**UNC School of Library and Information Science**

**INLS 520-1: Organization of Information**

**Fall 2014**

**Meeting times** Mondays and Wednesdays 12:30 pm – 1:45 pm

**& location** 01 Manning Hall

**Course websites** https://sakai.unc.edu/portal/site/77bcb591-6358-4a96-8e24-7daa99d2c950

**Instructor** Denise Anthony

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 Office: 7A Manning Hall

 Phone number: 919 962 3638

**Office Hours** M, T, W 2-3 pm *and by appointment*

**Description**

“Introduction to the problems and methods of organizing information, including information structures, knowledge schemas, data structures, terminological control, index language functions, and implications for searching.” http://sils.unc.edu/courses#102

This course will introduce you to concepts that you will build upon in future classes and will help you to better understand the field of Library and Information Science. Specifically, you will learn about the development and application of organizations systems for information, as well as critical terms, concepts and the skills needed to work with organization systems and their users.

**Objectives**

* Understand and apply the critical terms, main concepts, and specific challenges of information representation and organization.
* Analyze and evaluate principles and practices of information organization, including metadata functions as well as classification theory and schemes.
* Identify and implement standards for classification systems as well as data structure, content, and value.
* Compare aspects and create examples of controlled vocabularies, thesauri, taxonomies, and ontologies.
* Develop skills relating to the creation and use of organization systems.

**Communication**

Sakai is the central source of information for the class. Announcements or important updates will be posted there, but I will also send email to the group. You can reach me most readily through email. I will try to answer you within 24 hours (note: I never look at email in the middle of the night!)

**Assignments and Evaluation**

Course grades are determined as follows:

10 points: Class Participation

70 points: Assignments

20 points: Final Exam

For graduate students, points will be converted to letter grades as follows:

100-95: H, 94-80: P, 79-70: L, < 70: F

For undergraduate students, points will be converted to letter grades as follows:

100-95: A, 94-91: A-, 90-88: B+, 87-85: B, 84-81: B-, 80-78: C+, 77-75: C, 74-71: C-, 70-68: D+, 67-60: D, < 60: F

See the [undergraduate bulletin](http://www.unc.edu/ugradbulletin/procedures1.html#grading) for definitions of these letter grades.

Assignments

See the Assignments section in Sakai for details. All assignments will be submitted through Sakai.

**POLICIES & HONOR CODE**

**Honor Code**

Please respect the UNC Honor Code (http://honor.unc.edu/). Collaboration, discussion, and seeking assistance from other students as part of the course objectives is encouraged in this class and is not a violation of the Honor Code; however each student is responsible for their own final assignment submissions. In the case of written work, all words drawn from others must be [attributed appropriately](http://www.lib.unc.edu/instruct/tutorials.html) (http://www.lib.unc.edu/instruct/tutorials.html).

**Professional Conduct**

Please demonstrate integrity and professionalism in your participation in this course. This includes showing respect for all members of this course and all comments and questions posed by them.

**Students with Disabilities**

Any students requiring academic accommodations must be registered with Disability Services (<http://disabilityservices.unc.edu/>). This office will notify the instructor identifying what accommodation(s) are needed and what services may be available to the student.

**SCHEDULE OF TOPICS AND READINGS**

# ORGANIZING SYSTEMS

## August 20th: Introduction to course and Organizing Systems

### Readings:

Glushko, Robert J. “Foundations for Organizing Systems.” Chapter 1 in The Discipline of Organizing, edited by Robert J Glushko, 2012.

In class exercise:

The organizational system that is etsy.com

## August 25th: More on Organizing Systems; Resources in Organizing Systems

### Readings on Organizing Systems:

Glushko, Robert J. “The Organizing System Roadmap.” Chapter 10 in The Discipline of Organizing, edited by Robert J Glushko, 2012.

Morville, Peter, and Louis Rosenfeld. “Organization Systems.” In Information Architecture for the World Wide Web. 3rd ed. Sebastopol, California: O’Reilly, 2006. p. 53-68 (stop at Organization Structures) <http://proquestcombo.safaribooksonline.com.libproxy.lib.unc.edu/0596527349/I86131__ChapterStart__Chapter_5?readerfullscreen=&readerleftmenu=1&reader=>

### Readings on Resources:

Glushko, Robert J., Daniel D. Turner, Kimra McPherson, and Jess Hemerly. “Resources in Organizing Systems.” Chapter 3 in The Discipline of Organizing, edited by Robert J Glushko, 2012. Sections 3.1 through 3.3

Tillett, B. (2004). What is FRBR? - Library of Congress: <http://www.loc.gov/cds/downloads/FRBR.PDF>

Buckland, Michael K. “Information as Thing” Journal of the American Society for Information Science (1986-1998); Jun 1991; 42, 5

# STANDARDS

## August 27th: Standards

To do – find something about a standard in the news

### Readings:

Standards in a time of change<http://www.kcoyle.net/jal-31-3.html>

Library standards  <http://www.kcoyle.net/jal-31-4.html>

Cargill, Carl F. “Why Standardization Efforts Fail.” Journal of Electronic Publishing 14 (2011). http://quod.lib.umich.edu/j/jep/3336451.0014.103?rgn=main;view=fulltext

***Skim:***

Overview of ANSI history:

http://www.ansi.org/about\_ansi/introduction/history.aspx?menuid=1

Short video on ANSI history  <http://www.youtube.com/watch?v=kVMd87XZakI>

NISO: http://www.niso.org/about/

W3C: http://www.w3.org/Consortium/mission.html

Library of Congress Best Practices and Standards: <http://www.loc.gov/library/>

ISO: <http://www.iso.org/iso/home.html>

# DESCRIBING

## September 3: Describing Resources

### Readings:

Glushko, Robert J., Kimra McPherson, Ryan Greenberg, and Matthew Mayernik. “Resource Description and Metadata.” Chapter 4 in The Discipline of Organizing, 2012. Section 4.3 to end.

## September 8th Metadata

### First assignment on defining terms due

### Readings:

Gilliland, Anne. (2008) “Setting the stage” chapter in Introduction to Metadata, Online edition, version 3.0 <http://www.getty.edu/research/publications/electronic_publications/intrometadata/index.html>

Elings, Mary W. and Waibel, Gunter. (2007) Metadata for all: Descriptive standards and metadata sharing across libraries, archives and museums. First Monday, 12, 3-5. <http://firstmonday.org/ojs/index.php/fm/rt/printerFriendly/1628/1543>

Doctorow, Cory. (2001) Metacrap: Putting the torch to seven straw-men of the meta-utopia http://www.well.com/~doctorow/metacrap.htm

Other:

Wolfe, Jen. “Playing fast and loose with the rules: metadata cataloging for digital library projects” Chapter in Radical Cataloging (See Readings folder in Resources section in Sakai)

## September 10 Comparing Metadata Schemas

### Readings:

<http://dublincore.org/resources/faq/>

You are welcome to read the entire page, but it is only necessary for the purposes of our discussion to look at:

[What is the Dublin Core Metadata Initiative?](http://dublincore.org/resources/faq/#whatisthedublincoremetadata)

[What is the Dublin Core?](http://dublincore.org/resources/faq/#whatisthedublincore)

[What is the Dublin Core Metadata Element Set?](http://dublincore.org/resources/faq/#whatistheelementset)

[Who can benefit from using the Dublin Core Metadata Element Set?](http://dublincore.org/resources/faq/#whocanbenefit)

[What is the difference between "Simple" ("unqualified") and "Qualified" Dublin Core?](http://dublincore.org/resources/faq/#whatisthedifference)

[Should I use Simple or Qualified Dublin Core?](http://dublincore.org/resources/faq/#whatisthedifference)

[How do I begin implementing the Dublin Core Metadata Element Set?](http://dublincore.org/resources/faq/#howdoibegin)

[What is the relationship between the DCMI and other Internet standards groups?](http://dublincore.org/resources/faq/#whatistherelationship)

[Was the Dublin Core intended to be used only for digital or Web-based resources?](http://dublincore.org/resources/faq/#wasthedublincore)

[How is Dublin Core metadata used?](http://dublincore.org/resources/faq/#howisdublincoreused)

[How is Dublin Core metadata stored?](http://dublincore.org/resources/faq/#howisdublincorestored)

[How can I embed Dublin Core metadata within my HTML documents?](http://dublincore.org/resources/faq/#howcaniembed)

[What is the Dublin Core data model?](http://dublincore.org/resources/faq/#whatisthedublincoredatamodel)

[What search-engines support the Dublin Core?](http://dublincore.org/resources/faq/#whatsearchenginessupport)

[How can I use existing controlled vocabularies for DC Subject metadata?](http://dublincore.org/resources/faq/#dcsubject)

[Can I use controlled vocabularies that are not approved by DCMI?](http://dublincore.org/resources/faq/#controlledvocab)

Phelps, T. (2012). An Evaluation of Metadata and Dublin Core Use in Web-Based Resources. Libri: International Journal of Libraries & Information Services, 62(4), 326-335. (See Readings folder in Resources section of Sakai.)

Pitti, Daniel (1997) Encoded Archival Description: The Development of an Encoding Standard for Archival Finding Aids. The American Archivist, 60, p. 268 -283. (See Readings folder in Resources section of Sakai.)

***Skim:***

EAD http://www.loc.gov/ead/tglib/index.html

## September 15 Identifying and Naming Resources

### Readings:

Glushko, Robert J., Daniel D. Turner, Kimra McPherson, and Jess Hemerly. “Resources in Organizing Systems.” Chapter 3 in The Discipline of Organizing, edited by Robert J Glushko, 2012. Sections 3.4 and 3.5

Coyle, Karen. “Identifiers: Unique, Persistent, Global.” The Journal of Academic Librarianship 32, no. 4 (2006): 428–431. <http://kcoyle.net/jal-32-4.html>

Berners-Lee, Tim. Cool URIs Don’t Change. W3C Style. W3C, 1998. [http://www.w3.org/Provider/Style/URI.html](http://www.w3.org/Provider/Style/URI.html%22%20%5Ct%20%22_blank)

The Echo Nest. “Announcing Echoprint.” The Echo Nest Blog, June 23, 2011. <http://blog.echonest.com/post/6824753703/announcing-echoprint>

Whitman, Brian. “Why Music ID Resolution Matters to Every Music Fan on Facebook.” Variogr.am, 2011. <http://notes.variogr.am/post/10733372290/music-resolving-facebook>

Riecks, David. "Recommendations for Limitations on Image Filenaming." <http://www.controlledvocabulary.com/imagedatabases/filename_limits.html>

Scherle, Ryan. "Filename Requirements for Digital Objects." [http://wiki.dlib.indiana.edu/confluence/display/INF/Filename+Requirement](http://wiki.dlib.indiana.edu/confluence/display/INF/Filename%2BRequirement)

## September 17 Controlled Vocabulary

### Readings:

Glushko, Robert J., Kimra McPherson, Ryan Greenberg, and Matthew Mayernik. “Resource Description and Metadata.” Chapter 4 in The Discipline of Organizing, 2012. Section 4.3.4 to end.

Glushko, Robert J., Matthew Mayernik, and Alberto Pepe. “Describing Relationships and Structures.” Chapter 5 in The Discipline of Organizing, edited by Robert J. Glushko, 2012. JUST SECTION 5.4.1 RELATIONSHIPS BETWEEN WORD MEANINGS

Wheatly, Malcolm. “Operation Clean Data.” CIO, September 10, 2005 <http://www.cio.com.au/article/166533/operation_clean_data/>

\*Fast, K., & Leise, F (2002). What is a controlled vocabulary? http://boxesandarrows.com/what-is-a-controlled-vocabulary/

\*Fast, K., & Leise, F (2003). Creating a controlled vocabulary: http://boxesandarrows.com/creating-a-controlled-vocabulary/

\*Fast, K., & Leise, F (2003). Synonym rings and authority files: http://boxesandarrows.com/synonym-rings-and-authority-files/

\*Fast, K., & Leise, F (2003). Controlled vocabularies: A Glosso-Thesaurus: http://boxesandarrows.com/controlled-vocabularies-a-glosso-thesaurus/.

\*Note. You are only required to read the articles by Fast, Leise, and Steckel, not the blog readings, although you should certainly feel free to skim/read the blog postings too.

## September 22: Assignment on Controlled Vocabulary List Due

No readings for the day. Assignment will be gone over in class.

**September 24: Metadata content standards**

### Readings:

Coyle, Karen and Diane Hillman. Resource Description and Access: Cataloging Rules for the 20th Century. D-Lib Magazine. January/February 2007. Volume 13, Number 1/2 http://www.dlib.org/dlib/january07/coyle/01coyle.html

Landis, William E. Plays well with others: DACS and CCO as interoperable metadata content standards. VRA Bulletin. Spring, voume 34, No. 1. P. 97- 103 (Can be found in the Resources section of Sakai in the Readings folder

***Metadata Content Standards:***

Describing Archives: A Content Standard (DACS) (2013) Society of American Archivists (in Resources section in Sakai): Read the Introduction to Describing Archival Materials, p. 3 – 5 and skim through the rest, noting the headings and how the document is organized.

Cataloging Cultural Objects: <http://cco.vrafoundation.org/index.php/toolkit/cco_pdf_version/> Read Sections 1-4 of the Guidelines and skim through the rest, noting the headings and how the document is organized

Content Standard for Digital Geospatial Metadata <http://www.fgdc.gov/metadata/csdgm/>

Read the Introduction and skim through the rest, noting the headings and how the document is organized

RDA Toolkit [www.access.rdatoolkit.org](http://www.access.rdatoolkit.org)

Account: uncch-sils

Password: sils#1932

Read the Introduction and skim through the rest, noting the headings and how the document is organized

## September 29: More on Content Standards

### Continue to acquaint yourself with RDA.

# RELATIONSHIPS

## October 1: Categories and Categorization

### Readings:

Glushko, Robert J., Rachelle Annechino, Jess Hemerly, and Longhao Wang. “Describing Resource Classes and Types.” Chapter 6 in The Discipline of Organizing, edited by Robert J. Glushko, 2012.

Glushko, Robert J, Paul P Maglio, Teenie Matlock, and Lawrence W Barsalou. “Categorization in the Wild.” Trends in Cognitive Sciences 12, no. 4 (April 2008): 129– 35. <http://www.sciencedirect.com/science/article/pii/S1364661308000557>

Lakeoff, George. Women, Fire and Dangerous Things. Preface and Chapter 1 (Chapter 2 is optional) See the Readings folder in the Resources Section in Sakai.

## *October 6: Classification: Assigning Resources to Categories*

Assignment on Content Standards Due

### Readings:

Glushko, Robert J, ed. “Classification: Assigning Resources to Categories.” Chapter 7 in The Discipline of Organizing, 2012. Sections 7.1 and 7.2 only.

The Man Who Wanted to Classify the World, directed by Levie, Francoise, produced by Sofidoc Productions (Filmakers Library, 2004), 61 minutes. Streaming video available via the UNC-Chapel Hill Libraries: (You need to use your onyen to login to: http://flon.alexanderstreet.com.libproxy.lib.unc.edu/View/1641522 )

***FYI:***

Paul Otlet: http://en.wikipedia.org/wiki/Paul\_Otlet.

Henri La Fontaine: http://en.wikipedia.org/wiki/Henri\_La\_Fontaine.

**Useful links to explore**:

ASIS&T SIG/CR (ASIS&T Special Interest Group / Classification Research): http://www.asis.org/SIG/cr.html.

International Society for Knowledge Organization: http://www.isko.org/.

International Federation of Classification Societies: http://www.classification-society.org/.

Classification Society of North America homepage: http://www.classification-society.org/csna/csna.html.

## October 8: Bibliographic Classification

### Readings:

Taylor and Joudry, (2008). The Organization of Information. Chapter 11, p. 383 – end. In Sakai Resources in Readings folder.

## October 13: Taxonomies and Knowledge Organization Systems

### Readings:

Hodge, Gail *Systems of Knowledge Organization for Digital Libraries: Beyond Traditional Authority Files* Council on Library and Information Resources Report 91 (2000) http://www.clir.org/pubs/reports/pub91/contents.html

Lambe, P. (2007). Taxonomies can take many forms. In Organising Knowledge: Taxonomies, Knowledge and Organisational Effectiveness, 4-48. Oxford: Chandos.

Morville, Peter, and Louis Rosenfeld. “Organization Systems.” Chapter 5 in Information Architecture for the World Wide Web. 3rd ed. Sebastopol, California: O’Reilly, 2006. p. 68- end. **NOTE: there are no page numbers in the online version! Start with the section “Organization Structures” (about half way through) and read to the end.** <http://proquestcombo.safaribooksonline.com.libproxy.lib.unc.edu/0596527349/I86131__ChapterStart__Chapter_5?readerfullscreen=&readerleftmenu=1&reader=>

## October 15

No class meeting

## October 20th Thesauri

###  Readings:

Ricci, C. (2004). Developing and Creatively Leveraging Hierarchical Metadata and Taxonomy http://boxesandarrows.com/developing-and-creatively-leveraging-hierarchical-metadata-and-taxonomy/

Thesaurus principles and practice. (2008, rev. from 1992 doc.). Willpower Information Management Consultants: <http://www.willpowerinfo.co.uk/thesprin.htm>.

Skim: Guidelines for the Construction, Format, and Management of Monolingual Thesauri. ANSI/NISO Z39.19 - 2003

## October 22nd Faceted Classification

***Readings:***

Glushko, Robert J, ed. “Classification: Assigning Resources to Categories.” Chapter 7 in The Discipline of Organizing, 2012. Section 7.4 only

Yee, K.-P., Swearingen, K., Li, K., & Hearst, M. (2003). Faceted metadata for image search and browsing. In *Proceedings of the SIGCHI conference on Human factors in computing systems* (pp. 401–408). ACM. http://kevinli.net/flamenco-chi03.pdf

Ranganathan for IAs by Mike Steckel on 2002/10/07: <http://boxesandarrows.com/ranganathan-for-ias/>

## October 27th Faceted Browsing

 Faceted classification exercise due

***Readings:***

La Barre, Kathryn A. (2006) Reconsidering the Practical Application of Facets on the Webhttps://www.ideals.illinois.edu/handle/2142/15103

## October 29 Ontologies

***Readings:***

## Ontology Development 101: A Guide to Creating Your First Ontology <http://protege.stanford.edu/publications/ontology_development/ontology101-noy-mcguinness.html>

What is an Ontology? http://www.youtube.com/watch?v=jfUPLuPL3Ho

***Explore:***

Gene Ontology   <http://www.geneontology.org/>

Disease Ontology <http://disease-ontology.org/> please read the tutorial

## November 3 Taking it to the Web

## Readings:

## Introduction to the Semantic Web <http://www.youtube.com/watch?v=OGg8A2zfWKg>

XML Namespaces: <http://www.w3schools.com/xml/xml_namespaces.asp>

RDF: <http://www.w3schools.com/webservices/ws_rdf_intro.asp>  (Please review the 10 sections (Intro – Reference)

What is RDF and What is it Good For? <http://www.rdfabout.com/intro/> chapters 1 - 4

Glushko 4.2.2.4

## November 5 Linked Data in Libraries and Archives

***Read/ Listen/View:***

Riley, J. (2012). Linked Data and RDA: Looking at Next-Generation Cataloging. UNC Libraries, Digital Discussion Sessions. (The recording of the talk is available via iTunesU, and the slides are in Sakai Resources): http://digitaldiscussions.web.unc.edu/2012/08/17/recording-available-for-first-digital-discussions-session/

BibFrame <http://www.loc.gov/bibframe/> Read the FAQs

Social Networks and Archival Context Project: a Case Study of Emerging Cyberinfrastructure http://www.digitalhumanities.org/dhq/vol/8/3/000184/000184.html

#### November 10 Understanding MARC

####  Readings:

Understanding MARC: <http://www.loc.gov/marc/umb/um01to06.html> “What is a MARC Record and Why is it Important?” I-VI

Another reference: http://www.oclc.org/bibformats/en.html

## November 12 XML

***Readings:***

XML in 10 points. <http://www.w3.org/XML/1999/XML-in-10-points>

XML tutorial: http://www.w3schools.com/xml/xml\_whatis.asp

If you don’t know about XML, this is a good place to learn. Regardless, it will be good to review it before the class.

Birnbaum, David J. “What is XML and why should humanists care? An even gentler introduction to XML”, January 5, 2012. <http://dh.obdurodon.org/what-is-xml.xhtml>. Read up to The XML family of standards closely and skim the rest.

Morrisey, Sheila "More What You’d Call ‘Guidelines’ Than Actual Rules”: Variation in the Use of Standards the Journal of electronic Publishing  Volume 14, Issue 1, Summer 2011<http://quod.lib.umich.edu/j/jep/3336451.0014.104?view=text;rgn=main>

## November 17 OAI and Z39.50

#### Readings: (all are in Sakai/Resources/Readings

Joteen Singh, R. K. A Library Software Model in 21st Century Network Environment. DESIDOC Journal of Library & Information Technology; May 2010, Vol. 30 Issue 3, p51-55, 5p

Shreeves, Sarah L.; Haning, Thomas G.; Hagedorn, Kat. Library Trends, Spring2005, Vol. 53 Issue 4, p576-589, 14p

Yiotis, Kristen. The open access initiative: a new paradigm for scholarly communications. Information Technology & Libraries; December 2005, Vol. 24 Issue 4, p157-162, 6p

Ward, Maribeth**.** Expanding access to information with Z39.50. American Libraries, July/August 1994, Vol. 25, p639-641, 3p

## November 19 MARC and XML Assignment due

## November 24: Review

**Reading:**

Hjorland, B (2011) Is Classification Necessary After Google? *Journal of Documentation* 68 (3): 299-317

## November 26 – no class Thanksgiving Break

## December 1: Poster session

## December 3: Poster session

December 8: Culminating experience 12 pm – 3 pm.