



From Indexer to Accidental Taxonomist

Heather Hedden

www.accidental-taxonomist.com



Outline

- What are Taxonomies
- Who are Taxonomists – Why Accidental
- Indexing vs. Taxonomy/Thesaurus Creation: Skills & Tasks
- Freelance Indexing vs. Freelance Taxonomy Work



What are Taxonomies

- **Controlled Vocabulary** – A controlled list of terms for concepts, usually with nonpreferred terms (“synonyms”). May or may not have structure and relationships between terms.
 - Broader and includes taxonomies.
- **Taxonomy** – A hierarchical structure of terms, which may or many not include nonpreferred terms. Targeted at end-users, not indexers.
 - Has popularly replaced “controlled vocabulary” as a broader concept, which may or may not be hierarchical.
- **Thesaurus** – A structured controlled vocabulary with nonpreferred terms, hierarchical relationships, associative relationships, and often term notes.
 - Higher end. Most useful for (periodical/database) indexers.



Thesaurus term example

Government lending

>BT [Economic policy](#)

>>BT2 [National policy](#)

<NT [Veterans' loans](#)

RT [Agricultural credit](#)

RT [Federally-assisted loans](#)

RT [Federally-guaranteed loans](#)

RT [Government and business](#)

RT [Government insurance](#)

RT [Loans](#)

RT [Student loan funds](#)

UF American domestic economic assistance

UF Federal aid to depressed areas

UF Federal credit programs

UF Federal domestic assistance programs

UF Government loans



















Thesaurus term example

materials acquisitions

- UF acquisitions (of materials)
library acquisitions
- BT collection development
- NT accessions
approval plans
gifts and exchanges
materials claims
materials orders
subscriptions
- RT book vendors
jobbers
subscription agencies
subscription cancellations

Taxonomy example

-  Markets & exchanges
-  Nonprofit organizations
-  Cultures & Languages
 -  Ethnic groups
 -  Africans
 -  American indigenous peoples
 -  Asians
 -  East Asian ethnicities
 -  South and Central Asian et...
 -  Aimaks
 -  Altays
 -  Andamanese
 -  Assamese
 -  Baniyas
 -  Bashkirs
 -  Bengalis

Taxonomy example

Top Level Headings

- Business and industry
- Economics and finance
- Education and skills
- Employment, jobs and careers
- Environment
- Government, politics and public administration
- Health, well-being and care
- Housing
- Information and communication
- International affairs and defence
- Leisure and culture
- Life in the community
- People and organisations
- Public order, justice and rights
- Science, technology and innovation
- Transport and infrastructure

Leisure and culture

- . Arts and entertainment venues
 - . Museums and galleries
- . Children's activities
- . Culture and creativity
 - . Architecture
 - . Crafts
 - . Heritage
 - . Literature
 - . Music
 - . Performing arts
 - . Visual arts
- . Entertainment and events
- . Gambling and lotteries
- . Hobbies and interests
- . Parks and gardens
- . Sports and recreation
 - . Team sports
 - . Cricket
 - . Football
 - . Rugby
 - . Water sports
 - . Winter sports
- . Sports and recreation facilities
- . Tourism
 - . Passports and visas



What are Taxonomies

- Controlled vocabularies and thesauri support consistent indexing with the same terms for the same topics
 - over time (periodical-type documents)
 - by multiple indexers
- Used for:
 - Multi-volume works
 - Periodical and reference articles
 - Organization-internal electronic documents
 - Image collections and other digital media databases



What are Taxonomies

- Used on:
 - Content vendor databases
 - Content-rich web sites
 - Internal organization intranets, content management ,and collaboration systems
 - Document management/records manage systems
 - Library, archive, museum catalogs



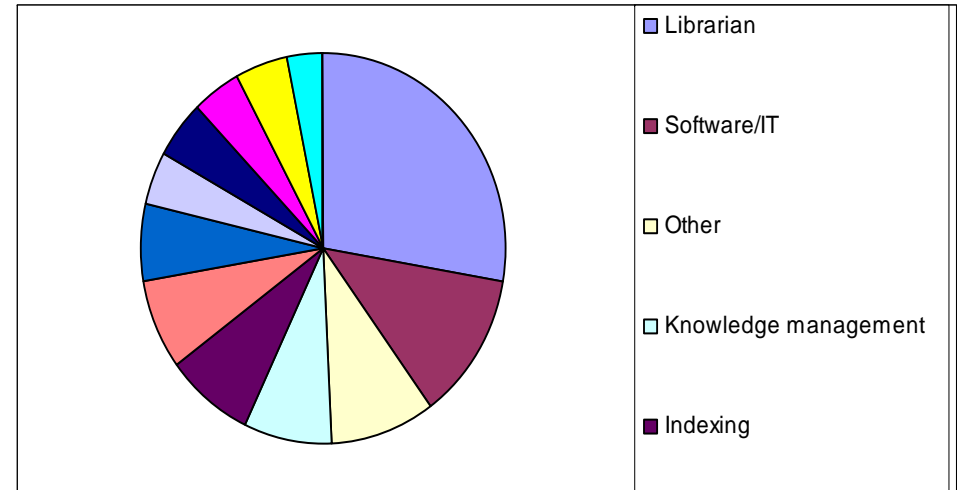
Who are Taxonomists

Backgrounds:

- Indexers
- Librarians/Information specialists
- Software and information technology (IT) professionals
- Web information architects
- Subject matter experts

Who are Taxonomists

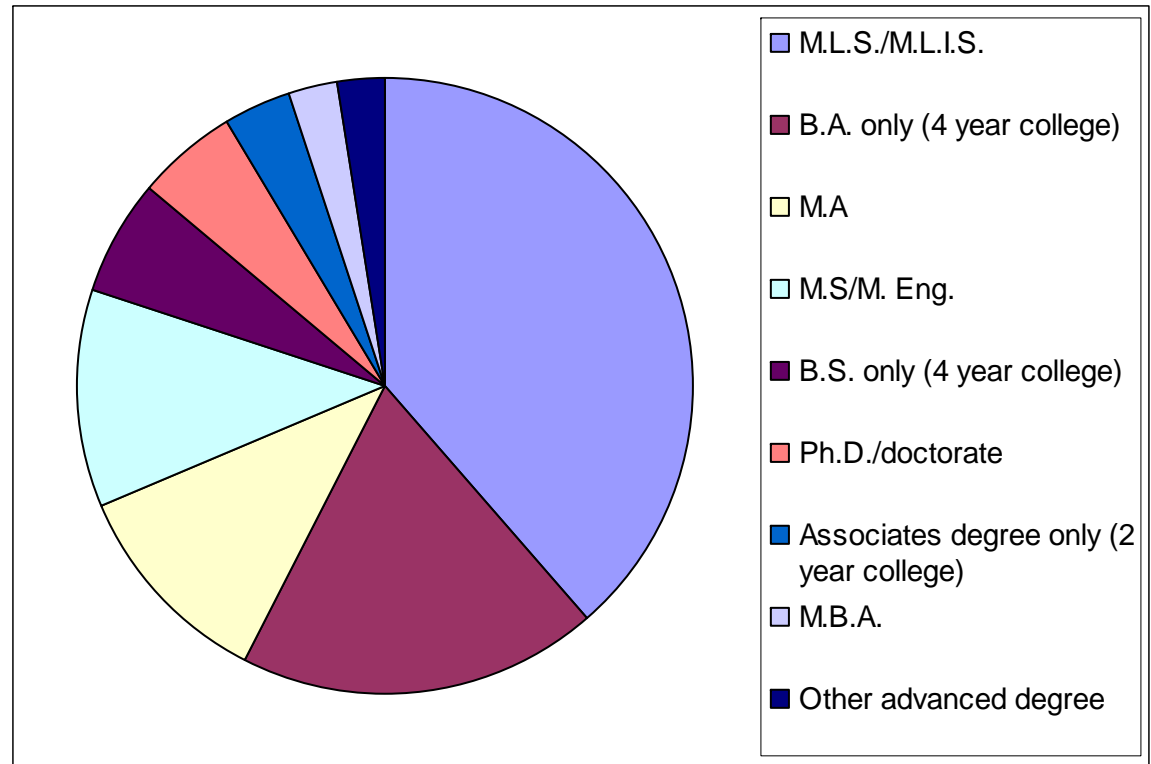
- Survey of 65 Taxonomists
- Librarian 27.7%
- Software/IT 12.3%
- Other 9.2%
- Knowledge management 7.7%
- Indexing 7.7%
- None/Student 7.7%
- Database design, development, or administration 6.2%
- Content management/ECM 4.6%
- Document management/Records management 4.6%



Who are Taxonomists

Education (survey of 65 taxonomists, December 2008)

- M.L.S./M.L.I.S. 48.4%
- B.A. only 23.4%
- M.A 14.1%
- M.S/M. Eng. 14.1%
- B.S. only 7.8%
- Ph.D./doctorate 6.3%
- Assoc. degree only 4.7%
- M.B.A. 3.1%
- Other adv. degree 3.1%





Accidental Taxonomists

- “The company needed the ability to find content better. Therefore I was tasked with delivering a solution that enabled us to find content more easily, which led to the development of a taxonomy/metadata approach.”
- “Was working as Data Entry Clerk. Someone needed to create the terms in one of the taxonomy and I got picked for the task. It went from there as no one else wanted to do it!”
- “Saw the need in my corporate library for managing digital information, and after some reading I realized that taxonomy was the way.”
- “Through a digital asset management project - the company needed a taxonomy to manage photos, illustrations, etc.”



Indexer to Taxonomist

Not so accidental

- Periodical/database indexer > Taxonomist
 - Via the work or materials
- Back-of-the-book indexer > Taxonomist
 - Via the skills
- Especially for thesauri



Book Indexing vs. Thesaurus Creation

Similarities:

- Determining what's important and likely to be looked up
- Creating index entries/terms
- Creating multiple points of entry for the user
- Creating hierarchical structure entries/terms
- Pointing out related terms



Indexing vs. Thesaurus Creation: Creating multiple Points of Entry for the User

Book Indexes	Thesauri
<ol style="list-style-type: none"><li data-bbox="352 654 751 706">1. Double-posts<li data-bbox="352 727 789 779">2. See references	Equivalency relationships
See references are one-directional	Equivalency relationships are fundamentally bi-directional and reciprocal (may <i>appear</i> in one direction)



Indexing vs. Thesaurus Creation: Creating Hierarchical Structure

Book Indexes	Thesauri
Subentries More specific <i>aspects</i> of the main entry	Narrower terms 1. Specific instances of generic term 2. Part terms of a whole-type term
Indicated by indentation or run-in following colon	Reciprocal hierarchical relationships of broader/narrower term (BT/NT)
Must be related to main entry	Stand on their own as terms
Narrower concepts <i>may</i> be subentries or other main entries	Narrower concepts <i>must</i> be treated only as narrower terms



Indexing vs. Thesaurus Creation: Pointing Out Related Topics

Book Indexes	Thesauri
See also cross-reference – is <i>often</i> two-way, indicated at both pairs of terms, but not necessarily always	Related Term (RT) relationship – is <i>always</i> bi-directional reciprocal, indicated at both pairs of terms
Not needed between entries that lie next to or near each other alphabetically	Do not assume an alphabetical view is used.
If pointing to a subentry, the corresponding main entry needs to be named. See also under...	May point to terms at any level in the hierarchy without distinction



Freelance Indexing vs. Freelance Taxonomy Work

Similarities:

- Analytical work
- Subject matter varies
- Subject matter knowledge helps, not always necessary
- You know the work than the person giving you the work


Difference:

- The working lifestyle



Freelance Indexing vs. Taxonomy Work

Book Indexing	Taxonomy Work
Don't need to meet the client, Always work from home	Need to meet and talk with people, Work partially from home, partially onsite
Use your own software	Use software provided by client
Jobs are clearly defined	Jobs not always clearly defined
Usually solo work	May work as part of a team
Projects of 1 – several weeks	Projects of months



Freelance Indexing vs. Taxonomy Work

Book Indexing	Taxonomy Work
Clients: publishers, packagers, authors, sometimes nonprofits (occasionally subcontracting)	Clients: large enterprises, consultancies (subcontracting), information web sites, yellow pages web sites, nonprofits
Can have repeat clients	Usually single projects
Usually pays per page	Usually pays per hour
Often predictable type of work	Rarely predictable type of work
Permanently freelance	Can become permanent



Questions/Contact

Heather Hedden

978-467-5195

heather@hedden.net

www.hedden-information.com

www.accidental-taxonomist.com