IST 602: INFORMATION AND KNOWLEDGE ORGANIZATION
Fall 2014 (Online)

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Course Description
The course is an introduction to fundamental concepts, theoretical principles, and practices of knowledge and information organization. This course covers essential concepts and techniques that are used to facilitate access to information resources.

The key themes include:
- Subject Analysis (Ofness and Aboutness)
- Vocabulary Control and Thesauri
- Systematic Classification
- Information Representation and Information Discovery
- Authority Control
- Metadata
- Organization of Non-textual Information
- Social Classification, and
- User Perspectives in Information Organization

Course Objectives
- to introduce the principles, theories, standards, and methods for information and knowledge organization;
- to understand the relationship between information organization and information discovery in information retrieval systems;
- to discuss approaches for understanding users to meet their information needs in the information organization systems and practices and;
- to promote critical thinking and problem solving abilities for addressing challenges of information organization in the digital age.

Course design and teaching methodologies
This is an online course. Each module will consist of lecture notes (ppt slides) by the instructor, class discussions, class exercises, and/or additional resources. Class discussions should be asynchronously participated to facilitate a sense of community. Students are required to visit to each module having read assigned readings for the week. Supplemental readings may be added.
Course Learning Activities and Evaluation Guidelines: Masters Students
Below are descriptions of the activities you will engage in during this course. Please note that this is NOT a self-paced course. For most tasks and assignments, you will have a window of time, from 3 days to 2 weeks, to complete the task.

The course is graded out of 100 points. There is 5-point of "extra credit" built into the course. Your grade will be based on the following breakdown:

<table>
<thead>
<tr>
<th>Item</th>
<th>Points Each</th>
<th>Total Points</th>
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<tbody>
<tr>
<td>Module Discussions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion Forum (individual assessment)</td>
<td>1</td>
<td>13 (1x13)</td>
</tr>
<tr>
<td>Team Answers (team assessment)</td>
<td>1</td>
<td>13 (1x13)</td>
</tr>
<tr>
<td>Module Exercises</td>
<td>1</td>
<td>9 (1x9)</td>
</tr>
<tr>
<td>Assignments</td>
<td>10</td>
<td>20 (10x2)</td>
</tr>
<tr>
<td>Midterm Exam</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Final Paper (Literature Review)</td>
<td>30</td>
<td>30</td>
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<tr>
<td>TOTAL</td>
<td></td>
<td>105</td>
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All content for this course will be delivered though your course textbook and additional readings. At the start of each unit, you will need to read the assigned chapter(s) and articles.

Based on the readings, you will need to participate in class discussions. The class discussions will be conducted as team. You will be assigned to a team based on your concentration track, self-identified field experiences and skills on information technology. In the discussions, you need to provide the evidence that you read the assigned readings and gave time to develop your own thoughtful reflections. Once your team completed the discussions for given questions, your team needs to submit collective answers to those questions each week. You can decide on role assignments in your team who will aggregate discussions and/or compile answers in what module. You can use Chit Chat Central and Class Email for informal communication with your team members or with other classmates.

You will find many materials to help you understand course content in each module. This includes assigned readings, lecture notes, related video clips, further readings, etc. These materials are selected to help you identify key terms, concepts, and important applications. If you find any concepts or material to be unclear, you will need to post a request for assistance in the Ask a Question forum. A classmate who understands the concept or the instructor will respond to your inquiry there.

In most modules, there is an exercise for you to test out studied concepts and principles with real-life examples (systems). This is intended to help you link theories with practices. They are not designed to evaluate specific performances of students, but to show students basic concepts and functions utilized in applications and systems. Thus, they will be graded based on if you completed it or not.
In addition to the weekly activities (team discussions, team answers, and module exercises), there are two short written assignments, a midterm exam, and a final paper.

Each grading component will be assessed as follows:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
<th>How it will be evaluated</th>
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<tbody>
<tr>
<td>Discussion Forums</td>
<td>During each grading module, you will discuss some major questions with your teammates. Each unit will have between one and five discussion questions.</td>
<td>Each forum is worth 1 point. In order to earn full credit, you must actively participate in each team forum. Active participation is defined by posts that help the team organize, synthesize, and create answers for submission. In order to earn credit, you must have at least one active post per discussion question (not per forum) posted in the module's forum.</td>
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<tr>
<td>Team Answers</td>
<td>Based on the discussions within your team, your team needs to submit an answer to each of the discussion questions in an aggregated form.</td>
<td>Answers will be graded based on the coverage from the assigned readings. For some discussion questions, there are clear right and wrong answers. For others, teams will have to discuss and justify your answers with reasonable inferences. When submitting team answers successfully, all the members will receive additional 1 point in each module.</td>
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<tr>
<td>Module Exercises</td>
<td>Most of modules will include an exercise for students to complete. The exercises are to give students a chance to experience the existing applications for concepts/theories discussed in class.</td>
<td>Each module exercise is worth 1 point. Students who completed an exercise correctly will receive the point. A suggested (sample) answer will be given for each exercise. Students will be able to see the answers once they complete them.</td>
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<tr>
<td>Assignments</td>
<td>Assignment 1: This assignment involves the analysis of the existing organization of information or products within a certain domain. Assignment 2: This assignment is to explore and compare two indexing systems (professional thesaurus and social tagging) in terms of representing and searching</td>
<td>The instructions and grading guidelines of these assignments will be provided in the Assignment folder. There will be major discussion points to include in analysis. Grades will be given based on comprehensiveness of coverage for those discussion points, depths of discussions in analysis, and evidence of critical thinking.</td>
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<tr>
<td>Course Learning Activities and Evaluation Guidelines: Doctoral Students</td>
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<td>Doctoral students will do all the weekly activities in each module (see above): discussion forums, team answers for discussions, and module exercises. Doctoral students will take the same midterm exam.</td>
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<td>However, instead of two short written assignments and a final literature review paper, doctoral students will need to write a publishable research paper of 25-35 pages on any aspect of information organization that the student is interested in or that relates to the student's ongoing dissertation research. Students need to submit a research proposal by Module 4. The paper is due on 12/8.</td>
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<td>Students should demonstrate the evidence of a wide reading of the existing literature and can look at the topic from a theoretical or applied perspective. Examples of topics for this paper include any problems and issues related information organization systems (information systems,</td>
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vocabulary systems, classifications, and other related technology and applications), information behavior studies and user studies in relation to information organization practices/systems, new digital cultures and the web environment related issues for information organization, information organization in various domains (archives, museums, and other types of information providing centers), information organizations for various formats of information, etc. Doctoral students can also make a case for conducting literature reviews or research papers related to their planned or possible dissertation projects. Doctoral students who go beyond the library and information science literature in their background reading will do better on this paper, producing something with potential for publication. The grade for a paper submitted by a doctoral student is based on its potential for publication or its relevance for development of a dissertation proposal.

The final grade for Doctoral students will be based on the following:

<table>
<thead>
<tr>
<th>Item</th>
<th>Points Each</th>
<th>Total Points (Percent of Grade)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion Forums</td>
<td>1</td>
<td>13 (1x13)</td>
</tr>
<tr>
<td>Team Answers</td>
<td>1</td>
<td>13 (1x13)</td>
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<tr>
<td>Module Exercises</td>
<td>1</td>
<td>9 (1x9)</td>
</tr>
<tr>
<td>Midterm Exam</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Final Paper</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>105</strong></td>
</tr>
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Course Exit Competencies
At the end of this course, students will generally understand:
- Fundamental concepts of basic terms being used in the field of information studies and information organization
- How basic concepts and principles for organizing information are applied in the design of information systems
- Fundamentals of major classificatory structures and systems
- The purposes and functions of surrogates of information in information discovery
- The roles and different types of metadata for representing digital resources
- The importance of users in the information providing organizations and systems
- Different methods and approaches to organize information in archives, museums, and other types of information providing institutions
- Collective organization and information architecture for internet resources

Text

Articles on ERes: Some assigned readings (journal articles) are available on E-Reserve. E-Reserve resources can be accessible through BLS without additional login process.
Course Expectations and Policies

What I expect from you:
An online course requires you, the student, to be in control of your learning. In a face-to-face (F2F) course, I can play a much bigger role in actively directing your learning, since I see you once a week. In an online course, I have to do a lot more work in designing an appropriate learning environment, so that you can learn at your convenience. Since you are in control, you need to be disciplined enough to stay up to date with the course. The following tips will help you succeed in the course:

Blackboard Login: Log in to compass every day to view announcements, discussion posts and replies to your posts. You may need to log in multiple times a day when group discussions are due.

Manage your Time: This is a course where you are expected to internalize a broad variety of concepts with your own control. This requires good planning. Good planning allows you to plan for the unexpected sickness, travel requirements, Internet outages etc. Allow for 8-10 hours per week on this course, which would mean about 2 hours per day for 4 to 5 days of the week. This is no different than a F2F course, where we meet for about 3 hours (class attendance) and you do at least 4-6 hours of work (reading, assignments, etc.) outside the classroom. This is not a class that you can log into once a week and pass!

Keep track of due dates: Use the calendar tool on BLS to keep track of due dates. Print out the schedule or the syllabus, but look for updates on BLS.

What your peers expect from you:
Netiquettes: Please observe proper "netiquette" -- courteous and appropriate forms of communication and interaction over the Internet (within your online course). This means no personal attacks, obscene language, or intolerant expression. All viewpoints should be respected.

Remember that the person receiving your message is someone like you, someone who deserves and appreciates courtesy and respect.

- Be brief. Succinct, thoughtful messages have the greatest impact.
- Your messages reflect on YOU. Take time to make sure that you are proud of their form and content.
- Use descriptive subject headings in e-mail messages.
- Think about your audience and the relevance of your messages.
- Be careful with humor and sarcasm; without the voice inflections and body language of face-to-face communication, Internet messages can be easily misinterpreted.
- When making follow-up comments, summarize the parts of the message to which you are responding.
- Avoid repeating what has already been said. Needless repetition is ineffective communication.
- Cite appropriate references whenever using someone else’s ideas, thoughts, or words.
Giving Feedback: This course is designed along the principles of synergy and collaborative learning. Therefore, it is important that all students understand how to provide quality feedback to their peers. Here are a few tips for providing, positive, constructive, and useful feedback to peers:

- Be empathetic and remember that this environment is a safe place for making mistakes.
- Use nonjudgmental language and phrases that do not attack an individual. One way of doing this is to ask the individual to discuss his/her process for making the final decision.
- Use specific questions, examples, and references to research as a way of making your point.
- Make your feedback useful by providing suggestions that the individual can understand and use to improve her/his work.

What you can expect from me:
As your instructor, I am committed to providing a quality learning experience through thoughtful planning, implementation, and assessment of course activities. I am also committed to being readily available to students throughout the semester by

1. having synchronous sessions (office hours: Wednesdays 10-12, Fridays 10-12),
2. replying to questions in the forum/email within 24 to 48 hours
3. and to returning graded course work with feedback within a week from each assignment's due date.

Late assignments, make-up work and incompletes:
Late assignment will be marked down (10% per day), unless prior permission has been given by the instructor, in instances of medical or family emergencies. Please notify the instructor in writing of any circumstance accompanying with appropriate documents that will result in a late assignment. Any assignment that is more than 5 days late will not be accepted. If a student has a legitimate reason and documentation, the instructor might allow the student to do makeup work. The amount and nature of the work is up to the instructor’s discretion. It will be graded at the end of the term. No incomplete grades will be given.

Department of Information Studies Statement on Academic Dishonesty:
The Department of Information Studies takes academic dishonesty very seriously. Before taking classes within the Department of Information Studies, you should familiarize yourself with the department’s Academic Dishonesty Policy, available in both the department’s Graduate Handbook and online at http://www.albany.edu/content_images/Academic_Dishonesty.pdf.

It is your responsibility to complete your own work as best as you can in the time provided. Cheating (including sharing your answers with another), plagiarism, submission of the same work for two different classes, working together as a group for assignments/tests designed for individual assessment are serious offenses, and it is the instructor’s responsibility to make sure they do not occur. Anyone suspected of an academic misconduct should expect to have a record of the matter forwarded to the Committee on Academic Misconduct, in accordance with Faculty Rule. Academic misconduct will be punished to the fullest extent possible. Those who found
guilty of academic misconduct by the Committee on Academic Misconduct should expect to fail the entire course.

Communication:
I use the Announcements, Class Email, and My Grades features to communicate with you about your progress in the course. When you log into the course, these should be the FIRST areas you check. It is your responsibility to keep up with course communication and to use the Ask a Question forum if you need assistance with the course.

Discussions and Participation:
A significant portion of your grade will be based on your participation in the discussion forums. As a result, we must work to understand what constitutes participation. For the most part, your posts should add to the discussion by bringing in new ideas, asking additional questions for new perspectives, or synthesizing materials. You will be graded based on original contributions and significant feedback and not simply on a count of how many posts you make.

Writing:
All posts and papers for this course must be in standard English. Do not use slang or texting abbreviations (i.e., lol). To ensure that the course is easy to navigate and read, use formatting tools (text color, bold, etc) selectively. Capitalize and use complete sentences in your discussion responses and in your paper. You can use bullet lists for listing materials if it makes sense as a way to convey the information. Emoticons are acceptable as long as they are not over used and help with communication. Do not attach files or images to posts unless they add to the conversation and cannot be summarized in a normal post. In short, use this course as an opportunity to work on written communication!

Before submitting work, be sure to proof read your post and make sure that any links that you include are correct. You will not be able to edit your posts after hitting "submit." I recommend you to write your post in a word document and copy/paste to the BLS.

Submission of Work:
All work for this class must be submitted as the assignment states as instructed. Discussions must be made in the appropriate forum, your literature review paper must be submitted using the SafeAssign submission tool, etc. I will not accept submission of coursework though any other method. Items that are incorrectly submitted will NOT be graded.

NOTE: The instructor of this course reserves the right to remove any questionable or offensive material from public areas of this course.

Disabilities:
Please contact me if you have a disability, so we can discuss ways to help you succeed in the course. If you need accommodations that would affect the terms of this syllabus, you will need to provide documentation of your disability.

Course Calendar
Getting Technical Help

Syllabus as Contract:
The course syllabus is a contract for the terms and conditions of your participation in this course. If, after reading the syllabus, you are unclear about or do not agree to the terms stated within, please speak with the instructor or withdraw yourself from the course.

Course Schedule

Module 0 (8/11-8/24). Course Introduction & Ice Breaker
Introduction to the course, syllabus overview, student introduction.

Module 1 (Week of 8/25). Introduction to Information Organization
Information Organization in where, how, with what, by whom and for whom Student Survey
# In-class exercise 1: Understanding basic concepts of information organization (student introduction and extracting keywords)

Required Reading:
Taylor and Joudrey, Chapter 1

Module 2 (Week of 9/1). General Principles of Information Organization: Background Concepts
Concepts of Data, Information, Knowledge
History of the Organization of Information
General Principles of the Organization of Information
# In-class exercise 2: Understanding the concepts of data, information, knowledge and wisdom

Required Readings:
Taylor and Joudrey, Chapter 3 (67-85).

Organization in Various Domains
Tools and Systems for Organizing and Retrieving Information
# In-class exercise 3: Document vs. Work

Required Readings:
Taylor and Joudrey, Chapter 2 (39-66).

Recommended Reading:

Information Systems and System Design
Next Generation of Catalogs
Federated Searching and Meta Searching
# In-class exercise 4: Understanding primary information systems
Assignment 1 (Organization Practice) Due

Required Readings:
Taylor and Joudrey, Chapter 6 (159-199).

Module 5 (Week of 9/22). Subject Analysis: Understanding and expressing the intellectual content of information
Subject Analysis, Aboutness, Indexing, Abstracting
# In-class exercise 5: Subject analysis exercise (Interpreting index and abstract)

Required Readings:
Taylor and Joudrey, Chapter 9 (303-332).

Module 6 (Week of 9/29). Languages in Information Organization 1: Vocabulary Control
Controlled Vocabulary and Natural Language, Subject Headings, Thesauri, Ontologies,
# In-class exercise 6: Searching & interpreting controlled vocabulary

Required Readings:
Taylor and Joudrey, Chapter 10 (333-374).
Module 7 (Week of 10/6). Languages in Information Organization 2: Natural Language Processing and Social Tagging
Required Readings:
Taylor and Joudrey, Chapter 10 (333-374).

Module 8 (Week of 10/13) Categorization and Classification
Classificatory Structures, Taxonomies, Information Architecture
# In-class exercise 7: Case studies for library classification
Final Paper Topic and Preliminary Bibliography Due
Required Readings:
Taylor and Joudrey, Chapter 11 (375-415).

Midterm (Week of 10/20).

Module 9 (Week of 10/27). Information Representation and Information Discovery
Surrogates of Information (Bibliographic Description), Encoding Standards, Facets, Browsing and Navigation, Authority Control, FRBR.
Required Readings:
Taylor and Joudrey, Chapter 5 (129-142) & 8 (245-301).
Library of Congress, Understanding MARC Authority Records: Part I through VII (What is a MARC record, and Why is it Important?), Available at http://www.loc.gov/marc/uma/.

Recommended Reading:

Module 10 (Week of 11/3). Metadata: Information Organization for Digital Resources
# In-class exercise 8: Creating metadata for a web site
Assignment 2 (Vocabulary Study) Due
Required Readings:
Taylor and Joudrey, Chapters 4 (89-127) & 7 (199-243).

Recommended Readings:

Module 11 (Week of 11/10). Organization of Images and multi-media resources

Required Readings:

Module 12 (Week of 11/17). Organization for Special Collections, Archives, and Museum Archival Principles, Archival Processing, Special Collection Cataloging, Museum Registration

Required Readings:

Recommended Reading:

No module for the week of 11/24 (Thanksgiving week)

Module 13 (Week of 12/1) Users’ aspects in information representation and retrieval; Organization of Internet Resources and Social Classification
# In-class exercise 9: Creating a finding aid
Social Tagging, Social classification, Folksonomy, Findability.

Required Readings:


Recommended Reading:


**Week of 12/8. Student Presentations and Wrap-up**

**Final Paper Due**