THEMA Global Subject Scheme

Basic User Instructions, version 0.9
Thema Technical Committee, April 2013

Introduction

The *Thema* scheme is intended as a classification scheme for book content for the global book trade, for use with digital and physical products, for all sectors of publishing, and for online and bricks & mortar retail sectors.

The Pilot Draft of the *Thema* scheme (v0.9) was launched in April 2013, at the London Book Fair, and is available (as an Excel document) from the *Thema* website www.panthema.org

These Basic User Instructions are not intended to provide comprehensive guidelines, but simply to outline the fundamental principles of the application of *Thema* classification values. More extensive notes, guidelines, tools and worked examples may follow, as appropriate.

Composition

The *Thema* scheme comprises the following elements:

> Subject Categories
> *plus:*
> Geographical Qualifiers
> Language Qualifiers
> Time Period Qualifiers
> Educational Purpose Qualifiers
> Interest Age & Special Interest Qualifiers
> Style Qualifiers

Of these elements, only a Subject Category is mandatory for the classification of a book product record; Qualifiers are used to supplement and qualify Subject Categories as required.

Typically a user is working with a particular edition of the *Thema* scheme specific to a language group or country, and while the codes are universal, the heading will be presented in the user's language. The set of Subject Categories is universally applicable and common to all language editions of the *Thema* scheme. The Qualifiers contain "Shared Values" which are similarly common to all editions, but may also contain "National Extensions" which typically relate to very specific topics identified as important in certain countries, but presumed not to be of universal interest or applicability. The rules for applying National Extension Qualifiers are exactly the same as for Shared Qualifiers.

Each Subject Category or Qualifier consists of a code and a heading. In product records and message formats (such as ONIX), only the code is required to be communicated, which can then be translated by recipients as appropriate.

General Rules of *Thema* classification

The basic rules for assigning *Thema* Categories and Qualifiers, put most simply, are as follows:

Rule 1: Ensure the first Category entered is the primary subject.

Taking advantage of all available information about the subject and scope of the work, ensure the first Category indicates the single most pertinent and important subject of the work.

Rule 2: Classify titles as precisely as possible or as broadly as required.

If a book is precisely on a specific topic defined by a Category, use that precise code only; if it is broad-ranging in its scope within a single subject area, use a single broad Category rather than listing all the more specific Categories listed beneath it (see Note A below).

Rule 3: Assign as many Categories as are required.

If the book covers several subject areas, assign relevant Categories from across the *Thema* scheme to indicate this, as many as are required (see Note B below). Assign only Categories for subjects that the book is substantially about as a whole, not for subjects that are peripheral.

Rule 4: Observe any Scope Notes and instructions linked to Categories.

In the hierarchical listing, many Categories (and some Qualifiers) carry specific Scope Notes and See Also references; sometimes these are listed under a broad Category (eg Level 1 or Level 2) but they apply to all Categories listed beneath it. The Scope Notes give important and useful information about what it is covered by a heading, and how it should be used in conjunction with other *Thema* values to make full use of the scheme and maintain consistency. The See Also references point the user to other related *Thema* values that may be appropriate to be assigned instead of, or as well as, the value under consideration.

Rule 5: Add Qualifiers whenever appropriate.

The Qualifiers are a key feature of the *Thema* scheme structure and provide great flexibility, enabling the expression of a vast range of subjects with a comparatively small number of values. Note that the Qualifiers are associated *with the book as a whole* and not linked directly with a specific Category, although the link between Category and Qualifier is often implicit (eg Language learning material and Language Qualifiers, travel guides and Geographical Qualifiers etc). As with Categories, assign the most specific Qualifier values that are applicable, as many as are required (see Notes A and B below)

Rule 6: Consider Context

Always view and consider specific headings in the context of the scheme as a whole. Sometimes a heading may seem appropriate when viewed alone, but its location in the scheme may indicate connotations that are not appropriate. This principle is particularly pertinent to selecting between similar headings that indicate different treatments of related subject matter (eg works for specialist or general readers, adults or children etc). See Section Summary below.

Notes

Note A: Because of the hierarchical nature of the codes, it is not necessary to use "high-level" codes in conjunction with immediately subsequent codes denoting specific subjects. With the specific Category QDHR3 "Pragmatism" for example, it is not appropriate to add all or any of the preceding codes QDHR, QDH, QD or indeed Q. The fact that the subject is an aspect of QD "Philosophy" is implicit in the code. Similarly, if assigning Geographical Qualifier 1HFGA "Ethiopia", it is not appropriate to assign also 1H to indicate that country is in Africa, and so on.

Note B: There is no defined upper limit of the number of Subject Category values or Qualifier values that may be assigned to an individual book product record, but multiple values must be allowed for to enable the scheme to function effectively. It is suggested that a maximum of 10 of each type would more than sufficiently cover all reasonable circumstances.

Section Summary
1, Subject Categories

Section A	**THE ARTS**
Treatment	Specialist and some General Adult; prefer Section W codes for practical and hobbyist approaches
Qualifiers	Particularly STYLE and others as appropriate
Special Features	

Section C	**LANGUAGE & LINGUISTICS**
Treatment	Specialist and General Adult
Qualifiers	Particularly LANGUAGE and others as appropriate
Special Features	

Section D	**BIOGRAPHY, LITERATURE & LITERARY STUDIES**
Treatment	Specialist and General Adult
Qualifiers	Particularly LANGUAGE & STYLE, and others as appropriate
Special Features	For Literary Studies, use LANGUAGE Qualifiers to indicate the language of the literature in question; use GEOGRAPHICAL Qualifiers only to indicate national context where significant, eg literature in English of Australia

Section F	**FICTION & RELATED ITEMS**
Treatment	General Adult
Qualifiers	GEOGRAPHICAL and/or TIME PERIOD Qualifiers where these aspects are particularly pertinent & significant; SPECIAL INTEREST Qualifiers as appropriate
Special Features	FY* codes must be used with (after) F* codes

Section G	**REFERENCE, INFORMATION & INTERDISCIPLINARY SUBJECTS**
Treatment	Specialist and General Adult
Qualifiers	As appropriate
Special Features	GBC must be used with (after) other code denoting subject

Section J	**SOCIETY & SOCIAL SCIENCES**
Treatment	Specialist and some General Adult; see also Section V codes for practical approaches to issues
Qualifiers	As appropriate
Special Features	JN* codes may be used with YP* codes without the need for educational-level audience codes

Section K	**ECONOMICS, FINANCE, BUSINESS & MANAGEMENT**
Treatment	Specialist and some General Adult; see also Section V codes for practical approaches to issues
Qualifiers	As appropriate
Special Features	

Section L	**LAW**
Treatment	Specialist only; see Section V for General Adult items
Qualifiers	GEOGRAPHICAL must be assigned to LN* codes
Special Features	

Section M	**MEDICINE & NURSING**
Treatment	Specialist only; see Section V for General Adult items
Qualifiers	Not generally required
Special Features	

Section N	**HISTORY**
Treatment	Specialist and General Adult
Qualifiers	Particularly TIME PERIOD & GEOGRAPHICAL, and others as appropriate
Special Features	

Section P	**MATHEMATICS & SCIENCE**
Treatment	Specialist only (except see PDZ for popular treatments); see Section W codes for General Adult items
Qualifiers	Not generally required
Special Features	

Section Q	**PHILOSOPHY & RELIGION**
Treatment	Specialist and some General Adult; prefer VX* for Mind, Body, Spirit approaches
Qualifiers	As appropriate
Special Features	QRV* codes should be used with (after) other QR* codes

Section R	**EARTH SCIENCES, GEOGRAPHY, ENVIRONMENT, PLANNING**
Treatment	Specialist and some General Adult; prefer Section V and Section W codes for General Adult items
Qualifiers	Particularly GEOGRAPHICAL and others as appropriate
Special Features	

Section T	**TECHNOLOGY, ENGINEERING, AGRICULTURE**
Treatment	Specialist only; see Section W codes for General Adult items
Qualifiers	Not generally required
Special Features	

Section S	**SPORTS & ACTIVE OUTDOOR RECREATION**
Treatment	General Adult
Qualifiers	As appropriate
Special Features	

Section U	**COMPUTING & INFORMATION TECHNOLOGY**
Treatment	Specialist and General Adult
Qualifiers	Not generally required
Special Features	

Section V	**HEALTH, RELATIONSHIPS & PERSONAL DEVELOPMENT**
Treatment	General Adult; see Sections C, J, K, L, M, Q, R, as appropriate, for Specialist works
Qualifiers	Particularly SPECIAL INTEREST and others as appropriate
Special Features	

Section W	**LIFESTYLE, HOBBIES & LEISURE**
Treatment	General Adult; see Sections A, K, N, P, R, T, as appropriate, for Specialist works
Qualifiers	Particularly SPECIAL INTEREST and others as appropriate; GEOGRAPHICAL for WT* Travel
Special Features	

Section X	**GRAPHIC NOVELS, COMIC BOOKS, CARTOONS**
Treatment	General Adult, plus Teenage & Children's
Qualifiers	GEOGRAPHICAL and/or TIME PERIOD Qualifiers where these aspects are particularly pertinent & significant; INTEREST AGE & SPECIAL INTEREST Qualifiers as appropriate
Special Features	Items will typically need a "type" from XA* plus a "genre" from XQ* for full classification; note inclusion of Teenage & Children's material

Section Y	**CHILDREN'S, TEENAGE & EDUCATIONAL**
Treatment	All Teenage & Children's material (except see Section X above), ie up to c 16 years, and minimum school leaving age for Educational material
Qualifiers	Particularly INTEREST AGE and others as appropriate
Special Features	

2, Qualifiers

Geographical Qualifiers
USE: to indicate the geographical scope or applicability of book content (such as the location of a travel guide, the setting of a novel, the jurisdiction to which laws apply, etc).
DO NOT USE: to indicate the location or nationality of author, publisher etc.

Language Qualifiers
USE: to indicate the language(s) to which the book content applies (such as a linguistics or literary studies work, phrasebook or dictionary, etc); that is, the language a book is *about* not necessarily written in).
DO NOT USE: to indicate the language of the text itself (ie for fiction or literature).

Time Period Qualifiers
USE: to indicate the time period range of book content (eg a history book, memoir, etc).
DO NOT USE: to indicate the year of an annual, travel guide, conference proceedings etc,

Educational Purpose Qualifiers
USE: to indicate the curriculum, examination or level for which educational material is specifically designed (such as school textbooks, language learning coursework, etc).

Interest Age & Special Interest Qualifiers
USE: to indicate a variety of characteristics relating to content: the particular reading age or level, related events (eg religious or public holidays); groups of people that book content is specifically intended for, and/or, in some cases, about (eg for women, for/about religious & ethnic groups, for/about Gays & Lesbians, etc); and to indicate explicit content.

Style Qualifiers
USE: to indicate the particular style of artistic or creative expression covered by book content (such as books on art history, music, literary studies, etc). Styles do not include Fiction genres.