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# Indexing Minutes

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## Introduction

Minutes are one of the most difficult types of records to use. Unlike many other records, they are not arranged in a way that enhances access. Personnel files, for instance, are filed alphabetically by name, and people almost always search personnel files by name. Minutes, however, are filed chronologically by date of meeting, yet people almost always search minutes by subject. So while filing minutes chronologically is logical and useful, it means that many organizations waste countless hours each year searching through them. Sometimes people spend days or even weeks reading through minutes in search of a particular piece of information. The solution to this access dilemma is to index your minutes to help users find the information they need.

This publication examines two basic ways to improve access to minutes. First, it discusses how to develop an index using a database. This technique requires you to become an indexer, read the minutes, determine the subjects within the minutes, and keep a record of those subjects. Second, this publication explores how to use full-text searching software to improve access to minutes. This technique requires users to become searchers. For full-text searching software to work properly, users of the software need to understand how to develop and refine a search; otherwise, they will frequently either fail to find what they are looking for or will end up with too many possible hits.

This publication does not address the indexing of other kinds of records, such as personnel files, student records, or birth, death and marriage records. Fortunately, these records are generally easier to index, since they are indexed by objective attributes, such as the name of a person, rather than by subjective attributes, such as topic of a record. However, many of the guidelines in this publication will prove useful for people carrying out any indexing project.

## Step One: Assessing Your Situation

Before beginning to index minutes, you should evaluate your minutes and determine what type of access you need. This evaluation is an essential first step, since the best index will be one that fits the needs, habits, and preferences of the users of your minutes. Since indexing can be costly and time-consuming, you need to be sure you do only the level of indexing you need.

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## Users' Needs

The first and most important part of assessing your situation is to determine how people use your minutes and what they need from them. Users often have different but interrelated needs, and your index must be sure to address these.

### Search by subject

The most obvious need that users have from an index is access to information on the subjects in it. Therefore, before you design an index, you should first find out what subjects or issues users most frequently seek. This exercise will provide you with two pieces of information. First, you will determine what particular terms people use in their searches—so you can include terms in the index that are familiar to your users. Second, you will have a list of subjects important enough to index. You will probably decide not to index every single action documented in your minutes, so knowing users' needs will help you determine exactly what information to index.

### Search by department or unit

Some users need access to minutes by the department or unit of the organization most closely associated with the action. For instance, the highway department of a town might want a list of all issues related to their department that came before the town board, whether or not the actual subject of these actions was "Highways." If your users need access by unit, be sure to collect this information during your indexing and to create a field in the index to hold this information.

### Search by other special features

Users may need to search minutes by many different features, such as by resolution number or name of personnel. You should determine any of these special user needs beforehand, so that you can capture this information in the index.

### How far back users search

One of the most important issues you need to determine is how far into the past users might search for information. Many organizations have minutes going back decades—even centuries—but there is probably little need to index any set of minutes from their beginning. Most organizations find that indexing their minutes back a few decades meets most requests for information. Don't index minutes older than twenty years unless you can document a well-established and frequent need to access older minutes.

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## Need for a printed index

If you do not need to develop a printed index to your minutes, you can maintain a simple database or use full-text searching to hunt for information. If you do need a printed index, you can design and print one using any off-the-shelf database software package.

## Features of the Minutes

The minutes themselves, how they were created (handwritten, typewritten, or word-processed), and their current condition all have an effect on how quickly you can index them. The attributes of your minutes may also help you determine which indexing technique makes the most sense for your situation.

### Quantity

The quantity of minutes you plan to index directly influences the time the indexing will take and the cost of the project. To estimate quantity, measure the number of pages of minutes involved. There are two common ways to establish the number of pages. If you keep your minutes in books with numbered pages, you can easily add up the total of the page numbers in each minute book to arrive at an exact number. Many organizations, however, do not keep their minutes in books or do not have page numbers for large sections of the minutes. In such cases, measure one linear inch of your minutes, count the number of pages in that inch, and multiply the number of pages by the number of linear inches. Since this estimate will never be exact, add 5% to your total to make sure you don't underestimate.

### Condition

The condition of the minutes will affect the speed at which you can index the minutes. Minutes with torn or burned pages, minutes on flimsy carbons or onionskin paper, and minutes with many attachments stapled to their pages will slow the indexing process.

### Readability

The handwriting in old minute books is often quite attractive, but if you are unfamiliar with that particular script your indexing will take longer than if you were reading clean typescript. Minutes with smudged text or very light print will similarly slow down the process.

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## Format

Format can have a greater effect on your indexing project than any other issue. If your minutes are in large-format bound minute books, these may be more difficult to handle and, therefore, more time-consuming to read and index. Handwritten minutes will require a traditional indexing solution, because no software can convert cursive handwriting into editable text. With typewritten minutes, you have two indexing choices: you can index them in the traditional way, or you can scan the pages of the minutes, convert them into electronic text, and use full-text searching software to gain access. If you have any quantity of minutes in electronic form, using full-text searching software is the cheapest and probably easiest solution.

## Necessary Resources

When preparing to index, the final issue you must resolve is whether you have the resources to conduct the project. Often you may discover that you already have a number of resources on hand.

## Staff

If you are considering traditional indexing, you will need to set aside staff time to complete a project of any size. Before you start indexing, you must determine if you have staff available for this project or whether you need to consider other options. Local governments, for example, can apply for a Local Government Records Management Improvement Fund grant to pay staff and other costs associated with an indexing project.

## Software and hardware

Sometimes you already have on hand the software and hardware you need for indexing. Most organizations have commercial off-the-shelf database programs (like Microsoft Access) that are usually adequate for any traditional indexing project. Some organizations have full-text searching software (like Isys or ZyIMAGE) that can search the electronic text of their minutes, as well as scanners and scanning software that can scan typewritten minutes and convert them into electronic text.

## Existing indexes

One of the most important activities in traditional indexing is to develop a master list of terms, which is a list of chosen terms for your index. Appendix A, "Master List of Terms for Indexing Municipal Minutes," and Appendix B, "Master Lists of Terms for Indexing Board of Education Minutes," consist of two sample master

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lists of terms. You can use these as a starting point, but you may already have other “preliminary” indexes on hand. If so, these might be a better place to start.

Some organizations have **old indexes** that they no longer maintain; for the sake of consistency, it may make sense for you to continue using the terms in that index. Some organizations have minutes with **index terms** written in the margins of their minutes. If you have these, then use those terms as the kernel of your master list of terms. If you have a related **subject filing system** (such as a mayor’s or district superintendent’s general files) that includes many of the terms used in the minutes, then it makes sense for you to base your master list of terms on that filing system. In this way, you will expand consistency between the two recordkeeping systems, and users will be more familiar with the terms used in both. If you have detailed agendas to your minutes, you can use those as the beginning of your index, which will also speed up the indexing process.

## Money

Any indexing project will need money for supplies, software, and staff time. Be sure you have the funds necessary before you start an indexing project. An incomplete index may be better than no index at all, but a failed indexing project may give people the impression that indexing is always bound to fail.

If you don’t have the money available in your current budget, then you will need to talk to those in your organization in charge of finances and convince them that this project is essential. You should argue for the need for such a project in terms of time saved in finding information (which might be hundreds of hours per year), improvements to your operations when your organization can quickly find the information it needs, and improved responsiveness to queries from the public.

Once you have accumulated all this information, you should be able to design an index and an indexing process that will best fit your needs.

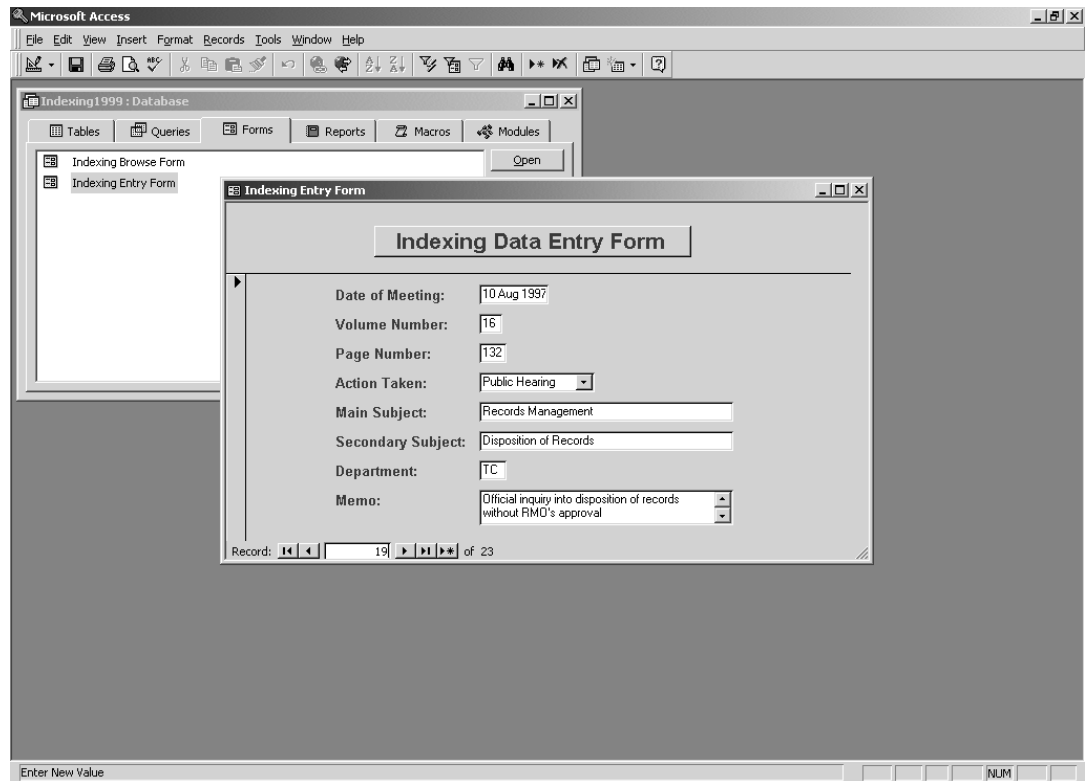
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## Types of Indexing

There are essentially two different ways to improve access to minutes: by developing a **traditional index** and by using a **full-text searching** tool. In the past, the traditional indexing method (requiring people to read, evaluate, and catalog information in a text) has been the most common. Today, full-text searching a “non-displayed index” of text is more common for two reasons: people are used to full-text searching (since this is the chief method they use to find information on the Internet), and organizations have much more electronic text than in the past. You should choose one of these methods based on your assessment of your minutes and of users’ needs. Keep in mind that you might choose to use traditional indexing for some of your minutes (for example, your older handwritten minutes) and a full-text searching solution for more recent minutes in electronic form.

**Traditional indexing** comes in many forms. In the past, most organizations maintained these indexes on index cards, which are awkward and susceptible to loss and disorganization. With the onset of word processing software, some organizations began to type their indexes into electronic documents. These indexes have the advantage of being in electronic form and of being updatable, but they still are more difficult to update or search than a database. That is why most organizations today use a database to maintain an index. You can either buy a standard database product (such as Microsoft Access or FileMaker Pro), or you can purchase a professional indexing software package (such as CINDEXTM or wINDEX). Most organizations will use basic database products and develop a database structure to meet their needs, since this is usually cheaper and easier than using professional indexing software. For a sample indexing database and instructions on how to use it, visit the State Archives’ website at [www.archives.nysed.gov](http://www.archives.nysed.gov).

**Full-text searching** does nothing more than use software to search a body of electronic text. If you don’t have your minutes available in electronic form, you’ll need to convert them. Then you can use one of many software products (such as Isys and ZyIMAGE) to search the text.



*A view of a simple database for creating and maintaining an electronic index of minutes. Note that, with only eight fields, you can collect all the information you need to find and judge the relevance of information in your minutes.*

## SIDEBAR

### Deciding Level of Detail

One decision that will increase the time an indexing project takes is the level of subject detail you include in the index. Although this publication describes three levels of subject indexing (main subject, secondary subject, and the memo field), you may be satisfied with fewer levels than that. Carefully evaluate your situation to determine the suitable level of detail.

#### **Main subject**

Any index to a set of minutes needs at least one level of subject access, since the subject is always the primary means of searching for information. Always include a main subject level in your index.

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### **Secondary subject**

The secondary subject level provides a little more detail than the main subject level. Use secondary subjects if you need to conduct more detailed searches than the main subject level will allow. Also, use secondary subjects in cases where you have many requests for information; the more requests you have, the more likely that you'll need secondary subjects.

### **Memo field**

The memo field is not literally a third subject level, but it gives you a way to collect and use very specific information on the main subject. The more entries you have in your index, the more likely it will be that you will need to use the memo field to distinguish between similar entries. Use the memo field to store detailed information on actions, such as the names of streets, organizations, or personnel.

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## Step Two: Designing an Indexing Project

Planning is essential to any successful indexing project. If you plunge into the project without planning, you are likely to waste time and make mistakes. Good indexing is about maintaining consistency, and you will save the most time if you develop and follow logical rules from the outset. Consistency in this case means indexing in the same manner, using the same subject terms, and always indexing the same types of actions.

### A. Determine how you will index

First, you must decide what your indexing solution will be: whether you will develop a traditional controlled index to your minutes or use full-text searching. This decision will have a great effect on your project. For instance, it determines how you will estimate the time needed for the project. For traditional indexing, you'll need to estimate how many pages per hour an indexer can complete; for full-text searching, you may not need to estimate at all, because the electronic text is already complete, or you may need to estimate the time to scan the minutes and convert them into electronic text.

If you're doing a **traditional index**, you can estimate that you will index about seven pages per hour. That estimate assumes you have a fairly standard set of minutes with only a few actions per page,

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and it also allows time for the indexer to read through the minutes and evaluate the importance of each recorded event. Some organizations' minutes, however, will be more complicated, and so will take longer to index. For instance, if your minutes contain dozens of personnel actions each month and you need to index all of them, then you probably won't be able to index at quite this speed. If you think your minutes will take longer to index, you should index a certain number of pages, keep track of the time it takes, and then extrapolate how long it will take to index all of them.

Many organizations do not perform **scanning and conversion** in-house. If this is the case, there is no need for you to estimate the time to complete these activities. If you are doing your own scanning and conversion, there are a few estimates you can use. Assuming you are converting 1,000 pages of minutes, you can estimate that it will take you about 1½ hours (or 675 pages per hour, using a scanner with an automatic feeder) to scan them. After scanning, you will have to verify that the pages have scanned correctly and legibly, and occasionally you will need to rescan a page. You can estimate that it will take you about 3.3 hours to verify and correct the 1,000 images you have produced (assuming a speed of five pages per minute). After converting the pages into digital images, you can estimate that it will take about 5½ hours to convert and save 1000 pages (assuming a rate of 20 seconds per page). Keep in mind once again that these are merely estimates, and that you may realize speeds that are much slower or faster than this.

## B. Develop a preliminary master list of subject terms

For an index to be reliable, you must use the subject terms within it consistently. You must ensure that a term in your index always stands for only a single concept and that you don't use two or more terms with the same meaning. The best way to maintain consistency in terminology is to develop a master list of terms. This master list should include all the main subject terms and secondary subject terms in your index. Indexers can refer to this master list to ensure that they are using only approved terms.

However, the master list can also help indexers maintain consistency if it also includes terms that are not approved for the index and thus directs users (via *See* references) to the approved terms. For instance, an indexer may try to index an action under the subject "Emergency" when the accepted subject term is "Public Safety." By reviewing the master list of terms, the indexer will find the entry, "Emergencies. *See* Public Safety," indicating that Public Safety is the correct subject term. The master list of terms should also include *See also* references that direct users from one term to a

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related term that may be more appropriate. For instance, the entry, “Students. *See also* Health,” in a master list of terms means that “Students” is an approved main subject, but that the related term “Health” may be a more appropriate term for some subjects.

You can begin developing a master list of terms by using one of the master lists produced by the State Archives (see Appendix A, “Master List of Terms for Indexing Municipal Minutes,” and Appendix B, “Master List of Terms for Indexing Board of Education Minutes”). Or you can develop one on your own by using your knowledge of the issues discussed in your minutes, or by using subject titles in a related filing system as a guide. Keep in mind that the master list of terms will be a work in progress, especially during the first phase of your indexing project. You should be willing to add needed terms to the index as you proceed. See Appendix D, “Town of Brockway Minutes Indexing Procedures Manual,” section 2, for an additional explanation of the master list of terms. For electronic versions of the master list of terms, visit the State Archives’ website at [www.archives.nysed.gov](http://www.archives.nysed.gov).

Although indexers usually compile master lists only for a traditional index, master lists can also benefit users of full-text searching. For example, a minutes-taker can use a master list of terms in advance, making sure that the preferred subject term is used within the minutes themselves. Thus, you will consistently use the same term for the same subject, which will make it easier to find information in the minutes.

## C. Determine what to index

You must determine what actions in your minutes you will and will not index. Not every recorded event is important enough to index. For instance, there’s little reason to index the approval of each set of minutes, but you will certainly want to index any major decision recorded in the minutes. You should decide ahead of time what is important to you, and then instruct any indexer to follow these guidelines. See Appendix D, “Town of Brockway Minutes Indexing Procedures Manual,” section 3, for an example of how you might describe what you will and will not index.

You also must decide the range of years you need to index. Most organizations begin with the idea that they must index the entire series of minutes, but few organizations refer frequently enough to their earliest minutes to justify indexing them. Indexing takes time and money, so you need to make sure that it saves time in the long run. The way to do that is to index only those minutes that users refer to most frequently. As a rough guideline, many organizations

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find that they don't need to index beyond their most recent twenty years of minutes. But it is best to specify exactly the minutes you refer to the most.

For instance, if you find you are searching last year's minutes about twenty times a month, and it takes you an average of fifteen minutes to find what you're looking for each time, then it is taking you about sixty hours per year to search through one set of minutes. That covers only one year's worth of minutes, so indexing minutes would certainly save you a great deal of time. On the other hand, you might discover that it takes you thirty minutes (twice as long) to search for information in minutes that are thirty to fifty years old, but you only need to do this three times a year. So even though the time for each search is longer, the need for access is so infrequent that it is impossible to justify indexing those minutes.

The last indexing decision you must make is the level of detail you need for the subject. Some simple indexes use only one level of indexing (the main subject), but many organizations find this too restrictive and add a second level (a related secondary subject). Some organizations occasionally find a need for a third level of subject detail that gives very specific information (such as street names, personnel names, etc.). You should decide ahead of time what level of detail you need for the subject, and design your index to support that level. See Appendix D, "Town of Brockway Minutes Indexing Procedures Manual," section 4, for an example of a decision on the subject level to include in an index.

## **D. Determine the order in which you will index**

Most people index the most recent minutes first and work backwards. The merit of this approach is that it ensures you will first index the minutes most likely to be used. The problem with this approach is that, by indexing meeting by meeting, your indexer will constantly be moving backwards and forward in time without any context.

It is probably best to choose a point sometime in the past and index forward from that point, then move to a point further in the past and go forward, etc. This solution keeps you moving backward section by section, so that your indexer can follow the progress of discussions as they take place over time. In this way, the indexer will be more likely to understand the context of the issues under discussion and correctly index them. If you store your minutes in minute books, one way to follow this approach might be to index your latest minute book first, then the next-latest minute book, and so on.

Indexing minutes is a time-consuming process, so you should be careful to index only those actions you must record. Consider why you might decide not to index the following actions:

**Approval of Minutes****Routine Monthly Reports****Adjournments**

Although some organizations have indexed this information in the past, it is unlikely that you will have any need to index such routine information. Be sure to review your minutes carefully and identify whatever routine information you will not index.

**Approval of Payments of Claims**

When an executive board approves any payments, the checks that actually make those payments usually follow shortly afterwards, so the date on the check and in your books roughly indexes the action to approve the payments. Even though you'll discard these records after six years, it's unlikely you'd need an index to them after this date.

**Acceptance of Policies**

Many school districts develop policy books to codify their policies. Since the policy books include the date the school board adopted each policy, they automatically index that portion of the minutes. So there may be no need to index policies in this case—as long as the people using the index realize this alternate source of information exists.

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## Step Three: Indexing Minutes

After you have designed a plan for your indexing project, you are ready to begin indexing. Explained below are simple, discrete steps you can use to index your minutes.

### A. Identify an important action within the minutes

What you want to index in your minutes are the actions taken by or presented to the board or committee. Your first step in indexing is to read the minutes and identify these formal actions within the minutes. Actions include such events as appointments, disapprovals, discussions, reports, and resolutions. See Appendix A,

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“Master List of Terms for Indexing Municipal Minutes,” and Appendix B, “Master List of Terms for Indexing Board of Education Minutes,” for lists and definitions of sample action terms.

Tracking actions has two interrelated benefits. First, finding actions can help indexers identify what information in the minutes is important enough to index. If there is no action, for instance, there is nothing to index. On the other hand, if an action is a disapproval and you’ve decided not to index those, then the indexer will quickly realize not to index that action. The second benefit to tracking actions is that, if you include actions as a field in your index database, those terms can provide users with another way to search for information. For instance, if users want to find a record of each time the board passed a resolution on “Solid Waste Management,” they can search for this term in the index database by entering “Resolution” in the action field and “Solid Waste Management” in the subject field.

## **B. Identify the main subject**

After identifying the action, determine the subject in reference to the action. For example, if your board has passed a resolution with a large number of paragraphs beginning with “Whereas,” you might lose sight of the main subject of the action. But if you focus on the important point being made at the end of the resolution, it should be easy to determine that the main subject is “Solid Waste Management.”

The main subject should always be a broad or general subject. See Appendix A, “Master List of Terms for Indexing Municipal Minutes,” and Appendix B, “Master List of Terms for Indexing Board of Education Minutes,” for more information on subject terms.

## **C. Identify the secondary subject that is a subset of the main subject**

If you believe that two levels of subject access are useful in your situation, you should next determine the more precise secondary subject of the action in question. The secondary subject should be one logical subset of the main subject. Keep in mind that you only need to use secondary subjects when a main subject has more than one secondary subject. For instance, if you use the main subject “Building Codes” but have only one secondary subject (say, “Electrical”), then you have no need for secondary subjects in that particular case. But if you could subdivide “Building Codes” into “Electrical,” “Fire,” “Plumbing,” and “Sanitary,” then it makes sense for you to include secondary subjects.

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## D. Identify any information for a memo field

Occasionally you might find it necessary to index additional information on a certain action, and you can store this information in a memo field. This field can include any detailed information about the action. The memo field allows you to store important keywords within the index and to provide details, so searchers realize sooner whether an entry is relevant to their search.

You should use memo fields sparingly, but don't be afraid to use them whenever collecting more information will help users find or identify pertinent information. Examples of information you might put in a memo field include a short description of an action, a resolution number, the name of a person or organization submitting a petition, or the names of people being appointed to new positions. Adding these items of information to your index database provides users with more terms to search, increasing the chances they will find what they're looking for.

Here's an example of what a full set of subject fields might look like:

Action:	"Approval"
Main subject:	"Fiscal"
Secondary subject:	"Loans"
Memo:	"Construction Fund, Bank of Springfield"

Here the action is an approval, meaning that the board has passed a motion approving an item of business before it. The main subject is "Fiscal," meaning that the approval was some type of fiscal action, and the related secondary heading is "Loans," meaning the approval was of a loan. The memo field has two other pieces of information, little sets of keywords from the text of the action. One is "Construction Fund," which indicates that the loan concerned the construction fund. The other memo item is "Bank of Springfield," which probably indicates the bank that made the loan.

## E. Identify other indexing information

For an index to be useful, you will need to maintain some other easily identified information within it. The **date of the meeting** is an essential piece of information, since this will lead the user back to the correct part of the minutes; without this information, your index leads you nowhere. Some organizations find it useful to include the **volume and page number** for each indexed action as a way to increase the speed of retrieval, but this field is not absolutely necessary so long as you know the date of the meeting. Some organizations also include fields for items like the **personal name**, **resolution number**, and **department** or unit affected by the action.

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## F. Verify the index and make it available

As you develop your index, you should periodically glance through your entries to check for misspellings and other errors. You should also spot check the index to make sure the use of subject terms is consistent and accurate. Once you've completed your index, you need to make it available to the public. You can do this by printing it and providing access to it at your offices or in a local library. You can also do this by loading a searchable version of your index on your organization's website.

## SIDEBAR

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### Developing Your Own Subject Terms

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If you are considering the possibility of developing a new master list of terms or adding new subject terms, develop and follow a set of guidelines beforehand, such as the following:

#### **Choosing terms**

In general, choose terms commonly used in your organization, especially if they also appear in the minutes. This will ensure that users will be more likely to understand the intended concept behind each term. However, you should avoid any commonly used terms with dual meanings that might cause confusion, such as "senior" (which could mean "senior citizen" or "high school senior") or "vital records" (which means both "birth, death, and marriage records" and "the most important records in an organization").

#### **Designing terms**

When developing terms for the master list of terms, make sure the subject terms are nouns (like "Health"), noun phrases (like "Collective Bargaining"), or compounds made up of nouns (like "Contracts and Agreements"). For abstract concepts, use the singular form of the noun (like "Insurance"), and use the plural form for concrete, countable concepts (like "Injuries" or "Permits"). You should leave off initial articles ("The," "A," and "An"), since including them will cause the entries to alphabetize incorrectly.

Follow a single capitalization pattern for all new subject terms. The sample master lists of terms in Appendices A and B capitalize all the important words in the indexing term (as in "Parks and Recreation"). However, you might decide to capitalize only words in formal titles (like "Springfield City School District") or personal names (like "Lanley, Lyle"), and leave all other terms completely in lower case.

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### **Including alternative terms**

Be sure to link subject terms in the index to any applicable alternative terms. Alternative terms include related terms that may be more appropriate for the searcher, or synonymous terms that are not accepted terms in your index.

### **Allowing modification**

After you finish designing your master list of terms, you may believe you are finished with it forever. However, you must still allow for the inclusion of terms denoting new concepts and for new terminology that appears over time. When you add terms that replace older terms, you can either change all the older terms in your index database to comply with the current terms or you can add *See also* references from new terms to direct users to the relevant older terms.

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## Full-Text Searching

Traditional indexing is not the only way to improve access to minutes. Many organizations are now using full-text searching as an alternative or supplement to traditional indexing. Because this solution never shows the user the whole set of information at once, some people call the electronic text that you will search a “non-displayed index.”

Full-text searching, as with any other solution, has benefits and drawbacks. One of the greatest but sometimes unappreciated advantages of full-text searching is that people are used to it. Anyone who uses a computer probably uses full-text searching every day. If you are working on a long electronic document and want to find where you wrote about zebra mussels, you would probably click on “Find,” type in that string of words, and hit “Return.” If you forgot the name of the document that included a discussion of zebra mussels, you could use the Windows search function to identify documents that contained the term “zebra mussel” in the text. And if you wanted to learn more about zebra mussels, you might go to a search engine on the Internet, type in “zebra mussel,” and examine the hits it provided you. All of these are types of full-text searching, and each works in a slightly different way. So full-text searching is nothing more than using an automated tool to search the entire text of whatever you are searching.

Another advantage to full-text searching is that sophisticated software tools of this type actually provide you with the ability to use a wide range of complex search mechanisms to refine your

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search. Some of these mechanisms are called Boolean operators (using *and*, *or*, and *not* to help narrow a search). But the developers of full-text searching software have provided a wide variety of other mechanisms to help you sift through digital text to find what you're looking for. A few of these are explained below.

## Boolean Operators and Other Ways of Narrowing a Full-Text Search

### *and*

Use ***and*** when you want to search for two terms that are both present in the same document. This technique helps to narrow a search (since any two different words are less likely to appear in the same document than any single word alone). For instance, if you searched for “recycling ***and*** local law,” you would expect to find instances where the board discussed or passed a local law related to recycling. Searching for just one of the words might return too many hits, most of which would be without value to you.

### *or*

Use ***or*** when you are not sure what term might have been used in a document, and you want to improve your chances of finding the subject in question by checking for different yet related terms. For this technique to work, you must choose likely synonymous terms. For instance, if you searched for “recycling ***or*** waste management,” you would find any document containing these two terms and be able to choose the correct hits.

### *not*

Use ***not*** when you are sure of one term you want to find, but you don't want to find it in the same document as another term. You should use this technique when you expect a second term to be associated with the major term you are searching for but you are interested only in instances besides this. For instance, you might search for “recycling ***not*** corporation” because you are interested in recycling as a subject, but you do not want to pull up hits related to recycling rules for corporations, since you are not interested in that subject.

### *near*

Use ***near*** (or a similar search term) when you expect two terms to be used frequently together. Different search engines will use the concept of near in different ways: some will make a distinction between different levels of nearness, such as within ten words, in the same sentence, in the same paragraph, etc. For instance, you might search for “records ***near*** management,” with the understanding that you would find all instances of the phrase

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“records management” as well as instances of “management of records,” “records and information management,” etc.

*parentheses*

Some search engines allow you to better define a complex search by using parentheses: ( ). When a search engine supports the use of parentheses, you can use them the same way you would use them in mathematics: first, the search engine must address the issue within the parentheses, then the search engine continues to the rest of the “equation.” For instance, if you search for “(forests or woods) not pinewoods,” you are asking the search engine to carry out two separate but related activities:

first, search for all documents that include the terms “forests” or “woods” and develop a set of documents that meets that requirement;

second, eliminate all documents from that set if they contain the word “pinewoods.”

In this case, you are interested in searching for anything dealing with forests, so you search for two synonymous terms (“forests” and “woods”). However, you have no interest in pinewoods, so you narrow your search by eliminating all documents that refer to pinewoods.

*character string*

Search engines don’t search for exact words; they search for character strings, which are any set of letters, numerals, symbols, and spaces in one piece. You need to keep this idea in mind when you are searching the text of your minutes. If you are, for instance, searching for the term “records management,” you may need to make clear that it is a single character string by surrounding the term with quotation marks (“ ”). Otherwise, the search engine may assume you meant to search for “records *or* management,” and it will return too many hits for your review.

*wildcard*

A wildcard is a character (usually an asterisk [\*], but sometimes a question mark [?]) that can take the place of any number of letters in a search term. For instance, if you search only for “records,” you would not find instances of “record,” “recorder,” “recorded,” “recording,” etc., all of which might have been reasonable hits for your search. If you search instead for “record\*” (assuming \* is the wildcard on your system), you will now obtain hits for anything beginning with the character string *record*. Wildcards usually appear only at the end of a search term, but some search engines allow for the use of wildcards anywhere within a term.

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### *fuzzy searching*

Many types of search engines allow for fuzzy searching, which means that the software will search for and return documents with any terms that match the terms you're searching for—along with any documents with terms that almost match your terms. Fuzzy searching allows you to find a reference in a document even if the search terms are misspelled. For instance, if you did a fuzzy search for “record,” you would find all documents with “record,” but also documents with “racord,” “redord,” and other close misspellings.

These are just a few of the sophisticated searching mechanisms supported by different full-text searching software packages. Be sure to read the instructions for your particular software before attempting a sophisticated search using these techniques. Your software may not support all of these features, or it may have many more, or it may define these functions in slightly different ways. It is important to understand how your particular software works so you can search as accurately as possible.

## When to Use Full-Text Searching as an Access Solution

Full-text searching makes the most sense when you already have your minutes in electronic form. In such a case, full-text searching is the easiest and cheapest solution for access. If you can spend a few hundred dollars on the software and a little while learning how its search engine works and how to set up a repository of documents for it to search, you will have a complete access tool. Most text-searching software can search text in dozens of different data formats, even databases, so you may be able to search your electronic index database and the text of minutes through a single interface.

Text searching is a little more expensive if your minutes are not already available as electronic text. If you have clean typewritten text of your minutes, however, you can scan the pages and convert the images of those pages into electronic text. Some organizations do this scanning in-house, but many others hire firms to carry out this conversion. Typically, you would scan pages of the minutes and capture each as a TIFF image file, which is a standard electronic image format for long-term records that uses a lossless compression system. Then you run these image files through an optical character recognition (OCR) engine that identifies the characters in the image

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and converts them into electronic text. The image files of the minutes and their electronic texts are associated with each other and both are saved. The electronic text then serves as the “index” to the associated images. Although there is no particular need to save the images of the pages, most people continue to save them because this is an easy way of making a copy of the minutes if a user requests it.

Regardless of whether you outsource such a project or keep it in-house, you will need to use a fairly expensive scanner if you want to have an accurate conversion of the images into electronic text. A poor scanner can have a huge error rate (say over 10%), but a high-quality scanner should have an error rate of around 2%. However, you will probably not need to worry about that 2% rate if your searching software supports fuzzy searching. Error rates for OCR conversions are based on the level of the character, so an error rate of 10% means 10 out of every 100 characters are wrong.

Some organizations take optical character recognition one step further, capturing their electronic text as images and converting them back into electronic text. They do this so that all of their minutes are searchable through the same system, and so they can easily make copies of their minutes directly from the computer. However, unless you have a need to make copies of minutes on demand, there is little reason to go to the trouble to convert electronic text back into electronic text since most searching software will be able to read the electronic documents in their native formats. If you are worried about the problems associated with migrating wordprocessing files, you can save your minutes as ASCII text files instead.

One case where full-text searching is not appropriate is when you do not have electronic text and do not have clean typewritten text you can convert. The earliest minutes from many organizations are handwritten, and there is no OCR engine that can convert cursive handwriting into electronic text (although intelligent character recognition can convert some hand-printing). Some typewritten minutes are carbon copies or other low-quality reproductions that you can convert into electronic text only with an unacceptably large number of errors. With minutes in these formats, organizations sometimes rekey them (type them all over again) to convert them into a searchable electronic form. However, this technique is far too labor-intensive and prone to human error to be successful. If you need better access to such minutes, develop a database to serve as an index to those minutes. This will be the fastest, cheapest, and most accurate method of indexing them.

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## Disadvantages of Full-Text Searching

Despite all its advantages, full-text searching does have disadvantages as an access tool for minutes.

### *Inaccurate searches*

First, all full-text searching is prone to inaccuracies. If the document you are searching for has typographical errors, these errors may prevent you from finding what you seek. Also, staff in your organization who are searching the minutes might not understand the searching rules of the software well enough to design a good search. One study of Internet searching determined that users were less likely to find what they were looking for on a website if they used the site's search engine than if they browsed the website on their own! Keep in mind, however, that traditional indexing is prone to many inaccuracies as well.

### *Harder to provide public access*

With a traditional index, you can provide the public with both a paper copy of the index and a simple electronic version on a website. However, with full-text searching as the sole access tool, your only option is to load all the electronic text of the minutes on a website (or a kiosk in your building) and provide the users with a search engine to search the minutes themselves. If your website uses a different search engine than is used on office computers, there is a real possibility that the same search might result in a different set of results, which might cause embarrassing situations. (Imagine, for example, citizens relating how easily they found a document online that staff cannot find on their own computers.)

### *Service bureau costs*

If you use a service bureau to scan and convert your minutes to electronic text, you sometimes have committed your organization to paying continuing annual costs for new conversions, updates to software, etc. These costs might be quite reasonable and expected, but you need to be aware of and prepared for them beforehand.

### *Data migration*

Almost all data formats for electronic records become obsolete over time. The most common way to maintain access to electronic records is to move them from an old format to a newer format using a process called migration. The migration of electronic records can be time-consuming and even costly, but it is essential if you want to maintain access to your records. If you have converted your paper minutes into both TIFF images and electronic text, you have now doubled the quantity of electronic documents you will need to migrate. If a service bureau migrates data for you on a regular basis,

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you will not notice this increased quantity as much, but you will certainly have to pay for the service.

## SIDEBAR

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### **Avoiding Errors in an Index**

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Every index is prone to error, so your goal should be to reduce errors as much as possible without unreasonably increasing cost. A few simple guidelines should improve the quality of your index.

#### **Set up data entry rules from the start**

If you want data to be consistent, make sure indexers know exactly what your rules are from the start. Data entry rules cover such areas as capitalization, use of abbreviations, formatting of dates, punctuation, formatting of personal names, and required level of detail.

#### **Verify data entry as you enter data**

Make sure that indexers or those scanning your minutes check the quality and accuracy of their work before they move to the next step. A quick check at this point might save you hours of work later.

#### **Query data to check for inconsistencies**

After completing a traditional index in a database, you can arrange similar data together in the index and scan the list for inconsistencies. Often this simple step will point out areas where the indexer has added unnecessary punctuation or misspelled a word. You can certainly also spell-check your index, but this will not necessarily uncover any misspellings in names within the index.

#### **Use pre-programmed data correction**

In databases, you can set up fields so that they only accept certain data or so that they format data in the way you require. For instance, you could set up a field to force the capitalization of each initial word within it, to standardize the format of dates, or to require alphabetical or numeric data. If well designed, these features will save your indexer time and ensure consistency.

#### **Ensure good quality character recognition**

To get the best conversion of hard copy text to electronic text, you need to start with good quality characters. If you have two copies of the same text you want to scan, choose the cleanest copy with the best contrast between the color of the paper and the color of the text. Do not skimp on the cost of a scanner. Higher quality scanners that do a good job imaging text for OCR

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are often more expensive than run-of-the-mill scanners, but the extra cost is worth it. Also, look for higher quality character conversion. Some character recognition software (sometimes called intelligent character recognition, or ICR) actually interprets characters based on their context within a word, allowing the software to determine characters more accurately.

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## Step Four: Developing a Minutes Indexing Procedures Manual

Your last step is to produce a minutes indexing procedures manual, but you should not wait until you finish indexing to begin it. An indexing manual is nothing more than the rules you follow to make, use, and distribute the index. The reason to write these down is to ensure consistency by making sure people continue to use the same rules for indexing and searching your index.

There are many reasons to compile an indexing manual. If an indexer at one point in time uses “elderly” as an index term, but later on another indexer uses the term “seniors” instead, users may fail to find the important pieces of information they need in your minutes. Also, if future users don’t know how your index or your full-text searching process works, they may also fail to find the information they need.

An indexing procedures manual should be brief and to the point. Few organizations will require a manual that is more than a few pages long. For ideas on what issues to address in such a manual, see Appendix C, “Indexing Procedures Manual Checklist.” For a sample manual, see Appendix D, “Town of Brockway Minutes Indexing Procedures Manual,” but keep in mind that this is a manual designed for traditional indexing using a database. It will not be adequate for all situations, and you should modify it to meet your needs.

### Indexing Tips

Here are a few final tips to help you produce and maintain the best index possible.

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## Maintain consistency

Indexing is both simple and complex. The steps to follow are easy enough, but there's always a subjective element to indexing that might make you stumble. Indexers are likely to use subject terms inconsistently at times, or to add subject terms to the master list when an appropriate term is already available. Also, searchers using full-text searching might occasionally fail to recall the particular subject term actually used in the minutes. For these reasons, it's always important to train indexers well and to check the accuracy of your index. Similarly, it's also important to train searchers how to search your minutes accurately.

## Monitor your progress

As you are indexing your minutes, make sure to monitor the progress of the indexing. Keep track of the number of entries produced or the number of pages scanned and converted, so you can make sure you're making satisfactory progress. Otherwise, you might fall behind and fail to complete your project on time.

## Back up conscientiously

Whether you conduct a traditional index or a scanning and conversion project, you need to back up your electronic data conscientiously as you progress. Otherwise, you could lose days or weeks of work in an instant. Store any backups offsite so that you will have a copy of your data in case a disaster in your building destroys the copy stored there.

## Migrate data

Changes in technology are constantly making electronic data formats unreadable. Electronic data is also susceptible to destruction in all sorts of ways. To make sure you don't end up with data you cannot read, you must plan a thorough strategy to protect your data. This plan should include a schedule for backing up all electronic text and image files, migrating files as you update software and hardware, and establishing procedures to ensure that staff follow these safeguards.

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## Maintaining the Index

After you complete the index, all you have really done is begun a process. Now, indexing has to become part of your regular work. From now on, after writing each set of minutes, you will need to remember to index them or to store an electronic copy of the minutes in the repository for your full-text searching software. You will need to back up all this data (the index itself or the minutes) periodically so you don't lose all your work. You will also need to update the master list of terms as new subjects enter the discussion recorded in your minutes. You will have to make indexing a routine.

## For More Information and Assistance

The State Archives provides direct advice to state agencies and local governments on indexing and improving access to records. The Archives has regional offices throughout the state, and each office has an expert records specialist who can visit you and provide technical advice and assistance. The Archives' website contains an indexing service that includes a sample indexing database, electronic versions of the master lists of terms, and instructions on how to use both. The Archives' services also include publications and workshops on a wide variety of records management topics. For further information, contact your regional office or the following:

Government Records Services  
New York State Archives  
State Education Department  
9A47 Cultural Education Center  
Albany, New York 12230  
[www.archives.nysed.gov](http://www.archives.nysed.gov)  
(518) 474-6926

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# Appendix A

## Master List of Terms for Indexing Municipal Minutes

Anyone considering indexing minutes should develop a master list of terms before beginning to index. This master list contains the standard vocabulary that you will use in the index. It is important to have a standardized vocabulary so that you always index the same subject using the same term. Using standardized terms will also improve searches by directing users to a single term instead of many terms. A master list of terms includes cross-references that direct users from non-standard terms to standard terms. This feature minimizes useless searches by directing users to the right term each time.

No matter what indexing approach you take, maintaining and using standardized terms will be useful to both the indexer and the users of the minutes. If you develop an index in database form, you will use standardized terms when you enter data into this system. If you decide to use free-text searching software (which searches for character strings in electronic versions of your minutes), you will use the standardized terms while writing the minutes. By conscientiously using your standard set of terms as you write, you can be sure you will be searching for the right word when you use free-text searching to find information in your minutes.

A master list of terms for an index consists of a few separate lists.

### 1. Subject heading list

The subject heading list should include main and secondary subject terms that reflect the activities of your organization and the topics before it. Within this list, you should include formal names for any personnel positions, committees and boards, government properties, geographical features in the region (such as names of bridges, highways, and roads), businesses, organizations, and government agencies.

The subject list should also include *See* and *See also* references, which ensure that the index remains consistent and that users can always find the information they need. These references work in two different ways.

**See references:** A user might want to look up information related to finance by searching for the word “Finance.” But since “Finance” is not a standard term in this master list, the word is followed by the note “*See Fiscal*,” which indicates that “Fiscal” is the official term that the searcher or indexer must use.

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**See also references:** A user might look up “Planning and Zoning” and discover a note to “*See also* Urban Renewal.” This means that “Planning and Zoning” is still a standard indexing term, but that the user might also find useful information under the related term “Urban Renewal.”

## 2. List of actions

The master list should include a list of actions before the board. Actions, which are explained below, are useful for two reasons. First, they help to isolate important discussions within the minutes. For example, an indexer will know that an appointment by the board is an action important enough to index. Second, actions are another useful way for users to search for information. In an index kept in a database, a user can easily produce a list of all resolutions. If using a text-searching tool, a user can achieve the same result by consistently identifying resolutions in the text of the minutes with the word “Resolution.”

## 3. List of departments

The master list should also include a list of departments or units within the organization, noting the authorized name and any standard abbreviation used in the index or minutes. Many organizations find it useful to identify the department or unit that is most closely related to any action. In this way, any department can retrieve a list of board actions related to its own work. There is no list of departments or units included in this master list of terms, since this is an objective list that varies from organization to organization.

To help organizations develop their individual master list of terms, the State Archives has compiled a template master list of terms for use by cities, towns, and villages. This template represents those subjects that are frequent concerns of municipalities, but it also may prove useful to other government entities. You should use this template as a starting place, adding subject terms that you decide you need and eliminating those that are of no use to you. Occasionally, you may decide to use a different official term that will be more familiar to the users of your minutes. You will need to add the names of committees, boards, local businesses, organizations, and properties as well. Nevertheless, the template can be of great value to you—not only for the headings included, but also because it shows you how to incorporate additional subjects, secondary subjects, and cross-references into your own master list.

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This template list of master of terms consists of two sections:

1. Standardized terms for **actions** before a local government's board.
2. **Main and secondary subject headings.**

## 1) Actions

You can make your index more useful by maintaining information on the type of actions that take place during the course of meetings. Tracking actions can provide users with another way to search for information, and can be helpful to indexers seeking to identify what information in the minutes is important enough to index.

Below are some suggested action terms, along with descriptions of when to use each. Use "Disapproval" for any motion that is not approved by the board. For all other actions, assume that the board has approved or received the action. To make the index as useful as possible, be sure to use the most specific terms possible whenever you have a choice between two actions. As with any part of this master list of terms, you should modify it to suit your own needs.

**Appointment.** *Use for* official appointments of individuals to government positions.

**Bond resolution.** *Use for* any approved bond resolution, if you decide you need to track these separately.

**Complaint.** *Use for* any complaints received, whether via discussion or correspondence.

**Correspondence.** *Use for* any cases where the board receives or sends a letter, including petitions from the public but not including complaints.

**Disapproval.** *Use for* any motion that is declined, rescinded, or not approved, if you decide to index such actions.

**Discussion.** *Use for* any cases that are merely discussions of a topic and which end in no formal decision, if you decide to index such actions.

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**Executive session.** *Use for cases where the board goes into executive session. (In such cases, you can provide only minimal information on the subject related to the action.)*

**Local law.** *Use for a local law, the highest form of local government legislation.*

**Order.** *Use for motions where the board is directing departments or officials of the local government to carry out a certain activity.*

**Ordinance.** *Use for any ordinance, which is special local legislation on a subject specifically delegated to local governments by the State Legislature.*

**Other action.** *Use for any actions that do not fit any of the descriptions of the other actions on this list; this is the “miscellaneous” category for actions.*

**Public hearing.** *Use for any formal public hearing.*

**Report.** *Use for any reports presented to the board by departments or committees.*

**Resolution.** *Use for those cases where the board formally expresses a particular opinion or takes a specific action.*

**Tabled.** *Use for situations where the board postponed making a decision on an issue.*

## 2) Main and Secondary Subjects

The following is a suggested list of main and secondary subject headings. Note that many but not all possible positions in municipal government are included in this list, always followed by “(Position)” after the title. You will need to add any other positions to this list, as well as other necessary subject terms.

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911. *See also* E-911

Accidents

ADA. *See* Americans with Disabilities Act (ADA)

Adult Homes. *See* Housing

Affirmative Action

Agreements. *See* Labor Relations *or* specific subject of agreement

Agriculture

AIDS. *See* Diseases

Airports. *See also* Public Transportation

Ambulance Service. *See* Public Safety

American with Disabilities Act (ADA)

Animal Control

- Licenses
- Nuisances
- Rabies Outbreaks
- Shelters
- Vaccinations

Animal Control Officer (Position)

Annual Reports. *See* specific subject of report

Anticipation Notes. *See* Fiscal

Aquifers. *See* Water Supply

Architectural Plans. *See* Facilities Planning

Architectural Review. *See* Planning and Zoning

Assembly. *See* Public Assembly

Assessment. *See* Taxes, Real Property

Assessor (Position)

Assisted Living. *See* Housing

Associations. *See* Conferences *or* specific topic

Attorney (Position)

Auctions. *See* Sale, Surplus Property

Audits. *See* Fiscal

Audits, Performance. *See* specific subject of audit

Authorities. *See* name of specific authority

Awards

Background Checks. *See* Personnel

BANs (Bond Anticipation Notes). *See* Fiscal

Banking. *See* Fiscal

Beaches. *See* Parks and Recreation

Benefits. *See* Personnel

Bequests. *See* Commemorations

Bicentennial. *See* Celebrations

Bids. *See* subject of bid

Bike Trails. *See* Parks and Recreation

Billboards

Bills. *See* Fiscal

Bingo. *See* Games of Chance

Blasting Permits. *See* Permits

Boards. *See* specific function or name of board

Boats

Bond Anticipation Notes (BANs). *See* Fiscal

Bonds and Notes. *See* Fiscal

Bonds, Performance

Bonds, Surety

Bookkeeper (Position)

Bridges. *See also* Highways

Budgets. *See* Fiscal

Building Codes

- Electrical
- Fire
- Plumbing
- Sanitary

Building Inspection

Building Permits. *See* Permits

Buildings. *See* Public Property

Burial Permits. *See* Permits

Bus Service. *See also* Public Transportation

Cable Television

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Capital Construction. *See* specific project or function

Carnivals. *See also* Celebrations *or* Permits

Cats. *See* Animal Control

Celebrations

- Bicentennial
- Parades

Cemeteries

Census

CETA. *See* Comprehensive Employment and Training Act (U.S.)

Chamber of Commerce

Charter

Churches. *See* Houses of Worship

Circuses. *See* Permits

City Hall. *See* Public Property

City Manager (Position)

Civil Defense. *See* Public Safety

Civil Service. *See* Personnel

Civil Service Employees Association. *See* Labor Relations

Claims (Bills). *See* Fiscal

Clerk (Position)

Clubs. *See* specific name of club

Code Enforcement Officer (Position)

Codes. *See* Building Codes *or* specific topic

Collective Bargaining. *See* Labor Relations

Commemorations

- Bequests
- Condolences
- Dedications
- Memorials
- Proclamations
- Tributes

Commissioner of Public Works (Position)

Commissions. *See* specific topic *or* name of commission

Committees. *See* specific topic *or* name of committee

Communications Towers

Community Center. *See* Public Property *or* Parks and Recreation

Community Development. *See also* Urban Renewal

Compensation. *See* Personnel

Complaints. *See* subject of complaint

Comprehensive Employment and Training Act (CETA)

Comptroller (Position)

Computers

- Automation
- Hardware
- Internet Services
- Training
- Services
- Software

Condolences. *See* Commemorations

Conference of Mayors. *See* Conferences

Conferences

- Association of Towns of the State of New York
- Conference of Mayors
- Training (Use for non-annual training events)

Conservation

- Drainage
- Environment
- Environmental Impact Statement
- Flood Plain
- Pollution Control
- Soil and Water Conservation
- Wetlands

Constable (Position)

Construction. *See* Public Property, Highways, *or* Subdivisions

Consultants. *See* specific function

Consumer Affairs

Contracts and Agreements. *See* Labor Relations *or* subject of contract

Copiers. *See* Office Operations

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Corporation Counsel (Position)  
County Sales Tax. *See* Taxes, Sales  
Courts  
Crime. *See* Public Safety  
Culverts. *See* Highways  
Curbs and Gutters. *See* Highways  
DARE (Drug Abuse Resistance Education). *See*  
Drug Abuse Programs  
Dedications. *See* Commemorations  
Deeds. *See* Public Property  
Delinquent Charges. *See* Fiscal  
Department of Environmental Conservation, NYS  
(DEC). *See also* Conservation  
Department of Transportation, NYS (DOT)  
Departments. *See* specific name of department  
Developments. *See* Subdivision *or* Urban Renewal  
Disabilities. *See* Permits *and* Americans with  
Disabilities Act (ADA)  
Disaster Preparedness and Response. *See also*  
Public Safety  
Diseases  
    AIDS  
    Lyme Disease  
    Tuberculosis  
    West Nile Virus  
Dismissals. *See* Personnel  
Disposal Plants. *See* Solid Waste Management  
Districts. *See* specific name or function of district  
Docks. *See* Marinas  
Dog Control Officer (Position). *See* Animal Control  
Officer (Position)  
Dogs. *See* Animal Control  
Donations. *See* subject of donation  
Drainage. *See* Highways *or* Conservation  
Driving While Intoxicated (DWI)  
Drug Abuse Programs

Drug Abuse Resistance Education (DARE). *See*  
Drug Abuse Programs  
Dump. *See* Solid Waste Management  
DWI. *See* Driving While Intoxicated (DWI)  
E-911. *See* Public Safety  
Easement. *See* specific name of property  
Economic Development  
Elderly. *See* Senior Citizens  
Elderly Housing. *See* Housing  
Election Inspector (Position)  
Elections  
    Polling Places  
    Voting  
Electrical Codes. *See* Building Codes  
Emergencies. *See* Public Safety  
Emergency Services. *See also* Public Safety  
Employee Agreements. *See* Labor Relations  
Employee Handbook. *See* Personnel  
Engineer (Position)  
Entertainment  
Environment. *See* Conservation  
Equalization Rates. *See* Taxes, Real Property  
Equipment. *See* Office Operations  
Ethics  
Excavations. *See* Public Property *or* Urban Renewal  
Exemptions. *See* Taxes, Real Property  
Expenditures. *See* Fiscal  
Facilities Planning  
Federal Emergency Management Agency (FEMA).  
*See also* Disaster Preparedness and Response  
Fees. *See* Fiscal  
Finance. *See* Fiscal  
Fines  
Fire Codes. *See* Building Codes

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Fire District. *See* Public Safety

Fire Insurance. *See* Insurance

Firearms

Fireworks. *See* Permits

Fiscal

- Appropriations
- Audits
- Banking
- Bills
- Bond Anticipation Notes (BANs)
- Bonds and Notes
- Budgets
- Consulting Services
- Delinquent Charges
- Donations
- Fees
- General Fund
- Investments
- Loans
- Payroll. *See also* Personnel
- Petty Cash
- Revenue Anticipation Notes (RANs)
- Revenue Sharing
- Tax Anticipation Notes (TANs)
- Transfer of Funds

Fixed Assets. *See* Public Property

Floodplains. *See* Conservation

Fluoridation. *See* Water Supply

FOIL. *See* Freedom of Information Law, NYS (FOIL)

Forests. *See* Conservation *or* Permits

Freedom of Information Law, NYS (FOIL). *See also* Open Meetings Law

Funds. *See* Fiscal

Games of Chance

- Bingo
- Off-Track Betting (OTB)

Garbage. *See* Solid Waste Management

General Fund. *See* Fiscal

Geographic Information Systems (GIS). *See also* Records Management

Gifts and Memorials. *See* Fiscal *or* Commemorations

Golf Courses. *See* Parks and Recreation

Grants. *See also* specific subject topic *or* program

Grievance. *See* Labor Relations *and* Taxes, Real Property

Group Homes. *See* Assisted Living

Halfway Homes. *See* Assisted Living

Handicapped Accessibility. *See* Americans with Disabilities Act (ADA)

Hazardous Waste. *See* Solid Waste Management

Health. *See* Public Health

Health Insurance. *See* Insurance

Health Officer (Position)

Highway Superintendent (Position)

Highways. *See also* Bridges *and* Traffic Control

- Brush and Loose Leaves
- Construction
- Culverts
- Curbs and Gutters
- Damage Reports and Claims
- Designation as Municipal Road
- Hydrants
- Lighting
- Numbering
- Parking Regulations
- Repairs
- Sidewalks
- Snow Removal
- Street Surfacing (*Use for* grading, resurfacing, potholes)
- Utility Poles

Historian (Position)

Historic Preservation

Holidays. *See* Personnel

Hospitals. *See also* specific name of hospital

Houses of Worship

Housing. *See also* Urban Renewal

- Elderly Housing
- Group Homes

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Halfway Homes  
Nursing Homes

Housing and Urban Development (HUD)

Hydrants. *See* Highways

Incineration. *See* Solid Waste Management

Injuries. *See* Accidents

Inspections

Inspector, Election (Position)

Insurance. *See also Personnel*  
Disability  
Fire  
Health  
Liability  
Unemployment  
Workers Compensation

Interns. *See* Personnel

Investments. *See* Fiscal

Jails

Junkyards. *See* Permits

Jurors

Justice (Position)

Justice Court

Kennels. *See* Animal Control

Labor Department, NYS

Labor Relations  
Collective Bargaining  
Employee Agreements  
Grievance  
Negotiations  
Specific name of union

Land Conservancies. *See* Conservation

Landmarks. *See also* Commemorations

Landfill. *See* Solid Waste Management

Leases. *See* specific subject of lease

Legal. *See* specific topic

Legislation. *See* specific subject of legislation

Libraries. *See also* specific name of library

Licenses. *See* Permits, Animal Control, *or* Marriage Licenses

Lighting. *See* Highway

Lighting Districts

Litigation. *See* specific topic or litigant

Littering

Loans. *See* Fiscal

Loitering

Lyme Disease. *See* Diseases

Maintenance and Improvements. *See* Public Property

Marinas

Marriage Licenses

Mass Gatherings. *See* Public Assembly

Mass Transportation. *See* Public Transportation

Master Plan. *See* Planning and Zoning

Mayor (Position)

Medical Insurance. *See* Insurance

Memorials. *See* Commemorations

Microfilm. *See* Records Management

Mileage. *See* Personnel

Mobile Homes

Moratoria. *See also* Codes

Mosques. *See* Houses of Worship

Negotiations. *See* Labor Relations

Newspaper

911. *See* Public Safety

Noise. *See* Nuisance

Nuisance

Nurse (Position)

Nursing Homes. *See* Assisted Living

NYS Conference of Mayors. *See* Conferences

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NYS Environmental Quality Review (SEQR). *See*  
Planning and Zoning

Office Operations. *See also* Computers

- Copiers
- Equipment
- Furniture
- Storage Equipment
- Surplus

Officer. *See* specific position

Open Meetings Law. *See also* Freedom of  
Information Law (FOIL)

Organizations. *See* specific name of organization

Parades. *See* Celebrations

Parking Permits. *See* Permits

Parking Regulations. *See* Highways

Parks and Recreation. *See also* Public Property

- Athletic Fields
- Beaches
- Bike Trails
- Community Centers
- Golf Courses
- Park Districts
- Playgrounds
- Pools
- Programs
- Senior Citizens
- Tennis Courts
- Youth Services

Payroll. *See* Fiscal

Peddlers

Pedestrians. *See* Traffic Control

Penalties. *See* Fines

Performance Bonds. *See* Bonds, Performance

Permits. *See also* Building Codes

- Blasting
- Block Party
- Burial
- Carnival
- Circus
- Commercial Hauler
- Fireworks

Handicapped Parking

Junkyard

Parking

Special Use. *See* Planning and Zoning

Vending

Personnel

Background Checks

Bonding

Changes in Title

Civil Service

Deferred Compensation

Discipline

Drug and Alcohol Testing Programs

Employee Benefits

Employee Handbook

Insurance. *See* Insurance

Interns and Volunteers

Leaves of Absence

Meal Allowance

Mileage Allowance

Performance Appraisal

Reimbursement of Expenses

Reinstatement

Retirement

Sabbatical

Salary and Wages

Separations

Training

Vacation

Workers' Compensation

Petitions. *See* subject of petition

Petty Cash. *See* Fiscal

Planning and Zoning. *See also* Urban Renewal

Architectural Review

Commercial Development

Master Plan

Residential Development

Special Use

State Environmental Quality Review (SEQR)

Variations

Wetlands

Playgrounds. *See* Parks and Recreation

Plumbing Codes. *See* Building Codes

Plumbing Permits. *See* Permits

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Poles (Utility). *See* Highways

Police. *See* Public Safety

Policies and Procedures. *See also* specific topic

Polling Place. *See* Elections

Pollution Control. *See* Conservation

Pools. *See* Parks and Recreation

Postal Service

Proclamations. *See* Commemorations

Professional Services. *See* specific subject of services

Property. *See* Public Property

Property Taxes. *See* Taxes, Real Property

Public Assembly

Public Disclosure. *See* Freedom of Information Law

Public Health. *See also* Diseases

Public Housing. *See also* Assisted Living

Public Property

- Building and Construction
- Building Sites
- Community Centers
- Deeds
- Equipment and Furnishings
- Excavations
- Facilities Planning
- Fixed Asset Management
- Grounds
- Janitorial and Maintenance Services
- Remodeling
- Rental of Property
- Repairs
- Specific name of property
- Vehicles

Public Relations

Public Safety

- 911
- Ambulance Service
- Civil Defense
- Crime
- Disaster Preparedness
- E-911

Emergencies

- Fire District
- Noise Control
- Police
- Rescue Squad

Public Transportation. *See also* Airports, Bus Service, *or* Railroads

Public Works. *See* specific function

Publications

Pump Stations. *See* Water Supply

Purchases. *See* Fiscal *or* specific subject of purchase

Rabies. *See* Animal Control *or* Diseases

Railroads. *See also* Public Transportation

RANs (Revenue Anticipation Notes). *See* Fiscal

Real Property. *See* Taxes, Real Property

Receiver of Taxes (Position). *See* Tax Collector (Position)

Records Access. *See* Freedom of Information Law (FOIL)

Records Access Officer (Position)

Records Management

- Electronic Records
- Historical Records
- Imaging
- Microfilm
- Records Disposition
- Records Storage

Records Management Officer (Position)

Recreation. *See* Parks and Recreation

Recycling. *See* Solid Waste Management

Referenda. *See* specific topic of referendum

Refuse. *See* Solid Waste Management

Registrar of Vital Statistics (Position)

Rental. *See* specific subject of rental

Repairs. *See* Public Property *or* name of specific property

Reports. *See* specific subject of report

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Rescue Squad. *See* Public Safety

Reservoir. *See* Water Supply

Resignations. *See* Personnel

Retirement. *See* Personnel

Revaluation. *See* Taxes, Real Property

Revenue Anticipation Notes (RANs). *See* Fiscal

Revenue Sharing. *See* Fiscal

Rights of Way. *See* specific name of property

Roads. *See* Highways

Rules and Regulations. *See* Policies and Procedures

Salary and Wages. *See* Personnel

Sale, Surplus Property

Sales Tax. *See* Taxes, Sales

Sanitary Codes. *See* Building Codes

Sanitary Landfill. *See* Solid Waste Management

School District. *See* specific name of district

Senior Citizens. *See also* Assisted Living *or* Parks and Recreation

- Meals on Wheels
- Medicare

Separations. *See* Personnel

SEQR. *See* Planning and Zoning

Sewage

- Improvements and Repairs
- Outside Sewer User Agreements
- Professional Services
- Sewage Treatment
- Sewer Districts
- Sewer Lines
- Sewers
- Wastewater

Sick Leave. *See* Personnel

Sidewalks. *See* Highways

Signs and Billboards. *See* Billboards *or* Traffic Control

Snow and Ice Removal. *See* Highways

Snowmobiles

Social Services

Society for the Prevention of Cruelty of Animals (SPCA). *See* Animal Control

Soil and Water Conservation District. *See also* Conservation

Solid Waste Management

- Collection
- Garbage
- Hazardous Waste
- Incineration
- Landfill
- Monitoring
- Recycling
- Solid Waste Management Plan
- Toxic Waste
- Transfer Station

Special Use Permits. *See* Planning and Zoning

Speed Limits. *See* Traffic Control

State Agency, Law, or Program. *See* specific name

State Comptroller

Street Lighting. *See* Highways

Street Surfacing. *See* Highways

Streets. *See* Highways

Subcontracting. *See also* Policies and Procedures

Subdivisions. *See also* Planning and Zoning

- Construction
- Excavations
- Planning
- Special Use Permits. *See* Planning and Zoning
- Specific name of subdivision

Summer Recreation Program. *See* Parks and Recreation

Supervisor (Position)

Surety Bonds. *See* Bonds, Surety

Surplus Equipment. *See* Office Operations

Surplus Property. *See* Sale, Surplus Property

Swimming Pools. *See* Parks and Recreation

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Synagogues. *See* Houses of Worship

TANs (Tax Anticipation Notes). *See* Fiscal

Tax Anticipation Notes (TANs). *See* Fiscal

Tax Certiorari. *See* Taxes, Real Property

Tax Collector (Position)

Tax Receiver (Position). *See* Tax Collector

Taxes, Real Property

- Assessment
- Equalization Rates
- Exemptions
- Grievances
- Revaluation

Taxes, Sales

Taxi Cabs

Terminations. *See* Personnel

Towers. *See* Communications Towers

Toxic Waste. *See* Solid Waste Management

Traffic. *See* Traffic Control *or* Highways

Traffic Control. *See also* Highways

- Lights
- Pedestrians
- Signs
- Speed Limits
- Vehicles

Trailer Park. *See* Mobile Homes

Transfer of Funds. *See* Fiscal

Transportation. *See* Highways *or* Traffic Control

Trash. *See* Solid Waste Management

Travel

Treasurer (Position)

Trees. *See also* Public Property

Tributes. *See* Commemorations

Tuberculosis. *See* Diseases

Unemployment Insurance. *See* Insurance

Uniforms. *See* specific department

Union or Employee Association. *See* specific name of association

Unions. *See* Labor Relations

Urban Renewal. *See also* Community Development. *See* specific name of development or project

Utilities. *See* specific name or function

Vacancies

Vacation Leave. *See* Personnel

Vaccinations. *See* Animal Control

Vandalism. *See* Public Safety

Variances. *See* Planning and Zoning

Vehicle and Traffic Code. *See also* Traffic Control

Vehicles. *See* Traffic Control *and* Public Property

Vending. *See* Permits

Veterans. *See also* Commendations, Personnel, *or* Taxes, Real Property

Vital Statistics

Volunteer Programs

Voting. *See* Elections

Wages. *See* Personnel

Waste Management. *See* Solid Waste Management

Wastewater Treatment Plant

Water Supply

- Aquifers
- Fluoridation
- Maintenance and Improvements
- Master Water Plan
- Monitoring
- Professional Services
- Pump Stations
- Reservoir
- Water Billings
- Water Districts
- Water Filtration Plant
- Water Mains
- Water Treatment
- Waterline Repairs
- Watershed
- Wells

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Watersheds. *See* Water Supply *or* Conservation

Waterways

Welfare. *See* Social Services

Wells. *See* Water Supply

West Nile Virus. *See* Diseases

Wetlands. *See* Conservation *or* Planning and Zoning

Workers Compensation. *See* Personnel *or* Insurance

Youth Services. *See* Parks and Recreation

Zoning. *See* Planning and Zoning

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## Appendix B

### Master List of Terms for Indexing Board of Education Minutes

Anyone considering indexing minutes should develop a master list of terms before beginning to index. This master list contains the standard vocabulary that you will use in the index. It is important to have a standardized vocabulary so that you always index the same subject using the same term. Using standardized terms will also improve searches by directing users to a single term instead of many terms. A master list of terms also includes cross-references that direct users from non-standard terms to standard terms. This feature minimizes useless searches by directing users to the right term each time.

No matter what indexing approach you take, maintaining and using standardized terms will be useful to both the indexer and the users of the minutes. If you develop an index in database form, you will use the standardized terms when you enter data into this system. If you decide to use free-text searching software (which searches for character strings in electronic versions of your minutes), you will use the standardized terms while writing the minutes. By conscientiously using your standard set of terms as you write, you can be sure you will be searching for the right word when you use free-text searching to find information in your minutes.

A master list of terms for an index consists of a few separate lists.

#### 1. Subject heading list

The subject heading list should include main and secondary subject terms that reflect the activities of your organization and the topics before it. Within this list, you should include formal names for any personnel positions, committees and boards, government properties, geographical features in the region (such as names of bridges, highways, and roads), businesses, organizations, and government agencies.

The subject list should also include *See* and *See also* references, which ensure that the index remains consistent and that users can always find the information they need. These references work in two different ways.

**See references:** A user might want to look up information related to finance by searching for the word “Finance.” But since “Finance” is not a standard term in this master list, the word is followed by the note “*See Fiscal*,” which indicates that “Fiscal” is the official term that the searcher or indexer must use.

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**See also references:** A user might look up “Students” and discover a note to “*See also* Health Services.” This means that “Students” is still a standard indexing term, but that the user might also find useful information under the related term “Health Services.”

## 2. List of actions

The master list should include a list of actions before the board. Actions, which are explained below, are useful for two reasons. First, they help to isolate important discussions within the minutes. For example, an indexer will know that an appointment by the board is an action important enough to index. Second, actions are another useful way for users to search for information. In an index kept in a database, a user can easily produce a list of all resolutions. If using a text-searching tool, a user can achieve the same result by consistently identifying resolutions in the text of the minutes with the word “Resolution.”

## 3. List of departments

The master list should also include a list of departments or units within the organization, noting the authorized name and any standard abbreviation used in the index or minutes. Many organizations find it useful to identify the department or unit that is most closely related to any action. In this way, any department can retrieve a list of board actions related to its own work. There is no list of departments or units included in this master list of terms, since this is an objective list that varies from organization to organization.

To help organizations develop their individual master list of terms, the State Archives has compiled a template master list of terms for use by school districts and Boards of Cooperative Educational Services (BOCES). This template represents those subjects that are frequent concerns of school districts, but it also may prove useful to other government entities. You should use this template as a starting place, adding subject terms that you decide you need and eliminating those that are of no use to you. Occasionally, you may decide to use a different official term that will be more familiar to the users of your minutes. You will need to add the names of committees, boards, local businesses, organizations, and properties as well. Nevertheless, the template can be of great value to you—not only for the headings included, but also because it shows you how to incorporate additional subjects, secondary subjects, and cross-references into your own master list.

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This template of master terms consists of two sections:

1. Standardized terms for **actions** before a local government's board.
2. **Main and secondary subject headings.**

## 1) Actions

You can make your index more useful by maintaining information on the type of actions that take place during the course of meetings. Tracking actions can provide users with another way to search for information, and can be helpful to indexers seeking to identify what information in the minutes is important enough to index.

Below are some suggested action terms, along with descriptions of when to use each. Use "Disapproval" for any motion that is not approved by the board. For all other actions, assume that the board has approved or received the action. To make the index as useful as possible, be sure to use the most specific terms possible whenever you have a choice between two actions. As with any part of this master list of terms, you should modify it to suit your own needs.

**Appointment.** *Use for* official appointments of individuals to government positions.

**Bond resolution.** *Use for* any approved bond resolution, if you decide you need to track these separately.

**Complaint.** *Use for* any complaints received, whether via discussion or correspondence.

**Correspondence.** *Use for* any cases where the board receives or sends a letter, including petitions from the public but not including complaints.

**Disapproval.** *Use for* any motion that is declined, rescinded, or not approved, if you decide to index such actions.

**Discussion.** *Use for* any cases that are merely discussions of a topic, and which end in no formal decision, if you decide to index such actions.

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**Executive session.** *Use for cases where the board goes into executive session. (In such cases, you can provide only minimal information on the subject related to the action.)*

**Other action.** *Use for any actions that do not fit any of the descriptions of the other actions on this list; this is the “miscellaneous” category for actions.*

**Public hearing.** *Use for any formal public hearing.*

**Report.** *Use for any reports presented to the board by departments or committees.*

**Resolution.** *Use for those cases where the board formally expresses a particular opinion or takes a specific action.*

**Tabled.** *Use for situations where the board postponed making a decision on an issue.*

## 2) Main and Secondary Subjects

The following is a suggested list of main secondary subject headings. Note that many but not all possible positions in a school district or BOCES are included in this list, always followed by “(Position)” after the title. You will need to add any other positions to this list, as well as other necessary subject terms.

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Accidents and Injuries

Accounting

ADA. *See* Americans with Disabilities Act (ADA)

Adult Education. *See* Curricula

Affirmative Action

Agreements. *See* Labor Relations *or* specific subject of agreement

Aide, Teacher's (Position)

Americans with Disabilities Act (ADA)

Annual Report. *See* specific subject of report

Anticipation Notes. *See* Fiscal

Assembly. *See* Public Assembly

Assistant Superintendent (Position)

Associations. *See* Conferences *or* specific topic

Athletics

At-Risk Students. *See* Students

Attendance

Attendance Officer (Position)

Attorney, School District (Position)

Audits, Performance. *See* specific subject of audit

Auto Mechanic (Position)

Background Checks. *See* Personnel

Banking. *See* Fiscal

BANs (Bond Anticipation Notes). *See* Fiscal

Benefits. *See* Personnel

Bills. *See* Fiscal

Bids. *See* subject of bid

Board of Cooperative Educational Services (BOCES)

Board of Education

Boards. *See* specific function *or* name of board

Board Member (Position)

Bomb Scares. *See* Weapons

Bond Anticipation Notes (BANs). *See* Fiscal

Bonding. *See* Personnel

Bonds and Notes. *See* Fiscal

Bonds, Performance

Bonds, Surety

Bookkeeper (Position)

Boundaries, School District

Budgets. *See* Fiscal

Building Reconstruction. *See* Public Property

Building Safety. *See* Safety

Buildings. *See* Public Property

Bus Driver (Position)

Bus Leases. *See* Transportation

Bus Purchase Options. *See* Transportation

Buses. *See* Transportation

Business Manager (Position)

Cafeteria. *See* Food Services

Cafeteria Manager (Position)

Calendar

Cancellation, School. *See* Policies and Procedures

Census

Certification, Teacher. *See* Personnel

Chairperson, Department (Position)

Change in Title. *See* Personnel

Civil Defense

Civil Service. *See* Personnel

Civil Service Employees Association. *See* Labor Relations

Class Trips. *See also* Field Trips

Clerk (Position)

Clerk, District (Position)

Closing of Roadways. *See* Transportation

Clubs. *See* Extracurricular Activities

Coach (Position)

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Cocurricular Activities. *See* Extracurricular Activities

Code of Conduct. *See* Policies and Procedures

Collective Bargaining. *See* Labor Relations

Colleges and Universities

Commemorations

- Bequests
- Condolences
- Dedications
- Memorials
- Proclamations
- Tributes

Commencement. *See* Graduation

Commissions. *See* specific topic *or* name of commission

Committees. *See* specific topic *or* name of committee

Community Activities

Compensation. *See* Personnel

Complaints. *See* subject of complaint

Computers

- Automation
- Hardware
- Internet Services
- Training
- Services
- Software

Conferences

- Association of School Business Officials
- School Boards Association
- Training (Use for non-annual training events)

Consultants. *See* specific function

Construction. *See* Public Property

Contingency Fund. *See* Fiscal

Contingent Budget. *See* Fiscal

Continuing Education. *See* specific department *or* course of study

Contracts and Agreements. *See* Labor Relations *or* specific subject of contract

Cook (Position)

Copiers. *See* Office Operations

Curricula

- Adult Education
- Course Approval
- Distance Learning
- Driver Education
- Evening Programs
- Remedial Education
- Specific name of course
- Vocational Education

Custodial Service. *See* Public Property

Custodian (Position)

DARE (Drug Abuse Resistance Education). *See* Drug Abuse Programs

Deeds. *See* Public Property

Delay, School. *See* Policies and Procedures

Delinquent Charges. *See* Fiscal

Departments. *See* specific name of department

Disabilities. *See* Americans with Disabilities Act (ADA)

Disadvantaged Pupils. *See* Students

Disaster Preparedness and Response

Diseases

- AIDS
- Lyme Disease
- Tuberculosis
- West Nile Virus

Discipline, Staff. *See* Personnel

Discipline, Student. *See* Students

Dismissals. *See* Personnel

District Clerk (Position)

Doctor, District (Position)

Donations. *See* subject of donation

Drug Abuse Programs

- Drug Free Schools
- Drug Policy
- DARE (Drug Abuse Resistance Education)

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Drug Abuse Resistance Education (DARE). *See*  
Drug Abuse Programs

Elections

Elementary Schools

Emergency Procedures. *See* Disaster Preparedness  
and Response

Employee Agreements. *See* Labor Relations

Employee Handbook. *See* Personnel

Employment Certificates. *See* Personnel *or* Students

Equipment. *See* Office Operations

Evacuation. *See* Disaster Preparedness

Evening Programs. *See* Curricula

Examinations

Expenditures. *See* Fiscal

Extracurricular Activities

Facilities Planning

Federal Aid. *See* Income

Federal Programs. *See* Income *or* specific program *or*  
function

Fees. *See* Fiscal

Field Trips. *See also* Class Trips

Finance. *See* Fiscal

Fire Safety

Drills

Inspections

Protection

Firearms. *See* Weapons

Fiscal. *See also* Income

Appropriations

Audits

Banking

Bills

Bond Anticipation Notes (BANs)

Bonds and Notes

Budget, Contingent

Budgets

Consulting Services

Contingency Fund

Delinquent Charges

Donations

Fees

General Fund

Investments

Loans

Payroll. *See also* Personnel

Petty Cash

Revenue Anticipation Notes (RANs)

Revenue Sharing

Tax Anticipation Notes (TANs)

Transfer of Funds

FOIL. *See* Freedom of Information Law, NYS (FOIL)

Food Service Worker (Position)

Food Services

Cafeteria

School Lunch Program

Free and Reduced Meals

Freedom of Information Law (FOIL). *See also* Open  
Meetings Law

General Fund. *See* Fiscal

Gifts and Memorials. *See* Fiscal *or* Commemorations

Graduation

Grants. *See also* specific topic *or* program

Grievance. *See* Labor Relations

Grounds. *See* Public Property

Guidance

Guidance Counselor (Position)

Handicapped Accessibility. *See* Americans with  
Disabilities Act (ADA)

Head Custodian (Position)

Head Start Program. *See* Preschool Programs

Health Insurance. *See* Insurance

Health Services

Dental Hygiene

Immunizations

Physicals

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Hearings. *See* specific subject of hearing

High Schools

Holidays. *See* Calendar

Income. *See also* Federal Programs  
Federal Aid  
Rental  
Sale of Property  
State Aid  
Special Education  
Taxation. *See* Taxes, Real Property  
Tuition

Injuries. *See* Accidents and Injuries

In-Service Training. *See* Personnel

Inspections

Inspector, Election (Position)

Insurance. *See also* Personnel  
Disability  
Fire  
Health  
Liability  
Unemployment  
Workers' Compensation

Investments. *See* Fiscal

Janitorial Services. *See* Public Property

Junior High Schools

Kindergarten

Knives. *See* Weapons

Labor Relations  
Collective Bargaining  
Employee Agreements  
Grievance  
Negotiations  
Specific name of union

Learning Disability Program. *See* Special Education

Leases. *See* specific subject of lease

Leaves of Absence. *See* Personnel

Legal Counsel (Position)

Legal Notices

Legislation. *See* specific topic

Legal Opinions. *See* specific topic

Library Media Specialist (Position)

Library

Lighting. *See* Public Property

Litigation. *See* specific topic or litigant

Loans. *See* Fiscal

Lyme Disease. *See* Diseases

Maintenance and Improvements. *See* Public Property

Maintenance Mechanic (Position)

Mass Gatherings. *See* Public Assembly

Medical Insurance. *See* Insurance

Merit Pay. *See* Personnel

Microfilm. *See* Records Management

Middle Schools

Mileage. *See* Personnel

Negotiations. *See* Labor Unions

Newspaper

Non-Public Schools

Nurse (Position)

Office Operations. *See also* Computers  
Copiers  
Equipment  
Furniture  
Storage Equipment  
Surplus

Open Meetings Law. *See also* Freedom of Information Law, NYS (FOIL)

Opinions of Commissioner. *See* specific topic of opinion

Parent-Teacher Association

Parking

Payroll. *See* Fiscal

Pensions. *See* Personnel

Performance Bonds. *See* Bonds, Performance

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Personnel

- Background Checks
- Bonding
- Certification
- Change in Title
- Civil Service
- Deferred Compensation
- Discipline
- Drug and Alcohol Testing Programs
- Employee Benefits
- Employee Handbook
- Insurance. *See* Insurance
- Interns and Volunteers
- Leaves of Absence
- Meal Allowance
- Merit Pay
- Mileage Allowance
- Performance Appraisal
- Reimbursement of Expenses
- Reinstatement
- Retirement
- Sabbatical
- Salary and Wages. *See also* Fiscal
- Separations
- Tenure
- Training
- Workers' Compensation

Petty Cash. *See* Fiscal

Planning

Playgrounds. *See* Public Property

Policies and Procedures. *See also* specific topic

- Code of Conduct
- School Cancellation
- School Delays
- School Uniforms
- Substance Abuse

Preschool Programs

Principal (Position)

Principal, Assistant (Position)

Probation

- Academic
- Family Court

Professional Services. *See* specific subject of services

Property. *See* Public Property

Psychologist, School (Position)

Public Assembly

Public Property

- Athletic Fields
- Building Sites
- Construction
- Equipment and Furnishings
- Fixed Asset Management
- Grounds
- Janitorial and Maintenance Services
- Playgrounds
- Reconstruction
- Rental of Property
- Repairs
- Specific name of property
- Vehicles

Public Relations

Purchases. *See* Fiscal *or* specific subject of purchase

Rabies. *See* Diseases

Racial Imbalance

RANs (Revenue Anticipation Notes). *See* Fiscal

Records Access. *See* Freedom of Information Law (FOIL)

Records Access Officer (Position)

Records Management

- Electronic Records
- Historical Records
- Imaging
- Microfilm
- Records Disposition
- Records Storage

Records Management Officer (Position)

Recreation

Referenda. *See* specific topic of referendum

Registration. *See* Students

Religious Holidays. *See* Calendar

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Remedial Education. *See* Curricula

Rental. *See* specific subject of rental

Reorganization, District

Repairs. *See* Public Property *or* name of specific building

Resignations. *See* Personnel

Retirement. *See* Personnel

Revenue. *See* Income

Revenue Anticipation Notes (RANs). *See* Fiscal

Sabbatical Leave. *See* Personnel

Safety

- Building Security
- Crossing Guards
- Traffic Patterns

Salary and Wages. *See* Personnel

Sales Surplus Property

Scholarships

School Lunch Program. *See* Food Services

Schools. *See* specific name of school. *See also* Public Property

Secretary (Position)

Separations. *See* Personnel

Sewers

Sick Leave. *See* Personnel

Sites, Possible School. *See* Public Property

Snow and Ice Removal

Social Work Service

Social Worker (Position)

Special Education

- Emotionally Disturbed
- Hearing Impaired
- Learning Disabled
- Physically Handicapped Placement
- Speech Therapy

Speech Therapist (Position)

State Aid. *See* Income

Student Government

Students. *See also* Health Services

- At-Risk Students
- Disadvantaged
- Discipline
- Enrollment
- Registration
- Work Permits

Subcontracting. *See also* Policies and Procedures

Substitute Teacher (Position)

Summer School

Superintendent, Buildings and Grounds (Position)

Superintendent of Schools (Position)

Surety Bonds. *See* Bonds, Surety

TANs (Tax Anticipation Notes). *See* Fiscal

Tax Anticipation Notes (TANs). *See* Fiscal

Tax Collector (Position)

Tax Exemption

Taxes, Real Property

- Assessment
- Equalization Rates
- Exemptions
- Grievances
- Revaluation

Teacher Certification. *See* Personnel

Teacher (Position)

Telephone

Tenure. *See* Personnel

Terminations. *See* Personnel

Textbooks

- Disposal
- Distribution
- Selection

Traffic. *See also* Safety

Training, Staff. *See* Personnel

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Transportation  
    Bus Leases  
    Bus Purchase Options  
    Buses  
    Closing of Roadways  
Transportation Supervisor (Position)  
Travel  
Treasurer (Position)  
Tuberculosis. *See* Diseases  
Tuition. *See* Income  
Tutoring  
Unemployment Insurance. *See* Insurance  
Uniforms. *See* specific department, Extracurricular  
Activities, *or* Policies and Procedures  
Unions. *See* Labor Relations  
Vacation Leave. *See* Personnel  
Vaccinations  
Vandalism  
Vocational Education. *See* Curricula  
Volunteer Programs  
Voting  
Wages. *See* Personnel  
Waste Disposal  
Water Supply  
Weapons  
West Nile Virus. *See* Diseases  
Work Permits. *See* Students  
Worker's Compensation. *See* Personnel *or* Insurance

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## Appendix C

### Indexing Procedures Manual Checklist

#### Master List of Terms

- Main and secondary subjects:
  - Personnel positions in your organization
  - Committees and boards
  - Properties belonging to the organization
  - Geographical features (including roads, bridges, buildings)
  - Businesses, organizations, and government agencies
  - List of actions before the board
- List of departments or units with their abbreviations
- Determining when to add terms to the master list of terms
- Updating the master list of terms

#### Selection Criteria

- Information to index
- Information not to index

#### Conducting the Indexing

- Adding, revising, and deleting entries
- Determining when to add a memo field
- Selecting subjects
- Cross-referencing

#### Data Formatting

- Format of dates
- Format for location within minutes (volumes and pages)
- Abbreviations or codes to be used
- Capitalization
- Format of personal names

#### Updating the Index

- How often to update the index
- Updating to the next version of the software
- Rules for revising subject terms

#### Backing up the Index

- Frequency of backups
- Location of backups
- Medium used for backups

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## Retrieving and Reporting Information

- Search procedures
  - How to conduct a search
  - Techniques for narrowing a search
  - Techniques for broadening a search
- Generating reports
  - Standard formats of reports (alphabetical, by department, etc.)
  - Annual or cumulative reports
- Access to the index
  - Who will have access to the index and in what format
  - How staff will handle queries for information

## Distributing the Index

- Who will receive updates to the index
- How often to distribute the index

## Definitions of Terms

- Terms used in the minutes
- Terms used in the procedures manual

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# Appendix D

## Town of Brockway Minutes Indexing Procedures Manual

### Table of Contents

1. Minutes Indexing Procedures Manual
2. Master List of Indexing Terms
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  - 2.4 Actions Before the Town Board
  - 2.5 Abbreviations for Town Departments
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3. Selection Criteria
  - 3.1 What Information to Index
  - 3.2 What Information Not to Index
4. Using the Indexing Database
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  - 4.2 Selecting Subjects
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  - 4.4 Cross-References Within the Index
5. Data Formatting
6. Updating the Index
7. Backing Up the Index
8. Retrieving and Reporting Information in the Index
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  - 8.3 Providing Access to the Index
9. Distributing the Index
10. Definitions of Terms

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## 1. Minutes Indexing Procedures Manual

The town clerk as Records Management Officer is responsible for ensuring that the guidelines within this manual are followed for all current and future indexing of the minutes of the town board's meetings.

## 2. Master List of Indexing Terms

The Town of Brockway's Master List of Indexing Terms is based on the "Master List of Terms for Indexing Municipal Minutes" developed by the State Archives.

The town clerk has modified the original master list of terms to make it suitable for indexing the town's minutes.

### 2.1 Updating and Maintaining the Master List

The town clerk will update the master list whenever necessary.

Reasons for updating the master list of terms include the following:

- The list has no appropriate term for a subject being indexed

- A term in the master list becomes outdated or inexact

After updating the master list, the town clerk will review the electronic database and update any entries if necessary to make sure they conform to the new master list.

### 2.2 Categories of Local Topics to Include in the Master List

The town clerk will ensure that the master list contains an up-to-date list of local topics in these categories:

- Personnel positions in the Town of Brockway

- Committees and boards in the Town of Brockway

- Town of Brockway properties

- Local geographical features (roads, bridges, buildings, etc.)

- Businesses, organizations, and government agencies

The town clerk will add such local terms to the master list as needed.

**Do not add terms to the list without the town clerk's authorization.**

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## 2.3 Cross-References in the Master List

When devising or updating the master list, the town clerk or indexer may add cross-references, which will direct users and future indexers to related or more appropriate subject terms.

**The indexer should add cross-references only with the express permission of the town clerk.**

The indexer should add cross-references in these circumstances:

1. An old-fashioned term is used frequently in the minutes and may be used as a point of entry by users, but is not appropriate as a subject term itself. (Use a *See* reference.)
2. A modern but less-exact term is used in the minutes, and the indexer believes that users may look for this term. (Use a *See* reference.)
3. A term in the master list is related to another term that may also be useful to the user. (Use a *See also* reference.)

## 2.4 Actions before the Town Board

An “action” is any business transacted before the board. There are many types of actions taken by the board (or by others in attendance at a meeting) that count as actions.

The first step to indexing anything in the minutes is to determine the action that is recorded in a set of minutes.

In order to do this, the indexer must understand the meaning of each of the types of actions. The town uses the list of actions developed by the State Archives.

Include the following attached explanation of actions with any printed copy of the minutes that includes these actions:

**Appointment**

*Use for* official appointments of individuals to government positions.

**Bond resolution**

*Use for* any approved bond resolution.

**Complaint**

*Use for* any complaints received, whether via discussion or correspondence.

**Correspondence**

*Use for* any cases where the board receives or sends a letter, including petitions from the public but not including complaints.

**Disapproval**

*Use for* any motion that is declined, rescinded, or not approved.

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**Discussion**

*Use for any cases that are merely discussions of a topic and which end in no formal decision.*

**Executive session**

*Use for cases where the board goes into executive session. (In such cases, you can provide only minimal information on the subject related to the action.)*

**Local law**

*Use for a local law, the highest form of local government legislation.*

**Order**

*Use for motions where the board is directing departments or officials of the local government to carry out a certain activity.*

**Ordinance**

*Use for any ordinance, which is special local legislation on a subject specifically delegated to local governments by the State Legislature.*

**Other action**

*Use for any actions that do not fit any of the descriptions of the other actions on this list; this is the “miscellaneous” category for actions.*

**Public hearing**

*Use for any formal public hearing.*

**Report**

*Use for any reports presented to the board by departments or committees.*

**Resolution**

*Use for those cases where the board formally expresses a particular opinion or takes a specific action.*

**Tabled**

*Use for situations where the board postponed making a decision on an issue.*

## 2.5 Abbreviations for Town Departments

The town clerk will devise and maintain a list of two-letter abbreviations for each of the departments in the town for use in the town’s automated index database.

The town clerk may modify these abbreviations if necessary and will revise any affected database entries in the index to conform to the new abbreviations.

Include the following list of abbreviations with any printed copy of

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the minutes that includes these abbreviations. Use the abbreviation “TB” (for “Town Board”) for any index entry that concerns the town as a whole or is related to a town-wide function.

<b>Department</b>	<b>Abbreviation</b>
Animal Control	AC
Assessor	AS
Bookkeeper	BK
Building Inspector	BI
Highway	HY
Historian	HS
Personnel	PE
Planning Board	PB
Supervisor	SU
Tax Collector	TX
Town Board	TB
Town Clerk	TC
Town Justice	TJ
Water Department	WT
Zoning Board	ZB

## 2.6 Indexing Personnel Actions

Index all personnel actions, whether appointments, retirements, resignations, or changes in status, in this manner:

Action:	“Appointment”
Subject:	(Title of Position)
Secondary subject:	(Specific personnel action)
Memo:	(Person’s name)

*Example:*

Action:	“Appointment”
Subject:	“Attorney (Position)”
Secondary subject:	“Resignation”
Memo:	“Hutz, Lionel”

**Note that the indexer must use the subject “Personnel” only for broad personnel policies or discussions, not for indexing information on individuals.**

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### 3. Selection Criteria

Whenever the town clerk modifies the criteria concerning what to index, the town clerk will decide whether a review of the minutes already indexed is necessary to ensure consistency in the index.

#### 3.1 What Information to Index

The indexer must index any important information in the minutes, including:

Any motions, except for routine matters.

Any significant communications to the board, such as petitions from the public.

Any special reports made to the board, but not routine monthly reports.

Any public hearings.

Any time the board goes into executive session.

#### 3.2 What Information Not to Index

Do not index any routine or insignificant information, such as the following:

Attendance

Approval of minutes

Routine monthly reports

Approval of bills

Routine annual events (like adoption of the newspaper of record)

Adjournment

### 4. Using the Indexing Database

The Town of Brockway uses a database template provided by the State Archives. This database currently runs under Microsoft Access. The town follows the State Archives instructions for using the database.

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## 4.1 Adding, Revising, and Deleting Entries

**Only someone specifically assigned by the town clerk should add entries to the indexing database.**

If entries need to be revised or deleted, the indexer must make sure that there are no other entries within the database that fall within the same category that must also be revised or deleted.

The indexer may need to revise entries because of changes to the indexing criteria or an indexing subject term.

If there are such entries, the indexer must revise or delete all of them, so that the index will be consistent.

**However, the indexer must not revise or delete any entries without first verifying with the town clerk the need to revise or delete this information.**

## 4.2 Selecting Subjects

1. After determining an item in the minutes to index, identify the action.
2. Then determine the main subject of the action. Find the main subject within the master list of terms. In the rare case where the indexer believes there are two main subjects, the indexer should produce a separate entry for each main subject.
3. After identifying the main subject, determine the secondary subject, which is a related subject that is part of the main subject.
4. If necessary, the secondary subject can be expanded by adding a comma plus other information (such as "Vaccinations, Rabies").
5. After completing the major subject information, the indexer can add any pertinent information in the memo field.

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### 4.3 Determining When to Add a Memo Field

Add information to the memo field in these circumstances:

- Whenever the indexer decides it may be valuable to add extra searchable information to the index.
- For all resolution numbers.
- For all names of personnel.
- For all names of public buildings.
- For all names of roads, streets, or bridges.
- When, without this information, the context of the index entry may be difficult to understand.

### 4.4 Cross-References Within the Index

See manual item 2.3, “Cross-References in the Master List,” for an explanation of cross-references.

There are two types of cross-references in the master list of indexing terms: *See also* and *See* references.

*Example:*

“Dog Catcher. See Animal Control Officer (Position).”

The indexer must add each of these types of cross-references to the indexing database by adding the first subject (“Dog Catcher”) under the main subject field and the cross-reference itself, “*See Animal Control Officer (Position),*” to the secondary subject field.

Enter any cross-reference only once. The next time the term arises, the indexer must not add a redundant second cross-reference.

## 5. Data Formatting

The indexer must follow the following data formatting rules:

*Format of dates:*

Use this format for dates: 11 Feb 1984

*Location (Vol/Pg):*

Include volume and page numbers in Arabic numerals (1, 2, etc.)

Include only the number of the first page of the entry being indexed

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*Example:*

2:48 (meaning volume 2, page 48)

*Abbreviations:*

Use only the following abbreviations:

“Co.” for “County”

“Jr.” for “Junior”

“Mr.” for “Mister”

Months: Use three-letter abbreviations without periods  
(*example:* Jun)

“NYS” for “New York State”

“Rd.” for “Road”

“Soc.” for “Society”

“St.” for “Street”

*Data entry layout:*

Enter data in the order the database fields appear on the data entry screen, to avoid forgetting to include some information

*Capitalization:*

Capitalize only the first letter of all phrases (such as “Softball field rental”)

Capitalize all important words in titles

Capitalize every part of a personal name (except in rare cases: “de,” “van,” etc.)

*Personal Names:*

Add all personal names to the memo field

Format in this order: “Lanley, Lyle”

## 6. Updating the Index

Within a week after the approval of minutes of a board meeting, the town clerk will direct the indexer to add important entries from the minutes to the automated index.

If the indexer modifies any subject terms during the course of this indexing, the town clerk will direct the indexer to check and revise any pertinent entries in the index to conform to the new subject terms.

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## 7. Backing Up the Index

*Frequency of backups:*

After each revision to the index

*Location of backup copies:*

The town's safe deposit box, Third National Bank of Brockway

*Method used for backups:*

Alternate media, so a backup is never saved onto another backup

## 8. Retrieving and Reporting Information in the Index

See also manual item 4, "Using the Indexing Database."

To be able to design new reports in the future, the town clerk must ensure that someone in the office is always familiar enough with the Access database program to do so.

### 8.1 Searching the Index

Conduct a search by using the search function in Access (binoculars on toolbar). Follow the guidelines in the search window.

For a narrow search, confine the search to words within the field you're in.

For broader searches, make sure you select "Search All" in the search window.

For complicated searches using multiple fields, use the filter function (funnel on toolbar).

For searches you will conduct frequently, design and save a query.

### 8.2 Printing Reports from the Index

At the end of each year, print an annual index and file it in the back of the appropriate index book.

Quarterly, produce a new cumulative index of the entire index and make it available in the town clerk's office

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## 8.3 Providing Access to the Index

In the town clerk's office, provide paper copies of the index to the public in two formats:

1. A cumulative copy, alphabetical by Subject
2. A cumulative copy, alphabetical by Memo Field (because the memo field contains notes on the names of streets and individuals)

Provide town departments with updated paper copies of the index if requested.

Otherwise, use the computerized index in the town clerk's office as the main version for access by town staff.

## 9. Distributing the Index

In January of every year, the town will send an updated cumulative index to the Brockway Public Library and to the library of Brockway High School.

These indexes will be another way to provide access to the index to the general public.

## 10. Definitions of Terms

**Actions:** Actions are any events that take place before the board. These may be actions of the board itself (such as resolutions), or actions of department heads (such as reports), or actions of the public (such as petitions). Determining the action is the first step in indexing.

**Cross-references:** Cross-references, such as *See* and *See also* references, help the indexer index in a consistent way and help users find the information they need.

**See reference:** A type of cross-reference used to guide a user to the correct term in the database. A user might want to obtain information related to finance by looking up "Finance" in the master list. But since "Finance" is not a standard term in this master list, the note "*See* Fiscal" follows, indicating that "Fiscal" is the official term the searcher or indexer must use.

**See also reference:** A type of cross-reference used to guide a user to related terms in the database. A user might look up "Planning and Zoning" and discover a note to "*See also* Urban Renewal." This means that "Planning and Zoning" is still a standard term in the index, but that the user might also find pertinent information under the related term "Urban Renewal."

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## Appendix E

### Glossary of Indexing Terms

**access.** permission, opportunity, and ability to use a record

**action.** an event that is recorded in minutes as having taken place during the course of a meeting

**back up (verb).** to copy an electronic record to ensure its information will not be lost, often compressing data to save space

**backup (noun).** a copy of an electronic record, maintained to protect the information from loss and often compressed to save space

**Boolean logic.** a searching method used in electronic information systems that uses logical operators (“and,” “or,” “not,” etc.) in combination to improve the chances of successful search results

**character string.** a sequence of letters, numerals, typographical symbols, and/or spaces (such as a word, a number, or a phrase)

**cross-reference.** a notation in an index that directs users to relevant information under another subject heading. (*See also* “*See reference*” and “*See also reference*”)

**data format.** a specific type of computer file, such as a Microsoft Word XP file or a JPEG image file; sometimes called “file format”

**data migration.** *See* “migration”

**database management system.** a software system used to access and retrieve data stored in a database

**document.** a single record item; a container of information in any medium, generated in the normal course of business, that facilitates the management of that information (such as a letter, an e-mail message, or a completed form)

**electronic text.** written matter in editable electronic form (a word processing file, for instance, as distinct from an image of a document)

**field.** a location in a database that stores one type of data (such as an address field, a city field, a state field, etc.)

**filing system.** a pre-defined plan using numbers, letters, or keywords to identify and organize records in a systematic scheme

**free-text searching.** *See* “full-text searching”

**full-text searching.** a system for seeking occurrences of certain character strings in electronic text files

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**fuzzy searching.** a system for seeking occurrences of character strings in electronic text files that also finds instances of strings that almost match the request

**general files.** an alphabetic series of files on various topics. *See also* “subject files”

**ICR.** *See* “intelligent character recognition (ICR)”

**imaging.** the process of electronically capturing the visual appearance of documents, especially those on paper; informally called “scanning”

**imaging system.** a collection of units (a scanner, processor, printer, and monitor) that work together to capture and recreate images of records

**index.** an information guide that identifies the location of specific pieces of information within a document or a set of documents (for example, an index to a set of minutes could list topics and when they were discussed, or an index to personnel files could list the names of people included)

**indexing.** the process of designing a guide to identify and locate specific pieces of information within the records of an organization

**intelligent character recognition (ICR).** the recognition of printed and hand-printed (but not cursive) characters by a computer that uses context to determine the likely character and the subsequent conversion of images of those characters into electronic text (*See also* “optical character recognition [OCR]”)

**interface.** the place at which a computer program and a human user interact; the specific layout and functionality of a screen in a computer program

**Internet.** the master network of interconnected computer networks that allows the rapid transfer of information in electronic form between computers over large distances

**keyword.** a significant word in a document that might be used to find relevant content in a text

**kiosk.** a remote computer terminal that provides information to customers who may not have other access to Internet services

**lossless compression.** a compression method that retains every bit of data that was in the original file

**lossy compression.** a compression method that reduces a file by permanently eliminating certain information

**main subject.** the highest level topic of an index entry

**master list of terms.** a series of words or phrases that delineates the expected subjects in a set of minutes

**memo field.** a text field in a database that stores unstructured and sometimes lengthy text

**migration.** the periodic transfer of data from one electronic system to another, retaining the integrity of the data and allowing users to continue to use the data despite changing technology; sometimes called “data migration”

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**native format.** the original file format of an electronic record

**OCR.** See “optical character recognition (OCR)”

**online.** on the Internet (occasionally spelled “on-line”)

**optical character recognition (OCR).** the recognition of printed characters by a computer and conversion of images of those characters into electronic text. (*See also* “intelligent character recognition [OCR]”)

**outsource.** to pay an outside firm to carry out certain records management functions such as indexing, imaging, or microfilming, instead of conducting that work in-house

**procedures manual.** a written document of the rules to follow for certain records management functions in an organization

**record.**

1. *informal definition:* information, in any format, that is created by an organization or received in the formal operation of its responsibilities
2. *legal definition for local governments in New York State:* any book, paper, map, photograph, microphotograph or any other information storage device regardless of physical form or characteristic which is the property of the state or any state agency, department, division, board, bureau, commission, county, city, town, village, district or any subdivision thereof by whatever name designated in or on which any entry has been made or is required to be made by law, or which any officer or employee of any said bodies has received or is required to receive for filing
3. *legal definition for state agencies in New York State (plural):* all books, papers, maps, photographs, or other documentary materials, regardless of physical form or characteristics, made or received by any agency of the state or by the legislature or the judiciary in pursuance of law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities, or because of the information contained therein

**recordkeeping.** the creation and maintenance of reliable evidence of business transactions in the form of recorded information

**records series.** a group of related records (such as minutes of a board, payrolls, or purchase orders) that are normally used and filed as a unit and that normally have the same retention requirements

**repository.** (*in document management*) a storage area for documents searched by a specific electronic document management system or full-text searching application

**scanner.** a machine that converts eye-readable images into digital representations of those images

**scanning.** See “imaging”

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**search engine.** a software program that allows users to search for electronic textual content stored on the Internet or a computer device

**secondary subject.** a subdivision of a main subject of an index entry

**See also reference.** a notation in an index that directs users from one subject heading to another possibly relevant subject heading. (*See also* “cross-reference” and “*See reference*”)

**See reference.** a notation in an index that directs users from an unacceptable subject heading to the accepted subject heading in that index (*See also* “cross-reference” and “*See also reference*”)

**series.** *See* “records series”

**service bureau.** a company that provides direct records management services, such as microfilming, imaging, or indexing

**software.** programs that run operations on a computer

**subject files.** a records series that consists of files on various topics maintained in alphabetical order

**subject term.** a word or phrase used in an index to represent a certain concept

**Tagged Image File Format (TIFF).** a lossless file format for storing color and grayscale images and used as a standard for the maintenance of long-term records

**TIFF.** *See* “Tagged Image File Format (TIFF)”

**website.** a collection of webpages on the World Wide Web

**wildcard.** a symbol (usually an asterisk [\*], but sometimes a question mark [?]) designated to stand in for one or more characters in a full-text search

