



# Heather Hedden

JULY 15, 2020 — 10AM PT/1PM ET

## Introduction to Taxonomies For Technical Writers





**Heather Hedden**



**@HHedden**

# Introduction to Taxonomies for Technical Writers

by

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BrightTALK: The Content Wrangler  
Webinar

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# About Heather Hedden

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- Taxonomy consultant
  - For intranets, enterprise content management, SharePoint, research databases, websites, ecommerce, etc.
  - Independent, through Hedden Information Management
  - Previously as an employed and contract consultant
- Instructor of online and onsite taxonomy courses
  - Independently through Hedden Information Management
  - Previously at Simmons University - Library & Information Science School
- Former staff taxonomist
  - At various companies: Gale/Cengage Learning, Viziant, First Wind
- Former indexer
  - Back of the book freelance, periodical article indexer at Gale
- Author of *The Accidental Taxonomist* (2010, 2016, Information Today, Inc.)

# Outline

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- Methods for Content Findability
- What is a Taxonomy
- Categories and Tags
- Taxonomy Features
- Taxonomy Creation

# Outline

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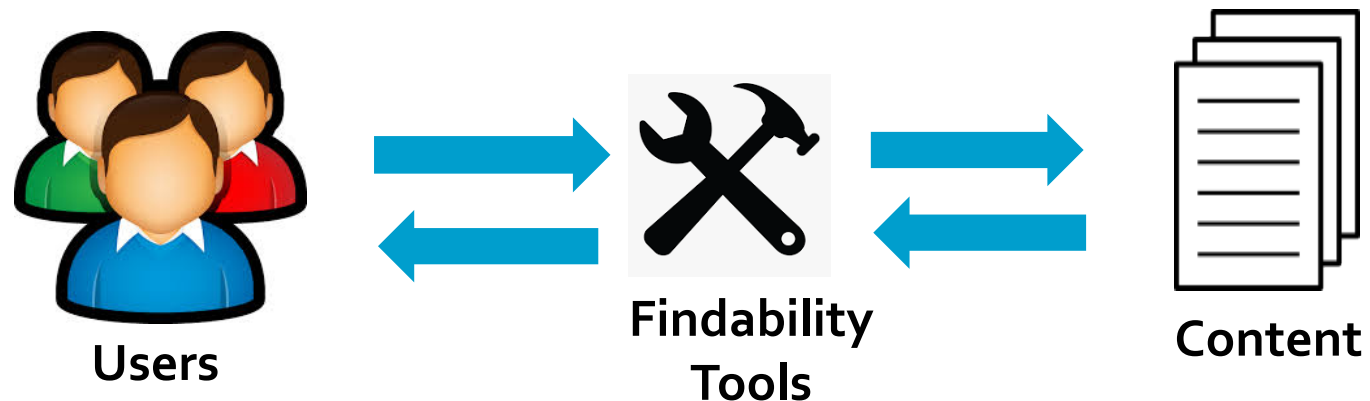
- Methods for Content Findability
- What is a Taxonomy
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- Taxonomy Creation

# Methods for Content Findability

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Tools to connect users to specifically sought content

1. Indexes – browsable, alphabetically displayed back-of-the-book style
2. Search engines
3. Content/document management systems with (taxonomy) tagged content



# Methods for Content Findability

## Indexes

“A systematic guide designed to indicate topics or features of documents in order to facilitate retrieval of documents or parts of documents”

--*NISO TR02-1997*

- Print
  - Book/manual indexes
  - Periodical article indexes (formerly)
- Electronic
  - Ebook hyperlinked indexes
  - Periodical article/reference/database indexes
  - Web site A-Z indexes (have become rare)
  - Online help A-Z indexes (have become rare)

### A

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# Methods for Content Findability

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## A-Z Displayed Indexes

### Advantages

- Best method for print
- Familiar and intuitive to users
- Standardized features

### Disadvantages

- Does not scale well to large-volume electronic content
- Is not dynamic for changing, growing content
- Does not support discovery or multi-faceted queries well



# Methods for Content Findability

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## Search engines (enterprise search, site search)

Searching within a large document (ebook) or across multiple documents.

### Advantages

A search bar consisting of a white text input field with a grey border and a small grey dropdown arrow on the right side, followed by an orange button with the word "Search" in white text.

- Scales well for large volumes of content
- Is dynamic for growing, changing content

### Disadvantages

- Misses relevant documents if identical words are not used in the search. Problem of synonyms: User searches cars, but text has automobiles.
- Retrieves incorrect documents with search words having more than one meaning (homographs) or are negated.
- Quality of results depend on search expertise of the user.

You get what you pay for.

# Methods for Content Findability

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## Content/document management systems and tagged content

- Allow tagging of content for customizable attributes (topics, other)
- May support both categories and tags
- Support controlled vocabularies/taxonomies and uncontrolled keywords

- For multiple small documents
- For larger documents broken into smaller content units



# Methods for Content Findability

---

## Content/document management systems and tagged content

### Advantages

- Scales well and adapts to growing, changing content
- Has better (more comprehensive and accurate) results than search alone
- Supports discovery and multi-faceted queries
- Supports novice and experienced users

### Disadvantages (Caveats)

- Dependent on flexible, well-designed user interface
- Quality of results depend on quality of controlled vocabularies/taxonomies and quality of tagging/indexing.

# Outline

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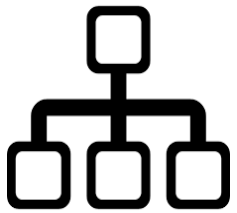
- Methods for Content Findability
- What is a Taxonomy
- Categories and Tags
- Taxonomy Features
- Taxonomy Creation

# What is a Taxonomy

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## Two major approaches to taxonomies

1. A hierarchy of terms/topics/categories arranged with narrower topics/subcategories displayed under their broader/parent categories.

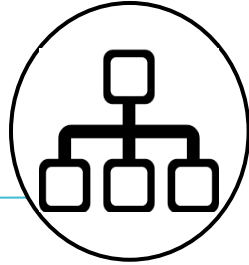


- To guide users to find the desired topic (and its linked content of pages or documents)
- Similar to navigation and site maps, but more topical and not just based on page titles

2. A controlled vocabulary of metadata tags/labels to apply to pages or documents, so that they can be more precisely and comprehensively retrieved (than by search algorithms alone on words in text).



- Implemented as search suggestion terms, search refinement filters, or post-search suggested related topics and searches



## community

activities  
artists  
childcare  
classes  
events  
general  
groups  
local news  
lost+found  
missed  
connections  
musicians  
pets  
politics  
rants & raves  
rideshare  
volunteers

## services

automotive  
beauty  
cell/mobile  
computer  
creative  
cycle  
event  
farm+garden  
financial  
household  
labor/move  
legal  
lessons  
marine  
pet  
real estate  
skilled trade  
sm biz ads  
travel/vac  
write/ed/tran

## discussion forums

android  
apple  
arts  
frugal  
gaming  
garden  
pets  
philos  
photo

## housing

apts / housing  
housing swap  
housing wanted  
office / commercial  
parking / storage  
real estate for sale  
rooms / shared  
rooms wanted  
sublets / temporary  
vacation rentals

## for sale

antiques  
appliances  
arts+crafts  
atv/utv/sno  
auto parts  
aviation  
baby+kid  
barter  
beauty+hlth  
bike parts  
bikes  
boat parts  
boats  
books  
farm+garden  
free  
furniture  
garage sale  
general  
heavy equip  
household  
jewelry  
materials  
motorcycle parts  
motorcycles  
music instr  
photo+video  
ps+comp

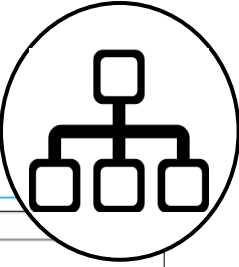
## jobs

accounting+finance  
admin / office  
arch / engineering  
art / media / design  
biotech / science  
business / mgmt  
customer service  
education  
etc / misc  
food / bev / h  
general labor  
government  
human resources  
legal / paralegal  
manufacturing  
marketing / pr / ad  
medical / health  
nonprofit sector  
real estate  
retail / wholesale  
sales / biz dev  
salon / spa / fitness  
security  
skilled trade / craft  
software / qa / dba  
systems / network

Craigslist Boston

[boston.craigslist.org](https://boston.craigslist.org)

# What is a Taxonomy



Office DEPOT OfficeMax

Products ^ Services v Deals v Search

Free next-day ship

**Office Supplies** >

- Furniture >
- Cleaning >
- Breakroom >
- Paper >
- School Supplies >
- Technology >
- Ink & Toner >
- Tax Return Solutions
- Cold & Flu

**Pens, Pencils & Markers**

- Pens
- Markers & Highlighters
- Pencils
- Correction Fluid & Tape

**Basic Supplies**

- Staplers & Staples
- Paper & Binder Clips
- Scissors
- Paper Punches & Cutters

**Mailing & Shipping**

- Envelopes
- Shipping & Moving Boxes
- Mailers
- Packing Tape
- Packing Materials

**Filing & Folders**

- File Folders
- Hanging File Folders
- Expanding File Folders
- Classification Folders

**Binders & Accessories**

- Binders
- Dividers & Tabs
- Report Covers & Portfolios
- Sheet Protectors

**Labels & Label Makers**

- Standard Labels
- Label Maker Tapes
- Address Labels
- Label Makers
- Name Badges & Holders

**Desk Accessories**

- Desk Organizers
- Desk Trays
- File Organizers
- Drawer Organizers

**Calendars & Planners**

- Calendars
- Planners
- Organizers

**More Ways to Shop**

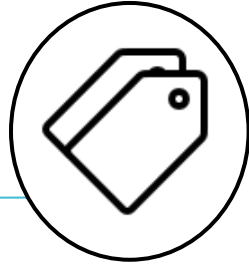
- Tax Return Solutions
- Post-It & Sticky Notes
- Tape & Adhesives
- Storage Boxes & Bins
- Presentation Boards

[www.officedepot.com](http://www.officedepot.com)



# World Bank Open Data

Free and open access to global development data

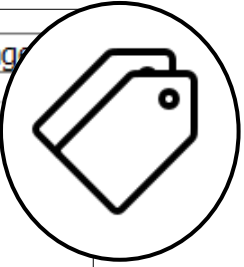


pop|

- Population, male
- Population, total
- Population, female
- Rural population
- Urban population
- Population, male (% of total population)
- Population, female (% of total population)
- Population in largest city

World Bank

<https://data.worldbank.org>



Sort By: Relevance ▾

Showing Results 1 - 20 of 5602

Show: 20 per page

### MEASURES

Measure Attributes (4906)

Measure Category (5602)

Measure Published By (5602)

### CHARACTERISTICS

Demographics - Characteristics of People (98)

Establishments/Businesses/Firms (1085)

Geography (5432)

Industry (5465)

Occupation (4474)

Unemployment and Labor Force Status (1)

Worker Characteristics (94)

### SURVEY

Employment, Hours, and Earnings from the Current Employment Statistics survey (National) (42)

Employer Costs for Employee Compensation (388)

Consumer Expenditure Survey (137)

Occupational injuries and illnesses industry data (696)

SEARCH: retirement X

- All employees, thousands, continuing care retirement communities, seasonally adjusted +
- Production and nonsupervisory employees, thousands, continuing care retirement communities, seasonally adjusted +
- Women employees, thousands, continuing care retirement communities, seasonally adjusted +
- All employees, thousands, continuing care retirement communities, not seasonally adjusted +
- Women employees, thousands, continuing care retirement communities, not seasonally adjusted +
- Social Security, private & government retirement by Highest Education: All Consumer Units +
- Social Security, private & government retirement by Hispanic Origin: All Consumer Units +
- Social Security, private & government retirement by Census Region: All Consumer Units +
- Social Security, private & government retirement by Income Deciles: Ninth 10 percent +
- Social Security, private & government retirement by Race: All Consumer Units +
- Social Security, private & government retirement by Income Range: \$70,000 to \$99,999 +

Bureau of Labor Statistics  
<https://beta.bls.gov/dataQuery/search>

# What is a Taxonomy

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## What is a taxonomy?

*Controlled and organized*

- A kind of **controlled** vocabulary or knowledge organization system, based on unambiguous concepts, not just words.
- Terms are **organized**, arranged in a structure of hierarchies, categories, or facets to organize the terms.

## Why called “taxonomy”?

- From ancient Greek "taxis," meaning **arrangement** + "nomia," meaning **method**.
- Originally meant the science and practice of naming and classifying.
- Aspect of "classification" is still relevant to the definition of taxonomies.

# What is a Taxonomy

## Taxonomy Examples

- 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
  - Young people's activities

### Hierarchical Taxonomy Example

#### Career Level

- Student
- Entry Level
- Experienced
- Manager
- Director
- Executive

#### Function

- Customer Service & Support
  - Delivery
  - Engineering
  - Finance
  - General Management
  - Legal & Regulatory Affairs
  - Marketing & Advertising
- [\[more\]](#)

#### Industry

- Agriculture
  - Apparel & Fashion
  - Automotive
  - Aviation & Aerospace
  - Banking
  - Biotechnology
  - Broadcast Media
  - Chemicals
- [\[more\]](#)

### Faceted Taxonomy Example

# What is a Taxonomy

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## Taxonomy

- A controlled vocabulary with broader/narrower (parent/child) term relationships that include all terms to create a hierarchical structure
- Has a focus for categorizing and organization concepts
- May or may not have “synonyms” to point to the correct, preferred terms
- May comprise several hierarchies or facets  
(A facet can be considered as a hierarchy.)

# What is a Taxonomy

## 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)
- Created in accordance with ANSI/NISO Z39.19 standards
- The kind of controlled vocabulary most used in indexing periodical and other research literature.
- Can form the basis of an index of articles/multiple documents.

### animal nutrition

#### Subject Category

L Animal Science and Animal Products  
S Biological Sciences

#### RDF/XML Format:

<http://lod.nal.usda.gov/nalt/9178.rdf>

#### Persistent URI:

<http://lod.nal.usda.gov/nalt/9178>

#### Broader Term

animal science  
nutrition

#### Narrower Term

feed conversion  
feed intake  
fish nutrition  
insect nutrition  
livestock nutrition  
maternal nutrition  
poultry nutrition  
ruminant nutrition

#### Related Term

animal feeding  
animal production  
cannulas  
diet-related diseases  
digestive physiology  
feedlots  
finishing  
forage and feed science  
nutrition research

USDA National  
Agricultural  
Library Thesaurus

<https://agclass.nal.usda.gov>

Thesaurus term  
example

# What is a Taxonomy

---

## Controlled Vocabulary Types



<b>Pick List</b>	<b>Synonym Ring</b>	<b>Name Authority</b>	<b>Taxonomy</b>	<b>Thesaurus</b>	<b>Ontology</b>
Ambiguity control	Synonym control	Ambiguity control Synonym control	Ambiguity control (Synonym control)  Hierarchical relationships	Ambiguity control Synonym control  Hierarchical relationship  Associative relationships	Ambiguity control (Synonym control)  Semantic relationships  Classes Attributes

# What is a Taxonomy

---

## Standards for Taxonomies

**ANSI/NISO Z39.19** *Guidelines for Construction, Format, and Management of Monolingual Controlled Vocabularies* (first published 1974; last update 2010)

- Developed by the National Information Standards Organization (NISO)
- A standard for consistent design for user experience
- Specifies best practices for when and how to create hierarchical, associative, and equivalence relationships, what wording to use in terms, and display options.
- Intended especially for thesauri, but applicable (as relevant) to taxonomies

**SKOS** Simple Knowledge Organization System (first published 2004; last update 2009)

- Developed by the World Wide Web Consortium (W3C)
- A standard for interoperability, both machine and human readable
- Specifies types and notations for relationships, labels, concepts, and schemes
- Intended for all kinds of controlled vocabularies, including taxonomies and thesauri



# Outline

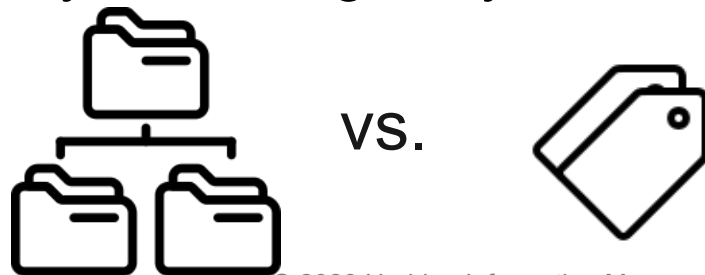
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- Methods for Content Findability
- What is a Taxonomy
- **Categories and Tags**
- Taxonomy Features
- Taxonomy Creation

# Categories and Tags

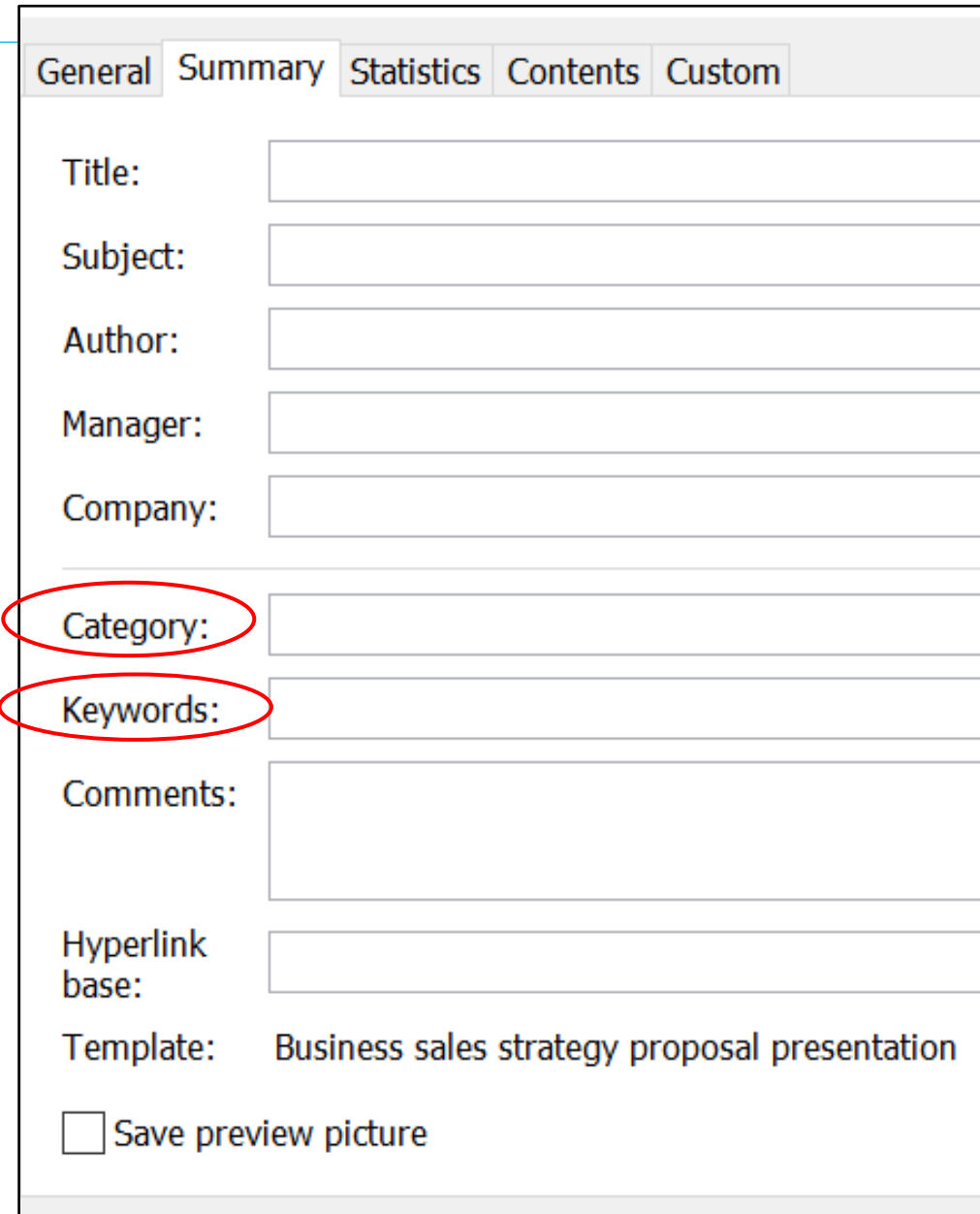
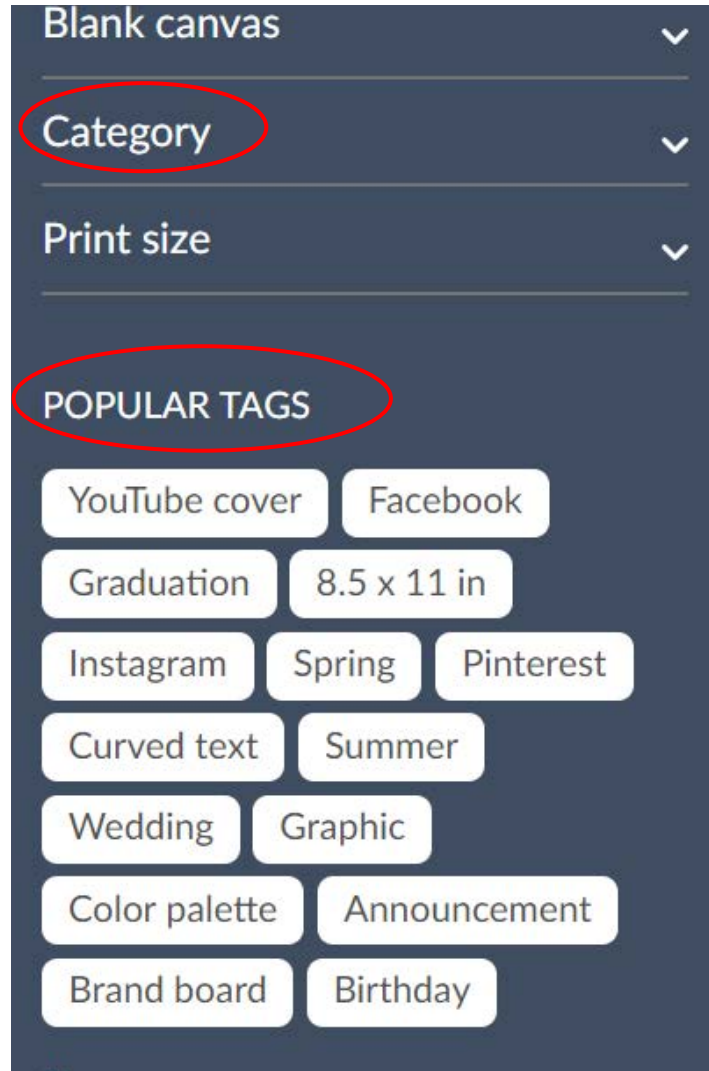
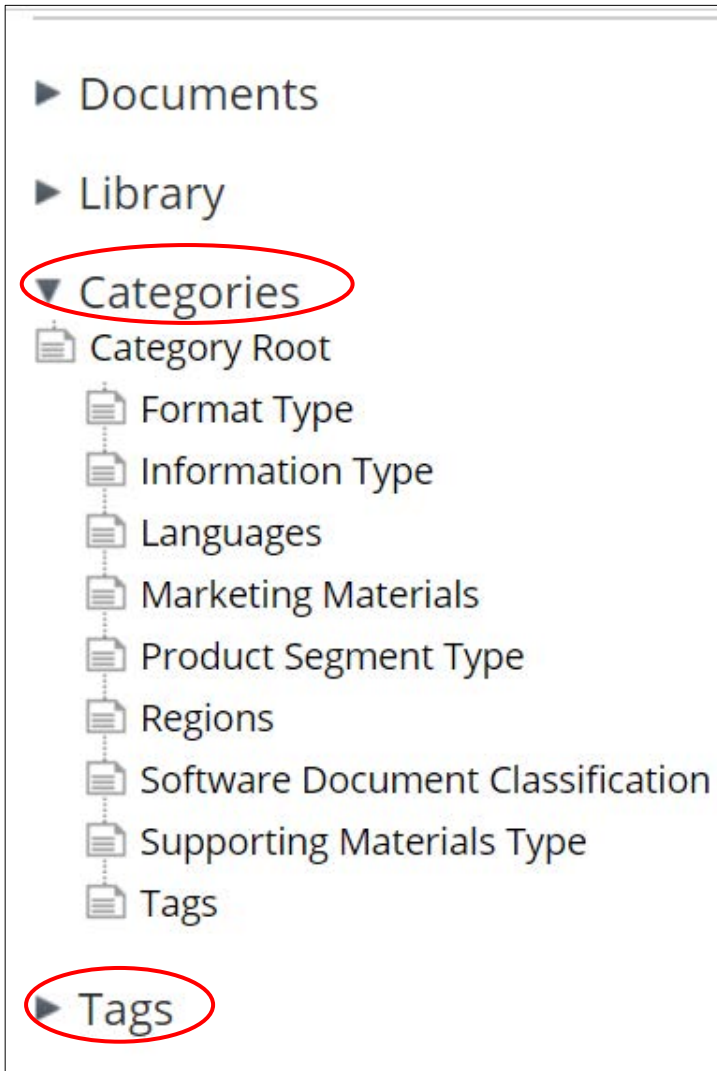
---

- A single taxonomy may include both approaches/features of
    - (1) organized guiding classification structure, and
    - (2) controlled vocabulary search terms
  - Sometime two different taxonomies exist at the same time, as supported by many content management systems:
    - one for supporting hierarchical classification (as categories)
    - one for supporting search (as tags)
- Categories or tags both are familiar to users.
  - Categories are often virtual folders to “contain” or group content.
  - Tags are searchable metadata associated with content.
  - The same content may be managed by both categories and tags.



# Categories and Tags

Categories and tags within the same application



# Categories and Tags

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## Categories and tags within the same application

### Using Linked and Other Open Vocabularies

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 September 24, 2018  Heathers Admin

Taxonomy terms assigned to content items makes the content easier to find, whether in an internal system, on the web, or both. To make content easier to find or discover on the web, the use of taxonomy terms or tags is part of the broader application of search engine optimization(SEO). A lot...

[Read more](#)

 *Taxonomy terms*  *Blog post taxonomies, Linked data, Linked open vocabularies, Tagging, Tags*

# Categories and Tags

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## Categories and Tags comparison



### Categories

- What “buckets” the content goes into
- Like a table of contents
- Relatively broad
- Limited in number
- Mutually exclusive
- Often hierarchical
- More controlled
- Pre-planned
- Supports browsing



### Tags

- What topics the content contains
- Like an index
- More specific
- More numerous
- Overlapping
- Often unstructured
- Less controlled
- May be Ad hoc
- Supports searching


# Categories and Tags

## Metadata

Both categories and tags can be metadata.

### Metadata and controlled vocabulary

- Some, but not all, metadata elements/properties are populated with terms in a controlled vocabulary.
- When a controlled vocabulary term is assigned/tagged to content in a designated metadata element, then it becomes metadata.
- Most implementations of controlled vocabularies are as metadata.
- A hierarchical topical taxonomy could serve a single metadata property, *or* each facet of a faceted taxonomy could serve a separate metadata property.

Metadata Properties	Metadata Values
Properties ▾	
Size	7.31MB
Slides	52
Hidden slides	0
Title	Introduction to Taxonomie...
Tags	<a href="#">Add a tag</a>
Categories	<a href="#">Add a category</a>
Related Dates	
Last Modified	Today, 10:50 AM
Created	2/14/2020 5:58 PM
Last Printed	
Related People	
Author	 Heather Hedden

# Categories and Tags

## Metadata and Taxonomy Example

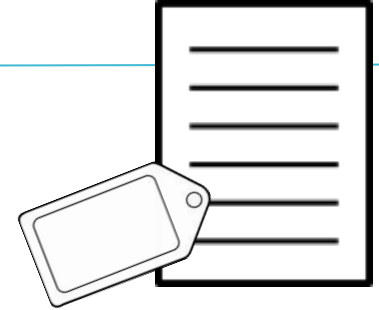
Properties	Version	Platform	Language	User	Content Type	Function
Metadata Values	4	Windows	English	Administrator	Key concept	Customizing
	5	Mac	French	Editor	Window/menu description	Messaging
	6	Web	German	Publisher	Trouble-shooting	Navigating
			Spanish	End-user	Step-by-step	Records updating

# Categories and Tags

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## Tagging/Indexing

Whether as categories or as tags...



- For **structured content**:  
Taxonomy terms can become metadata values associated with documents.
- For **unstructured content**:  
Taxonomy terms can have links to IDs of unstructured content items.
- Content is divided into units; tagging is done on the unit level.
- Tagging functionality is usually a component of content management system.
- Tagging guidelines/policies are needed for each taxonomy hierarchy or facet.
- Those doing tagging should receive instruction/training.  
Tagging should be reviewed.



# Outline

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- Methods for Content Findability
- What is a Taxonomy
- Categories and Tags
- **Taxonomy Features**
- Taxonomy Creation

# Taxonomy/Thesaurus Features

---

## Synonym Control

As a controlled vocabulary...

Gathers synonyms, acronyms, variant spellings, etc.

- Documents not missed due to use of different words (e.g. **Automobiles**, instead of **Cars**)

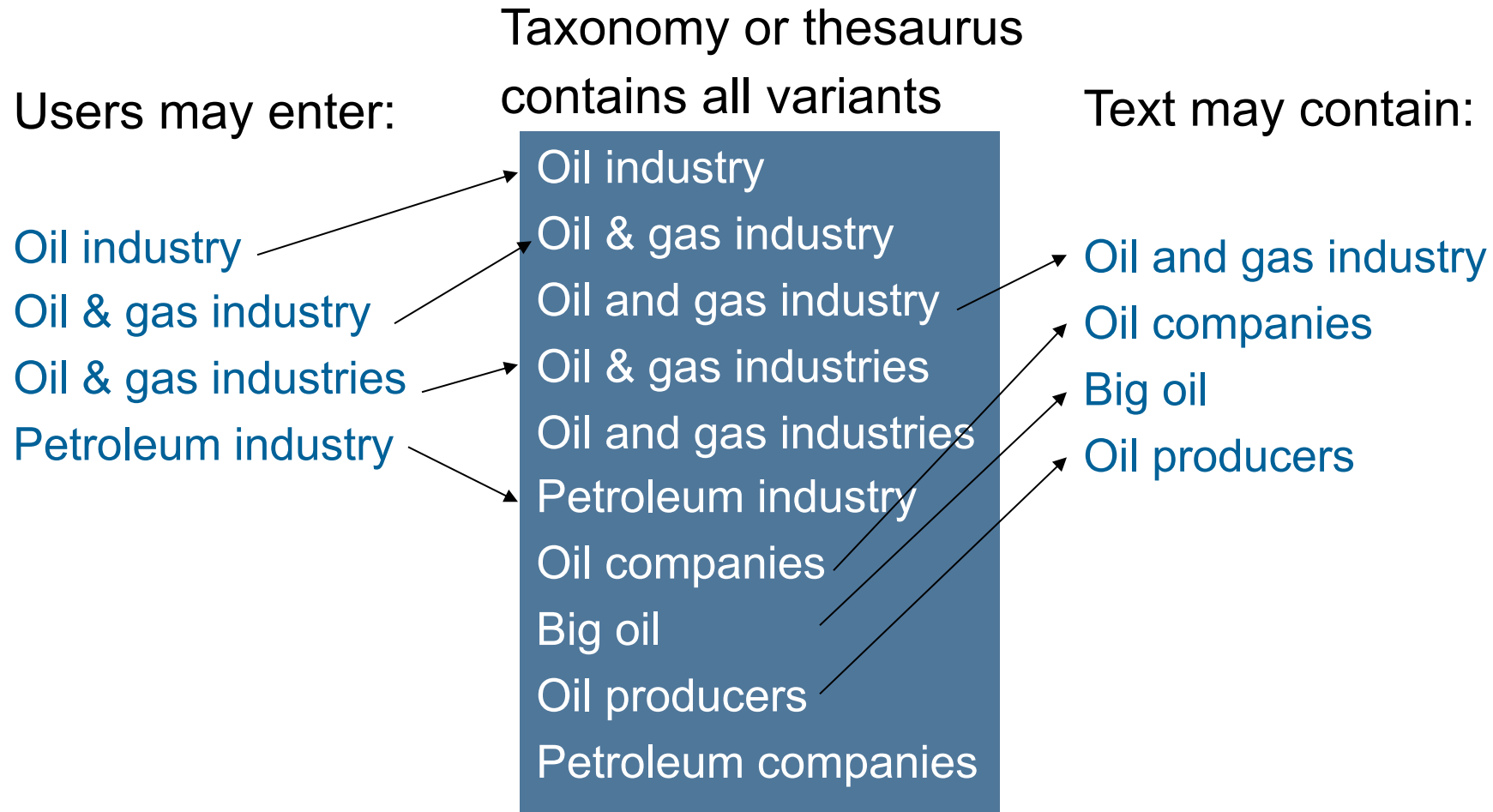
A search restricted on the controlled vocabulary retrieves concepts not just words.

- Documents excluded for mere text-string matches (e.g. **monitors** for computers, not the verb “observes”)

# Taxonomy/Thesaurus Features

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## Synonym Control



# Taxonomy/Thesaurus Features

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## Synonym Control

### Variants, Synonyms, Alternative Labels, Nonpreferred Terms

- Approximately synonymous words or phrases to refer to an equivalent concept, for the context of the controlled vocabulary and the set of content.

## Purpose:

- To capture different wordings of how different people might describe or look up the same concept, thus used as alternative entries.
  - Differences between that of the author and the user/reader
  - Differences between that of the indexers and the end-users
  - Differences among different users/readers
- To serve as “multiple entry points” to look up and retrieve the desired content, as do double posts or See references in an index.
- To enable consistent indexing

# Taxonomy/Thesaurus Features

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## Synonym Control

### Examples

from  
Gale Subject  
Thesaurus

Conflict management

*Conflict resolution*

*Managing conflict*

Wills

*Codicils*

*Last will and testament*

*Testaments (Wills)*

Influenza

*Flu*

*Grippe*

Movies

*Cinema*

*Films (Movies)*

*Motion pictures*

*Movie genres*

Telecommunications industry

*Communications industry*

*Digital transmission industry*

*Interexchange carriers*

*Telecommunications services industry*

*Telephone holding companies*

*Telephone industry*

*Telephone services industry*

Environmental management

*Adaptive management (Environmental management)*

*Environmental control*

*Environmental stewardship*

*Natural resource management*

*Stewardship (Environmental management)*

Piano music [no variants]



# Taxonomy/Thesaurus Features

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## Structure: Hierarchical Relationships

Permitted scenarios:

- Generic – specific  
Category and more specific types
- Generic – instance  
Common noun – proper noun
- Whole – Part  
Concept or entity and an integral part

System software

- > Device Drivers
- > Operating systems

Operating systems

- > Linux
- > Windows

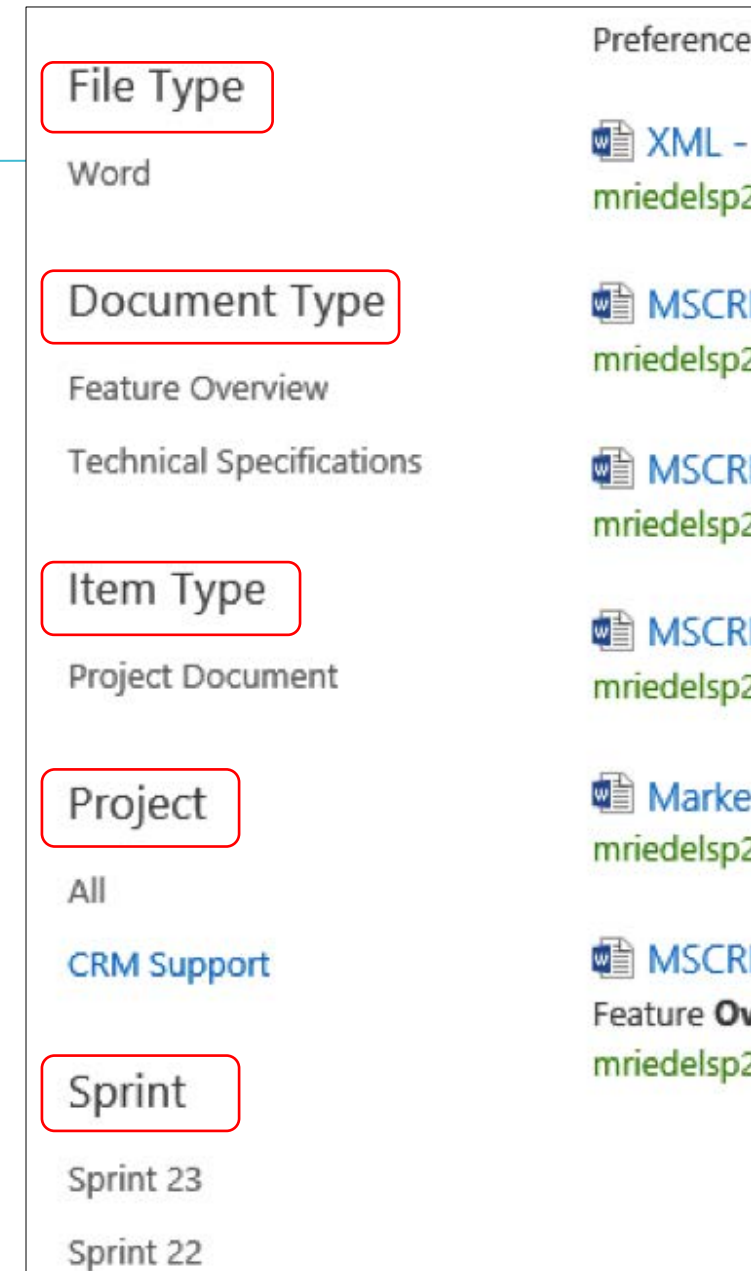
Operating systems

- > Kernel
- > Operating system user interface

# Taxonomy Features

## Structure: Facets

- For serving faceted classification, which allows the assignment of multiple classifications to a content item.
  - A “dimension” of a query; a type of concept; an attribute of a thing; an aspect
  - Intended for searching with multiple terms in combination, selected from multiple facets
  - A refinement, filter, limit by, narrow by
- 
- A single facet may contain a taxonomy of topics.
  - A single taxonomy may be divided into multiple facets.





# Taxonomy Features

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## Structure: Facets

### Facet advantages

- Supports more complex search queries by users
- Allows users to control the search refinement, narrowing or broadening in any manner or order
- Familiar to novice users; suitable for expert users

### Facet disadvantages

- Only suitable for somewhat unified type of content that share the same multiple facets
- Not practical for extremely large topical taxonomies
- Requires investment of thorough indexing/tagging

# Outline

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# Taxonomy Creation

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## Taxonomy planning

Determine:

- Who are the stakeholders that need to be involved.
- The scope of subject coverage and content coverage
- Who the users are and what their purposes are (use cases)
- The taxonomy type: hierarchical, faceted, thesaurus-like
- The content/document management system's features and limitations
- How the taxonomy will be maintained



# Taxonomy Creation

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## Sources for concepts, labels, and variants

### Consider

- Your content (table of contents, headings, descriptive metadata)
- Your users (through interviews, questionnaires, feedback, search logs)
- Existing in-house vocabularies, glossaries, file folder names, navigation menu labels – from different departments (Marketing, Sales, Support, IT)



### Be cautious and only consider selected terms from:

- External taxonomies, classifications, thesauri, etc. for license or free
- Suggestions from engineers, SMEs, or stakeholders who do not know how the taxonomy will be used

# Taxonomy Creation

## Sources for concepts, labels, and variants

### Glossaries vs. Taxonomies

- Only *some* glossary terms would belong in a taxonomy; most would not.
- Glossaries include all terms needing definitions; Taxonomies include concepts only for which there is a significant amount of content.
- Glossaries may include words/terms with multiple meanings; Taxonomy concepts must each have their own unique meaning.
- Glossaries may include terms that are nouns or adjectives; Taxonomies include only nouns or noun phrases.
- Taxonomy concepts usually do not require definitions, rather they may have “scope notes” to explain the scope of the concept in the context of the content.

<u>GLOSSARY</u>	
Aboriginals	First people of any region.
Artiste	One skilled in music or the dramatic art.
Balance of trade	Balance of trade in goods or balance of visible trade or merchandise balance (Exports of goods minus imports of goods).
Bill of Rights	Chapters in a country's constitution that recognize and protect human rights and freedoms.
Birth rate	The number of live births per year per 1000 of the population.
Capitalism	An economic system in which most of the industries and businesses in a country are owned privately, rather than the government.
Class discrimination	To be treated unfairly or unequally because of one's socio-economic status.
Common Market	A form of economic integration where restrictions on the free movement of commodities, capital and

# Taxonomy Creation

## Sources for concepts, labels, and variants

### Tables of contents vs. Taxonomies

All items in a ToC should *covered* by the taxonomy, but ToC chapter or heading names should not become taxonomy terms.

- Chapters are based on roughly uniform length.
- Chapter and heading names are usually too long, sometimes vague, might be questions or commands and not noun phrases, might be for "introduction" to a topic and repeated later in detail.
- Hierarchies of headings are balanced and don't reflect true taxonomy hierarchy of concepts.
- Topics are presented an instructional or chronological order.

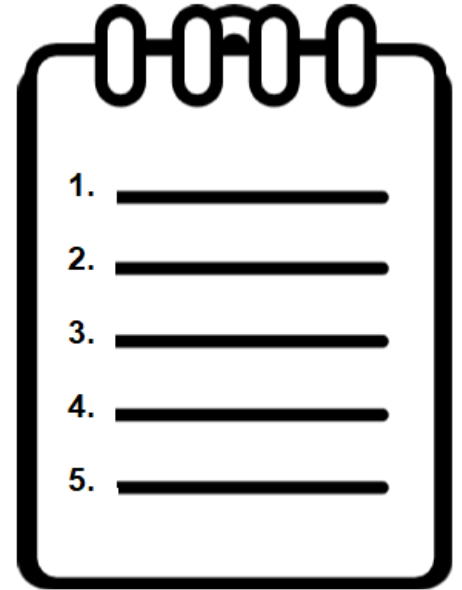
Contents	
Chapter 1- Basic of InDesign .....	1
History of InDesign .....	1
InDesign in Ancient Greek .....	1
The Birth of InDesign .....	1
The Death of InDesign .....	2
The Best Publishing Software .....	2
What About Quark .....	3
What About Office .....	3
Why Use inDesign? .....	3
I Love InDesign .....	4
I Also Love Photoshop .....	4
Who Create InDesign? .....	4
Chapter 2- Typography .....	5
Definition of Typography .....	5
Typography is Text In Visual .....	5
Typography as Art .....	5
Dealing With Typography .....	6
Mr. Typography Himself .....	6

# Taxonomy Creation

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## Taxonomy project steps

1. Content analysis/audit (look at ToCs, headings, etc.)
  2. Stakeholder interviews (and use-case creation)
  3. Review of any existing vocabularies, search logs
  4. Taxonomy build
  5. Stakeholder review of taxonomy and feedback
  6. User testing
  7. Taxonomy governance documentation
    - Taxonomy maintenance and editorial style policies/guidelines
    - Taxonomy use (tagging) policies/guidelines
- May be part of a larger information or content strategy initiative.

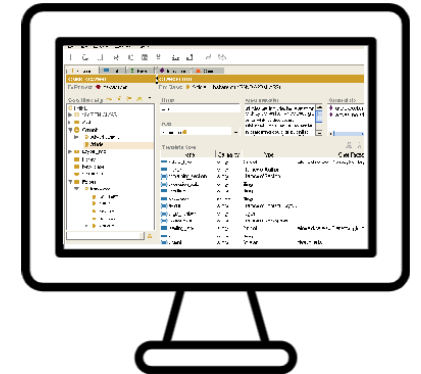


# Taxonomy Creation

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## Taxonomy building & maintenance tools

- Spreadsheets (Excel, Google Sheets, etc.) for hierarchies or facets
- Taxonomy/thesaurus management software
  - MultiTes
  - Data Harmony (from Access Innovations)
  - Synaptica
  - PoolParty (from the Semantic Web Company)
  - Semaphore (from Smartlogic)
- Taxonomy editing feature of a content/document management system
- Additional options: term extraction tools and auto-classification tools





# Taxonomy Creation

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## Build yourself or contract a consultant

- Depends on: time, taxonomy size and complexity, interest and background in information management

In addition to taxonomy creation, a consultant can determine:

- What kind of controlled vocabulary/taxonomy
- For multiple purposes (indexing, search, and browse); a single or multiple separate (or linked) taxonomies
- Taxonomy size, breadth, and depth
- How many facets
- Indexing rules for each facet (required, single or multiple term from a facet)
- Editorial style/format for terms
- What taxonomy management software to consider

## Resources

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Hedden, Heather. (2016) *The Accidental Taxonomist, 2<sup>nd</sup> edition*. Medford, NJ: Information Today Inc. [www.accidental-taxonomist.com](http://www.accidental-taxonomist.com)

The Accidental Taxonomist Blog  
<http://accidental-taxonomist.blogspot.com>

Hedden Information Management past presentations  
[www.hedden-information.com/presentations.htm](http://www.hedden-information.com/presentations.htm)

ANSI/NISO Z39.19-2005 (2010) *Guidelines for Construction, Format, and Management of Monolingual Controlled Vocabularies*. Bethesda, MD: NISO Press. [www.niso.org/publications/ansiniso-z3919-2005-r2010](http://www.niso.org/publications/ansiniso-z3919-2005-r2010)

# Resources

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## Workshops and Conferences

“Taxonomies & Controlled Vocabularies” self-paced online course through Hedden Information Management

[www.hedden-information.com/taxonomy-course-online.htm](http://www.hedden-information.com/taxonomy-course-online.htm)

Taxonomy creation corporate onsite training through Hedden Information Management [www.hedden-information.com/courses-workshops](http://www.hedden-information.com/courses-workshops)

“Connecting Users to Content: An Introduction to Taxonomy Design & Creation” Virtual conference workshop, September 21-25, 2020 <https://euroia.eu>

Taxonomy Boot Camp conference, November 16-17, 2020, Washington, DC (or online, TBD) [www.taxonomybootcamp.com](http://www.taxonomybootcamp.com)

# Questions/Contact

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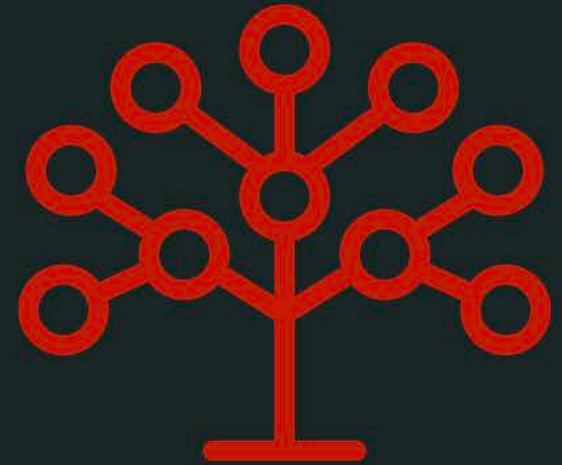


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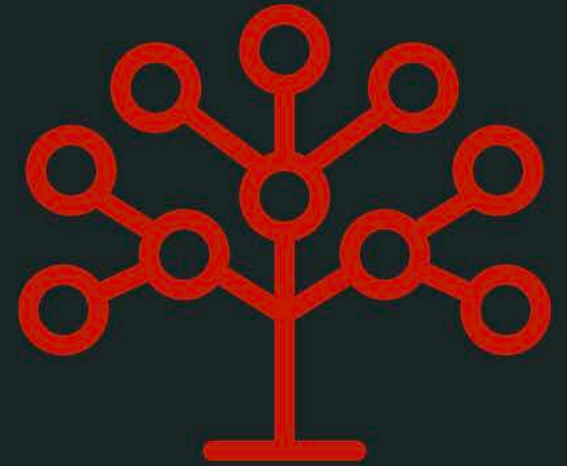
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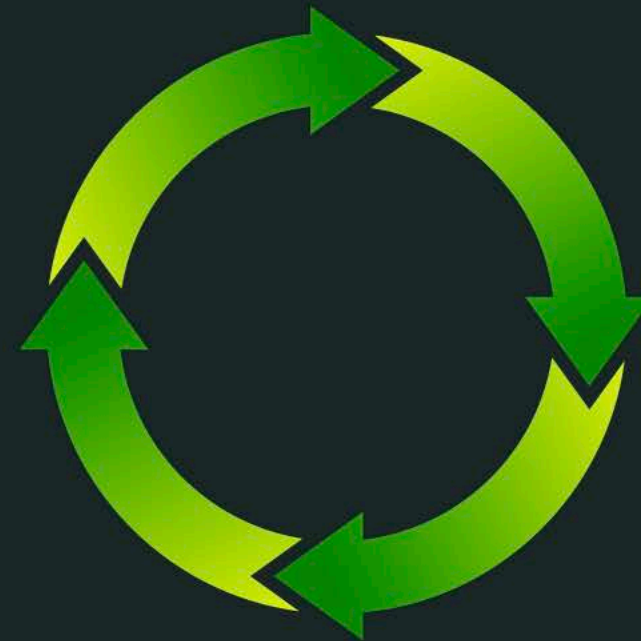


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## Introduction to Taxonomies For Technical Writers

