Simplified cataloging for non-catalogers through FAST

Joelen Pastva, Metadata Librarian
Northwestern University’s Galter Health Sciences Library

Northwestern Medicine
Feinberg School of Medicine

September 28, 2016
Hosted by ALCTS, Association for Library Collections and Technical
Greetings from Chicago!
Project background:

Non-MARC metadata environment at the University of Illinois at Chicago, 2015
**CONTENTdm**
- Digital images, documents, videos
- Dublin Core, LCSH
- 30 collections
- 59,071 items
- Presented via CARLI consortium CDM interface

**Archivists’ Toolkit**
- Finding aids for manuscripts and archives
- EAD, LCSH
- 624 collection-level records
- 1,528 accession records
- Presented in HTML on library’s website
Subject usage analysis:
Subject heading inventory for CDM and AT

**CONTENTdm**
- 2,413 unique subjects
  - 38% used only once
- 11% of terms subdivided
  - Of the top 100 most used terms, only 1 was subdivided

**Archivists’ Toolkit**
- 937 unique subjects
  - 92% topical, 7% geographic, 1% uniform titles and misc.
- 54% of terms subdivided
  - Most common subdivision: geographical
Problem #1:

Non-expert catalogers
Workflow factors

• Metadata largely created by non-catalogers
• Non-cataloger librarians frustrated with complexity of LCSH, felt uncomfortable instructing others
• Minimal time to devote to training
• High turnover rate among graduate assistants and student employees
• No detailed documentation for subject analysis
Problem #2:

Inconsistent metadata
Types of duplication errors encountered:

• Singular vs. plural
  Woman
  Women

• Capital vs. lowercase

• & vs. and
  City and town life
  City & town life

• Subdivision punctuation
  Adults Education
  Swimming - Illinois - Chicago
  Swimming--Illinois--Chicago

• Order of subdivisions
  African Americans--Illinois--Chicago--Economic conditions
  African Americans--Economic conditions--Illinois--Chicago
Why worry about subject headings?

Despite the seemingly small role subject headings play in record displays, they require more judgement and interaction with external sources than other types of description.
Concerns about usability

Inconsistent metadata means:
• Compromised facets
• Unsuccessful keyword searches
• Confusion for user

Concerns about interoperability

All metadata is NOT local:
• Explore Chicago Collections portal
• Digital Library of the Caribbean
• Digital Public Library of America
Solution:

FAST
FAST impressed non-catalogers because:

- No more subdividing (kinda)
  - Better reflects user search behavior
  - Easier to take ownership of training outside of Tech Services
- Retains much of vocabulary currently in use
  - Based on LCSH
- Simple user interface(s)
  - searchFAST for early users
  - assignFAST for quick retrieval
  - FAST converter if referring to MARC records
Search Results

Do you need assistance with your search?

Search

chicago

All

LC Subject Headings
LC Name Authority File
LC Classification
LC Children's Subject Headings

Search
Reset

**Please Note: LC Classification entries are not included in general search results. You must explicitly select LC Classification in order to search the scheme. This is temporary while the impact of adding LCC to the current system is better understood.

<table>
<thead>
<tr>
<th>Label</th>
<th>Vocabulary</th>
<th>Concept Type</th>
<th>Subdivision Type</th>
<th>Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Chicago City Hall (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2010000587</td>
</tr>
<tr>
<td></td>
<td>City Hall (Chicago, Ill.); City Hall-County Building (Chicago, Ill.); Cook County Building (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Chicago Federal Center (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2005000137</td>
</tr>
<tr>
<td></td>
<td>Federal Center (Chicago, Ill.); Federal Center Chicago (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Paul Simon Chicago Job Corps Center (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2002007943</td>
</tr>
<tr>
<td></td>
<td>Simon Chicago Job Corps Center (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Chicago Theatre (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2011003450</td>
</tr>
<tr>
<td></td>
<td>Balaban and Katz Chicago Theatre (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Chicago Seven Trial (Chicago, Ill., 1969-1970)</td>
<td>LC Subject Headings</td>
<td>Topic</td>
<td>sh85033260</td>
</tr>
<tr>
<td>6.</td>
<td>Sterling Theatre (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2011003978</td>
</tr>
<tr>
<td></td>
<td>Image Cinema (Chicago, Ill.); Immensehuren's Theatre (Chicago, Ill.); Le Image Cinema (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Mile-High Illinois (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh07908527</td>
</tr>
<tr>
<td></td>
<td>Illinois Mile High (Chicago, Ill.); Mile-High Office Tower (Chicago, Ill.); Mile-High Skyscraper (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Chicago Union Loop Elevated Structure (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Topic</td>
<td>sh60009498</td>
</tr>
<tr>
<td></td>
<td>Chicago Loop Elevated Structure (Chicago, Ill.); Loop Elevated Structure (Chicago, Ill.); Union Loop Elevated Structure (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>Chicago Board of Trade Building (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2010012167</td>
</tr>
<tr>
<td></td>
<td>Board of Trade Building (Chicago, Ill.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>Chicago Auditorium Building (Chicago, Ill.)</td>
<td>LC Subject Headings</td>
<td>Corporate Name</td>
<td>sh2001003037</td>
</tr>
</tbody>
</table>

VS

SEARCH FAST

chicago

Illinois--Chicago

Illinois--City of Chicago

Chicago (Computer file)

Illinois--Chicago Metropolitan Area

Exposition universelle de Chicago
Exposition internationale de Chicago
Chicago
Chicago World's Fair
Chicago Columbian Exposition
Chicago Columbian World's Exposition

14

Hosted by ALCTS, Association for Library Collections and Technical Services
FAST plan

Ideal timing – new metadata creation largely on hold at UIC

• Replace LCSH terms
  • Decision not to use time period facet, genres to be used sparingly – data is captured elsewhere in records
  • Split up subdivided headings
• Create new documentation
• All new metadata projects to use FAST

Changes would be gradual, especially for public interfaces
Implementation: Conversion

**CONTENTdm**
- Collection by collection basis
- Targeted batch updates for geographic & subdivided terms
- Few subdivisions = many terms stay the same
- Still in progress

**Archivists’ Toolkit**
- Vocabulary shared across all collections
- Subdivided terms manually split
- Modifications to AT to accommodate FAST
  - Term source dropdown
  - EAD stylesheet
CONTENTdm with FAST

**Description**

- **Title**: 4th of July celebration Bowen Country Club
- **Creator**: Kirkland, Wallace
- **Date of Original**: ca. 1920
- **Geographic Location**: Illinois--Waukegan
- **Description**: Flag raising ceremony.
- **Subject--Topical**: Children; Holidays; Fourth of July celebrations; Flagpoles
- **Subject--Name**: Joseph T. Bowen Country Club
- **Type**: Image
- **Physical Description**: Black and white print
- **Extent**: 6 3/4 x 9 5/16 in.
- **Collection**: Bowen Country Club (University of Illinois at Chicago)

**CONTROLLED ACCESS HEADINGS**

**Geographic Name(s)**
- Illinois--Chicago.

**Personal Name(s)**
- Curry, Richard L.

**Subject(s)**
- Mayors--Election.
- Municipal government.
- Politics and government.

Archivists’ Toolkit with FAST
Implementation: Training

New documentation on staff wiki
• Overview of facets in FAST
• List of FAST tools and basic instructions
• Tips and best practices for assigning subjects

In-person session for librarians and staff
• Less focus on tools and vocabulary
• Emphasis on methodology
  ▪ Consider user’s needs, support user tasks
  ▪ Techniques for subject analysis – painless and demystified
Implementation: Training Documentation

Subject Cataloging in Special Collections

Remember your users:
- Literature – performing collection management, material, research, reference work, etc.
- Researchers – students, graduate students, faculty, scholars
- The World – anyone with a computer who lands on our site (personally or internally)

User tasks (FRBR and RDA): the metadata should support:
1. Find the resources that correspond to the user’s search criteria.
2. Identify that the resource is available.
3. Select a resource to access.
4. Obtain access to the resource.

Getting started:

Method 1: Who is the work about?
- When? (author, creator, etc.)
- What? (generic topics)
- Where? (geographic locations)
- When? (events)

Method 2: Synopses to organize
1. Describe what it power
2. Identify common, unique
3. Integrate – does the resource/image convey any important meanings, themes, or concepts?

Good practice:
- headings across reflect the predominant themes of the description
- For collections of materials, subjects assigned should describe the collection as a whole, through subjects can be used to highlight important compositions and narratives
- Try to match the specificity of the heading to the task (e.g., roads vs. Toll roads; Powell vs. Rock)
- Complete topic will likely require multiple headings
- Consider the subject result and consider the intent of the creator.
- Creation can also be subjects
- If you don’t know, don’t guess – broad and specific is better than specific and incorrect
- Don’t forget the user’s needs
- For abstract work, use subjects to describe elements of the composition and function or symbolic meanings.

Assigning headings:
1. Navigate to list of headings
2. Enter keywords from your search above
3. For example, search for “road” or “toll road”

Tips:
- Think of assigning subject terms as looking for the most useful “tag” that would best summarizing the important by the description form your description and make the heading is useful enough to
- Always use headings that are from thesauri/synonim大全 coverage for accuracy
- Avoid naming specific locations
- Provide access to a resource (e.g., URL, online-access for local resources)
- Make sure the heading is well described and meaningful
- Metadata created on the same day in your Online Cataloging System

Tools
- searchFAST
- assignFAST

References:
- Please refer to headings assigned in LC for cataloging information
- Tips for assigning headings

Title
This field is used to entry uniform that is works contains it or refers to the resource using language. Uniform title are formatted as a way to standardize references to works that may appear under multiple titles through

Examples:
- Great expectations (Charles Dickens)
- GoogleBooks (Title: 101)
- Google Scholar

Implementation:
Training Documentation

Subject Cataloging in Special Collections

Remember your users:
- Literature – performing collection management, material, research, reference work, etc.
- Researchers – students, graduate students, faculty, scholars
- The World – anyone with a computer who lands on our site (personally or internally)

User tasks (FRBR and RDA): the metadata should support:
1. Find the resources that correspond to the user’s search criteria.
2. Identify that the resource is available.
3. Select a resource to access.
4. Obtain access to the resource.

Getting started:

Method 1: Who is the work about?
- When? (author, creator, etc.)
- What? (generic topics)
- Where? (geographic locations)
- When? (events)

Method 2: Synopses to organize
1. Describe what it power
2. Identify common, unique
3. Integrate – does the resource/image convey any important meanings, themes, or concepts?

Good practice:
- headings across reflect the predominant themes of the description
- For collections of materials, subjects assigned should describe the collection as a whole, through subjects can be used to highlight important compositions and narratives
- Try to match the specificity of the heading to the task (e.g., roads vs. Toll roads; Powell vs. Rock)
- Complete topic will likely require multiple headings
- Consider the subject result and consider the intent of the creator.
- Creation can also be subjects
- If you don’t know, don’t guess – broad and specific is better than specific and incorrect
- Don’t forget the user’s needs
- For abstract work, use subjects to describe elements of the composition and function or symbolic meanings.

Assigning headings:
1. Navigate to list of headings
2. Enter keywords from your search above
3. For example, search for “road” or “toll road”

Tips:
- Think of assigning subject terms as looking for the most useful “tag” that would best summarizing the important by the description form your description and make the heading is useful enough to
- Always use headings that are from thesauri/synonim大全 coverage for accuracy
- Avoid naming specific locations
- Provide access to a resource (e.g., URL, online-access for local resources)
- Make sure the heading is well described and meaningful
- Metadata created on the same day in your Online Cataloging System

Tools
- searchFAST
- assignFAST

References:
- Please refer to headings assigned in LC for cataloging information
- Tips for assigning headings

Title
This field is used to entry uniform that is works contains it or refers to the resource using language. Uniform title are formatted as a way to standardize references to works that may appear under multiple titles through

Examples:
- Great expectations (Charles Dickens)
- GoogleBooks (Title: 101)
- Google Scholar

Implementation:
Training Documentation

Subject Cataloging in Special Collections

Remember your users:
- Literature – performing collection management, material, research, reference work, etc.
- Researchers – students, graduate students, faculty, scholars
- The World – anyone with a computer who lands on our site (personally or internally)

User tasks (FRBR and RDA): the metadata should support:
1. Find the resources that correspond to the user’s search criteria.
2. Identify that the resource is available.
3. Select a resource to access.
4. Obtain access to the resource.

Getting started:

Method 1: Who is the work about?
- When? (author, creator, etc.)
- What? (generic topics)
- Where? (geographic locations)
- When? (events)

Method 2: Synopses to organize
1. Describe what it power
2. Identify common, unique
3. Integrate – does the resource/image convey any important meanings, themes, or concepts?

Good practice:
- headings across reflect the predominant themes of the description
- For collections of materials, subjects assigned should describe the collection as a whole, through subjects can be used to highlight important compositions and narratives
- Try to match the specificity of the heading to the task (e.g., roads vs. Toll roads; Powell vs. Rock)
- Complete topic will likely require multiple headings
- Consider the subject result and consider the intent of the creator.
- Creation can also be subjects
- If you don’t know, don’t guess – broad and specific is better than specific and incorrect
- Don’t forget the user’s needs
- For abstract work, use subjects to describe elements of the composition and function or symbolic meanings.

Assigning headings:
1. Navigate to list of headings
2. Enter keywords from your search above
3. For example, search for “road” or “toll road”

Tips:
- Think of assigning subject terms as looking for the most useful “tag” that would best summarizing the important by the description form your description and make the heading is useful enough to
- Always use headings that are from thesauri/synonim大全 coverage for accuracy
- Avoid naming specific locations
- Provide access to a resource (e.g., URL, online-access for local resources)
- Make sure the heading is well described and meaningful
- Metadata created on the same day in your Online Cataloging System

Tools
- searchFAST
- assignFAST

References:
- Please refer to headings assigned in LC for cataloging information
- Tips for assigning headings

Title
This field is used to entry uniform that is works contains it or refers to the resource using language. Uniform title are formatted as a way to standardize references to works that may appear under multiple titles through

Examples:
- Great expectations (Charles Dickens)
- GoogleBooks (Title: 101)
- Google Scholar

Implementation:
Training Documentation

Subject Cataloging in Special Collections

Remember your users:
- Literature – performing collection management, material, research, reference work, etc.
- Researchers – students, graduate students, faculty, scholars
- The World – anyone with a computer who lands on our site (personally or internally)

User tasks (FRBR and RDA): the metadata should support:
1. Find the resources that correspond to the user’s search criteria.
2. Identify that the resource is available.
3. Select a resource to access.
4. Obtain access to the resource.

Getting started:

Method 1: Who is the work about?
- When? (author, creator, etc.)
- What? (generic topics)
- Where? (geographic locations)
- When? (events)

Method 2: Synopses to organize
1. Describe what it power
2. Identify common, unique
3. Integrate – does the resource/image convey any important meanings, themes, or concepts?

Good practice:
- headings across reflect the predominant themes of the description
- For collections of materials, subjects assigned should describe the collection as a whole, through subjects can be used to highlight important compositions and narratives
- Try to match the specificity of the heading to the task (e.g., roads vs. Toll roads; Powell vs. Rock)
- Complete topic will likely require multiple headings
- Consider the subject result and consider the intent of the creator.
- Creation can also be subjects
- If you don’t know, don’t guess – broad and specific is better than specific and incorrect
- Don’t forget the user’s needs
- For abstract work, use subjects to describe elements of the composition and function or symbolic meanings.

Assigning headings:
1. Navigate to list of headings
2. Enter keywords from your search above
3. For example, search for “road” or “toll road”

Tips:
- Think of assigning subject terms as looking for the most useful “tag” that would best summarizing the important by the description form your description and make the heading is useful enough to
- Always use headings that are from thesauri/synonim大全 coverage for accuracy
- Avoid naming specific locations
- Provide access to a resource (e.g., URL, online-access for local resources)
- Make sure the heading is well described and meaningful
- Metadata created on the same day in your Online Cataloging System

Tools
- searchFAST
- assignFAST

References:
- Please refer to headings assigned in LC for cataloging information
- Tips for assigning headings

Title
This field is used to entry uniform that is works contains it or refers to the resource using language. Uniform title are formatted as a way to standardize references to works that may appear under multiple titles through

Examples:
- Great expectations (Charles Dickens)
- GoogleBooks (Title: 101)
- Google Scholar
Good first impressions

• FAST is faster!
• Catalogers and librarians are happy!
• Initial results look promising

Nothing is perfect

• FAST’s quirky interface
• Subdivisions remain
• Systems still have limitations
  ▪ Lack of linking in HTML for AT
  ▪ CONTENTdm
    o Wonky links and facets
    o Restrictions on batch edits and customizations
Overall

FAST is a good fit:

- Simple structure and tools are easy to use
- More time to concentrate on analysis and technique
- Catalogers feel more empowered to make judgments and evaluate materials
  - Can move on to other metadata fields faster
- Better reflects user searching behavior vs. LCSH
Parting thoughts

Switch to FAST –

• Acknowledgement of the non-MARC cataloging environment at UIC

• Highlights importance of communication and cross-departmental collaboration

• Attempt to better align practices and resources with user-centered mission of library
Image credits:

Alberto, Letter from Puerto Rican nationalist prisoner to a member of the Puerto Rican Cultural Center, February 2, 1987, PRCC_01_0001_0001_0003, Puerto Rican Cultural Center Collection (University of Illinois at Chicago), http://collections.carli.illinois.edu/cdm/compoundobject/collection/uic_prcc/id/104/rec/1

Century of Progress poster, 1933-1934, COP_17_0023_00000_049, Century of Progress World’s Fair, 1933-1934 (University of Illinois at Chicago), http://collections.carli.illinois.edu/cdm/singleitem/collection/uic_cop/id/1508/rec/1187

Kendis, James and Charles Bayha, Come out of the Kitchen Mary Ann, 1911, SMC_007B_0065_1, Sheet Music Collection (University of Illinois at Chicago), http://collections.carli.illinois.edu/cdm/compoundobject/collection/uic_smusic/id/7385/rec/1

Kirkland, Wallace, 4th of July celebration Bowen Country Club, ca. 1920, JAMC_0418_4823.JPG, Bowen Country Club (University of Illinois at Chicago), http://collections.carli.illinois.edu/cdm/singleitem/collection/uic_bcc/id/487/rec/1

Von Tilzer, Harry, Can You Tame Wild Wimmen, 1918, SMC_0007_0056_1, Sheet Music Collection (University of Illinois at Chicago), http://collections.carli.illinois.edu/cdm/compoundobject/collection/uic_smusic/id/6153/rec/1
Thank you!

Joelen Pastva
joelen.pastva@northwestern.edu