Combustible

French Frequency

Fuel

Fulfill Function Fundamental Fund Further Future Futuribles Futurology Gain Gap Gather General Generate Generation Geneva Genuine Geography Geology German Germany Ghana Global Glossary GNP Goal Government Governmental Graduate Grant Graph Great Britain Great Lakes Greece Ground Group Growth Guatemala Guide Guideline Guinea Haiti Half Halifax Handbook Hardware Hawaii Hazard Чеаlth Heavy Heuristic High Hiring Historical History Holography Honduras Hong Kong Honourable Horizontal Hospital Hospitality MQH Hudson Bay Hull Human Numanities Hundred Hungary Iceland IDA Ideal

Accomplir Fonction Fondamental Fond Promouvoir Avenir Futuribles Futurologie Gain Ecart Cueillir Général Générer Génération Genève véritable Géographie Géologie Allemand Allemagne Ghana Mondial Lexique PNB But Gouvernement Gouverremental Diplômé Subvention Graphique Grande-Eretagne Les Grands Lacs Grèce Sol Caroupe Croissance Guatémala Guide Ligne directrice Guinée Haîti Demi Halifax Guide Matériel Hawaii Risque Santé Lourd Heuristique Haut Embauchage Historique Histoire Holographie Honduras Hong-Kong Honorable **Horizontal** Höpital Hospitalité M.H.Q. Baie Hudson Hull Humain Humanités Cent Hongrie Islande AID

Idéal

Identification IDRC Illegal Illustration Image Impact Implementation Implication Import Impossible Improvement Inaccurate Inadequate Incentive Incidental Income Incompetent Increase Increment Index India Indian Indian (Can) Indicator Indirect Indonesia Industrial Industry Inefficient. Inexperience Inflation Informatics Information Infrastructure Initial Initiative Innovation Install Institute Institutional Institution Instruction Insurance Intact Integration Intelligent Intensive Inter-regional Interaction Interactive Interdepartmental Interdisciplinary Interest Interim Internal International Interpretation Interprovincial Intervention Interview Introduction Invalid Invention Inventory Investigation Investment Invitation Invoice Involvement Iran

Iraq

Identification CRDI Illegal Illustration Image Impact Execution Conséquence Importation Impossible Amélioration Incorrect Inadequat Stimulant Incidente1 Revenu Incompêtent Augmentation Accroissement Index Inde Indien Indien (Can) Indicateur Indirect Indonésie Industriel Industrie Inefficace Inexpérience Inflation Informatique Information Infrastructure Initial Initiative Inncvation Installer Institut Institutionnel Institution Instruction Assurance Intact Integration Intelligent Intensif Inter-regional Interaction Interactif Interdépartemental Interdisciplinaire Interet Interimaire Interne International Interprétation Interprovincial Intervention Entrevue Introduction Invalide Invention Inventaire Enquête Investissement Invitation Facture Implication Iran Iraq.

Irlande Ireland Irreversible Irréversible Irrevocable Irrévocable Israël Israel Problème Issue Italien Italian Italy Italie IEC ITEC Itinerary Itinéraire Baie James James Bay Janvier January JamaTque Jamaica Japan Japon Jordanie Jordan Journal Journal Judgment Jugement July Juillet Juin June Junior Junior Jurisdiction Juridiction Jurisprudence Jurisprudence Justice Justice Kenya Kenya Korea Corée Kuwait Kuweit Etiquette Label Laboratory Laboratoire Labour Travail Labrador Labrador Décalage Lag Language Langue Laos Laos Laser Laser Dernier Last Amérique Latine Latin America Lancer Launch Loi Law Avocat Lawyer Lead Conduire Leader Leader Leave Conge Liban Lebanon Lecture Cours Registre Ledger Legacy Legs Légal Legal Legislation Législation Legislative Legislatif Legitimate Légitime Length Longueur Letter Lettre Responsabilité Liability Liaison Liaison Liberal Liberal Library Bibliothèque Libye Libya Licence Licence Délivrance d'une licence Licensing Life Vie Limite Limit Limité Limited Liste List Litteral Literal Literature Littérature Loan Prēt. Location Location Fermer Lock Londres London London Ont London Ont

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Nation

NASA Nation

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Premier Preparation Premier ministre

Preparation

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Suisse

Survey

Sweden Switzerland

Symbol . Symbole Symposium Colloque Synthesis Synthèse Syrie Syria System Système Table Tableau Tactical Tactique Taiwan Taïwan Tanzania Tansanie Target But. Tariff Tarif Task Tâche Task Force Groupe de travail Tax Impôt Technical Technique Technique Technique Technological Technologique Technologiste Technologist Technology Technologie Radiodiffusion Telecast Telegram Télégramme Telephone Téléphone Télévision Television Télex Telex Temporaire Temporary Term Terme Terminal Terminal Terrestrial Terrestre Testify Témoigner Test Test Texte Text Thailand Thailande Theory Théorie Thesis Thèse Third World Tiers-Monde Mille Thousand Time Temps Title Titre Sujet de discussion Topic Topological Topologique Toronto Toronto Total Total Tourism Tourisme Commerce Trade Trafic Traffic Formation Training Transfert Transfer Transform Transformer Transformation Transformation Translation Traduction Transmission Transmission Transparent Transparent Transport Transport Transportation Transport Voyage Travel Treasury Board Conseil du Trésor Traitement Treatment Traite Treaty Tendance Trend Trinidad & Tobago Trinidad & Tobago Tunisie Tunisia Turkey Turquie Uganda Uganda Ultérieur Ulterior UK Royaume-Uni UN ONU Incertitude

Entente PNUD

Unesco

Uniforme

Uncertainty Understanding

UNDP Unesco

Uniform

Unit Universal University Unsatisfactory Urban Urban planning Urbanization Uruguay USA Usage User USSR Utility Wage Waiver War Warranty Washington Waste Water Welfare West Indies Western OHW Wide Windsor Winnipeg Woman Work Working Group World Vacant Value Vancouver Vanish Variable Venezuela Veto Vice-president Victoria Vietnam Violence Visit Visual Vocal Voucher Year Yugoslavia Yukon Zambia

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Zambie

zone

- 25. Title or division as #14 but for recipient outside MOSST.
- 26. Organization as #15 but for recipient outside MOSST.
- 27. Location as #16 but for recipient outside MOSST.
- 28. SPIRS Analyst and Date the initials of the indexe and the date the indexing was performed. This attribute is not entered in the data bank.
- 29. Officer and Date not used for the pilot project. The initials of the officer to whom the index ? and document were sent for verification and the date: usually the officer listed in #20. This attribute is not entered in the data bank.

- 17. Journal, book or report data if the document's are article, the name of the journal in which it is found along with the page numbers and other relevant information; if the document is a book, the name and address of the publisher; if the document is a report, all relevant data not included elsewhere such as the name of the organization(s) enter the auspices of which the report was proposed if it is not the actual corporate author; any author/publisher type information not included elsewhere.
- 18. Report number the reference number of the document assigned by the originating organization. In practice this has been used primarily for OECD and UN report numbers.
- 19. Conference or meeting data if the document relates to a conference or meeting, e.g. minutes, agenda, working paper, the full name location and date of the meeting.
- 20. To (MOSST) the names(s) of the recipient(s) within MOSST if any.
- 21. Title or division the name of the division of the recipient 'within MOSST or if Assistant Secretary or above the title.
- 22. C.R. File the central registry file number if any.
- 23. Library accession the library accession number of the document if any.
- 24. To (NOT MOSST) The recipient of the document outside of MOSST. This is used for documents which originate in MOSST or which were sent from someone outside MOSST to someone outside MOSST and MOSST's involvement is as a third party.

- 8. Distribution restriction not used in the pilot project, but intended to restrict documents to selected users.
- Title or topic of the document as given by the originator (author).
- 10. Abstract a brief description of the content and purpose of the document written by the SPIRS indexer.
- 11. Description subject search terms selected from the approved list (Annex II).
- 12. Proposed descriptions those additional subject search terms not in the approved list which are felt by the indexer to be necessary. These are not entered in the data base unless the project coordinator approves them by entering them in attribute 11.
- 13. From the originator or author of the document. Only people and not organizations are listed in this attribute.
- 14. Title or division the title and the names of all subdivisions of the major organization(s) of the originator.
- 15. Organization the name(s) of the organization(s) which originated the document.
- 16. Location the name(s) of the city(ies) and province(s) or country(ies) in which the organization(s) listed in attribute 15 are located, or if no organizations are listed the city(ies) and province(s) or country(ies) in which the people listed in attribute 13 are located are given.

ANNEX III

SPIRS: Document Attributes

There are 29 attributes listed on the coding forms used by SPIRS indexes during the pilot project (Annex III.1, attached). Of these 26 are entered in the data bank.

A list of these document attribures with a brief description of each follows. Additional information is available in Annex IV, "Guide for Document Indexing".

- Accession number a unique sequential number assigned
 by the indexer.
- 2. Document Type a brief description of the type of document e.g. letter, memo, working paper, book, article etc. see also 3 below.
- 3. Document Code a numerical code indicating the type of documents. A list of codes is given in Annex III.2.
- 4. Issue date the date the document was written or published.
- Language the language(s) in which the document is written.
- 6. Number of pages the approximate number of pages in the document.
- 7. Security classification as assigned by the originator of the document. No document classified higher than "restricted" was entered into the data bank.

CODE

DESCRIPTION

21

Theses and dissertations.

22

Working papers, position papers, notes to file.

23

Regulations and legislations.

ANNEX III. 2

19

20

DOCUMENT TYPES

DESCRIPTION Agreements, treaties, pacts, etc. between or among countries, organizations, etc., usually governmental. Contracts, memoranda of understanding or intent, between or among organizations, individuals, etc. Correspondence (of a relevant and significant nature) from and to the Ministry. Telegrams and Telexes. Articles in periodicals, journals, newspapers, etc. Books, monographs. Briefings. Cabinet Memoranda, Cabinet Documents, Cabinet Decisions. Catalogues, brochures. Charts, maps. Notices and program information for meetings and conferences of scientific, technical, scholarly, or other NGO groups. Proceedings and records of meetings and conferences as in 11 above. Minutes and records of meetings of interdepartmental and intergovernmental (Canada) committees and ad hoc groups, Minutes and records of meetings of official organizations, i.e., IGO's. Notices and agenda for meetings of IGO's, e.g., NATO, OECD, UN, etc. Press releases. 17 Reports. Reviews and abstracts.

Speeches, seminar presentations.

Statistical compilations, presentations.

...:/2

MEST Système d'information sur reférences en politique scientifique (SIRPS)

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GUIDE FOR DOCUMENT INDEXING

INTRODUCTION

The purpose of this guide is to facilitate the indexing of documents, an operation which is of decisive importance both for retrieval effectiveness and for the quality of the information retrieved.

Two types of indexing are described here: analytic and bibliographic.

Analytic indexing is intended to provide an objective analysis of the content of documents deemed relevant and significant to the science policy information reference system. Because this type of indexing tends to be subjective, however, the effectiveness of the retrieval depends essentially on the analyst performing the indexing operations. This portion of the indexing form includes the following elements:

10 - Abstract

11 - Descriptors

12 - Proposed Descriptors

<u>Bibliographic indexing</u> involves the assigning of descriptive elements recorded and transcribed directly from the document with **no** analysis required on the part of the indexer. This objective **portion** of the indexing form includes the following elements:

1 - Accession number

2 - Document type

3 - Document code

4 - Issue date

5 - Language

6 - Number of pages

7 - Security classification (if applicable)

8 - Distribution restriction

9 - Title or topic

13 - From

14 - Title or division

15 - Organization

16 - Location

17 - Journal, book or report data

18 - To (MOSST)

19 - Title or division

20 - C.R. File

21 - Library accession

22 - To (Not MOSST)

23 - Title or division

24 - Organization

25 - Location

26 - SPIRS analyst, date

27 - Officer, date (optional)

In the following, each descriptive element is discussed in turn.

(1) Accession number

This number is assigned by the SPIRS Analyst and is recorded on the input form and the original or registry copy of the corresponding document. The number consists of, in order, the last two digits of the year, the month of the year in numerical value, SPIRS analyst code (alphabetic) and a 3-digit sequential number of the indexed document in monthly intervals - e.g.,

<u>Year</u>		Month		Analyst <u>Code</u>		Document No.
75	1	04	1	Α	1	001
75	1	06	1	F	1	101

(2) Document type

The document type should be briefly described according to Appendix A.

(3) Document type code

The numerical code, in Appendix A, appropriate to the document type, must be recorded by the SPIRS analyst.

(4) <u>Issue date</u>

Day, month and year, the document (the one for which an abstract is written) was issued should be listed, whenever possible. When neither the date, month or year is known, enter 0's

i.e. 00%06/75 00/00/73

(5) <u>Language</u>

The language of the document must be given. If the document is written in French, enter F; if the document is written in English, enter E; when in other than these two languages, enter the language in long-hand. If the document is bilingual, enter EF or clearly identify languages other than E and F.

(6) Number of pages (optional)

If a document contains more than a few pages, say three, it may be helpful to an enquirer to know how large a document he is looking for. The number of pages is to include Annexes, Bibliography, Notes attached, Covering letter.

(7) Security classification

This is assigned by the issuer of the document, and the abstract may be considered to be of the <u>same security classification</u> as the document (see Note P.6). The categories (and terms) are: restricted, confidential, secret and top secret. The term "Unrestricted" is generally not recorded and is assumed unless otherwise noted.

(8) Distribution restriction

This restriction is used to limit distribution to a selected clientele (named individual(s), organizational entities, etc.) e.g., Limited (or Restricted) to "John Brown, Adam Smith, etc.", Limited to MOSST, Limited to MOSST and TBS, Limited to ______Branch.

(9) <u>Title or topic</u>

The original main heading must always be recorded in its entirety. However, when indexing a document related to a meeting or conference, the analyst may choose to only briefly describe the topic/title:

i.e. 38th Meeting 116th Session

A special field (19) is provided for meeting and conference data: title, place, date; therefore, the title (9) should give a minimum of information.

(10) The abstract

Because of their high input cost, abstracts should be kept as brief as possible. Of course, brevity should not be detrimental to quality. An abstract is defined in terms of what the document contains, and not in terms of what it doesn't. Abstracts should reproduce neither the type of the document abstracted, nor its title,

as these two fields are searchable. Whenever possible, begin abstract with verb "discusses, relates, reviews, analyzes, etc.", and finish by noting, if it is the case, existence of annexes, tables, charts, French or English version and its accession number.

Depending on the type of document (see Appendix A), the elements of the abstract to be emphasized are the purpose, scope, method, results and conclusions of the original. There follows a brief definition of each of these elements.

Purpose:

States the goals, objectives, aims or reasons why the document was written.

Scope:

States the extent of the work reported in qualitative and/or quantitative terms. For example, the terms "brief" or "exhaustive" may be used to characterize the original.

Method:

Describes the techniques or the means employed to achieve the purpose. If the method is original or the application unusual, details should be included.

Results:

Are restricted to the most significant findings or the outcome of applying the methods named. The most significant quantitative data should be provided.

Conclusions:

Are restricted to the most significant conclusions or interpretations of the results. Care should be taken that this abbreviated statement does not imply concepts or conclusions broader than those supported in the original document.

NOTE: It may be necessary to omit results and conclusions from abstracts of "confidential" and above documents if abstract is to be available on retrieval by other than those with access to such classes of information.

The form, content and length of an abstract depend upon the type of the original document. However, storage limitations within computer memories and information handling systems indicate that abstracts should not exceed 100 words, if possible.

(11) and (12) <u>Descriptors and Proposed descriptors</u>

Descriptors should reflect the subject matter of the document and, as such, should go right to the point, i.e. words like "problem" "discussion" "miscellaneous" are meaningless from the point of view of retrieval. Whenever possible, words already contained in the keyword list should be chosen as descriptors.

- If a country (or countries) is involved, use it as a descriptor.
- Do not propose a descriptor if its synonym is already listed

Ex.: refuse waste

petroleum oil
Always opt for the broader term.

Ex.: naphta oil corn grain

- Use and propose only established names of organizations.

Ex.: "NEA" "IIASA"

"Ad-hoc group on ---"

"Standing group on ---"

"Committee on Naphta"

- Dates as descriptors:

for a single year use "1975" for years in a row "1975" 1975" 1975" 1975" 1980" for separate years "1975" "1980" for dates with month "04/1975"

 Use and propose pre-coordinate descriptors only if the combined concept represents one unit of thought and, as such, is used very frequently.

Ex.: Systems analysis
Science policy

S&T

and not: Scientific cooperation
Waste management, Nuclear safety

Proposed acronyms should always be followed by the full term,
 in parenthesis.

Ex.: NEA (Nuclear Energy Agency)

* The number of descriptors used in indexing one document should not exceed 20.
The number of proposed terms should not exceed 10.

(13) From

The issuer of a document may be a personal author(s) or an organizational author.

If the issuer is a person, his title or function within an organization is often useful data.

Example: G.Y. Tremblay,
Assistant Secretary,
Resources and Information Branch,
MOSST.

The issuer of a document may also be an "organizational" author, such as:

- an international or foreign organization
- a federal or provincial department, agency, committee, commission
- a professional association

(14) Title or division

Titles are given, starting with "director" and up; otherwise division alone. This field should also be used for the sub-units of organizations.

Ex.: Standing Group, Environment Directorate Ad-hoc group, etc.

(15) Organization

Only the organization is recorded here:

Ex.: OECD

(16) Location

If well-known, city only should be listed.

Ex.: Paris, London, Brussels

but: Paris, Ontario
 London, Ontario

(15) (16) In the case of foreign delegations, the particular country goes in (15) and the receiving country goes in (16) Ex.: (15) Ambassade de France

(16) Canada

(17) Journal, book or report reference

If the document is an article in a periodical, journal, magazine, newspaper, etc., the following data should be given:

- Title of the respective periodical, etc.
- Volume No., and Issue No., if applicable
- Pagination of the respective article
- Date to be entered in 4

If the document is a <u>report</u>, the following data must be given:

- Report number
- Issuing organization and/or
- Distributing agency
- Place
- Date to be entered in 4

If the document is a book:

- Publisher)
- Place) must be lsited

NOTE: Author(s) are to be listed under item 13.

(18)

This new field is provided for the number given by the originating organization itself. It should be given as such, as it plays an important part in the retrieval of this particular type of document.

(19)

This field is provided for full title of conference, seminar, meeting, etc., date in full and all other information considered useful and not duplicated in other fields.

Ex.: Science Council Meeting, Paris, 30/04/75 (20) and (21) To (MOSST)

The data to be listed are the following:

- Name of recipient*
- Title or division
- C.R. file and volume
- Library accession, if applicable

*NOTE: With several recipients, only first name will be searched; order of names can be altered.

(22) (23) (24) and (25) To (Not MOSST)

To be itemized further as for 11.

(26) SPIRS Analyst

Signature of analyst and date of indexing.

(27) Officer*

Signature of officer and date when officer reviewed input data.

*This category is optional on the input sheet in that the data recorded on the sheet will be entered to the information bank five working days after forwarding the document and input sheet to the officer if there is no action by the latter.

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