LIS 714: Metadata

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Fall 2010 Online

Syllabus (updated 9-9-10)

Catalog Description

Principles and applications of metadata for digital resource representation and retrieval using various schemes. Includes metadata creation, management, and dissemination, especially for digital libraries. 3 credits.

Course Objectives

1) To become conversant with concepts of metadata for the description of and access to knowledge records; 2) To become conversant with the principles and standards for description and access and authority control; 3) To understand the broader theoretical context in which these principles function; 4) To acquire the ability to create metadata; and, 5) To be able to cite authorities, synthesize opinions, and defend work in written and oral form.

PREREQUISITES

Required:

"Successful completion of L&I SCI 511 (531) Organization of Information

"Basic computer literacy as outlined in the SOIS policy: http://www.uwm.edu/Dept/SOIS/academics/MLIS/mliscomplit.htm

"SOIS technology requirements for distance learning: http://www.uwm.edu/Dept/SLIS/academics/DE/deptechreq.htm

Recommended:

"Completion of L&I SCI 571 Information Access and Retrieval

Orientation

We will begin with an overview of the role of metadata in the organization of information, both in bibliographic and nonbibliographic milieus. Then we will proceed to a thorough review of the recent development of metadata concepts and tools for retrieval of web-resources. The majority of the course will involve hands-on work with resources and metadata standards, including *Dublin Core, EAD,* and *XML*. Techniques for description and access will be practiced in class and honed through un-graded homework assignments.

A mock steering committee event is the capstone scenario for the course. In this event, your small groups will present and defend proposals to alter various aspects of major metadata schema.

Grading

The grade will consist of the following:

1) Homework (30%)--Four ungraded metadata-creation assignments.

2) Group Project (30%)--Students will work in small groups (Task Forces) to develop proposals for revision of meta-data standards. Written proposals are due December 2. These will be considered during the week of December 9 by our "Mock" steering committee session (actually, an asynchronous wiki event).

3) Final Exam (30%)--A final exam will be written, including some metadata creation, and both long and short essays; essays are expected to demonstrate comprehension of the reserve reading. This is due December 16.

4) Discretion (10%)--my judgment, but mostly based on participation in the blogging, homework all turned in, attendance at chat, participation in the small group, etc.

Textbooks

Zeng, Marcia Lei and Qin, Jian. 2008. *Metadata*. New York: Neal-Schuman.

> You have to buy this one. You are going to read the whole thing. So either buy it new, or buy a copy from someone who took the course before. It isn't a "keeper" book.

Smiraglia, Richard P. ed. 2005. *Metadata: A cataloger's primer*. Binghamton: Haworth Information Press.

> You really don't have to buy this one. You are going to read the whole thing. But it was also published as a special issue of *Cataloging & classification quarterly* vol. 40 nos. 3/4, which means all of the content is available to you free, in full-text, online through the library (use the journal article finder on the UWM library's homepage). Only buy this if you decide to use it for doorstops or Christmas/Hanukkah presents. Here is the Table of Contents showing you how to locate the individual chapters as articles:

> > Smiraglia, Richard P. Introduction

> > Part I: Intellectual Foundations

> > > Greenberg, Jane, Understanding Metadata and Metadata Schemes. Howarth, Lynne. Metadata and

Library Catalog

Thurman, Alexander C. Metadata Standards for Archival Control: An Introduction to EAD and EAC

Yott, Patrick. Introduction to XML

Cantara, Linda. METS: the Metadata Encoding and Transmission Standard

Chopey, Michael. Planning and Implementing a Metadata-driven Digital

Reposit
ory

SCHEDULE:

Interesting thing about online delivery is that we can
decide on these dates as we go along. So I'm posting
this schedule at the beginning of the course as a general
guideline for all of us. But chances are it will change as
we move along (always by adding time for specific
activities). So check back here often. I will be changing
this.
And, I will load new content for you each Thurs., come
what may. Blogging assignments will expect your more-
or-less immediate response; so I'll want you to pay
attention to the dynamics of the interaction in our
group.

Date	Topic	Textbook	Due
September 2	Knowledge Artifacts and Information Meta-data concepts: Introduction to Metadata	Smiraglia: Smiraglia, "Introducing Metadata"; Greenberg, "Understanding Metadata …"; Zeng chapter 1	
September 9	Further Concepts in Metadata; TEI, RDF, The Dublin Core	Smiraglia: Coleman, "From Cataloging to Metadata"; Dublin Core Zeng, chapters 2-5	Assignment 1
September 16	The Dublin Core in Detail		Discussion--OUR DIGITAL LIBRARY
September 23	Principles of Access; Authority Control	Smiraglia: Cwiok, "Defining Element …"	
September 30	Standards for Resource Description; Bibliographic Description ; AACR2 and USMARC as Meta-data Standards Revision Process	Smiraglia: Howarth, "Metadata and Bibliographic Control" Zeng, Appendix A	
October 7	Vocabulary and syntax schemes; subject analysis and representation	Canadian Thanksgiving is this week … relax a bit ….	Assignment 2
October 14	Encoding and XML, OAI harvesting, OAI-DC XML; metadata and the Web	Smiraglia: Yott, "Introduction to XML"	
October 21	Archives metadata: EAD/EAC	Smiraglia: Thurman, "Metadata Standards for Archival Control"	
October 28	Library metadata, MARC,	Smiraglia: Smiraglia, "Content	

	MARCXML, FRBR, RDA; ONIX; TEI	Metadata …"	
November 4	Museum metadata, VRA, CCO, etc.		Assignment 3 Small groups formed
November 11	This is the real Veteran's Day (Remembrance Day in Canada). So let's take a week off.		
November 18	Metadata Interoperability	Smiraglia: Cantara, "METS" Zeng, chapter 8	Assignment 4
November 25	American Thanksgiving ... work on your pumpkin pie this week	eat turkey, go shopping, help the economy	
December 2	Metadata services, repositories, OAI harvesting Metadata quality; manipulation/ normalization, repurposing/reuse	Smiraglia: Chopey, "Planning and Implementing …"; Campbell, "Metadata, Metaphor, and Metonymy" Zeng, chapters 6-7	Proposals due
December 9	Review Metadata research Mock Steering Committee Event	Smiraglia: Ferraioli, "Exploratory Study ..." Zeng, chapter 9	
December 16			final exam

COURSE REQUIREMENTS AND POLICIES

Software.

This course requires use of the following software and file formats:

o Microsoft Word 2003 or 2007 or Open Office Writer for text documents; acceptable file formats: .doc, .docx, .rtf, or .odt.

o Microsoft Excel 2003 or 2007 or Open Office Calc for Dublin Core records; acceptable file formats: .xls, .xlsx, or .ods.

Contacting the Professor

I reside in Philadelphia, Pennsylvania, and I often work in both Amsterdam and Toronto. So I will always be available to you online, but time delays have to be taken into account. It is always easiest to reach me via email. Please use the email within the course module for course-related questions.

D2L and Student Privacy Statement:

Certain SOIS courses utilize the instructional technology Desire to Learn (D2L) to facilitate online learning. D2L provides instructors the ability to view both individual data points and aggregate course statistics, including the dates and times individual students access the system, what pages a student has viewed, the duration of visits, and the IP address of the computer used to access the course website. This information is kept confidential in accordance with the Family Educational Rights and Privacy Act (FERPA), but may be used for student evaluation.

UWM AND SOIS ACADEMIC POLICIES

The following links (note these are not linked directly; please copy the link into your browser) contain university policies affecting all SOIS students. Many of the links below may be accessed through a PDF-document maintained by the Secretary of the University: http://www.uwm.edu/Dept/SecU/SyllabusLinks.pdf. Undergraduates may also find the Panther Planner and Undergraduate Student Handbook useful (http://www.uwm.edu/Dept/OSL/DOS/Handbook2005-06.pdf). For graduate students, there are additional guidelines from the Graduate School (http://www.uwm.edu/Dept/Grad_Sch/StudentInfo/), including those found in the Graduate Student and Faculty Handbook: http://www.uwm.edu/Dept/Grad_Sch/Publications/Handbook/.

Students with disabilities. If you will need accommodations in order to meet any of the requirements of a course, please contact the instructor as soon as possible. Students with disabilities are responsible to communicate directly with the instructor to ensure special accommodation in a timely manner. There is comprehensive coverage of issues related to disabilities at the Student Accessibility Center (http://www.uwm.edu/Dept/DSAD/SAC/MainOffice.html), important components of which are expressed here: http://www.uwm.edu/Dept/DSAD/SAC/SACltr.pdf.

Religious observances. Students' sincerely held religious beliefs must be reasonably accommodated with respect to all examinations and other academic requirements, according to the following policy: http://www.uwm.edu/Dept/SecU/acad%2Badmin_policies/S1.5.htm. Please notify your instructor within the first three weeks of the Fall or Spring Term (first week of shorter-term or Summer courses) of any specific days or dates on which you request relief from an examination or academic requirement for religious observances.

Students called to active military duty. UWM has several policies that accommodate students who must temporarily lay aside their educational pursuits when called to active duty in the military (see http://www3.uwm.edu/des/web/registration/militarycallup.cfm), including provisions for refunds, readmission, grading, and other situations.

Incompletes. A notation of "incomplete" may be given in lieu of a final grade to a student who has carried a subject successfully until the end of a semester but who,

because of illness or other unusual and substantial cause beyond the student's control, has been unable to take or complete the final examination or some limited amount of other term work. An incomplete is not given unless the student proves to the instructor that s/he was prevented from completing course requirements for just cause as indicated above (http://www.uwm.edu/Dept/SecU/acad%2Badmin_policies/S31.pdf).

Discriminatory conduct (such as sexual harassment). UWM and SOIS are committed to building and maintaining a campus environment that recognizes the inherent worth and dignity of every person, fosters tolerance, sensitivity, understanding, and mutual respect, and encourages the members of its community to strive to reach their full potential. The UWM policy statement (http://www.uwm.edu/Dept/SecU/acad%2Badmin_policies/S47.pdf) summarizes and defines situations that constitute discriminatory conduct. If you have questions, please contact an appropriate SOIS administrator.

Academic misconduct. Cheating on exams and plagiarism are violations of the academic honor code and carry severe sanctions, ranging from a failing grade for a course or assignment to expulsion from the University. See the following document (http://www.uwm.edu/Dept/OSL/DOS/conduct.html) or contact the SOIS Investigating Officer (currently the Associate Dean) for more information.

Complaints. Students may direct complaints to the SOIS Dean or Associate Dean. If the complaint allegedly violates a specific university policy, it may be directed to the appropriate university office responsible for enforcing the policy.

Grade appeal procedures. A student may appeal a grade on the grounds that it is based on a capricious or arbitrary decision of the course instructor. Such an appeal shall follow SOIS appeals procedures or, in the case of a graduate student, the Graduate School. These procedures are available in writing from the respective department chairperson or the Academic Dean of the College/School (http://www.uwm.edu/Dept/SecU/acad%2Badmin_policies/S28.htm).

Examinations, Finals. The Secretary of the University is authorized to prepare the final examination schedule. The time of the final examination for an individual or a class may be changed only with the prior approval of the dean or director of the respective college/school. The change will involve a postponement to a later date. For individuals with exam conflicts, a separate week at the very end of the exam week will be reserved to take one of the conflicting exams (http://www.uwm.edu/Dept/SecU/acad+admin_policies/S22.htm).

Additional Readings

Boiko, Bob. "Defining Data, Information, and Content: A CM Domain White Paper." http://www.metatorial.com/downloads/Boiko_Wp_DefiningDataInformationContent.pdf

Gilliland, Anne. "Setting the Stage." In: Baca, Murtha. Introduction to Metadata. Second Edition. Los Angeles: Getty Research Institute, 2008. Online edition, Version 3.0: http://www.getty.edu/research/conducting_research/standards/intrometadata/setting.html

DCAM. DCMI Abstract Model. Creators: Andy Powell, Mikael Nilsson, Ambjörn Naeve, Pete Johnston, and Thomas Baker. Online: http://dublincore.org/documents/2007/04/02/abstract-model/

Dublin Core FAQ: http://dublincore.org/resources/faq/

Foucault, Michel. 1984. What is an author? In Rabinow, P. ed., *Foucault reader*. Harmondsworth: Penguin, pp. 101-20.

Salo, Dorothea. 2009. Name authority control in institutional repositories. *Cataloging & Classification Quarterly* 47 no. 3: 249-61.

Smiraglia, Richard P. 1992. The continuous revision process. In Smiraglia, Richard ed. *Origins, content, and future of* AACR2 *revised*. Chicago: ALCTS, pp. 14- 26.

DCAM. DCMI Abstract Model. Creators: Andy Powell, Mikael Nilsson, Ambjörn Naeve, Pete Johnston, and Thomas Baker. Online: http://dublincore.org/documents/2007/04/02/abstract-model/

ANSI/NISO Z39.19-2005. Guidelines for the Construction, Format, and Management of Monolingual Controlled Vocabularies. Scan the whole document; read closely Section 5. Available online: http://www.niso.org/kst/reports/standards?step=2&gid=&project_key=7cc9b583cb5a62e8c15d3099e0bb46bbae9cf38a

LCTGM. LC Thesaurus for Graphic Materials I: Subject Terms (TGM I). Introduction: Section II (Indexing Images: Some Principles) and Section III (Subject Heading Strings and Subdivisions). http://www.loc.gov/rr/print/tgm1/

Turner, James M. and Goodrum, Abby A.(2002)'Modeling Videos as Works',Cataloging & Classification Quarterly,33:3,27 — 38.

Menard, Elaine. Study on the Influence of Vocabularies used for Image Indexing in a Multilingual Retrieval Environment. Knowledge Organization, 34(2), 91-100.

Bowen, Jennifer. "Metadata to Support Next-Generation Library Resource Discovery: Lessons from the eXtensible Catalog, Phase 1." *Information Technology and Libraries* June 2008, p. 6-19. http://hdl.handle.net/1802/5757

DLF/Aquifer MODS Guide. Digital Library Federation / Aquifer Implementation Guidelines for Shareable MODS Records, Version 1.0, November 2006. Selections for week 6: Examples on pages 101-116. Online: http://wiki.dlib.indiana.edu/confluence/download/attachments/28330/DLFMODS_ImplementationGuidelines_Version1.pdf?version=1

Lowe, Carrie. 2000. Design and implementation of a metadata project for education. *Journal of internet cataloging* 3 no. 2/3: 109-26.

Greenberg, Jane and Spurgin, Kristina and Crystal, Abe (2005) Final Report for the AMeGA (Automatic Metadata Generation Applications) Project. Technical Report. http://dlist.sir.arizona.edu/878/)

Greenberg, Jane. 2009. Theoretical considerations of lifecycle modeling: an analysis of the Dryad Repository demonstrating automatic metadata propagation, inheritance, and value system adoption. *Cataloging & classification quarterly* 47 no. 3/4: 380-402.

Oliver, Chris. "Changing to RDA." *Feliciter* Issue #5, 2007, p. 250-253 http://www.rda-jsc.org/docs/felicitervol53no7p250-253.pdf.

Cataloging Cultural Objects: A Guide to Describing Cultural Works and Their Images. Edited by Murtha Baca et al. Chicago: American Library Association, 2006. xiii, 396 p. $75.00 ($67.50 to members) ISBN 0-8389-3564-8) provides details of both approach and technique. Segments of the volume are maintained online, and may be found here http://www.vrafoundation.org/ccoweb/cco/selections.html