INDUSTRY-COMMITTEE GUIDANCE OF A CENTRALIZED ABSTRACTING SERVICE*

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In the beginning of all combustion there is the spark. In the case of the API technical abstracting program, this spark was furnished by several dedicated individuals. The fuel was obvious: in a number of separate petroleum libraries, abstracts of the same documents were prepared at a very high cost by trained specialists. These tailor-made services provided a current awareness aspect which international services such as Chemisches Zentralblatt and Chemical Abstracts did not fulfill, since this was not their purpose.

It seemed logical that this work could be done more economically and on an even larger scale by a central office. Even though items of particular interest to specific companies still would have to be covered individually, each company would gain in the cooperative effort. Thus, interest was aroused among petroleum research managements and a project to begin centralized abstracting was put before the American Petroleum Institute.

The Institute is divided into different Divisions according to interest, such as Production, Marketing, Transportation and Refining. The Abstracting Service is part of the Division of Refining, which in turn consists of a number of working committees reporting to a General Committee. The latter has the power to finance projects, and it was this Committee which approved the establishment of a centralized abstracting service in the API.

This was an important development; an industry sponsored and operated service meant direct and effective industry control of the service. It shortly became evident that this control should be exercised through two industry committees. Management participation was needed to support the project and to validate budgets. A study committee of information specialists was needed to work out the operating details. When the managements of petroleum companies voted a large sum to support the abstracting project in its infancy, they also permitted their technical information specialists to donate company time and work for handling the details. Thus, the service could be continually shaped and adapted to the needs of the industry.

Here is how it worked: An API Administrative Committee on Abstracting was set up, whose members were representative of technical management. This committee, in turn, appointed an Abstracting Advisory Subcommittee whose members were petroleum librarians and information specialists who knew the literature and were familiar with the problems of abstracting.

The Abstracting Advisory Subcommittee began by clarifying projected aims and needs, and came up with a number of requirements: (1) definition of subject areas to be covered; (2) a list of journals to be covered; (3) a staff consisting of an editor, abstractors with foreign language background and clerical help; (4) some type of index or classification system; (5) and, of course, subscribers. H. W. Field reported earlier on these details.[1]

CURRENT COMMITTEE OPERATIONS

Even after the service was started in 1954, the Advisory Subcommittee continued to meet regularly each month, or more often, to help and to advise the editor. In a way, the Subcommittee was a buffer between the public on the one hand, and the editorial staff on the other. It was also a listening post or "watch dog" for new wants and needs.

In subsequent years the Subcommittee has tried to support the service on a high level. Abstract quality is studied continuously. The classification system is revised and improved periodically. Individual classification numbers are assigned to Subcommittee members for study whenever the quantity of cards seems to indicate a need for further breakdown. New classes, such as fuel cells, magnetohydrodynamics, molecular sieves, etc., are added as the industry's interests expand.

Journal coverage is reviewed by checking the number of abstracts gleaned from secondary sources, such as Journal of Applied Chemistry, Journal of the Institute of Petroleum, etc. If the number of pertinent articles decreases excessively, a journal may be dropped. New journals are reviewed for inclusion and in fact the original number of one hundred has increased to 140 journals. Similarly old subject headings may be dropped or new ones added to the Bulletin as required.

Readability, format and printing are part of the Subcommittee's assignments. In May of 1960 the typewriters were changed from standard to IBM Executive machines, using photoreduction for the final printing. "Sticky-back" mats are used to add classification numbers to the original abstracts for producing cards. This permits two different kinds of printing from the same mats.

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[1]H. W. Field, "A Centralized Abstracting Service for the Petroleum Industry," Chapter XV-C, p. 269, in Jesse H. Shera's "Documentation in Action," Reinhold Publ. Corp., N. Y., 1956.

There are several other approaches which the Subcommittee uses for more extensive studies. These include: (1) sending out questionnaires to subscribers; (2) using experts in the fields concerned for special studies; (3) sponsoring open meetings for subscribers, separately or in conjunction with the meetings of large societies. Since the Service has the backing of an industry association, the response to all these approaches probably has been far greater than any commercial organization could command.

In the past four years these major studies were undertaken by the Subcommittee: abstracting of patents, of the Soviet petroleum literature, and of exploration and production literature. Machine systems as applied to the petroleum literature also are being studied. Work on these projects has involved the use of one or all of the above-mentioned approaches.

Questionnaires have been used in several instances. These usually are sent to management personnel, a practice which works very well where policy decisions are involved. However, experience has shown that also sending a copy to the technical-information group of a company improves the reliability of a response.

To take the patent abstracting study as an example, answers to a questionnaire indicated the interests of the companies with regard to subject, geographical coverage, and type of abstract (technical and legal information). Some companies indicated the U. S. Patent Office classifications in which they were interested, but the composite list was still very incomplete. This list was enlarged, therefore, by studying the U. S. Patent Office Classification Manual, after which one study team member went to Washington to find out the number of pertinent patents in each class. From the information he brought back, we were able to decide what classes should be covered by standing orders, and which patent classes could be covered from the Official Gazette.

By studying present foreign-patent coverage of one large petroleum company, the number of pertinent patents for each country was then approximated. Three alternate methods are under consideration for actually covering these countries.

The Study Team's report yielded preliminary economics for a centralized petroleum-patent-abstracting service, including the personnel, salaries, and benefits and costs of patent acquisitions, rent, printing, postage, and express. A recommendation has been sent through committee channels inside the API, and it is expected that this service, covering perhaps 15,000 patents per year, will be started on January 1, 1961.

Experts are added to the Abstracting Advisory Subcommittee whenever a new subject field seems to warrant it; they are drawn from the petroleum industry, and the Subcommittee depends greatly upon their recommendations in making decisions. These "experts" usually work on special study teams whose chairmen are members of the Subcommittee itself.

A good example of this type of operation was the development of the API Soviet Abstracts. Some consideration had been given to more extensive coverage of the Soviet literature before the Russian Satellite was launched, but the pressure on the Service became very great at that time. Preliminary studies by the Subcommittee had revealed a need for expert knowledge of Soviet journals, existing services, and available cover-to-cover translations.

Three petroleum-company specialists with a strong knowledge of both petroleum abstracting and the Russian literature were appointed to the Subcommittee. Under their guidance a questionnaire was sent to subscribers listing various pertinent Soviet journals. Subscribers were asked to indicate their interest in these journals, and their preference for cover-to-cover translations or abstracts. Also included was a list of possible subjects to be checked and an estimate of the cost of abstracting the journals listed and of those cover-to-cover translations already available. Most of the companies expressing interest in the Soviet literature preferred abstracts over translations; but there was definite interest in translations of individual articles.

From the results of the questionnaire, the experts on the Subcommittee worked out the approximate number of issues, pages, and articles which would be abstracted from 26 journals in which general interest had been expressed. Estimates and sample abstracts from commercial and government agencies were evaluated. The cost of an API-operated service also was investigated.

The results of these studies indicated that the API could operate the service most effectively from an industry viewpoint. Here, the Administrative Committee on Abstracting took over from the Subcommittee. Several other API committees were consulted, and, after final API approval in November, 1958, the Soviet abstracts service went into operation in January, 1959.

The third approach, that of open meetings, has been very successful in bringing out opinions from readers of the Service's technical-abstract bulletins. These meetings have cleared up misunderstandings on both sides of the fence, and have increased the usefulness of the abstracts. A number of improvements have come about in the Service because of ideas which have been brought up at these open meetings and several new projects have resulted from such ideas. For instance, the current effort to start exploration and production abstracts was a direct result of requests from open meetings of library, chemical, and petroleum societies.

Since the API Central Abstracting Service reports to the Division of Refining, exploration and production was outside its jurisdiction, and the request for exploration and production abstracts had to come through the Division of Production. The fact though remains that industry made its wishes known and the Institute responded. Now that organizational barriers have been overcome, the study of exploration and production abstracts is under way.

This is the way it worked: First, an Exploration and Production Study Team was formed to advise a predominantly refining Subcommittee. Members were appointed by their respective company representatives on the pertinent API Advisory Committee to find out whether the Central Abstracting Service would be able to do exploration and production abstracting for the industry. The Subcommittee itself worked out the economics of such coverage and findings were reported back to the Study Team. Adding to this information the opinions expressed at an SLA forum, the study team recommended that the Central Abstracting Service be authorized to offer such a service. The Advisory Subcommittee presented its report through API channels and it is expected that this new service will be offered beginning January 1, 1961.

The machine-processing study group has operated differently. It has completed a study of machine systems already in use in the petroleum industry, and has submitted a preliminary report on these. Its meetings have consisted mainly of visits to petroleum companies with existing systems, and discussions of other systems. On the basis of their own companies' desires, and from their discussions, members have been able to describe essentially what would be needed to satisfy the majority of petroleum companies. They now have begun the second phase of their study - visits and discussions of systems in operation outside the petroleum industry, and review of unique machines.

Of course, these supplementary methods used by the Subcommittee are not one-way communications. Subscribers benefit by having a strong voice in the policies of the Service, and by knowing about plans for new services.

In summary, then, (a) centralized information services have unique merits: (1) they permit current awareness services too costly for single companies, but which are economic on a cost-sharing basis; (2) they have impartiality (due to the whole-industry approach), which lends credence to dependability; (3) they have flexibility and empathy to industry's needs. (b) These advantages can be realized only through close industry cooperation which is based on two principles, both valid in the competitive age: (1) What is good for industry is good for the companies in it and usually vice versa. Specific company benefits are a legitimate incentive to action on the part of committee members, since final action depends on legitimacy on an industry-wide basis. (2) Information processing is not an end in itself for private companies. Legitimate competition lies in information use. Thus, active assistance in developing better and more economic central information processing groups is legitimate for both large companies (more of whose funds can then be diverted to use) and small companies (who can thus gain access to the storehouse of information which is too vast for them to tap properly for themselves).

The activities of the API Technical Abstract Service thus provides know-how guides to industries and other groups faced with the problem of information control.