

# **The Index to *The Bulletin***

## **Subject Assignment Guidelines Data Entry Instructions & Business Rules**

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## Introduction

These guidelines and instructions contain information on the use and construction of subject headings in this index, as well as business rules and instructions for actual data entry.

This index will primarily be used as a ready reference tool. It is expected that the index will be used most frequently via the report “Articles by Subject,” which displays all of the subject headings in the index, and the articles to which the heading has been assigned. This should be kept in mind when performing indexing. Subject headings may need to be modified in order to file at the spot in the index where the user is most likely to look for the topic at hand—it is unlikely that the thesaurus will be consulted before the index is used. Subdivisions should be used sparingly, and in most cases only to provide additional specificity when a topic has several articles assigned.

When assigning and constructing subject headings, the ease-of-use of the printed index (as it appears when arranged by subject heading—the report “Articles by Subject”) should be the primary consideration. There is no limit on the number of subject headings that can be assigned to any given article, but an effort should be made to ensure that each entry has at least two subject headings. Subject headings should be assigned based on the usefulness of the article to a scholar or researcher when located under a particular heading.

## Database Structure

This index was created in a Microsoft Access database. The following information lays out the structure of the database itself. Several tables, queries, forms and reports have been created to facilitate access to the data for editing and browsing.

The database tables hold all of the data and are structured as follows:

- **article:** holds article title, volume, issue, date, series, page range; automatically assigns a unique identifying number to each article
- **author:** holds author first, middle and last name and assigns a unique identifier to each.
- **subject:** contains subject headings and assigns a unique identifier to each
- **auth\_asst:** connects authors to the articles they write
- **see:** creates *see* references (called *use* references in the Thesaurus)
- **see\_also:** creates *see also* references
- **subj\_asst:** assigns subject headings to articles

A form was built for each table to provide an easy-to-use interface for data entry. Unfortunately, Access does not allow forms to facilitate data entry into more than one table. Thus, a form was built for every table:

- **Article:** for data entry into the table ‘article’
- **Author:** for data entry into the table ‘author’
- **Author Assignment:** for entry into the table ‘auth\_asst’
- **See Also References:** for entry into the table ‘see\_also’
- **Subject Assignment:** for entry into the table ‘subj\_asst’
- **Subjects:** for data entry into the ‘subject’ table

- **Use References:** for entry into the table 'see'

A large number of queries were built to combine the information held in the tables into several reports. The reports function as tools for data entry as well as primary access to the index itself.

### Article Citations:

This report displays the full record for each article in the database, including the subject headings and the article number.

### Article Citations

Article ID	Title	Date	Series Volume.Issue	Pages
87	"A New Errand:" Massachusetts Puritans and the Founding of Dorchester, South Carolina	Winter 1977	First 28.2	4-10
			Francis J. Bremer	
	Dissenters, Religious			
	Dorchester, S.C.			

### Articles by Subject

Subject	Date	Series Volume.Issue	Pages
<b>Abolitionists</b>			
Congregationalism and Racism: The 19th-Century Challenge	1997	First 48.3	4-14
	Clara Merritt DeBoer		

### Articles by Subject:

This report displays the subject headings used in the database (without *see* and *see also* references) and provides citations to

each article assigned to the heading. This report is the primary way in which librarians will access the index to answer reference questions. It should be kept in mind that, due to the restrictions of working within Microsoft Access, *use* and *see also* references are not present in this report. For this information, the Thesaurus should be consulted (see below).

**Authors:** This report displays the author names along with their unique identifiers. This report is used as a tool for data entry.

### Authors

Author Name	Author No.
--, --	30
Ahlstrom, Sidney E.	31
Allen, Francis W.	32
Anderson, Stuart LeRoy	33
...	...

Author	Title	Series Volume.Issue
<i>Douglas K. Showalter</i>		
	The Story of the Haystack Prayer Meeting	Second 3.1
<i>Douglas Walkington</i>		
	"To Prevent the Heathenizing of Christians:" The Memoirs of Rev. Ammi James Parker	First 31.2
<i>Duane W. H. Arnold</i>		
	The Congregationalist and the Cardinal: Gaius Glenn Atkins and the "Silver-Grey Enigma" of John Henry Newman	First 39.1
<i>Edgar J. Park</i>		
	A Minister's Reading [Park]	First 1.1

**Author Index:** This report prints brief article citations, arranged by author. Unsigned articles appear at the beginning, under the entry "-- --".

**Thesaurus:** This report prints out the subject headings with *use* and *see also* references. As with the Authors report, this will primarily be used as a data entry reference tool.

<i>Term ID</i>	<i>Term</i>	Use
200	<i>Bible -- Reading</i>	
201	<i>Bible -- Versions</i>	
449	<i>Bible Society of Massachusetts</i>	Massachusetts Bible Society
23	<i>Blogs</i>	
	<i>Digital media</i>	
34	<i>Books and reading</i>	

There are also two sub-reports that are used to place author names in the “Article Citations” and “Articles by Subject” reports.

### Notes on what gets indexed

- Major articles
- Illustrations associated with major articles
- Unsigned articles on topics of historical interest
- Thematic bibliographies
  - For example, a bibliography on “History and Literature of the Christian Connection” is indexed, while one entitled “Selected New Titles in American Religious and Cultural History” is not. The latter, as a list of new acquisitions on a variety of topics, would not be of use to a researcher. The former, with its thematic focus, has potential use for a scholar.

## Scope Notes on Current Subject Headings

- The term **Anniversaries** is used to index any article on church anniversaries, bicentennials or centennials. The subdivision -- **Centennial celebrations, etc.** should not be used unless there is already a large number of articles indexed under the corporate name in question.
- All bibliographies should be indexed under **Books and reading** as well as any appropriate topical subject headings.
- The subject heading **Letters** should be used to index transcriptions of or articles about letters sent by clergy, missionaries, etc., not letters sent to *The Bulletin* in response to articles.
- The terms **Churches** and **Associations** should not be used, but rather the corporate names of the particular churches and associations in question.
- There are several subdivisions used with the heading **Congregational Library (Boston, Mass.)**. This heading is not used in and of itself, but always in conjunction with one of these subdivisions. It should be noted that the subdivisions are not from LCSH, but mimic its structure. The goal in creating these was to provide a useful segmentation of a large list of articles that are all on the same broad topic.
  - -- **Collections:** For articles focusing on the holdings, archival or otherwise, of the library.
  - -- **History:** Articles pertaining to the history of the library.
  - -- **Librarians:** Items regarding the librarians themselves (retirement, new appointments, etc.)
  - -- **News:** Other news items and announcements
  - -- **Portraits:** For articles on portrait holdings of the library.
- These headings may also be employed if it becomes necessary to introduce more specificity into other subjects. For example, the subdivision -- **Portraits** has been employed under the heading **Clergy** in order to separate illustrations of Congregational clergy from articles about them.

## Constructing Topical Subject Headings

This index is primarily used as a ready-reference tool and as such, the Thesaurus will most likely not be consulted when answering reference questions. The bulk of the subject headings in this index are personal or corporate names (see next section). Topical subject headings are loosely based on Library of Congress Subject Headings, which are employed and modified as follows:

- Subject headings that indicate religious affiliation should only be used when the religious affiliation is not Congregationalism. For example, the heading **Congregational churches -- Clergy** is not used in this index, as it is implicit; the concept is simply expressed by the heading **Clergy**. However, an article about Catholic clergy would be entered under **Catholic Church -- Clergy**.
- Do not use the subdivision **-- Religious aspects**. Again, this is implicit.
- In general, subdivisions should be used sparingly and only when there is a large body of articles on the subject in question. Some subject headings from the original index employed subdivisions, and these headings have not been simplified.
- Some headings, especially those that employ multiple subdivisions, may be simplified to alphabetically file in the first place one might think to look. For example, the LC heading **United States -- History -- Revolution, 1775-1783** is modified and entered as **American Revolution, 1775-1783**. It should be noted that some headings from the original index have not been simplified in this manner.

Below is a list of deviations from LCSH and the LC Authority File, as of May 2007. The term in use in this index is listed first, with the LC subject heading in parentheses:

- American Revolution, 1775-1783 (United States -- History -- Revolution, 1775-1783)
- Civil War, 1861-1865 (United States--History--Civil War, 1861-1865)

## Constructing Personal or Corporate Name Subject Headings

Personal and corporate names are handled in slightly different ways. Personal names are taken directly from the text in the fullest form possible. Some examples:

Ahlberg, Ralph  
 Finney, Charles Grandison  
 Robbins, Francis L.  
 Sobin, Jr., George

For corporate names, the Library of Congress Authorities (<http://authorities.loc.gov>) should be consulted, with one caveat: if the name employed by the LC Authorities differs significantly from the common form of the name, the common form should be used. For example, the Christian Endeavor organization is listed in the LC Authorities as **United Society of Christian Endeavor**. The commonly used form of the name is simply Christian Endeavor, and so the term used in the index is **Christian Endeavor**. This change is especially important in this example, because the two headings do not file near each other in the alphabetical list of subject headings.

In all cases, when establishing a heading for a group or corporate name that is not listed in the LC Authorities, the heading should be established using the fullest form of the name to be found in the article. Following are some additional guidelines for establishing subject headings for corporate bodies that are not listed in the LC Authorities.

- The Associated Press style is used for state name abbreviations. A list can be found at <http://www.nyu.edu/classes/copyXediting/STABBREV.html>.
- Headings for churches that are not in the LC Authorities are constructed as follows: Church name (city, state). For example: **Congregational Church of Somers (Somers, Conn.)** or **First Church (Cambridge, Mass.)**
- For physical items that are not in the LC Authorities or Subject Headings, use the full name of the item as referenced in the article. If the item stays in a single physical place (for example, a monument) add the location to the end: **Haystack Monument (Williamstown, Mass.)**.
- For meetings or events not in LC Authorities or Subject Headings, use the full name of event as referenced in article, and add the year in parentheses at the end. For example: **Haystack Prayer Meeting (1806)**.

## Data Entry Business Rules & Addressing Access Quirks

- Access alphabetizes letter-by-letter. When entering subject headings, remember that in order to facilitate alphabetical filing in Access, articles such as *a*, *an* and *the* should not start off the heading. For example, the entry for The Bretheren is listed **Bretheren, The**.
- Articles with identical titles will be collapsed into a single entry in the reports, even if the author and citation data are different. In order to avoid this, a small note—the date of the issue, a personal name, etc.—should be appended onto the title, in brackets. It is easiest to spot this problem in the Table ‘article,’ shown below. Two sets of duplicate article names, as corrected to display properly, have been highlighted.

Article	Title	Date	Volume	Issue	Series	Page
+ 233	Forefather's Day in Westmoreland Church, Washington, D.C.	Jan. 1959	10	2	First	6-7
+ 19	Francis E. Clark [ill.]	1995	47	1	First	cover
+ 216	Frederick T. Persons Bookplate	May 1959	10	3	First	4
+ 160	From Ireland to America	Oct. 1952	4	1	First	5-8
+ 5	From the Archives and Manuscript Collection [Fall 1990]	1990	42	1	First	18
+ 8	From the Archives and Manuscript Collection [Spring/Summer 1991]	1991	42	3	First	14
+ 14	From the Archives and Manuscript Collection [Winter 1992]	1992	43	2	First	12
+ 41	George Smith, Jr. [bib.]	Spring 2005	2	1	Second	21
+ 240	George Washington: Thanksgiving Proclamation	Oct. 1952	4	1	First	10-12
+ 61	Haystack Homecoming	Summer 2006	3	1	Second	12-13
+ 230	Heritage of the Pilgrims	Jan. 1967	18	2	First	7-9
+ 46	Historians in Pursuit: The Local History of American Congregationalism	Fall 2005	2	2	Second	19-20
+ 38	History and Literature of the Christian Connection [bib.]	Spring 2005	2	1	Second	25-26
+ 149	History Corrects Itself: Robert Browne and Congregational Beginnings	Jan. 1954	5	2	First	9-19
+ 29	Horace Bushnell [ill.]	Winter 1999	50	2	First	cover
+ 170	How I Use the Congregational Library	May 1958	9	3	First	15-16
+ 43	Hymnals and Tunebooks in the Congregational Library	Spring 2005	2	1	Second	16-18
+ 7	In and Beyond Joseph Bellamy's Shadows: A Life of Azel Backus (1765-1816)	1990	42	1	First	4-17
+ 52	In the Stocks of the Congregational Library	Winter 2006	2	3	Second	16-18
+ 130	Introduction [to "History Corrects Itself"]	Jan. 1954	5	2	First	8
+ 25	Introduction [to the issue]	1998	49	3	First	4-5

- When indexing an illustration, indicate this in the title of the piece using [ill.]. For example, for an illustration of Azel Backus, the title should be *Azel Backus [ill]*). If the illustration is on the cover, simply type “cover” in the page field.
- Likewise, bibliographies entered into the database should have [bib.] appended to the end of the title, unless the word “bibliography” appears in the title itself. For example: *Read More About Haystack and the American Board [bib.]*.

- When entering double- or triple-issues, the earliest volume and issue is used in this database. This decision was made because the earliest volume and issue number is listed first on the publication itself. In addition, the year for these volumes is entered without any information regarding the season. For example:

Double Issue

Volume 45	Winter 1994	No. 2
Volume 45	Spring/Summer 1994	No. 3

This is entered into the index as follows

Date: 1994

Volume: 45

Issue: 2

- In cases where double and triple issues have spanned two calendar years (for example, Fall 1997 and Winter 1998) the year input into the database is that which corresponds with the volume and issue number used. For example:

Triple Issues

Volume 48	Spring/Summer 1997	No. 3
Volume 49	Fall 1997	No. 1
Volume 49	Winter 1998	No. 2

This is entered into the index as follows:

Date: 1997

Volume: 48

Issue: 3

- If a note of explanation is required for a title, place the note in brackets, as follows:  
*Introduction [to the issue].*

## Data Entry Instructions

Data entry has been made as simple as possible using Access Forms. However, several forms must be used to enter a single article and its associated subject headings, and certain types of data must be entered first.

Two sets of instructions have been provided: a “quick reference” checklist for those already familiar with Access, and a set of step-by-step instructions for those new to the program.

### Data Entry Quick Reference Checklist

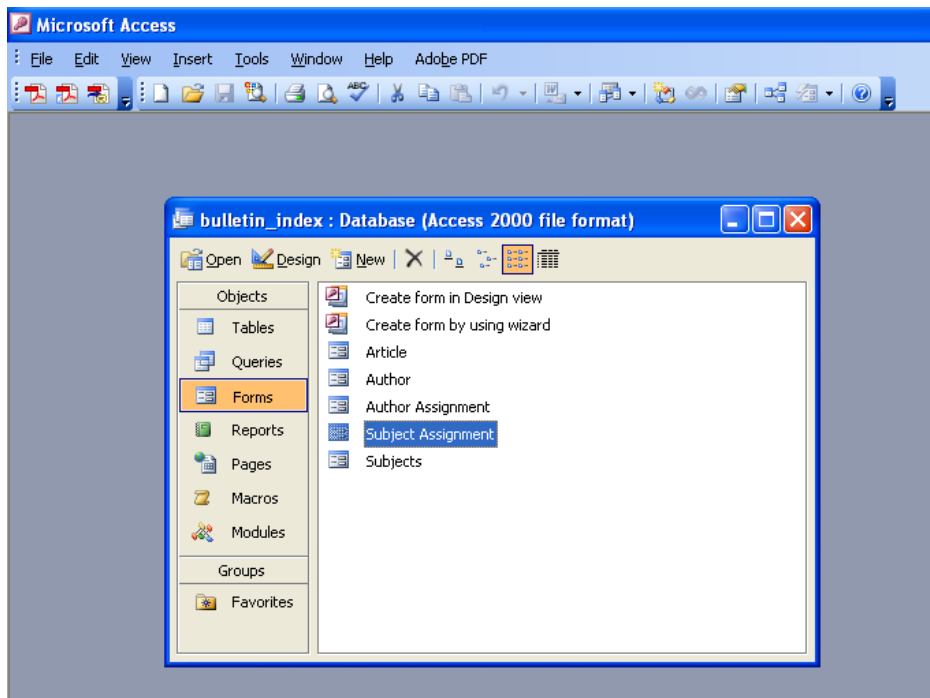
For those who are familiar with Access, these steps go through the order in which the data must be entered. Either the tables (t) or the forms (f) can be used for data entry, and either tables or reports (r) for reference to data already entered into the index.

1. If the author’s name is already entered into the index (t: author; r: Authors), make a note of the author number. If not, enter the name and note the number.
2. Select the subject headings (r: Thesaurus – the table ‘subjects’ includes non-preferred terms because it does not reflect *use* references) and note their numbers. After consulting the scope notes (above) enter any additional subject headings and note their numbers.
  - a. If applicable, add *use* (t: see; f: Use Reference) and *see also* (t: see\_also; f: See Also References) references to the thesaurus.
3. Enter the citation data (t: article; f: article) and make note of the number assigned.
4. Connect the article to the author (t: auth\_asst; f: Author Assignment) and subject headings (t: subj\_asst; f: Subject Assignment).
5. Check that citations are displaying correctly in the reports.

## Step-by-Step Data Entry

These instructions will walk you through consulting the database to use information (author names, subject headings) that has already been entered and entering new data of all types.

**The Database:** When you open the database, this is what you will see.



At the top are the Access menu and the toolbar. The icons should look familiar if you have used Microsoft Word. Find the “Save” button—you’ll need it later!

The window that is open in the workspace is the index. Note that under “Objects,” on the left, you can pick from Tables, Queries, Forms, Reports, Pages, Macros and Modules. In this screenshot, we are

looking at the Forms in this database. To switch to looking at the Reports, you would just click “Reports” in the “Objects” column.

You will enter data using the Forms, and can look at the information currently held in the database using the Reports. If you need to delete something from the database, you will use the Tables. The Queries take the information in the different tables and tie them together—these new combinations of data are displayed in the Reports. You won’t need to do anything with the Queries.

There is another menu across the top of this window. You don’t need to know what the different icons mean, but be sure that you do not click the X! It will delete the Form, Report, Query or Table that is selected.

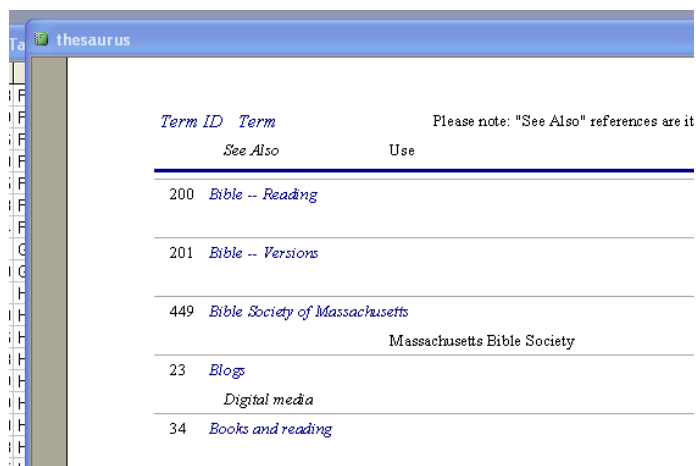
**Read the article:** To begin, pick an item from those to be indexed. If you are not already familiar with the contents and topic of the article, read it through.

The rest of the instructions will talk about entering data for articles, but you might also want to put an illustration, photo, map or bibliography in the database. The data entry procedures for all of these different items are the same, though there are some special guidelines for some of the formats. Look at the Data Entry Business Rules for these guidelines.

**Use the Thesaurus:** Click on “Reports” and select the report called “Thesaurus.” This will bring up a document that lists all of the subject headings that are currently used in the database. You

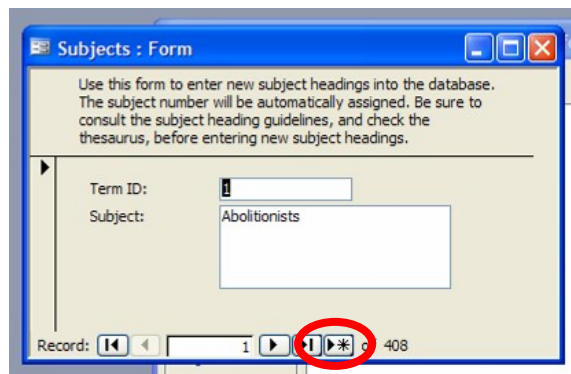
will notice that each subject heading has a “Term ID” assigned to it. This is a unique number that the database uses to refer to the subject heading. Make a note of the Term ID for each of the subject headings you wish to use.

**Use & See Also References:** Some of the terms have “See Also” or “Use” references listed. “See Also” references are printed in italics, like the subject headings, and point you to other terms in the database that you may wish to assign to the article, instead of or in addition to the term you are looking at. “Use” references are printed in plain text and are listed under terms that are not official subject headings—use the term listed at the “Use” reference instead.



Term ID	Term	See Also	Use
200	<i>Bible -- Reading</i>		
201	<i>Bible -- Versions</i>		
449	<i>Bible Society of Massachusetts</i>		Massachusetts Bible Society
23	<i>Blogs</i>		Digital media
34	<i>Books and reading</i>		

In the example shown here, the term *Bible Society of Massachusetts* has a “See” reference telling you that the subject heading you should use is *Massachusetts Bible Society*. Look up *Massachusetts Bible Society* and make a note of the Term ID. Further down, the term *Blogs* has a “See Also” reference pointing to *Digital Media*. You might wish to assign the term *Digital Media* to the article in addition, or instead of, the term *Blogs*



Subjects : Form

Use this form to enter new subject headings into the database. The subject number will be automatically assigned. Be sure to consult the subject heading guidelines, and check the thesaurus, before entering new subject headings.

Term ID:

Subject:

Record:  408

**Entering New Subject Headings:** You may find that you need to use subject headings that have not been entered into the database yet. Use the guidelines in the “Constructing Subject Headings” section of this document to create the new terms.

When you are ready to add the subject heading to the database, open the Form “Subjects.” Click the New Record button at the bottom of the box (circled in red). The Term ID will be filled in automatically. Enter your new subject heading in

the “Subject:” box. Make a note of the number assigned to your subject heading, and enter any additional headings. When you are done, click the “Save” icon in the Access menu and close the Form.

**Authors:** Next, check to see if the author’s name has already been entered into the database. Open the Report “Authors” and check to see if the author is listed. If so, make a note of the Author No. If not, add the author to the database using the “Author” Form. The box will look similar to the “Subjects” Form. Click the New Record button, add the author’s name, make a note of the number assigned, save and close.

**Enter the Article Information:** Now that the author and all of the subject headings are in the database, you are ready to enter the article citation information. Open the Form “Article.”

Once again, hit the “New Record” button. The Article No. and Series will be automatically entered. Fill in the rest of the details. You may need to shorten the title if it is exceptionally long. See the Data Entry Business Rules for guidelines on entering multi-volume issues, illustrations and bibliographies. Make a note of the article number, save and close.

**Assigning subject headings & authors to articles:** First, we will connect the author to the article. Open the Form “Author Assignment” and click the “New Record” button. Enter the Author No. and the Article No. (be sure you don’t get them reversed), and save. **IMPORTANT NOTE:** If there is no author, enter 30 as the Author No. This will display the Author name as “--,--” and must be done in order for unsigned articles to appear in the Reports.

To assign the subject headings, open the Form “Subject Assignment,” click the “New Record” button, enter the Term ID and Article No. for each subject heading you are assigning to the article, and save.

**Check your work:** Double-check your work by opening the report “Article Citations” and finding your article. Make sure that the author and subject headings are appearing as you expect. If they are not, you will need to correct your data entry.

### Correcting your data entry:

- **If the article is not showing up in the list**, be sure that you have assigned an author. If the article has no author, assign Author No. 30.
- **If you have found a typo** in the article citation, author name or subject heading, open the appropriate Form (“Author,” “Article” or “Subjects”), find the entry and make the correction.
- **If you have assigned the wrong author or subject heading**, you will correct this in the “Author Assignment” or “Subject Assignment” Form.

In this example, we will go through the steps you would take to correct the database when the wrong subject has been assigned to an article. (If you need to change the author assigned to the article, you would follow the same steps using the “Author Assignment” Form.)

First, look up the Article Number. Second, look up the Term ID for the subject heading you wish to replace. Then, look up the Term ID for the correct subject heading. Open the Form “Subject Assignment” and scroll through the entries until you find the entry for the article you need to correct. You may find it useful to use the “Last Record” button, which is circled in red on the screenshot shown here.

When you have found the spot in the database where the subjects are assigned to the article you are correcting, find the Term ID for the subject heading you need to replace. Type in the Term ID for the correct subject heading and save.

- **If you need to delete an entry entirely**, you will need to use the Tables instead of the Forms. Be careful when deleting information from the database—it can be easy to delete the wrong thing, and you cannot “undo” the deletion.

In this example, we will delete an entry in the “subj\_asst” table, which holds the information that is displayed in the “Subject Assignment” Form—the subject headings that have been assigned to each article. You would follow similar steps to delete information from other Tables.

First, open the Table “subj\_asst.” You will see the Table, which resembles an Excel file. The two columns here are Term ID and Article No. As you can see, the data is arranged by Article No. Find the entries for your article, and then locate the Term ID that you need to delete. Shown here is a row that represents Term ID 439 assigned to Article No. 1. Click on the beige column (where the arrow is displayed in the highlighted row), pick “Edit” from the Access menu and click “Delete Record.”

Term ID	Article No.
113	1
148	1
439	1
108	2
109	2
110	2
122	2
131	2
146	2
167	2
19	3
83	3
137	3
32	4
37	4
51	4
111	4
169	4
170	4