TE WHARE WĀNANGA O TE ŪPOKO O TE IKA A MĀUI

VICTORIA
UNIVERSITY OF WELLINGTON

School of Information Management

INFO 527 CREATING AND MANAGING METADATA

Trimester 1, 2016

COURSE OUTLINE

Prescription

An introduction to the theories, standards, and systems used for the storage and retrieval of information. Topics include metadata schemes, standards for record structure and content, and the design principles of databases used for information management and retrieval.

Course Learning Objectives

Students who pass this course should be able to:

1. Explain the need for different types of information retrieval systems in different contexts, in particular the relationships between a type of information environment, the users' information requirements, and the nature of the information resource involved.
2. Outline and apply common techniques used to determine the effectiveness of a text-based information retrieval system.
3. Explain the purpose of descriptive, administrative, and structural metadata in an information retrieval system.
4. Discuss the function of subject retrieval metadata, including controlled vocabulary systems such as classification schemes, subject headings lists, and thesauri, in an information retrieval system.
5. Use appropriate design principles to create a database application for information retrieval.
6. Identify techniques used to provide access to information published on the Web.
7. Describe the relationship between knowledge management systems and information retrieval systems in private sector and public organisations.
8. Discuss cultural issues that may affect information retrieval, particularly in the context of Māori resources.

Course Content

Week	Date	Topic
1	29 February-4 March	Organising information for retrieval
2	7-11 March	Evaluating information retrieval systems
3	14-18 March	Information retrieval and information seeking
4	21-23 March	Metadata: key concepts and issues
	Easter break	
5	31 March-1 April	Metadata: key concepts and issues
6	4-8 April	Metadata: schemas and description
7	11-15 April	Databases and system design
8	18-22 April	Metadata: access and authority control
	Mid-Trimester break	

9	2-6 May	Subject analysis and vocabulary control
10	9-13 May	Categorisation and arrangement; User-generated metadata
11	16-20 May	Information retrieval on the Web
12	23-27 May	Information architecture
13	30 May-3 June	Knowledge management; multimedia retrieval; the future

Trimester Dates
From Monday 29th February to Friday 3rd June 2016.

Withdrawal from Course
1. Your fees will be refunded if you withdraw from this course on or before Friday 11th March 2016.

2. The standard last date for withdrawal from this course is Friday 13th May 2016. After this date, students forced to withdraw by circumstances beyond their control must apply for permission on an '*Application for Associate Dean's Permission to Withdraw Late'* including supporting documentation. The application form is available from either of the Faculty's Student Customer Service Desks or online.

Names and Contact Details
Course Coordinator and Lecturer: Brenda Chawner
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Class Times and Room Numbers
INFO 527 will be delivered using a blended/flexible learning approach. There will be no regular weekly classes. Optional tutorials will be offered in Auckland on Saturday, 19 March and Saturday, 7 May, and by iConferencing the following weeks for students in other parts of the country. Additional information about these sessions, including the days and times they are offered, will be available on the course Blackboard site.

Course Delivery

Course materials
Weekly study guides, readings and other materials will be made available on Blackboard.

Online discussion
Blackboard online discussion boards will be used to discuss topics covered in INFO 527, and will also provide a forum for students to ask questions about the course material and assessments.

IST programmes information
Information relating to the Information Studies Programmes will be found in the Blackboard Community *Information Studies*, and through the IST-students email list.

iConferencing
iConferencing sessions are conducted using the interactive Saba Classroom platform, you will need an Internet-connected device, microphone, headphones/speakers (a webcam is optional). Further information about using the iConferencing software and the platform requirements are available in the Information Studies Community on Blackboard.

If a scheduled tutorial session does not run, please check Blackboard for an announcement of any alternative arrangements that the lecturer may make. iConferencing session recordings will also be available on Blackboard..

Readings
There is no prescribed text for this course; instead, you are expected to complete the weekly readings for each module, which will be available on the INFO527 course pages on Blackboard under the relevant module. A preliminary list of required readings is available at the end of this document. Links to these readings will be available in the course Blackboard site, along with suggestions for further reading. In addition, 3-day loan books relevant to INFO 527 are listed under the INFO527 VUW Library Course Reserves. To access the course reserves list for INFO527, go to the VUW Library Catalogue and search for INFO527 under Course Reserves.

Mandatory course requirements
In addition to obtaining an overall course mark of 50 or better, students must submit all assignments by the deadlines specified in the course outline, unless an arrangement has been made with the course coordinator prior to the deadline, or a major personal emergency prevents submission (evidence supporting this must be supplied as soon as possible to the course coordinator).

If you believe that exceptional circumstances may prevent you from meeting the mandatory course requirements, contact the Course Coordinator for advice as soon as possible.

If you cannot complete an assignment or sit a test or examination, refer to
www.victoria.ac.nz/home/study/exams-and-assessments/aegrotat

Expected Workload
To achieve satisfactory grades, you will need to spend approximately 12.5 hours per week on INFO 527, including time spent at the iConferencing tutorial sessions and contributing to the INFO 527 Blackboard discussion forums. The balance of your time should be spent reading material posted on

Blackboard http://blackboard.vuw.ac.nz/, doing any practical work required for the weekly modules, and working on assignments.

Assessment
The Assessment Handbook will apply to all VUW courses: see http://www.victoria.ac.nz/documents/policy/staff-policy/assessment-handbook.pdf.

This course will be internally assessed. All assessment will be submitted online via Blackboard. For all further details, including the requirements, assessment criteria, and submission details, please see the 'Assessment' section of the INFO 527 course site on Blackboard.

Assignment	Date due	Value	Length	Learning Objectives
1. Evaluation of the effectiveness of metadata	Monday, 11April	30%	2000 words	1-3
2. Proposal for a retrieval system	Monday, 30 May	50%	2000 words, plus 10 sample records	1-5
3. Discussion board postings	Various	20%		1-8

Penalties
Word count
Each submitted assignment *must* contain a word count, easily available from your word-processing program. The penalty for not including your word count, or going over the word count, will be 5%.

Late assignments
Assignments submitted after they are due will have a 10% penalty imposed unless an extension has been granted by the course coordinator. Assignments submitted more than one week after they are due will not be accepted unless there are exceptional circumstances and the late submission has the prior approval of the course coordinator.

Use of Turnitin
Student work provided for assessment in this course may be checked for academic integrity by the electronic search engine http://www.turnitin.com. Turnitin is an on-line plagiarism prevention tool which compares submitted work with a very large database of existing material. At the discretion of the Head of School, handwritten work may be copy-typed by the School and submitted to Turnitin. A copy of submitted materials will be retained on behalf of the University for detection of future plagiarism, but access to the full text of submissions will not be made available to any other party.

Materials and Equipment
As part of this course you will need to use resources on the Internet, as well as selected databases and online services. You will require access to the Internet to use these databases, and will also need to authenticate some databases using your student username and password.

For the second assignment in INFO 527 you may use a database application, DB/Textworks, to create a small-scale information retrieval system. DB/Textworks is used in many New Zealand information centres, and you will have access to a demonstration version for the assignment. Please note that this software requires you to have access to a computer running the Windows operating system. Other options will be offered to students who use other platforms, such as Mac OS X or Linux.

Student feedback

Course evaluations in 2015 indicated that although students were generally very satisfied with the content and delivery of INFO 527, some found the amount of reading higher than in other courses. This feedback was taken into account in planning the readings for the 2016 course.

Student feedback on University courses may be found at www.cad.vuw.ac.nz/feedback/feedback_display.php.

Class Representative

The IST programmes have a student committee which provides a communication channel to liaise with the Programmes Director and course coordinators on behalf of students.

Communication of Additional Information

Additional information about the course, including a weekly study guide and discussion forums, is available on Blackboard.

Link to general information

For general information about course-related matters, go to http://www.victoria.ac.nz/vbs/studenthelp/general-course-information

Note to Students

Your assessed work may also be used for quality assurance purposes, such as to assess the level of achievement of learning objectives as required for accreditation and academic audit. The findings may be used to inform changes aimed at improving the quality of VBS programmes. All material used for such processes will be treated as confidential, and the outcome will not affect your grade for the course.

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<h3 align="center">Preliminary list of readings</h3>

Module 1: Organising information for retrieval

Reading 1: Buckland, M. (2014). Documentality Beyond Documents. *The Monist, 97*(2), 179-186.

Reading 2: Hartland, R., McKemmish, S. & Upward, F. (2005). Documents. In Sue McKemmish, et al. (Eds.), *Archives: Recordkeeping in society* (pp. 75-100). Wagga Wagga, NSW: Centre for Information Studies, Charles Sturt University.

Reading 3: Currall, J., Moss, M. & Stuart, S. (2004). What is a collection? *Archivaria 58*, 131-146.

Reading 4: Latham, K. F. (2012). Museum Object as Document: Using Buckland's Information Concepts to Understand Museum Experiences. *Journal of Documentation, 68*(1), 45-71. DOI 10.1108/0022041121120329

Module 2: Evaluating information retrieval systems

Reading 1: Chu, H. (2010). Evaluation of information representation and retrieval, In *Information representation and retrieval in the digital age* (pp. 207-257). Medford, NJ: American Society for Information Science and Technology by Information Today.

Reading 2: Daniels, M. G. & Yakel, E. (2010). Seek and you may find: Successful search in online finding aid systems. *American Archivist, 73*(2):535-568.

Reading 3: Koolen, M., Kamps, J. & de Keijzer, V. (2009). Information retrieval in cultural heritage. *Interdisciplinary Science Reviews, 34*(2/3), 268-284.

Reading 4: Švab, K., & Žumer, M. (2015). The Value of a Library Catalog for Selecting Children's Picture Books. *Cataloging & Classification Quarterly, 53*(7), 717-737. doi:10.1080/01639374.2015.1044059

Module 3: *Information* retrieval and information seeking

Reading 1: Lesk, M. (1996) The seven ages of information retrieval. IFLA UDT Occasional Paper, available from http://archive.ifla.org/VI/5/op/udtop5/udtop5.htm

Reading 2: Robson, A., & Robinson, L. (2015). The Information Seeking and Communication Model: A study of its practical application in healthcare. *Journal of Documentation, 71*(5), 1043-1069. doi:10.1108/JD-01-2015-0023

Reading 3: Joseph, P., Debowski, S., & Goldschmidt, P. (2013). Search behaviour in electronic document and records management systems: An exploratory investigation and model. *Information Research, 18*(1). Retrieved from http://www.informationr.net/ir/18-1/paper572.html

Module 4/5: Metadata: key concepts and issues

Reading 1: Gilliland, A. J. (2008). Setting the stage. In Murtha Baca (Ed.), *Introduction to metadata 3.0* (19 pp.). Los Angeles: Getty Institute.

Reading 2: Coyle, K. (2005). Managing technology: Understanding metadata and its purpose. *Journal of Academic Librarianship, 31*(2), 160-163. DOI 10.1016/j.acalib.2004.12.010

Reading 3: Seeman, D. (2012). Naming names: The ethics of identification in digital library metadata. *Knowledge Organization, 39*(5), 325-331.

Reading 4: Gilliland, A. J. (2012). Contemplating co-creator rights in archival description. *Knowledge Organization, 39*(5), 340-346.

Reading 5: McQueen, K. (2015). Ethical Issues of Knowledge Organization in Designing a Metadata Schema for the Leo Kottke Archives. *Knowledge Organization, 42*(5), 332-338.

Module 6: Metadata: schemas and description

Reading 1: Warren, J. W. (2015). Zen and the Art of Metadata Maintenance. *Journal Of Electronic Publishing, 18*(3). Retrieved from http://quod.lib.umich.edu/j/jep/3336451.0018.305?view=text;rgn=main

Reading 2: Otto, J. J. (2014). Administrative Metadata for Long-Term Preservation and Management of Resources: A Survey of Current Practices in ARL Libraries. *Library Resources and Technical Services, 58*(1), 4-32.

Reading 3: Carlyle, A. (2006). Understanding FRBR As a Conceptual Model: FRBR and the Bibliographic Universe. *Library Resources and Technical Services, 50*(4), 264-273.

Reading 3: Milton, L. (2008). Arrangement and description. In Jackie Bettington, Kim Eberhard, Rowena Loo and Clive Smith (Eds.), *Keeping archives* (3rd ed., pp. 252-291). Canberra, ACT: Australian Society of Archivists.

Reading 4: Phelps, T. E. (2012). An evaluation of metadata and Dublin Core use in Web-based resources. *Libri: International Journal of Libraries & Information Services, 62*(4), 326-335.

Module 7: Databases and system design

Reading 1: Tenopir, C. & Lundeen, G. W. (1988). Search features and file structures. In *Managing your information: How to design and create a textual database on your microcomputer* (pp. 25-46). New York: Neal-Schuman.

Reading 2: Archives New Zealand. (2008). Technical Specifications for the Electronic Recordkeeping Metadata Standard (p. 1-16) Available from http://archives.govt.nz/sites/default/files/TS_4.pdf

Reading 3: Paling, S. (2011). Developing a Metadata Element Set for Organizing Literary Works: A Survey of the American Literary Community. *Knowledge Organization, 38*(3), 262-277.

Module 8: Metadata: access and authority control

Reading 1: Dunn, L. (2015). Name authority control in large projects. *Indexer, 33*(3), C1-C7.

Reading 2: O'Dell, A. J. (2015). Maker Metadata: Problems and Possibilities. *Cataloging & Classification Quarterly, 53*(7), 785-800. doi: 10.1080/01639374.2015.1020584

Reading 3: Noruzi, A. (2012). FRBR and Tillett's Taxonomy of Bibliographic Relationships. *Knowledge Organization, 39*(6), 409-416.

Reading 4: Whalen, M. (2008). Rights metadata made simple. In Murtha Baca (Ed.), *Introduction to metadata 3.0.* (19 pp.). Los Angeles: Getty Institute.

Module 9: Subject analysis and vocabulary control

Reading 1: Gross, T., Taylor, A. G., & Joudrey, D. N. (2015). Still a Lot to Lose: The Role of Controlled Vocabulary in Keyword Searching. *Cataloging & Classification Quarterly, 53*(1), 1-39. doi: 10.1080/01639374.2014.917447

Reading 2: Lancaster, F. W. (2003). Indexing principles. In *Indexing and abstracting in theory and practice* (3rd ed., p. 6-23). London: Facet. Chapter link

Reading 3: Lilley, S. (2015). Ka Pō, Ka Ao, Ka Awatea: The Interface between Epistemology and Māori Subject Headings. *Cataloging & Classification Quarterly, 53*(5-6), 479-495. doi:10.1080/01639374.2015.1009671

Reading 4: Fenton, C. (2010). Use of controlled vocabulary and thesauri in UK online finding aids. *Journal of the Society of Archivists, 31*(2), 187-205.

Reading 5: Koltay, T. (2010). The characteristics of the abstract. In *Abstracts and indexing. a genre and set of skills for the twenty-first century* (p. 33-70). Oxford : Chandos Pub., 2010.

Module 10: Categorisation and arrangement; User-generated metadata

Reading 1: Bowker, G. C., & Star, S. L. (2000). Introduction: To Classify is Human In *Sorting Things Out: Classification and Its Consequences* (pp. 1-32). Cambridge, MA: MIT Press. Out: Classification and Its Consequences (pp. 1-32). Cambridge, MA: MIT Press.

Reading 2: McTavish, J. (2015). Everyday life classification practices and technologies: Applying domain-analysis to lay understandings of food, health, and eating. *Journal of Documentation, 71*(5), 957-975.

Reading 3: Lambe, P. (2007). Designing your taxonomy. In *Organising knowledge: Taxonomies, knowledge and organisational effectiveness* (pp. 185-201). Oxford: Chandos. File link

Reading 4: Lu, C., Park, J. & Hu, X. (2010). User tags versus expert-assigned subject terms: A comparison of Library Thing tags and Library of Congress Subject Headings. *Journal of Information Science, 36*(6), 763-779. doi: 10.1177/0165551510386173

Varin, J. (2015). iTunes Metadata and Classical Music: Issues and Solutions for Crowdsourced Metadata in iTunes. *Serials Librarian, 69*(1), 70-76. doi:10.1080/0361526X.2015.1036196

Module 11: Information retrieval on the Web

Reading 1: Crasswell, N. & Hawking, D. (2009). Web information retrieval. In Ayşe Göker and John Davies (Eds.), *Information retrieval: Searching in the 21st century* (pp. 85-101). Chichester, UK: Wiley. File link

Reading 2: Mitchell, E. T. (2013). Building blocks of Linked Open Data in libraries. *Library Technology Reports, 49*(5), 11-25,12. OpenURL link

Reading 3: Mäkelä, E., Hypén, K., & Hyvönen, E. (2013). Fiction Literature as Linked Open Data -the BookSampo Dataset. *Semantic Web, 4*(3), 299-306. Article link

Reading 4: Lehmann, J., Isele, R., Jakob, M., Jentxch, A., Kontokostas, D., Mendes, P. N., . . . Bizer, C. (2015). DBpedia - A Large-scale, Multilingual Knowledge Base Extracted from Wikipedia. *Semantic Web, 6*(2), 167-195. Article link

Reading 5: Hawkins, L. (2015). The Semantic Web and the BIBFRAME Initiative. *Serials Review, 41*(2), 106-107. doi:10.1080/00987913.2015.1030962

Module 12: Information architecture

Reading 1: Hinton, A. (2009). The machineries of context. *Journal of Information Architecture, 1*(1), 37-47.

Reading 2: Rosenfeld, L. & Morville, P. (2002). Anatomy of an information architecture. In *Information architecture for the World Wide Web* (2nd ed., pp. 39-49). Sebastapool, CA: O'Reilly. File link

Reading 3: Land, M. (2013). Migrations: Not Just for Developers Any More. *Bulletin of the American Society for Information Science and Technology, 40*(1), 42-44.

Module 13: Knowledge management; multimedia retrieval; the future

Reading 1: Fraser-Arnott, M. (2014). Moving from Librarian to Knowledge Manager. Partnership: *The Canadian Journal of Library and Information Practice and Research, 9*(2), 1-10.

Reading 2: Lee, H-J. & Neal, D. (2010). A new model for semantic photographic description combining basic levels and user-assigned descriptors. *Journal of Information Science, 36*(5), 547-565. doi: 10.1177/0165551510374930 OpenURL link

Reading 3: Park, J.-r., & Brenza, A. (2015). Evaluation of Semi-Automatic Metadata Generation Tools: A Survey of the Current State of the Art. *Information Technology & Libraries, 34*(3), 22-42.