Aligning standards between catalogues and repositories: considerations

IGBIS Forum
29-30 August 2019
Centurion

Wynand van der Walt
Head Librarian: Technical Services
Rhodes University
Abstract

The same levels of standards and quality that are applied to bibliographic records within catalogues, have not necessarily been promoted and implemented within institutional repositories. This paper will look at enhanced bibliographic descriptions (including authority use) of materials held on the Rhodes Digital Commons, with the intent on conversations towards the establishment and implementation of national best practices for bibliographic descriptions on institutional repositories.
Content

- Catalogues / Repositories
- What is meant with alignment?
- What caused the misalignment?
- How to align?
- Outcomes of alignment
- Rhodes Digital Commons – Example
- Way forward
- What is required?
Catalogues / Repositories

• Catalogues:
  – Traditional library catalogue

• Repositories
  – Institutional repositories
  – Data repositories
  – Archival repositories
What is meant with alignment?

• Catalogues
  – Mainstream application
  – History of
    • Employment of trained/skilled cataloguers
    • Quality assessment
    • Collaboration
  – History of consistent use of:
    • Descriptive standards
    • Data schemas
    • Information interchange standards
    • Tested/established methodologies
What is meant with alignment?

• Repositories
  – Peripheral applications
  – History of
    • Employment of ‘non-cataloguing’ staff
    • No or little quality assessment
    • No or little collaboration
  – History of diversity in terms of use of:
    • Descriptive standards
    • Data schemas
    • Information interchange standards
    • Experimentation
What caused misalignment?

• Historical developments
  – Catalogues
    • Conceptual development within Library environment
    • Followed natural developments
    • National and international adherence to standards
    • Centralised ownership (e.g. National Libraries and WorldCat)
    • Active and focused community
What caused misalignment?

- Historical developments
  - Repositories
    - Conceptual development external to Library environment
    - Digitally born environment
    - Little national and international agreement to standards
    - Institutional/departmental/individual ownership
    - Active but diverse community
How to align?

- Institutional and national strategic priority
- Advocate for and adhere to same quality processes
- Advocate for and adhere to same standards
Outcomes of alignment

- Compliance
- Interoperability
- Consistency
- Quality
- Data
  - Validity
  - Discoverability
  - Linked
  - Interpretability
Rhodes Digital Commons

• Example of use of variant vocabularies in different fields
MODS Linked Data Records

• SEALS Digital Commons
  • Shared Institutional Repository
  • Migrated from Dublin Core (DC) to MODS in 2016

• MODS:
  – Metadata Object Description Schema (MODS)
MODS Linked Data Records

• Critical fields in MODS Data Linked Records:
  – Creator
    • Creator type
  – Role Term
    • Contribution type
  – Genre
  – Language
  – Subject
  – Series?
MODS Linked Data Records

• Creator
  – Authority – ORCiD if not Library of Congress Name Authority File (LCNAF)

```
<table>
<thead>
<tr>
<th>namePart</th>
</tr>
</thead>
<tbody>
<tr>
<td>authority</td>
</tr>
<tr>
<td>authorityURI</td>
</tr>
<tr>
<td>valueURI</td>
</tr>
<tr>
<td>#text</td>
</tr>
</tbody>
</table>

LCNAF
http://id.loc.gov/authorities/names/collection_LCNAF
http://id.loc.gov/authorities/names/nb2004009579.html
Lotz-Sisitka, Heila, 1965–
```
MODS Linked Data Records

- **Creator**
  - Authority – **ORCiD** if not Library of Congress Name Authority File (LCNAF)

  ![Diagram showing MODS data structure]

  - Personal
  - Orcid
  - http://id.loc.gov/vocabulary/identifiers/orcid.html
  - https://orcid.org/0000-0002-1764-7340

  - Code
  - Aut
  - Text
  - Author
  - Van der Walt, Wynand
MODS Linked Data Records

<table>
<thead>
<tr>
<th>Heading</th>
<th>Type</th>
<th>Sample Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lotz-Sisitka, Heila, 1965-</td>
<td>Personal</td>
<td>Critical realism, environmental learning and social-ecological change / edited b ...</td>
</tr>
<tr>
<td>Lotz-Sisitka, Heila</td>
<td></td>
<td>Environmental education, ethics and action in Southern Africa, 2002:</td>
</tr>
</tbody>
</table>
MODS Linked Data Records

Lotz-Sisitka, Heila, 1965-
Lotz-Sisitka, Heila
VIAF ID: 56126634 (Personal)
Permalink: http://viaf.org/viaf/56126634

Preferred Forms

100 1 _ ta_Lotz-Sisitka_Heila
100 1 _ ta_Lotz-Sisitka_Heila_td (1965-)
100 1 _ ta_Lotz-Sisitka_Heila_td_1965-
100 1 _ ta_Lotz-Sisitka_Heila_td_1965-
MODS Linked Data Records

- **Role Term**
  - Who was responsible for what aspect of the thing created

<table>
<thead>
<tr>
<th>Title</th>
<th>Jemerí</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creator</td>
<td>Emmanuel Namuto and Oshikuku mission participants</td>
</tr>
<tr>
<td>Creator</td>
<td>Namuto, Emmanuel</td>
</tr>
<tr>
<td>Creator</td>
<td>Tracey, Andrew T N</td>
</tr>
<tr>
<td>Subject</td>
<td>Folk music -- Namibia</td>
</tr>
<tr>
<td>Subject</td>
<td>Ovambo (African people) -- Music</td>
</tr>
<tr>
<td>Subject</td>
<td>Sub-Saharan African music</td>
</tr>
<tr>
<td>Date</td>
<td>1982-11-03</td>
</tr>
<tr>
<td>Publisher</td>
<td>International Library of African Music</td>
</tr>
<tr>
<td>Description</td>
<td>Traditional song with clapping accompaniment.</td>
</tr>
</tbody>
</table>

- abstract: Traditional song with clapping accompaniment.
- accessCondition (rights holder): International Library of African Music
- accessCondition (use and reproduction): Use of this resource is governed by the terms and conditions of the
- roleTerm (marcrelator): prf
- roleTerm (text): Performer
- namePart: Emmanuel Namuto and Oshikuku mission participants
- roleTerm (marcrelator): cmp
- roleTerm (text): Composer
- namePart: Namuto, Emmanuel
- roleTerm (marcrelator): rcd
- roleTerm (text): Recordist
- namePart: Tracey, Andrew T N
MODS Linked Data Records

- Role Term
  - Authority – Marcrelators
MODS Linked Data Records

- Genre

- namePart: Tracey, Andrew T N
- genre (lcfgt): sound recordings
- genre (lcfgt): folk music
- publisher: International Library of African Music
- dateIssued: 1982-11-03
MODS Linked Data Records

- Genre
  - Authority – MARC Genre terms (MARC GT) or LC Genre/Form Terms (LCGFT) or Thesaurus for Graphic Materials (TGM)
MODS Linked Data Records

• Genre
  – Authority – MARC Genre terms (MARCGT) or LC Genre/Form Terms (LCGFT) or Thesaurus for Graphic Materials (TGM)
MODS Linked Data Records

- Language
  - Authority – ISO 639 Series

<table>
<thead>
<tr>
<th>Language</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>166</td>
</tr>
<tr>
<td>Khoe</td>
<td>22</td>
</tr>
<tr>
<td>Tswana</td>
<td>19</td>
</tr>
<tr>
<td>Xhosa</td>
<td>19</td>
</tr>
<tr>
<td>Kuanyama</td>
<td>13</td>
</tr>
<tr>
<td>Shona</td>
<td>13</td>
</tr>
<tr>
<td>Chopi</td>
<td>4</td>
</tr>
<tr>
<td>Haya</td>
<td>4</td>
</tr>
<tr>
<td>Nyoro</td>
<td>4</td>
</tr>
<tr>
<td>Nyamwezi</td>
<td>2</td>
</tr>
</tbody>
</table>
MODS Linked Data Records

• Language
  – Authority – ISO 639 Series
MODS Linked Data Records

• Language
  – Authority – ISO 639 Series
MODS Linked Data Records

- **Subject**
  - Authority – LC Subject Headings (LCSH) or MARC Geographical Areas List (MARCAC)
MODS Linked Data Records

• Subject
  – Authority – LC Subject Headings (LCSH) or MARC Geographical Areas List (MARC-GAC)
Way forward

• Design and/or use appropriate schemas as per material types

• Investigate controlled vocabularies
  – Continual use of general / non-subject specific might impact negatively on information discoverability
  – LCSH vs
    • Systems Biology Ontology (SBO)
    • Kinetic Simulation Algorithm Ontology (KiSAO)
    • The Terminology for the Description of Dynamics (TEDDY)

• Experiment and test
What is required?

• IGBIS takes lead on defining standards for bibliographic description across systems
• Ensure that our repository managers are skilled cataloguers
• We need to advocate for compliance
• Increased use and development of taxonomies and ontologies
• Increased understanding and use of underlying technologies
References and Proposed Readings


• Berners-Lee, Tim. 2009. The next Web of open, linked data. Available: https://www.youtube.com/watch?v=OM6XiICm_qo


• Library of Congress. DLF/Aquifer Summary of MODS Requirements and Recommendations Table. Available: https://www.loc.gov/standards/mods/userguide/dlfaquifer.html

References and Proposed Readings


• W3C. Home Page. Available: https://www.w3.org/
Thank you!

Wynand van der Walt
w.vanderwalt@ru.ac.za