An Introduction to Taxonomies

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Background

Heather Hedden's taxonomy development experience

- Developed controlled vocabularies for periodical index databases (Gale)
- Matched controlled vocabulary to keywords for consumer products/services directories (various "yellow pages" clients)
- Created enterprise taxonomies for corporate web sites and intranets (Earley & Associations)
- Developed base and custom taxonomies for integration within an enterprise search software product (Viziant)
Outline

1. Definitions
2. Applications of Taxonomies
3. Creating & Wording of Terms
4. Non-preferred Terms
5. Term Relationships
6. Software
7. Implementation & Maintenance
8. Resources
Outline

1. Definitions
2. Applications of Taxonomies
3. Creating & Wording of Terms
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8. Resources
Definitions

Controlled vocabulary

- An authoritative, restricted list of terms (words or phrases) mainly used for indexing/tagging content to support retrieval
- Controlled in who and when new terms can be added
- Usually makes use of equivalent non-preferred terms (synonyms, etc.) to point to the correct, preferred terms
- May or may not have structured relationships between terms (broader/narrower)
- Also called “authority files,” especially if containing just named entities
- “Controlled vocabulary” is the most general, widely used, broadest concept for all applications (CV for short)
Definitions

Synonym ring

- A controlled vocabulary with synonyms or near-synonyms for each concept
- No designated “preferred” term: All terms are equal and point to each other, as in a ring.
- Usually just called a “controlled vocabulary”

Diagram:
- Applications
- Software
- Tools
- Computer programs
Definitions

**Thesaurus**

- A controlled vocabulary that has standard structured relationships between terms
  - Hierarchical: broader term/narrower term (BT/NT)
  - Associative: related terms (RT)
  - Equivalence: preferred term ("use for" or "used for")/non-preferred term (use) (USE/UF)
- Also supports notes, such as scope notes (SN), for terms, as needed
- 
  "Thesaurus" is most often used for controlled vocabularies used in indexing periodical literature
Thesaurus entry 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
Definitions

Thesaurus

Created according to standards:

- ISO 2788 (1986) *Guidelines for the Establishment and Development of Monolingual Thesauri*
- ISO 5964 (1985) *Guidelines for the Establishment and Development of Multilingual Thesauri*
Definitions

**Taxonomy**

- A controlled vocabulary with broader term/narrower term relationships that includes all terms to create a hierarchical structure
- An emphasis on categories and classification
- May or may not have associative term relationships or non-preferred terms
- “Taxonomy” is most often used for controlled vocabularies used in corporate/enterprise applications, where it’s used for any controlled vocabulary.
- Sometimes used synonymously for any controlled vocabulary.
Taxonomy (Hierarchical) 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
      - Banias
      - Bashkirs
      - Bengalis
Definitions

Ontology

- A complex thesaurus-type of controlled vocabulary, in which terms have specified attributes and relationships are further specified
- Relationships contain meaning, are “semantic"
- A form of “knowledge representation”
- “an ontology defines a set of representational primitives with which to model a domain of knowledge or discourse... ontology can be viewed as a level of abstraction of data models, analogous to hierarchical and relational models” -- Tom Gruber

Definitions

Ontology

- Created according to W3C guidelines:
  OWL Web Ontology Language Guide
  W3C Recommendation 10 February 2004
Definitions

**Ontology relationship examples**

- Broader/narrower types examples
  - Is located in/contains
  - Is comprised of parts/is a part of

- Associative types examples
  - Is purchased by/is sold to
  - Is a member of/has members of

- An ontology is not just for indexing. It is often an end itself in representing a domain of information.
Definitions

Summary of definitions

Synonym Ring
  + preferred terms
= Authority file (or controlled vocabulary)
  + broader/narrower terms
= Taxonomy
  + related terms
= Thesaurus

-- Fred Leise
Outline

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Applications of Taxonomies & Thesauri

1. Indexing support (and secondarily, retrieval)
2. Retrieval support
   - Retrieval support with facets
3. Organization and navigation support
Applications: Indexing support

List of agreed-upon terms as index entries for indexing multiple documents and/or by multiple indexers to ensure consistency

- For: periodical articles, database records, multi-volume works, encyclopedias, web pages
- Called: controlled vocabulary, thesaurus, authority file
- Format: print or electronic
Applications: Indexing support

Examples database index thesauri

- Library of Congress Subject Headings (LCSH)  
  http://authorities.loc.gov

- Library of Congress Graphic Materials (images)  
  http://lcweb2.loc.gov/pp/tgmiquery.html

- Medical Subject Headings (MeSH)  

- Maternal and Child Healthcare Thesaurus  
  http://www.mchthesaurus.info/thesaurus/home.htm
Applications: Retrieval support

Mapping-table of terms and their synonyms or equivalents to aid online retrieval

- For: on-site search engines, online databases, online yellow pages, enterprise search
- Called: controlled vocabulary, synonym ring
- Format: electronic
- Usually for automatic “indexing”
Applications: Retrieval support

Examples of online search taxonomies

- Verizon Superpages
  
  http://www.superpages.com/yellowpages

- Amazon.com book subject categories
  
  http://www.amazon.com/gp/homepage.html
Applications: Retrieval support: Facets

Multiple term lists of different types, also called facets (i.e. people, places, events, products, laws, etc.), for the user to search on in combination

- For: online databases, e-commerce sites
- Called: faceted taxonomy, faceted browse
- Format: electronic
- Depending on length, may or may not make use of synonyms; may or may not have hierarchies
Applications: Retrieval support: Facets

Examples of faceted taxonomies

- Microbial Life Educational Resources
  [http://serc.carleton.edu/microbelife/resources/index.html](http://serc.carleton.edu/microbelife/resources/index.html)
- Shoebuy.com - advanced search
  [http://www.shoebuy.com/s.jsp/r_as](http://www.shoebuy.com/s.jsp/r_as)
Applications: Retrieval support: Facets

Facets for enterprise taxonomies:
Patrick Lambe, 
*Organising Knowledge*

- People and organizations
- Things and parts of things
- Activity cycles
- Locations

Facets for Web sites:
Rosenfeld and Morville, 
*Information Architecture*

- Topic
- Product
- Document type
- Audience
- Geography
- Price
Applications: Organization/navigation support

Hierarchical categorization/classification systems for information organization

- For: web site structural design, online information services, intranet content organization, corporate content management
- Called: web site taxonomy, enterprise taxonomy
- Format: electronic
- Emphasis on classification and guided user search; hierarchical rather than A-Z
Applications: Organization/navigation support

Examples of web site taxonomies

- Digital Web Magazine topics
  http://www.digital-web.com/topics

- Information Architecture Institute

- MyFlorida.com State of Florida site map
  http://www.myflorida.com/taxonomy
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Creating & Wording of Terms

Variously Called:

- Terms
  - generic, common designation

- Nodes
  - in hierarchical “trees”

- Concepts
  - term + synonyms, attributes, relationships, etc.

- Objects
  - same as concept, in object-oriented databases

- Descriptors
  - preferred term, excludes non-preferred

- Preferred terms
  - excludes non-preferred terms

- Topics
  - preferred term, not a named entity
Creating & Wording of Terms

Deciding whether a concept should be a term

1. Is it within the subject-area scope of the taxonomy?
2. Is it important and likely to be looked up?
3. Is there enough information on the topic? (Current documents and anticipated documents or articles on the topic)
4. Do users want and expect it?
Creating & Wording of Terms

Choosing the “preferred” term

- Choosing between two synonyms:
  - Doctors vs. Physicians
  - Movies vs. Motion pictures
  - Cars vs. Automobiles

Consider:

1. Wording of terms most likely looked up by the intended users/audience, especially in browsed taxonomy
2. Enforcing organizational/enterprise controlled vocabulary
3. Conforming to academic or educational standards
4. Consistency in style throughout the taxonomy
5. Wording with in the documents/content indexed
Creating & Wording of Terms

Term format issues

- Lower case or initial caps; not title caps
- Single words or multi-word phrases
- Nouns or noun phrases
- Common nouns or proper nouns
- Adjectives alone can be terms in special circumstances and where noun is obvious from context.
- Countable nouns are usually plural.
- Parenthetical qualifiers may be used for disambiguation, not modification.
- Avoid term inversions.
Creating & Wording of Terms

Pre-coordination vs. Post-coordination

- Pre-coordination: creation of relatively specific, compound modified terms
  Example: Hispanic writers

- Post-coordination: leaving terms as simpler and broader, assuming that they will be combined by the user in searching
  Example: Hispanics AND Writers
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Non-preferred Terms

- Terms for which a designated preferred term should be used instead.

- Have various designations:
  - Variants
  - Non-preferred terms
  - Non-postable terms
  - NPT
  - Nondescriptors
  - Equivalent terms
  - Equivalency relationship
  - Used for terms
  - Use for terms
  - See references
  - Use references
  - Cross-references
  - Synonyms
  - Aliases
  - Keywords
Non-preferred Terms

Types include:

- synonyms: Cars USE Automobiles
- near-synonyms: Junior high USE Middle school
- variant spellings: Defence USE Defense
- lexical variants: Hair loss USE Baldness
- foreign language terms: Luftwaffe USE German Air Force
- acronyms/spelled out forms: UN USE United Nations
- scientific/technical names: Neoplasms USE Cancer
- phrase variations (in print): Buses, school USE School buses
- antonyms: Misbehavior USE Behavior
- narrower terms and instances that are not preferred terms: Power hand drills USE Power plants
Non-preferred Terms

Depending on the search/retrieval system, often a non-preferred term may point to only one preferred term. No “multiple USE” references.

Many-to-one, not one-to-many
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Creating Term Relationships

1. Broader term (BT) / Narrower term (NT)
2. Related term (RT)
3. More specific types of BT/NT or RT (in ontologies)

Relationships are reciprocal between terms.
Broader/Narrower Relationships

Asymmetrical reciprocal relationships

Broader term

SOME  ALL

Narrower term

Fruits NT Apples  Apples BT Fruits

Three types:
1. Generic - Specific
2. Common noun - Proper noun (instance)
3. Whole - Part
Broader/Narrower Relationships

Polyhierarchies

Sometimes a term can have two or more broader terms.

- **Paint Brushes**
- **Painting Supplies**
- **Generals**
- **Presidents**

- **Dwight D. Eisenhower**
Broader/Narrower Relationships

Polyhierarchies

- Based on different means of categorizing:
  - Lakes
  - Utah
  - Great Salt Lake

- Based on generic relationship:
  - Motor vehicles
  - Cars
  - Trucks
    - Light trucks
Associated Term Relationships

- Suggestions to the user of possible related terms of interest
- Not used in simple hierarchical taxonomies
- Required feature of standard thesauri
- Standard designation of RT
- Default is symmetrically bi-directional relationship
- Between terms within the same hierarchy or in different hierarchies

Called:
- Related terms
- Associated terms
- See also
Associated Term Relationships

Between terms within the same hierarchy

1. Having a shared broader term (siblings) and overlapping meaning

   Required RT links, according to the standards

Example:

```
Taxes

Local taxes  Property tax
```

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Associated Term Relationships

Between terms within the same hierarchy

2. Siblings *without* overlapping meaning (mutually exclusive terms)

Optional, and usually not done. Not incorrect, but better left out.

Example:

- Consumer Electronics
- Radios
- TV sets
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Software tools for creating and editing taxonomies and thesauri

- Taxonomies, thesaurus, or controlled vocabulary: the same software is used
- Simple controlled vocabulary (synonym ring) or simple hierarchical taxonomy could be created on paper (or Word or Excel), but combined features of UF, RT, BT/NT, and scope notes, attributes etc., require special software to maintain.
- Originally in-house developed mainframe computer programs
Software

- Spreadsheet software (Excel)
- Thesaurus software: Single-user Windows PC desktop software
- Thesaurus software: Larger-scale, multi-user client-server or Web-based systems
- Taxonomy creation & editing module of a search/indexing system
- “Home-grown” programs developed in-house in large organizations
Software

Thesaurus software should:

- Maintain terms and their relationships (UF, BT/NT, RT)
  - As reciprocals
  - When renaming, merging, subsuming, or deleting terms
- Disallow invalid relationships (according to standards)
- Create scope notes and attributes for terms
- Support candidate and approved terms; include term creation and update dates
- Generate reports in various thesaurus display formats
- Export data in format for importing into a content indexing/search/retrieval system
Software

Single-user Windows desktop software (may also have multi-user versions):

- MultiTes Pro [www.multites.com](http://www.multites.com)
- WebChoir TCS-10 Personal [www.webchoir.com](http://www.webchoir.com)
- TheW32 (freeware)
  [http://publish.uwo.ca/~craven/freeware.htm](http://publish.uwo.ca/~craven/freeware.htm)

Other tools have come and gone:
[http://www.willpowerinfo.co.uk/thessoft.htm](http://www.willpowerinfo.co.uk/thessoft.htm)
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**Government bodies & agencies**

- **General**
  - Classification
    - FT: Organization
    - FT: Thing
  - Notes
  - Relationships
    - UF: Government agencies
    - UF: Governmental agencies
    - UF: Governmental bodies
    - BT: Organizations
    - BT: Politics & Government
    - NT: Courts
    - NT: Embassies
    - NT: Intelligence agencies
    - NT: Legislative bodies
    - NT: National armed forces
    - NT: U.S. federal departments & agencies
    - ASSOC: Government agency directors
    - ASSOC: International governmental organizations
Butter

Defined as:
An oily substance obtained from cream by churning.

References:
www fred.com/aaa/cox....
www术语tree.com.au

Class:
Dairy Industry

Code:
Export
Import

Date Created:
6/9/1995
Date Modified:
10/26/2003
TheW32 interface
Software

Large-scale multi-user client-server systems (Windows or Web):

- Data Harmony (Access Innovations)  
  www.dataharmony.com
- Synaptica (Dow Jones)  
  www.synaptica.com
- Wordmap (Wordmap Inc.)  
  www.wordmap.com
- ConceptChoir (WebChoir Inc.)  
  www.webchoir.com
- STAR/Thesaurus (Cuadra Associates)  
  www.cuadra.com
- a.k.a. (Synercon Management Consultants)  
  www.a-k-a.com.au
Term: Health care facilities

Broader Term:

Health sciences

Narrower Term:

Hospices
Hospitals
Mental health facilities
Nursing and retirement homes
Rehabilitation centers

Status: Candidate

Related Term:

Non-Preferred Term:

Scope Note

Facet

History

Editorial Note

NNID
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Implementation & Maintenance

Implementation of a Taxonomy

- The taxonomy/thesaurus creation tool is usually separate from the indexing program.
- Might have a combined thesaurus creation/indexing system, but usually separate from the end-use search system.
- The taxonomy is likely to need to be ported (for indexing and/or end-use searching). Consider:
  - Export format
  - Schedule and method for updates
Implementation & Maintenance

Indexing Support

- Need communication with indexers on new terms
  - Method for indexers nominate new CV terms
  - Method for taxonomist to announce new terms

- Need to maintain indexing quality and consistency
  - Conduct random indexing checking/editing
  - Are terms being overlooked (not used)?
    - Create more non-preferred terms or related-terms.
  - Are terms being misused?
    - Re-word terms or add scope notes.
Implementation & Maintenance

Taxonomy maintenance, because change happens:

- Terminology changes
- New content brings up new concepts
- Some content might get dropped
- New requirements, users, needs, trends, markets, etc. arise
- User feedback suggests improvements
Implementation & Maintenance

For maintenance, review the following:

- Newly added content sources or latest issues of periodicals
- Sections of the taxonomy covering high-change topics (politics, technology, current events)
- End-user search logs, click-trail reports
- Indexing (human or auto) to find:
  - high-use terms needing further differentiation
  - low/no-use terms that should be merged
  - identifiable indexing errors
Outline

1. Definitions
2. Applications of Taxonomies
3. Creating & Wording of Terms
4. Non-preferred Terms
5. Term Relationships
6. Software
7. Implementation & Maintenance
8. Resources
Resources: Books


Resources: Organizations

- American Society for Indexing: Taxonomies and Controlled Vocabularies Special Interest Group
  http://www.taxonomies-sig.org

- Information Architecture Institute
  http://iainstitute.org

- Special Libraries Association (SLA)
  http://www.sla.org

- American Society of Information Science & Technology
  http://www.asis.org
Resources: Discussion Groups

- Taxonomy Community of Practice
  http://finance.groups.yahoo.com/group/TaxoCoP

- Taxonomies & Controlled Vocabularies SIG, ASI
  http://finance.groups.yahoo.com/group/taxonomies

- Metadatalibrarians
  http://metadatalibrarians.monarchos.com
Resources: Workshops, Seminars

- Taxonomy Community of Practice Webinar phone calls
  - $50 each. Occasionally free vendor-sponsored calls.
  - Usually first Wednesday of the month, 1:00-2:00 pm EST
  - www.earley.com/TaxoCoP.asp

- "Taxonomies and Controlled Vocabularies" course
  Simmons College Graduate School of Library and Information Science Continuing Education Program
  - Online: 5 weeks, $250, next session: February 2009
  - Onsite: Boston, full day, $220, next session: Saturday, March 28, 2009
  - www.simmons.edu/gslis/continuinged/workshops

- Taxonomy Boot Camp conference
  - Information Today Inc.
  - Next: November 19-20, 2009, San Jose, CA
  - www.taxonomybootcamp.com/2009
Resources: Web Sites

- Taxonomy Community of Practice Wikispace, http://taxocop.wikispaces.com

- Taxonomy Guide, Faculty of Information Studies, University of Toronto
  http://plc.fis.utoronto.ca/tgdemo/default.asp

- Construction of Controlled Vocabularies: A Primer
  http://www.slis.kent.edu/%7Emzeng/Z3919/index.htm

- Thesaurus Construction tutorial by Tim Craven
  http://publish.uwo.ca/~craven/677/thesaur/main00.htm

- Willpower Information: Publications on thesaurus construction and use
  http://www.willpowerinfo.co.uk/thesbibl.htm


- Earley & Associates www.earley.com
- Taxonomy Strategies www.taxonomystrategies.com
Questions

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