FALL 2022 TERM
LIS9202: THESAURUS CONSTRUCTION AND METADATA

1. Course Information:

Course Website will be accessible to the enrolled students only (via OWL).
Informational website: https://victoriarubin.fims.uwo.ca/teaching/thesaurus-construction-and-metadata/ is accessible to the general public.
Location: FIMS & Nursing Building, Room 2230 (2nd floor)
Time: Tuesday mornings, 9:00 – 11:50 a.m.

Format: in-person instruction (a mix of face-to-face lectures, discussions, group work, individual and group assignments; one in-class workshop and one computer lab tutorial session)

Enrolment Restrictions: enrollment in this course is restricted to **graduate students in the FIMS MLIS Program,** as well as any graduate student that has obtained **special permission to enroll** in this course from the course Instructor as well as the Graduate Chair (or equivalent) from the student's home program.

Prerequisite: MLIS 9002 (Information Organization, Curation and Access)

2. Instructor Information:

Prof. Victoria Rubin, Ph.D.
Associate Professor
Faculty of Information and Media Studies
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Website (*with a video self-introduction)*: http://victoriarubin.fims.uwo.ca/about/

3. Course Description:

Theory and practice in indexing and in constructing subject retrieval languages in thesaurus form. Distinguishing between controlled and natural language indexing, and between subject headings and index terms. Applying facet analysis to thesaurus construction. Selected topics in the theory of subject analysis. A new significant component of the course will overview current metadata and linked data initiatives and discuss how various metadata standards support subject access.

Course Objectives:

1. To teach students how to analyse the subject of a document, and to translate that expression into a suitable set of index terms.
2. To expand students' knowledge of the structure and use of indexing, the principles of thesaurus construction and theoretical topics in subject analysis.
3. To provide students with an opportunity to practice indexing and thesaurus construction skills.

Relationship to the Goals and Objectives of the MLIS Program
Students who complete this course will be able to:

1. describe and provide access to recorded information using techniques of indexing and thesaurus construction (from Goal 2, Obj. 1c);

2. use appropriate methods and technologies to analyse, design, implement, and evaluate subject access systems (from Goal 2, Obj. 1e).

Course Content (Subject to Modifications, Updates, and Refinement):

I. Thesaurus Construction

1. Introduction. Thesaurus: Definitions. Functions. Subject access & retrieval tools. ERIC Thesaurus.
2. Thesaurus: Types, formats & elements. Building thesauri: vocabulary collection and term extraction
3. Building thesauri: facets. Facet analysis. Thesaurus software.
4. Building thesauri: hierarchal relations. Subject headings & index terms
5. Building thesauri: equivalence and associative relations. Controlled & natural language indexes.
6. Knowledge Organization trends. Powering Web-Search Systems
7. Practical workshop.

Sample Readings (Part I)

- Ryan, C. (2014) *Thesaurus construction guidelines: An introduction to thesauri and guidelines on their construction.* Dublin: Royal Irish Academy and National Library of Ireland. ISSN: 2009-6461. DOI: 10.3318/DRI.2014.1
- Shiri, A. (2012). *Powering Search: the Role of Thesauri in New Information Environments.* Medford, NJ*:* Published on behalf of the American Society for Information Science and Technology by Information Today.
- Hedden, H. (2021a, March). Metadata and Taxonomies—Technology Transfer. Technology Transfer, an Italian IT Educational Company. https://technologytransfer.it/metadata-and-taxonomies/
- How Do I Build a Thesaurus? | American Society for Indexing. (n.d.). Retrieved January 9, 2022, from https://www.asindexing.org/about-indexing/thesauri/how-do-i-build-a-thesaurus/

II. Metadata

8. Metadata: Definitions. Functions. Typologies. Dublin Core.
9. Metadata: Encoding standards. Practical issues.
10. Metadata for: Governmental Resources, Art & Architecture Works, Educational Materials, Geographic Resources. Case studies.

Sample Readings (Part II)

- *Introduction to Metadata.* (2016) Baca, M., *editor.* The Getty Research Institute. Los Angeles.
- Pomerantz, J. (2015). *Metadata.* MIT Press. Cambridge, Massachusetts.

III. Linked Data.

11. What's beyond metadata? Semantic Web. Linked Data. Web of Data.
12. "Library Linked Data in the Cloud" by OCLC.
13. Future of Metadata. Reflections on inter-connectedness.

Sample Readings (Part III)

- Godby, C. J., Wang, S., Mixter, J. K. (2015) *Library Linked Data in the Cloud: OCLC's Experiments with New Models of Resource Description.* In the Semantic Web: Theory and Technology Series. Morgan & Claypool.

See also the Instructor's Teaching Philosophy statement.

4. Course Materials:

There is **no required textbook** for the course. Readings will be assigned from a selection of books and articles some of which will be the course website and/or on reserve in the FIMS Graduate Research Library.

Electronic Resources and Communications:

The OWL course website will contain selected course materials such as the full course syllabus, select readings, video recordings, and classroom handouts. The handouts will be posted prior to each lecture in the course of the term. Students will **not** be able to modify these materials electronically. The Instructor will also use OWL to communicate class announcements, collect written assignments, and hold Zoom office hours.

Class Policies:

Class **attendance** is mandatory. Marks may be deducted for late arrivals or unexcused missed classes, etc. Extra marks are not awarded for attending tutorials.

Academic accommodation will be made only on medical or compassionate grounds and for religious holidays. For religious holiday accommodation, the student must notify the Instructor at least one week in advance (please check all class dates and assignment deadlines and notify us as soon as possible if there is any conflict).

Laptops, cell phones, and other hand-held electronic devices are permitted in the classroom, provided that you **do not disturb** your colleagues or disrupt the class. Students are **not** permitted to carry on a cell phone conversation in the classroom. If you anticipate an important call, please make appropriate arrangements (e.g., set the phone to vibrate, sit close by the door, leave the room with minimum disturbance to the class).

5. Methods of Evaluation:

Students will complete **two (2) reports** and present in the practical workshop. **Report 2** will have 5 sub-components that need to be accomplished and submitted sequentially.

• **Report 1** (Analysis of ERIC indexing terms and metadata discussion)	**20 %**
• **Report 2** (Mini-thesaurus construction)	**70 % *(total)***
See the sequential sub-component below:	
Part 2.1. Collection of complex subject descriptions.	5 %
Part 2.2. Categorization of subject area by facets.	10 %
Part 2.3. Demonstration of hierarchies in subject area.	10 %
Part 2.4. Demonstration of relations in subject area.	10 %
Part 2.5. Written Report.	20%
Presentation in the workshop.	10 %
XML coding	5%
• **Participation**	**10 %**

6. Western Policies and Regulations

Statement on Academic Offences: Scholastic offences are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence, at the following Web site:
http://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_grad.pdf

Plagiarism: In accordance with the Western Policies, students must write their assignments in their own words. Whenever students take an idea or a passage from another author, they must acknowledge their debt both by using quotation marks where appropriate and by proper referencing such as footnotes or citations. Plagiarism is a major academic offence (see The Section on The Scholastic Discipline for Graduate Students from the Rights and Responsibilities in the Academic Handbook http://www.uwo.ca/univsec/pdf/academic_policies/appeals/ scholastic_discipline_grad.pdf).

Accessible Education Western (AEW): Western is committed to achieving barrier-free accessibility for all its members, including graduate students. As part of this commitment, Western provides a variety of services devoted to promoting, advocating, and accommodating persons with disabilities in their respective graduate program.

Graduate students with disabilities (for example, chronic illnesses, mental health conditions, mobility impairments) are strongly encouraged to register with Accessible Education Western (AEW), a confidential service designed to support graduate and undergraduate students through their academic program. With the appropriate documentation, the student will work with both AEW and their graduate programs (normally their Graduate Chair and/or Course instructor) to ensure that appropriate academic accommodations to program requirements are arranged. These accommodations include individual counselling, alternative formatted literature, accessible campus transportation, learning strategy instruction, writing exams and assistive technology instruction.

Health/Wellness Services: Students who are in emotional/mental distress should refer to Mental Health@Western http://www.uwo.ca/uwocom/mentalhealth/ for a complete list of options about how to obtain help.