



# CATALOGUING & CLASSIFICATION

for



school  
media  
centres



Sandra Olén

# Cataloguing & Classification for School Media Centres

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UNISA

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University of South Africa  
Pretoria

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for

## School Media Centres

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Pretoria

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# PREFACE

School Match is a Columbus, Ohio-based firm in the United States of America which has a computerized database of information on approximately 16 000 public school districts. It was reported in *American libraries* (September 1987 and June 1988 issues) that School Match had found a definite correlation between good school media centres and high pupil achievement in the USA.

A good media centre is expensive, but from the above information it appears to be a good investment. It has also been found that unless all or most of the teachers in a school make use of media in their teaching this investment will be under-utilized.

In order to derive the maximum benefit from the media centre, the materials should be properly stored and organized. Part 1 of this book deals with the basic theory of cataloguing and classification on which the storage, organization and retrieval of media and information are based. Part 1 should be read by subject teachers, media teachers and student teachers.

Part 2 is a manual and workbook for teachers wanting to learn how to catalogue print and non-print media, and how to classify media according to the *Abridged Dewey Decimal Classification and relative index*, 12th edition. Answers to the practical exercises are provided.

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# PART

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cataloguing and  
classification*

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# CHAPTER

## 1

### *Introduction to cataloguing and classification*

Today, more than ever before, information is important for all people in society. A person needs to know that he can find and obtain the information he requires. For example, she may want to find information about purchasing a house, about transport, recreation, training courses and jobs, in fact about anything and everything. There are also many different sources of information. People themselves are often very good sources of information. We can ask a teacher or a lawyer for information, but when one of these specialists is uncertain, he checks his facts in a book or in some other source of recorded information. Once information is recorded it is usually more reliable, more permanent.

Information can be recorded in books, periodicals, newspapers, pamphlets, pictures, maps, transparencies, slides, computer files, sound and videorecordings. There are an increasing number of information sources which are published or produced. To facilitate their use they are often collected and organized in libraries.

In schools we find school libraries, which are also called media centres because they stock a variety of recorded information sources. They collect sources of information which pupils use to obtain information for their curricular and extra-curricular activities and interests.

Pupils need to develop information skills so that they will be able to use a variety of information sources not only at school, but also in the community, because they are going to need information all their lives. These information skills include deciding what information is required for a particular task or to solve a specific problem, identifying, locating, selecting and interrogating information sources, recording information found in the sources, evaluating the information and using it to answer a question, solve a problem, communicate an idea, and so on.

The sources of recorded information in the media centre, and the information contained in these sources, are much more accessible to all the users of the media centre if they are stored and organized so that any item or any information can be quickly and effectively found. The finding of information is called information retrieval. The school librarian, or media teacher, as the person in charge of the media centre is called, is responsible for the effective storage and organization of all the materials.

These materials must be analysed according to subject content and the contents indicated by symbols or codes (for example classification numbers) or words (for example keywords or subject headings).

A catalogue or database comprising records which are substitutes for the information sources must also be compiled so that each source in the media centre collection can be identified. The catalogue is the only complete record of all the stock which is available in a particular media centre, because not all the sources are always on the shelves. Some items may be out on loan to pupils; others may be in use in either the media centre or in one of the classrooms. As we shall see it is only by using various systems that information retrieval will be effective. The media teacher will, however, want to spend the minimum amount of time possible on this work because of the many other tasks to do – the most important of these being to guide pupils in the use of books and media and to develop their information skills.

Traditionally information skills have been taught to pupils in the media centre. As a result of extensive research done in Great Britain it appears, however, that teaching pupils information skills in isolation in the media centre does not enable pupils to transfer these skills to other teaching/learning situations. Subject teachers should use media in their classrooms and encourage pupils to use media when they do assignments. Pupils will then acquire and develop information skills, both simple and complex ones, while they do work in their various school subjects. Not only should the skills be learnt in context, but they should also be developed gradually and reinforced regularly. The same skills may be practised

each year, but the tasks or assignments pupils do will become more complex as they progress through school. This approach requires planning by the whole school. It means *all* the teachers in a school are involved in the planning. At the beginning of each year the teachers should all meet to discuss what assignments or projects will be done in each subject and with each grade. At the same time consideration will be given to the skills which will be developed in the classrooms and the skills which the media teacher will develop.

However, if pupils need information for their assignments it is necessary to have a media centre with adequate resources which are organized for effective retrieval. When an Education Media Service does centralized cataloguing and classification of books and media this saves the media teachers a lot of work, but it is still necessary for all media teachers to understand the basic principles of cataloguing and classification.

The media teacher should be able to catalogue and classify books or other media, which are donated or purchased from special funds, so that these can be put on the shelves and be made accessible to pupils as quickly as possible. Media teachers will not be able to store and organize materials effectively, keep the catalogue up to date and use it effectively and assist pupils in their retrieval and use of information, unless they themselves understand the principles upon which the storage and organization of information in the media centre are based.

Media teachers should be able to catalogue and classify media according to an acceptable standard and in a way which will make the work done compatible with the cataloguing and classification found in most other libraries. This is important so that pupils will not only be able to find their way around public libraries, but after leaving school will also be able to use technikon, college, university and company libraries, as well as information services both in South Africa and overseas. Most libraries use the *Anglo-American Cataloguing Rules*, 2nd edition, 1988 revision (AACR2R) for cataloguing and the *Dewey Decimal Classification*, 20th edition for classification. Media teachers can use *The concise AACR2*, 1988 revision and the *Abridged Dewey Decimal Classification*, 12th edition, as these works are compatible with AACR2R and the *Dewey Decimal Classification*, full edition and are used in most of the media centres throughout the English-speaking world. Once the media teacher has learnt how to catalogue and classify works according to these standards, the Cataloguing in Publication information found in most of the recently published books can be checked and adapted for use in the media centre when catalogue records are not supplied by the Education Media Service.

As has already been pointed out above, whole school planning involves the active

participation of all the teachers in the school. Subject teachers will also want to know more about the theory and principles of the storage and organization of the media centre's resources, because they will wish to familiarize themselves with all the information sources available in the media centre. Subject teachers need not study Part 2 of this book which deals with the actual procedures for cataloguing and classification. However, students intending to become media teachers should study the complete text.

# CHAPTER 2

## *Media centre catalogue*

### 1 *Introduction*

The earliest known libraries were found in ancient Babylon. These libraries collected clay tablets on which information was recorded in cuneiform writing. Even these early libraries contained lists or inventories of the available information sources.

We have already explained that *the media centre catalogue is a complete list of all the information sources held in the media centre*. By consulting the catalogue we can determine what materials are available on a particular subject, on related subjects and by a particular author. We should also be able to find out whether the media centre owns a particular item if we know either its subject, author or title.

A catalogue can have various physical forms, the most common of which are the printed book catalogue, the card catalogue, the microfiche catalogue or the computer catalogue. We shall be looking at each of these physical forms, as each has some advantages as well as some disadvantages.

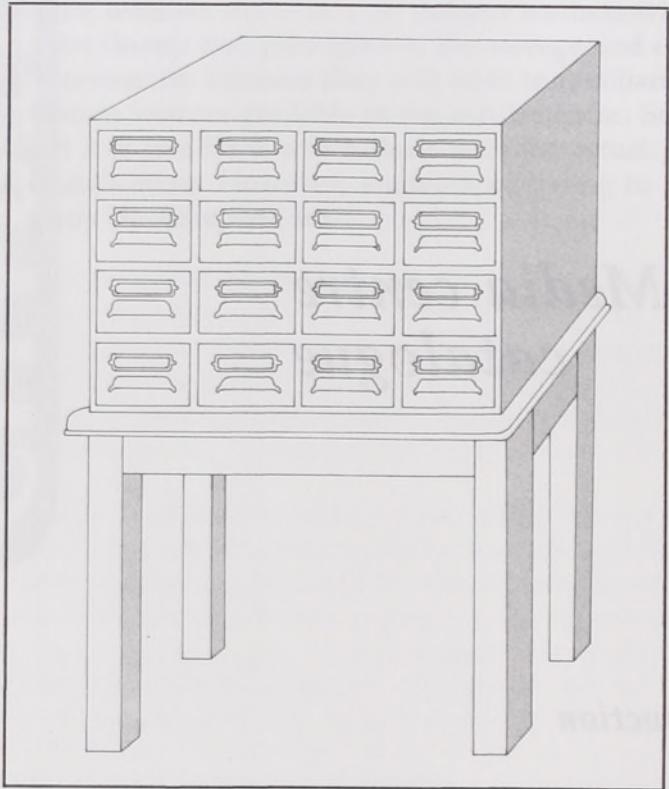


Figure 1 Card catalogue

The ideal catalogue should be easy to use and accessible to media centre staff and users. If it is portable and there are multiple copies, then it can be consulted outside as well as inside the media centre. The catalogue should be inexpensive and economical to maintain. The catalogue should be flexible, that is, it should be easy to add records to it or remove records from it. It should be durable, and it should be easy to guide people in its use. Any form of catalogue should be capable of using records which are made available from a centralized cataloguing agency such as an Education Media Service.

## 2 Physical forms of catalogues

- (1) The *book catalogue* has been used in the past as it fulfils most of the requirements for an ideal catalogue. Its greatest drawback, however, is that it is not

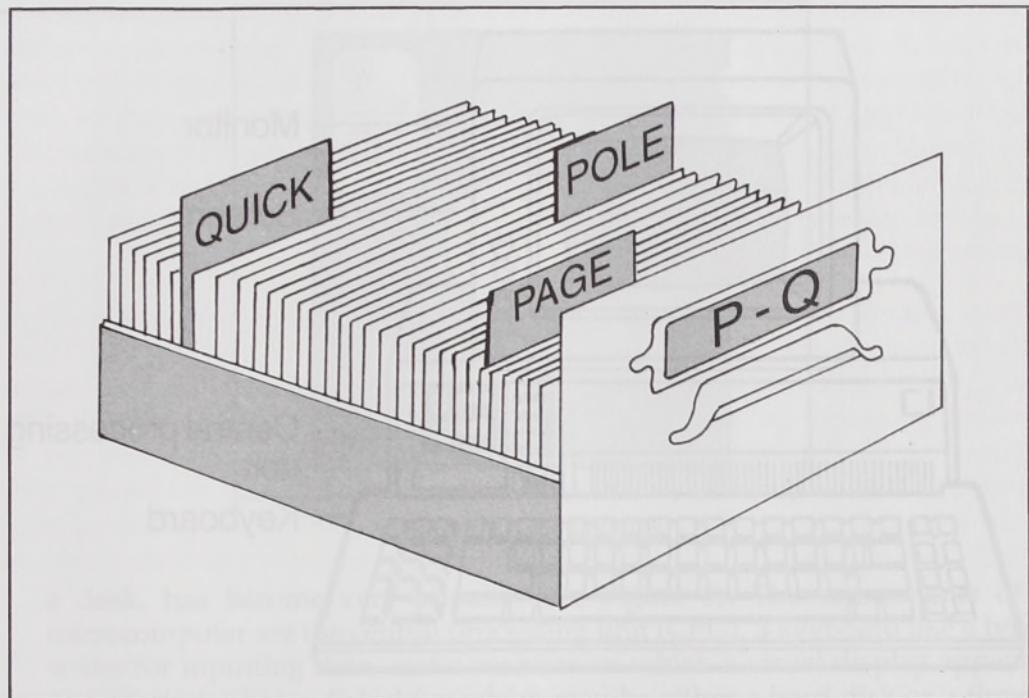


Figure 2 Catalogue drawer with label and guide cards

flexible. Once a book has been printed it is not possible to add records to or remove records from it. It is expensive to print and bind a book, especially if one only requires a few copies. The book catalogue was thus mainly used by very large national libraries and not in schools. A microcomputer with a printer makes a book catalogue more feasible, but this will be discussed later under the computer catalogue.

- (2) The *card catalogue* (see Figure 1) has been used in many types of library and is still in use in most of the media centres in South Africa.

Wooden catalogue cabinets with drawers are used to store the cards. These are expensive, not very portable and accessible to a limited number of users simultaneously. The advantage of using cards is that they are relatively inexpensive, durable and very flexible. It is very easy to insert or remove cards from a drawer and thus easy to keep the catalogue completely up to date. If the collection in the media centre is small and there is not enough money to buy expensive cabinets, or until such time as these can be purchased, the

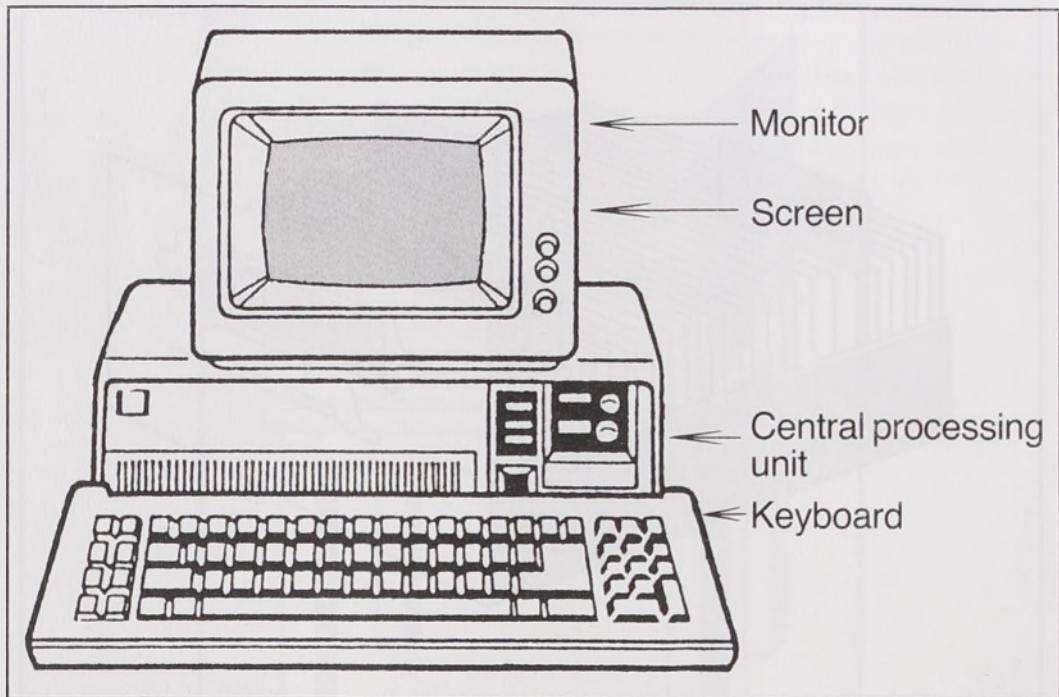


Figure 3 Microcomputer

media teacher can easily file the cards in strong cardboard or wooden boxes. The media teacher will file cards received from the Education Media Service or those which she herself has compiled. It is easy to provide guiding both on the outside of drawers and boxes, as well as having projecting tabs on some cards inside the drawers (see Figure 2).

- (3) The *microfiche catalogue* has not been used extensively in media centres except in Australia. The microfiche is a card of transparent film (usually 10,5 x 14,5 cm) with rows of bibliographic records in miniature. These micro-images are not legible until the card is inserted in a special machine or "reader" which magnifies the catalogue entries. The advantages of a microfiche catalogue are that it is very compact, portable and relatively inexpensive. However, it is not flexible and has to be brought up to date periodically. Another drawback is that only one person at a time can use the reader.
- (4) The *computer catalogue* is used in many media centres overseas. The microcomputer, which is a small, relatively inexpensive computer that can stand on

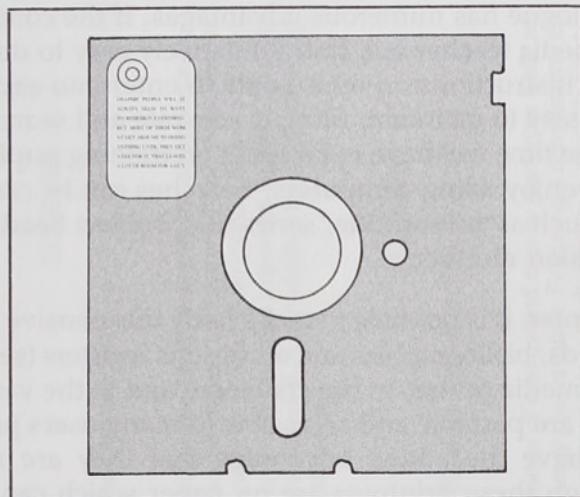


Figure 4 Floppy disk

a desk, has become very popular (see Figure 3). The components of a microcomputer are the central processing unit (CPU), a keyboard like a typewriter for inputting data, and a monitor on which a visual display appears. The computer has a disk drive which may be either a hard disk or a floppy disk. A floppy disk is a small paper-encased plastic disk that stores information (see Figure 4).

The computer also needs a software program which tells it what to do with the data that the media teacher enters, for example, the bibliographic records. After the computer has manipulated the data according to the instructions in the program, it will produce an output. This may be a visual display on the screen of the monitor, or if a printer has been attached to the microcomputer a paper copy may be printed out if required.

The computer catalogue may be stored on a hard disk or it may be stored on a number of floppy disks, depending on the memory capacity of the computer and the number of available records. If a microcomputer with a hard disk is purchased it is possible to store all the records on this disk, but one cannot store very many records on one floppy disk. This means that the catalogue user has to search through several disks. There are also computers available in which a stiffy disk made of plastic can be used and this has a larger storage capacity than a floppy disk. A number of media centres in South Africa have computerized their catalogues, but these are still in the minority. Also unless more than one terminal or microcomputer is available only one pupil at a time can access the catalogue.

The computer catalogue has numerous advantages. If the computer program is user friendly the media teacher will find it relatively easy to do cataloguing, because there will be instructions on which data to enter into each field. The computer catalogue is easy to maintain, filing is accurate and searches may be done very speedily. Some time will have to be spent on training pupils to do searches, but pupils usually enjoy using computers. Searches can be carried out on various access points such as author, title, series title, subject heading, classification number and accession number.

If there is also a printer, it is possible to make fairly inexpensive lists, called print-outs, of stock, records, bibliographies and accessions registers (see Figure 5). These can be used in the media centre, in the staffroom and in the various classrooms. Thus the printouts are portable and accessible to many users just like book catalogues, but they have the added advantage that they are not expensive to reproduce. Although these printouts are on paper which can tear easily, they could be placed inside a file for protection, and new lists can be produced periodically with relative ease. The completely up to date catalogue is available on the computer in the media centre.

If the computer has online access to a central database of cataloguing information, records may be downloaded from the database. Alternatively the Education Media Service may provide the required records on a floppy disk which can be used in the computer.

It will be apparent to you from the above discussion of the four types of catalogue that either the card or the computer catalogue would be the best choice for the media centre in a school. As has already been stated, at present most of the media centres in this country use the card catalogue.

## ANNOTATED SUBJECT BIBLIOGRAPHY

SCHOOL SUBJECT: BIOLOGY

DESCRIPTORS

SOLAR ENERGY  
FORCE AND ENERGY  
ECOLOGY

RECORDS

BRN: 29668

333.79 QIB

The energy crisis / Gibson, M. – Wayland, 1987. – (World issues). –  
ISBN 0 85078 955 9

ABSTRACT: Written for young adults, this lively and informative book deals with the all-important issue of an energy crisis. The challenging information is well-chosen and systematically presented in clear, easily readable print, supported by functional, elucidating, labelled illustrations. The table of contents gives an adequate outline of the field covered. It is possible to trace important subjects through an alphabetical index. A glossary and a reading list are provided. A stimulating, thought-provoking read to extend general knowledge. One of the series: World issues.

NUCLEAR ENERGY  
FORCE AND ENERGY  
FUELS

BRN: 193

333.79 WEL

Energy / Wellington, J.J. – Stanley Thornes, 1985. – (Extending science; 7). –  
ISBN 0 85950 237 6

ABSTRACT: Readers are introduced to the different forms of energy and energy resources while at the same time the author stresses the importance of energy conservation. Featuring a combination of simply written text containing much activity work for pupils and adequate illustrative material in black-and-white, this book forms part of a stimulating series on selected topics in science which offers interesting and relevant extension material for biology not always readily found in textbooks. Includes an index.

Figure 5 Computer printout of records (Reproduced by permission of Media Centre Services, Department of Education and Training)

## *The contents of the media centre catalogue*

### 1

### *Introduction*

The physical form of a catalogue is really only that of a container for the *bibliographic records* we put inside it. We compile a bibliographic record for each item or information source that we have in the media centre. This bibliographic record contains a description of the item according to a standardized format so that the item can easily be identified. The purpose of the bibliographic record is to act as a *substitute* or *surrogate* of the actual information source (see Figure 6).

The *call number* of the item is added to the bibliographic record and is found in the top right hand corner of the card. The call number is the address of the item in the media centre. It enables the user to locate the item on the shelves, if it has not been issued or removed for use in the media centre. The *accession number* is also added to the bibliographic record in the bottom left hand corner. If the media centre has more than one copy of the same book the additional accession numbers are merely added to the original card. Thus we can immediately see

636.8 THO
THOMAS, Leonard E
Cats : the complete guide to cat care, behaviour and health / Leonard E. Thomas. —
2nd ed. — London : Black, 1988. — 206 p. : col. ill. — (Caring for pets). —
Bibliography: p. 200–201. —
ISBN 0 7135 2900 2
91/33

Figure 6 Bibliographic record

if the media centre has more than one copy of an item by looking at its accession number/s.

The bibliographic description is entered under various headings which are also called access or search points. The headings are made so that the user of the catalogue can find the bibliographic record in the catalogue. What headings and entries do we want in our catalogue and why?

## 2 Inner form of a catalogue

In the catalogue entries with and without bibliographic descriptions are found. The former consist of subject, author and title entries. The latter are known as references.

### 2.1 Entries

- (1) *The subject entry.* For this entry the bibliographic description is entered under a subject heading. If users want to find out what information sources are available in the media centre which have information on a specific topic or subject such as "road safety" they will look under the subject. Thus it is the subject entries which are the most often consulted in the school media centre.

- (2) *The author entry.* For this entry the bibliographic description is usually entered under the name of a person who is responsible for the intellectual contents of a work. This person may be an author, an artist, composer or photographer. In some cases the author of a work may also be a corporate author such as an institute, company, association, church or government body. Often the author entry is the main entry card in the catalogue.

There may be added author entries for people who have made some contribution to the work, such as joint authors, compilers, editors, translators and illustrators. If the catalogue user knows the author of a particular work, he will look under the author's name in the catalogue and will be able to ascertain whether the required item is available. If she wants to find out for what other items the author has been responsible she will find all the records together under the author's name.

- (3) *The title entry.* The user often remembers only the title of an item. Certain information sources are best known by title, for example *World book encyclopedia*. Many periodicals and films, to which many individuals make contributions, are also better known by title. The catalogue user who wants to find an item with a title which he remembers, looks for a title entry to see whether the item is in the media centre. A user may also have used a book which is part of a series and may want to find out what other works in the series are available. This user will look under the series title.

The three types of entry are usually filed in three separate sequences, i.e.  
subject  
author  
title

or, they maybe filed in two sequences i.e.  
subject  
author and title

or in one sequence like an *encyclopedia* with subject, author and title entries all interfiled in one alphabetical order. The inner form of this last type of catalogue is known as a "dictionary" catalogue.

Whatever physical form of catalogue is used in the media centre the inner form will comprise the subject, author and title entries.

## 2.2 References

To facilitate the use of the catalogue, references may also be filed in the catalogue. *See references* are used to direct a user who looks under a different form of a heading in the catalogue. The user may select a heading such as SYMBOLS where he finds a reference

Symbols

see

NOTATION

A *see* reference directs a user to the subject term selected for the entry in the catalogue and to the form of an author's name which is used.

*See also* references are mostly used to direct the user to related subjects, for example if the user looks under the heading DOGS she may find a number of entries, but there may also be a reference such as

DOGS

*see also*

GUIDE DOGS

*See also* references may be used for changes of name. Some publications may have been entered under the heading SOUTH WEST AFRICA and others received after 1988 will be entered under NAMIBIA. At both these headings *see also* references should be inserted so that the user will realise that he can find bibliographic records under *both* of these headings.

It is often useful to make a general reference, for example:

DICTIONARIES for language dictionaries *see*

under the name of the specific language, e.g. English –  
dictionary

## 2.3 Guiding

It has already been pointed out that guiding will be used in book catalogues and in card catalogues to facilitate the use of the catalogue. In a book catalogue headings and indentations are used. The card catalogue should have a label on the

front of each tray to indicate the range of cards in that tray. Guide cards with tabs of different widths projecting above the top of the catalogue cards, and with an indication on the tabs of the range of cards behind each guide, divide the cards into convenient groups (see Figure 2).

A concise explanation of the arrangement of the catalogue and directions for its use should be attached to the catalogue cabinet.

## 2.4 Filing

There are different rules for filing entries and references in a catalogue. You may use *The ALA filing rules* (Chicago: American Library Association, 1980) or you may make your own summary of the rules followed. The important point is to use rules consistently.

Alphabetical arrangement may be either letter by letter or word by word. In the *letter by letter* method spaces are ignored and filing is straight through as though each heading were written as one word. In the *word by word* method short words are filed before longer words beginning with the same letters, or as it is sometimes expressed: nothing (that is, a space) comes before something (a letter). The *word by word* method is usually used in the catalogues in media centres.

**Example**    *Word by word*

D & C Company

D-day

D.P.

De Villiers, J.S.

Deaf and dumb

Deafness

A Death in the family

Dennis, Allan

DIALOG

The 1980 rules, which are suitable for use in either card or computer catalogues also follow the basic rule: 'file as is', that is file exactly as spelt. This rule places the emphasis on the way words *look* rather than the way they *sound* or their meaning. Similar elements that differ in form (for example, numbers expressed in digits and those expressed in words) are filed in different positions.

1 Numerals. All words beginning with numerals are filed before letters and written numbers are filed alphabetically.

(a) When filing numbers, arrange them from lowest to highest (for example 1, 19, 209). Remember, however, that punctuation such as spaces, dashes, hyphens, diagonal slashes and periods (.) are all treated as spaces and so they mark the beginning and end of numbers.

**Example**    1:00 am                      1 space 0  
             ½ of an orange                  1 space 2  
             1,5 percent                        1 space 5  
             2 + and 3 -                        2

(b) Roman and Arabic numerals are interfiled.

**Example**    Arabic      10 ways to save  
             Roman     XI Romans  
             Arabic      11 sketches

(c) Numerals after a decimal point are arranged digit by digit, one place at a time. Decimal numerals that are not combined with a whole numeral are arranged before the numeral 1.

**Example**    ,25  
             ,75  
             1  
             1,5

(d) Characters in fractions are arranged in the following order: numerator, line (the line, whether horizontal or diagonal is treated as a space), denominator. For filing purposes, fractions combined with whole numerals are considered to be preceded by a space, whether or not one is present.

**Example**    2 years from now  
             ¾ of a day  
             3 and 20 blackbirds  
             31-1-1990

(e) Dates expressed in numerals are arranged according to chronology.

**Example**    Smith, William, 1801-1879  
             Smith, William, 1821-1878  
             Smith, William, 1930

2 Letters of the alphabet. Lowercase and uppercase (capital letters) have equal filing value.

- (a) Punctuation and symbols are ignored for filing purposes. A hyphenated word will thus be filed as two words.
- (b) The ampersand (&) is filed as if spelled out in the language of the publication ('and' in English, 'en' in Afrikaans).
- (c) Initial articles (such as a, an, the, 'n, die) are ignored.
- (d) Abbreviations are filed exactly as written.

**Example** Doctor in the house  
Dr Faustus

- (e) Initials separated by periods (.) or other punctuation are filed as separate words.
- (f) Acronyms (for example, SCIS, BELTEL) are treated and filed as words.
- (g) A prefix that is part of the name of a person or place is treated as a separate word unless it is joined to the rest of the name directly or by an apostrophe without a space.

**Example** Darby, William  
D'Arcy, Ella  
De Villiers, J.S.  
Delmar, Dora

When, as sometimes occurs in filing, you find several apparently identical headings which are of different types you should use the following arrangement:

- personal forenames
- personal surnames
- place names
- things (corporate body)
- titles.

To ensure that you understand how headings are filed in a catalogue according to the above rules you should turn to the filing exercise, which is *Exercise 1* in Appendix A at the back of this book. Arrange the headings in the correct alphabetical order according to the above rules.

### **3 Shelf list**

The shelf list cards are kept in a separate drawer in the media teacher's workroom. A shelf list card is a main entry card with the call number above the main entry heading. The order of the cards in the shelf list corresponds to the order in which the media are arranged on the shelves. The shelf list is used for stocktaking.

### **4 Authority file**

When the media teacher is cataloguing an item by a person or a corporate body whose name is written in two or more different forms, it is necessary to consult an authoritative reference source to determine which form of the name is preferred. This is how the authority file got its name; it is an alphabetical file of cards with the names or terms which have been selected to be used as headings in the catalogue. This file can be consulted when cataloguing an item to ensure consistency in the entries for the catalogue. For example, the authority file will indicate that

ELIOT, T S is the standardized heading and  
not ELIOT, Thomas Stearns.

If the name is checked in the authority file all the works of this author will be entered under the same heading and will all be found together.

### **2 MARC**

# CHAPTER 4

## *Standardization, Machine Readable Cataloguing (MARC) and computerized library networks*

### **1** *Introduction*

Catalogue codes, which contain rules for compiling bibliographic records, have gradually evolved and been improved over the years in order to provide for changing needs and requirements. Since the beginning of the twentieth century there has been a steady growth in the popularity of a uniform or standard form of record. This development is closely related to the growth of centralized and cooperative cataloguing services and, also more recently, to the rapid development of computerized cataloguing.

The adoption of the *Anglo-American Cataloguing Rules*, 2nd edition, which was published in 1978 and which is referred to as AACR2 for short, as the national standard in many countries has been very important in the standardization of records for both print and non-print materials and their integration in catalogues and databases. This is because AACR2 is the first code to provide rules for bibliographic description and access points for all types of media. AACR2 also incorporates the International Standard Bibliographic Description (ISBD) for different types of materials. The ISBD provides a standard set of descriptive elements in a standard order using

standard punctuation to separate the elements. A revised edition of AACR2 was published in 1988 and is referred to as AACR2R for short.

Because the full edition of AACR2 contains many rules and much repetition, Michael Gorman prepared a simplified version, *The concise AACR2*, for use in small libraries with general collections, such as small public libraries or school media centres. Many of the full code's rules for out-of-the-way and complex materials are omitted and the method of presentation is different. However, it incorporates the same basic principles of AACR2R so that when a bibliographic record has been compiled it looks the same whether one has used the full or the concise text.

The importance of a standardized cataloguing code for pupils is that they become familiar with the standard format in the media centre and then when they use other libraries, such as public, college, university or special libraries, they will find it easier to identify and retrieve records.

Because there is such a mass of information available today, librarians realised that it was impossible for one library to obtain all the sources. They recognised the need to *share information*, to develop the technology necessary for resource sharing, and to reach agreement on standardization for access to and communication of information.

A standardized format makes it possible for libraries to exchange bibliographic records. It was also necessary to develop a format which could be used in library computers.

## 2 MARC

The acronym MARC is derived from the words **M**ACHINE **R**EADABLE **C**ataloguing. MARC is a cataloguing format or the method of organizing data in a bibliographic record which was developed by the Library of Congress (LC) in 1965. A computer treats unformatted data as a continuous string of characters. A format is needed to ensure that the fields within a bibliographic record, and the data elements within those fields, can be identified and manipulated by the computer. The format also ensures that the computer displays the bibliographic record as a unit.

A MARC format, then, is a set of specifications for encoding a particular type of machine readable record, that is, a record containing bibliographic data. As such, it provides for the record *structure*, the content *designation*, and the data *content* of the bibliographic record. The MARC structure is thus a standard way to communicate cataloguing or bibliographic information between users and between computers.

As the number of countries and networks using the MARC format increased, variations on the basic MARC format proliferated. For example, UKMARC refers to the MARC standard used in the United Kingdom and USMARC to the MARC standard used in the United States of America. These variations led to a need for the UNIMARC (UNiversal MAchine Readable Cataloguing) format in order that catalogue records could be exchanged internationally. National agencies creating MARC records use national standards within their own country, and re-format records to UNIMARC for international exchange.

UNIMARC is also used as the basis for the South African MAchine Readable Cataloguing (SAMARC) format which was developed locally and is used by the South African Bibliographic and Information NETwork (SABINET).

Before we study computerized library networks, we need to look at some of the developments in centralized and cooperative cataloguing, because a computerized library network provides for both centralized and cooperative cataloguing.

### 3

## *Centralized and cooperative cataloguing*

Obviously it is wasteful duplication if hundreds of cataloguers and media teachers in different places all have to catalogue the same work. This can be avoided by using the records from a central cataloguing agency, or by means of libraries and/or media centres cooperating on regional, national or international level.

Centralized cataloguing and cooperative cataloguing are distinct concepts and are dealt with separately here, but they interact and overlap to a large extent, especially in a computerized bibliographic network.

### **3.1 Centralized cataloguing**

The term centralized cataloguing refers to the cataloguing of information sources by a central agency which then makes the cataloguing information available to other libraries or media centres.

#### **Advantages of centralized cataloguing**

- (1) Economy for all in eliminating duplication of tasks (for example, cataloguing the same item only once for many media centres);

- (2) availability of bibliographic and professional tools which may be too expensive for every media centre to acquire;
- (3) assurance of having work done by experts according to standards (thus facilitating the use of other media centres and libraries)
- (4) advantageous bulk buying of supplies such as catalogue cards;
- (5) saving time and labour by using machinery, equipment and physical space too expensive for individual media centres;
- (6) elimination of duplicate records, such as authority files; and
- (7) increased opportunity for media teachers to work directly with pupils and teachers, because they are freed from the repetitive tasks associated with cataloguing.

### **Disadvantages of centralized cataloguing**

- (1) In the past it was sometimes difficult for the centralized agency to keep up to date with the despatch of card sets, but when an agency has computer facilities available it is possible to provide cards almost immediately; and
- (2) some media centres have used a very simplified form of classification and cataloguing and may find that the cataloguing from the centralized agency is more detailed.

The cost of establishing a centralized cataloguing or processing centre, whether it is computerized or not, is high, but as has been seen above there are more advantages than disadvantages.

Centralized cataloguing may be carried out by either regional, national or commercial agencies.

From 1901 the Library of Congress in Washington, D.C. ran a card distribution service. Since 1960 their catalogue records are available on machine readable tapes (LCMARC records). Since 1969 the British National Bibliography, the official catalogue of British publishing, has also made its records available on machine readable tapes (UKMARC records). In South Africa SABINET acquires the LCMARC and UKMARC records, and any library which participates in the network, can use its computer facilities to search these tapes for entries applicable to its own acquisitions. The Library

of Congress service is based on the acquisitions of its vast library with world-wide coverage. LC compiles records for children's books which include alternative, simple subject headings.

In South Africa the Media Centre Service of the former Department of Education and Training provided cataloguing information on a national basis.

A *regional* agency, such as the former Transvaal Education Media Service, also made its cataloguing information available to media centres either as sets of catalogue cards or on floppy disks.

Some *commercial* firms, most of them in countries such as the United States of America, do centralized cataloguing, as well as providing books with spine labels, date slips, book pockets, issue cards and so on.

*Cataloguing in Publication (CIP)* is a combined commercial and library service. Since 1971 LC has carried out pre-publication cataloguing from data obtained from publishers' proofsheets. This data is then printed in the books. At the present time, approximately 2 000 American publishers submit books in galley proof form to the CIP office at the Library of Congress.

More than a 1 000 publishers are participating in the United Kingdom CIP programme to supply the British Library with details of their forthcoming titles. The scheme covers 34 percent of UK publishing output. The bibliographic records created from this advance information are added to the UKMARC database in advance of publication, and are printed on the verso of the title pages of the books themselves. Thus, as soon as the book arrives, librarians and media teachers have this information available from which to prepare their catalogue cards. CIP data is available in most of the books for juveniles which are published overseas. Unfortunately local publications do not include CIP data.

### **3.2 Cooperative cataloguing**

Cooperative cataloguing occurs when two or more agencies each catalogue their own collections and then pool their records in a common catalogue. Usually the records will indicate which libraries have the item in their collections, this is called "holdings" information and facilitates interlibrary loans. The catalogue compiled in this manner is known as a *union catalogue*. A union catalogue may cover all the items held in a group of libraries, or all the material in a particular form in a specified group, such as union lists of periodicals, music, videos or slides. Sometimes

the catalogue is compiled by all the libraries in a specific group, in a geographic area, or on a specific subject field.

A *union catalogue* is available in different forms. In the past there was often only a single copy of such a catalogue on cards, or it could be printed in book form such as LC's *National union catalog*. A union catalogue could also be made available on microfiche. Today many union catalogues are available online in a computerized catalogue system or they may be available on a specific type of compact disc known as CD-ROM.

In South Africa, many libraries now contribute bibliographic records and holdings information to SABINET.

## 4 Computerized library networks

Computer-based library networks contain elements of both centralized and cooperative cataloguing. Libraries soon realized the economic advantages of the cooperative use of MARC tapes. Various computer-based library networks were initiated and developed, such as the Online Computer Library Center (OCLC) in Ohio. These cooperative schemes all built up large catalogues of machine readable records called databases. The database contains bibliographic records in machine readable format. Each element in the record – for example the author and the title – can be identified by the computer program. Members of OCLC have online access via a dial-access or dedicated line terminal to more than 16 million bibliographic records.

### 4.1 South African Bibliographic and Information Network (SABINET)

On 28 February 1983 SABINET was established at the request of the South African library and information community. SABINET was officially opened on 15 August 1984 and is able to provide libraries and information centres with the information normally found in a traditional library catalogue. Various types of library such as public libraries, academic libraries and special libraries participate in the network.

Users can access the databases through their own computer terminals which are linked to the central computer via a national communications network similar to a telephone network.

The aim of SABINET is to improve national bibliographic control, resource sharing and the exchange of information. The functions which SABINET supports on the network level are cooperative cataloguing, cooperative acquisitions, information retrieval and interlibrary loans.

The SABINET databases are growing all the time. At present the databases on the SABINET system are the *South African Cooperative library database* (SACD), *Library of Congress database* (LCDB), *South African national bibliography* (SANB), *Index to South African periodicals* (ISAP), *British national bibliography* (BNB or UKDB), *Cooperative indexing database* (CIDB) *Union catalogue of theses and dissertations* (UCTD), KOVSINDEX, *Technikon research database* (NAVTECH), *DNE approved journals*, *Book data* (this database replaces *Whitaker's Books in print database*) and *UnCover*.

The SACD incorporates the *SA joint catalogue of monographs, 1971-* and *Periodicals in southern African libraries* (PISAL) and is therefore the database which indicates the holdings of South African libraries. At present there are more than two million bibliographic records with approximately six million holdings statements.

If a member wants to add a bibliographic record for a recently acquired item, she may first search the holdings database to see whether a record has already been entered for the item. He may search under various headings such as author, keywords in the title, ISBN or series, and if necessary also consult the authority file. If an existing record is found this is called a match (or a "hit") and the library just adds its holdings statement or code to the record thus building up a cooperative catalogue. If no record is available the library compiles one by doing original cataloguing and enters this in the database, together with its holdings statement.

Members doing original cataloguing must maintain certain standards. Works should be described according to at least the first level of AACR2R and all elements should be correctly tagged for a machine readable format, that is the SAMARC format.

SABINET provides for authority file maintenance of Library of Congress subject headings. LC subject headings are more detailed than those usually used in school media centres. These subject headings are not suitable for school media centres where simple headings are preferred.

Although many libraries and information services make use of the SABINET databases at present this network is not widely used by the school media centres in South Africa. Possible reasons for this are that most media centres do not have the necessary technology or finances and that the bibliographic records available are not specifically tailored to meet the requirements of school media centres.

## **4.2 Schools Cooperative Information Service (SCIS)**

As seen in the previous paragraphs, when a large network has libraries of various types as members, the specific needs of schools are not always met. Media centres do not require very detailed cataloguing. For this reason single type networks that catered for the needs of school media centres were established in countries such as Canada, the United States of America and Australia. One of the largest of the networks specifically for media centres was established in Australia in 1984. This was called the Australian Schools Catalogue Information Service (ASCIS). There were further name changes, and this service is now known as the Schools Cooperative Information Service (SCIS), because its services are no longer provided in Australia only, but also to schools in New Zealand and in some of the South Pacific Islands. SCIS is one of the Curriculum Corporation's Information Services; the other is the Curriculum Information Network (CIN).

SCIS provides schools all over Australia with cataloguing data to meet the special requirements of the users of media centres. While SCIS aims for compatibility with internationally accepted standards such as AACR2R and DDC it has set standards to meet the special requirements of media centres, not only in the choice of materials catalogued, but also in the subject headings used. Use is made of simple headings which are suitable for pupils. Catalogue records are available as card sets, on microfiche, on floppy disks or online. SCIS is able to supply schools with almost 90 percent of the cataloguing records they require. Besides providing bibliographic records to the school media centres in Australia on a centralized basis the SCIS database was compiled as a cooperative effort and continues to grow as a result of cooperation. The prime client group for SCIS is media teachers.

## *Classification*

### 1 *Introduction*

Having studied the objectives, forms, compilation and standardization of catalogues, it is now time to learn what is meant by classification.

*Classification* is a mental activity whereby a person groups like objects and separates unlike objects. This sorting can be seen in many examples in daily life such as in the arrangement of the contents of a supermarket.

Foodstuffs, detergents, clothes and toiletries are separated. Foodstuffs will be separated and grouped according to various characteristics. Beverages such as tea and coffee will be put together, and they will be next to softdrinks and fruit juices. Tinned foods will be together but will be separated from fresh meat which will be in the refrigerator. If we go to the shelf where the sweets are located, we find these may be arranged according to either the flavour or the colour or the brand name. Thus various classifications are possible depending on which characteristic is used for the grouping or classification.

We can classify ideas as well as objects. Classification may be done instinctively, for example, when you hear talk of a dog you think of a four-legged animal which barks, chews bones and either wags its tail (friendly) or bites (vicious).

A person may decide to try to classify all the objects or phenomena found in the world. However, not everyone is interested in the same aspects of a phenomenon. For example, most people are interested in motor cars as a means of transportation, but some people are interested in their repair and maintenance, while there are others who are interested in motor car racing. Thus a classification according to subject disciplines is more common.

In the past philosophers have worked out classifications of knowledge and such a classification is known as *knowledge classification*. The problem is that knowledge does not remain static, and as knowledge increases a scheme could become outdated or incomplete.

## 2

## Bibliographic classification schemes

Classificationists (originators of classification schemes) have devised various bibliographic classification schemes for the classification of books and other library materials. There are a number of such schemes. Just as we can group objects in a supermarket according to function, colour or brand, so we may group library materials in different ways. There is not necessarily one correct classification. Classification schemes are devised and evolve for different types of library or for different types of collection and thus the *purpose* of classification schemes may differ according to the needs of the users.

A bibliographic classification scheme arranges books according to their subject content, so that those on the same subject will be shelved together. Those on related subjects will be adjacent. This is, however, an oversimplification as books may deal with two or more aspects of the same subject or with several topics, and yet it is only possible for a book to have one place on a shelf. This is one reason that we need other information retrieval systems, such as the catalogue, to support the bibliographic classification scheme if we want to be able to retrieve information effectively.

### 2.1 Schedules

A classificationist first decides on his main classes and the order in which they are to be arranged. She then proceeds to divide and subdivide each main class to provide for all the subdivisions of each subject, for example:

Technology		main class
Medical sciences	Medicine	
Engineering and allied operations		
Agriculture and related		
technologies		
etc.		

Each division and subdivision has its own name. In library terminology the names of classes and their subdivisions are usually called terms. So the classificationist works out complete schedules indicating all the main classes, divisions, and subdivisions. This classifying, or grouping, can only be achieved by applying a characteristic of division according to specific rules and principles. For example, we can classify the various literatures in the world firstly according to the characteristic of language (French literature, English literature, Zulu literature, etc.) We may then group books according to form within each language (French poetry, French drama, French fiction, French essays, etc.)

## 2.2 Notation

Since it is impossible to write the full names of the classes on the spines of books and on audiovisual materials, the classificationist chooses symbols to represent the various subjects. The symbols which make the process of placing the materials on shelves in a recognized order a more mechanical task are called notation. The notation may be letters of the alphabet, Arabic or Roman numerals, or any other sequence of symbols. The two types of notation are a pure notation (uses one type of symbol only) and a mixed notation (uses two or more kinds of symbols).

A notation should possess certain qualities. It should be:

- able to convey order
- simple
- brief
- expressive, that is express the relationships between and among numbers
- hospitable, permit the insertion of new topics in the scheme
- flexible, allow alternative classifications
- mnemonic, the notation should assist the memory
- synthetic, permit number building
- faceted, include various aspects of a topic.

## 2.3 Index

A good alphabetical index to the classification scheme is important and serves two purposes:

- (1) It locates topics within the schedules;
- (2) A relative index collects together the related aspects of a subject which have been scattered throughout the schedules.

A classification scheme therefore comprises all the schedules containing classes, subclasses, divisions, subdivisions and so on; the notations used to indicate the terms; and an alphabetical index of the terms used in the schedules. There is usually an introduction, giving instructions on how to use the scheme, and in some schemes there are also a number of auxiliary tables.

## **2.4 Problems associated with bibliographic classification schemes**

- (1) A book may deal with several aspects of the same subject which cannot be indicated by one notational symbol.
- (2) As pointed out above, a book may deal with two or more subjects but can only be given one place on the shelves.
- (3) Reference works are shelved separately. A general encyclopedia has articles on many topics, which will in fact be separated from the books on the various topics.
- (4) It is not possible to shelve all materials on a subject together, because these may be in different formats (for example books, pictures, videos).
- (5) Knowledge expands so rapidly that classification schemes cannot keep up and many placings are soon out of date; nor do the classification schemes provide for subjects which were not recognised at the time the scheme was completed. It is usually necessary to periodically revise schemes for the purpose of keeping them up to date as new subjects appear and are incorporated.

## **2.5 Advantages of bibliographic classification schemes**

- (1) The use of a bibliographic classification scheme does create order in the library or media centre.
- (2) Users will find books on the same subject together, and related subjects close to these, that is, first general subjects and then more specific topics.
- (3) Media teachers will be able to compile lists, bibliographies or displays on a topic.
- (4) Media teachers will be able to discover gaps in their collections and identify topics for which there are insufficient materials.

Even though each book or item can only have one place on the shelf, it can be given added subject entries in the catalogue. This means that a person consulting the catalogue will find all the information on a subject brought together in the catalogue, which also indicates where the items can be found. Thus the limitations of the classification scheme are to some extent overcome by the interaction between the catalogue and the classification scheme.

### **3** Contemporary classification schemes

There are general classification schemes which are meant to cover the whole field of recorded knowledge. There are also special classification schemes which cover a specific subject or particular application.

The three principal general classification schemes which are used universally are:

- The *Dewey Decimal Classification* (DDC or DC)
- The *Library of Congress Classification* (LCC)
- The *Universal Decimal Classification* (UDC).

The *Dewey Decimal Classification* is used in over 90 percent of all public libraries and media centres. The *Library of Congress Classification* was intended for the classification of the book stock of the Library of Congress in Washington D.C. It is used mainly in large national libraries and in academic libraries. The *Universal Decimal Classification* is used mainly in special, technical and scientific libraries.

Besides these general schemes there are a number of special schemes which are suitable for use in special libraries and information services, such as legal, medical and engineering libraries.

### **4** Dewey Decimal Classification Scheme (DDC or DC)

Melvil Dewey's *Decimal Classification* was first published in 1876. The full edition of the DDC is now in its 20th edition and comprises four volumes. It is probably the most widely used bibliographic classification scheme in the world and is suitable mainly for public libraries, but it is also widely used in university libraries. For many years, there has been a parallel series of abridged editions, which are intended for use in small libraries with less than 20 000 volumes in their collection. The 12th abridged edition was published in 1990 and it is a true abridgement of DDC 20.

A number of media teachers in the United Kingdom and in South Africa believe that even the abridged DDC provides more detailed classification than that required for media centres and so they use the *Dewey Decimal Classification for school libraries: British and international edition*, 4th ed. edited by Mary South. (New York: Forest Press, 1986.)

The abridged edition of the Dewey Decimal Classification is, however, widely used in media centres both in South Africa and abroad.

# CHAPTER 6

## *Dewey Decimal Classification, abridged edition*

### 1 *Introduction*

You should go to the media centre and look through a copy of the Abridged Dewey Decimal Classification and relative index, 12th edition so that you will have a better understanding of the construction of this classification scheme.

### 2 *Construction*

The abridged edition comprises one volume. The Editors' Introduction is found at the beginning and explains how to use the scheme. This is followed by a Manual which helps users interpret and apply the schedules. There are four auxiliary Tables, three Summaries, the Schedules and a Relative Index.

Dewey divided all knowledge into ten *main classes* numbered 0, 1, 2, 3, 4, 5, 6, 7, 8 and 9. He decided, however, that he wanted a three-figure minimum for his

notation, so he filled in the missing spaces with one or two 0s which he called zero, or nought. These mean that the subject is dealt with in general. The nought, or zero, therefore has no subject connotation. The main classes are indicated by:

000 GENERALITIES – used for bibliographies, books about books, and for books which contain information on many subjects such as encyclopedias and other reference works.

100 PHILOSOPHY & PSYCHOLOGY

200 RELIGION

300 SOCIAL SCIENCES

400 LANGUAGE

500 NATURAL SCIENCES & MATHEMATICS

600 TECHNOLOGY (APPLIED SCIENCES)

700 THE ARTS

800 LITERATURE & RHETORIC

900 GEOGRAPHY & HISTORY

DDC uses a pure notation of Arabic numerals. Each one of the ten main classes is subdivided into ten divisions, once again numbered 0–9 and each one of the divisions is further divided into ten subdivisions which Dewey called sections, likewise numbered 0–9.

For the first time a *manual* has been included in the 12th abridged edition. It is a guide to the use of the DDC and is made up primarily of extended discussions of problem areas in the application of the classification. 'See-Manual' notes are found at some numbers in the schedules and tables which indicate that relevant information is available in the manual.

There are three *summaries*, which give an overview of the scheme. The first summary lists the ten main classes 000 to 900. The second summary shows how each of these ten classes has been subdivided into ten divisions and thus indicates the 100 divisions. The third summary lists the 1 000 sections. Read through the three summaries in order to form an idea of how Dewey has classified knowledge.

Next turn to the *schedules*. Note how in each class the third section has been extended beyond the three digits to indicate further subdivisions of the subject. A decimal point has been inserted after three digits in order to break up long notations. This point has no decimal value in the usual sense of the word.

**Example** 616 Diseases

616.1 Diseases of cardiovascular system

Note how, by lengthening the digits, narrower subjects are indicated and increasing specificity has been achieved.

DDC scatters subjects according to discipline. This means that the same subject may be found in different classes in the scheme. If you have a book on 'motor cars' you will need to determine which aspect it deals with. If it deals with the maintenance and repairs of motor cars you will classify it at 629.28, but a book on motor car racing will be classified at 796.7.

The alphabetical index in the back of the book is a *relative index*, that is, it collects and relates all topics which have been scattered throughout the schedules according to discipline. It shows the specific aspect dealt with, and refers the user to the notations where the topics may be located in the schedules.

**Example** Motor vehicle racing 796.7

*see also* Sports

Motor vehicles

engineering 629.2

law 343

repair 629.28

transportation services 388.3

The abridged edition also includes four *auxiliary Tables*:

Table 1. Standard subdivisions

Table 2. Geographic areas, and persons

Table 3. Subdivisions for individual literatures, for specific literary forms

Table 4. Subdivisions of individual languages.

Notations from these tables, used consistently with their respective meanings, may be added to numbers in the schedules in certain instances. For example, -03 from Table 1 added to a number in the schedules will always indicate a dictionary or an encyclopedia.