From Indexer to Accidental Taxonomist

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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

<table>
<thead>
<tr>
<th>materials acquisitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UF</strong> acquisitions (of materials)</td>
</tr>
<tr>
<td>library acquisitions</td>
</tr>
<tr>
<td><strong>BT</strong> collection development</td>
</tr>
<tr>
<td><strong>NT</strong> accessions</td>
</tr>
<tr>
<td>approval plans</td>
</tr>
<tr>
<td>gifts and exchanges</td>
</tr>
<tr>
<td>materials claims</td>
</tr>
<tr>
<td>materials orders</td>
</tr>
<tr>
<td>subscriptions</td>
</tr>
<tr>
<td><strong>RT</strong> book vendors</td>
</tr>
<tr>
<td>jobbers</td>
</tr>
<tr>
<td>subscription agencies</td>
</tr>
<tr>
<td>subscription cancellations</td>
</tr>
</tbody>
</table>
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
    - Banias
    - 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 management 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

<table>
<thead>
<tr>
<th>Book Indexes</th>
<th>Thesauri</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Double-posts</td>
<td>Equivalency relationships</td>
</tr>
<tr>
<td>2. See references</td>
<td></td>
</tr>
<tr>
<td><strong>See</strong> references are one-directional</td>
<td>Equivalency relationships are fundamentally bi-directional and reciprocal (may appear in one direction)</td>
</tr>
</tbody>
</table>
Indexing vs. Thesaurus Creation: Creating Hierarchical Structure

<table>
<thead>
<tr>
<th>Book Indexes</th>
<th>Thesauri</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subentries</strong></td>
<td><strong>Narrower terms</strong></td>
</tr>
<tr>
<td>More specific <em>aspects</em> of the main entry</td>
<td>1. Specific instances of generic term</td>
</tr>
<tr>
<td></td>
<td>2. Part terms of a whole-type term</td>
</tr>
<tr>
<td>Indicated by indentation or run-in following colon</td>
<td>Reciprocal hierarchical relationships of broader/narrower term (BT/NT)</td>
</tr>
<tr>
<td>Must be related to main entry</td>
<td>Stand on their own as terms</td>
</tr>
<tr>
<td>Narrower concepts <em>may</em> be subentries or other main entries</td>
<td>Narrower concepts <em>must</em> be treated only as narrower terms</td>
</tr>
</tbody>
</table>
Indexing vs. Thesaurus Creation: Pointing Out Related Topics

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

<table>
<thead>
<tr>
<th>Book Indexing</th>
<th>Taxonomy Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t need to meet the client, Always work from home</td>
<td>Need to meet and talk with people, Work partially from home, partially onsite</td>
</tr>
<tr>
<td>Use your own software</td>
<td>Use software provided by client</td>
</tr>
<tr>
<td>Jobs are clearly defined</td>
<td>Jobs not always clearly defined</td>
</tr>
<tr>
<td>Usually solo work</td>
<td>May work as part of a team</td>
</tr>
<tr>
<td>Projects of 1 – several weeks</td>
<td>Projects of months</td>
</tr>
</tbody>
</table>
# Freelance Indexing vs. Taxonomy Work

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

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