The following proposed work item is submitted by:
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INTRODUCTION AND STATEMENT OF PROBLEM

NISO does not have a standard which addresses indexes and related information retrieval mechanisms. There is an outdated technical report from 1997 (NISO TR02-1997, *Guidelines for Indexes and Related Information Retrieval Devices*) which was based on Z39.4-1984, *Basic Criteria for Indexes.* When Z39.4-1984 (whose first edition was published in 1959) was being revised, consensus could not be reached by the voting members on approval of the draft revised standard, so it was published instead as a Technical Report.

The scope of NISO TR02-1997 includes guidelines for the content, organization, and presentation of indexes used for the retrieval of documents and parts of documents. It also includes the principles of indexing, regardless of the type of material indexed, the indexing method used (intellectual analysis, machine algorithm, or both), the medium of the index, and the method of presentation for searching. While this publication is very robust, it is now twenty years out of date. It does not address more modern techniques such as embedded indexing and indexes designed for electronic searching. Also, it is not quite specific enough in book indexing and not organized in a way to be useful as a guide for book indexers.

More importantly, NISO TR02-1997 lacks the authority and wider industry recognition of a formal standard. There is community interest in using the technical report as the foundation for creation of a new NISO index standard. Publishers will be able to refer to the reestablished standard when specifying requirements for index creation, for both print and electronic materials. End-users of the published materials will experience an increased level of uniformity of indexes which will drive improved consistency (and therefore effectiveness) of the end-user experience.

STAKEHOLDERS:

- Professional indexers
- Publishers (including University Presses)
- Indexed Database vendors
- Libraries
- Indexing tool vendors

STATEMENT OF WORK:

- Using NISO TR02-1997 as a starting point, review, revise and extend as needed to address any issues of currency and completeness of coverage.
- All relevant advances in technology and techniques since 1997 will be addressed, including embedded indexing.
- Additionally, revise as needed to enable the NISO voting members to consider designation of final work product as a formal ANSI/NISO standard.

WORK TIMELINE:

January 2018: Approval of Work Item by NISO's ICC Topic Committee
February 2019: Approval of Work Item by NISO voting members
March 2019: Complete recruitment of interested experts to Working Group / Begin work
December 2019: Complete first draft of revised standard and circulate for public comment
February 2020: Complete final draft of revised standard
March 2020: Approval by NISO ICC Topic Committee
May 2020: Approval by NISO voting members
June 2020: Approval by ANSI; Publication as an ANSI/NISO Standard