

# Taxonomies, Categories, and Tags

## Controlled Vocabularies in WordPress and Beyond

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[www.hedden-information.com/presentations](http://www.hedden-information.com/presentations)

# About Heather Hedden

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- Taxonomy consultant
  - Independent (2004 – present) and employed (2011 – 2012)
- Staff taxonomist/controlled vocabulary editor
  - Gale/Cengage Learning, Viziant, First Wind
- Instructor of online taxonomy courses
  - Independently and via Simmons College School of Library & Information Science
- Author of *The Accidental Taxonomist* (2010, 2016, Information Today, Inc.)

# Outline

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1. Categories and Tags Overview
2. Taxonomies and Controlled Vocabularies Intro
3. Taxonomies, Categories, and Tags in WordPress
4. Taxonomy Creation Best Practices

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# Categories and Tags Overview

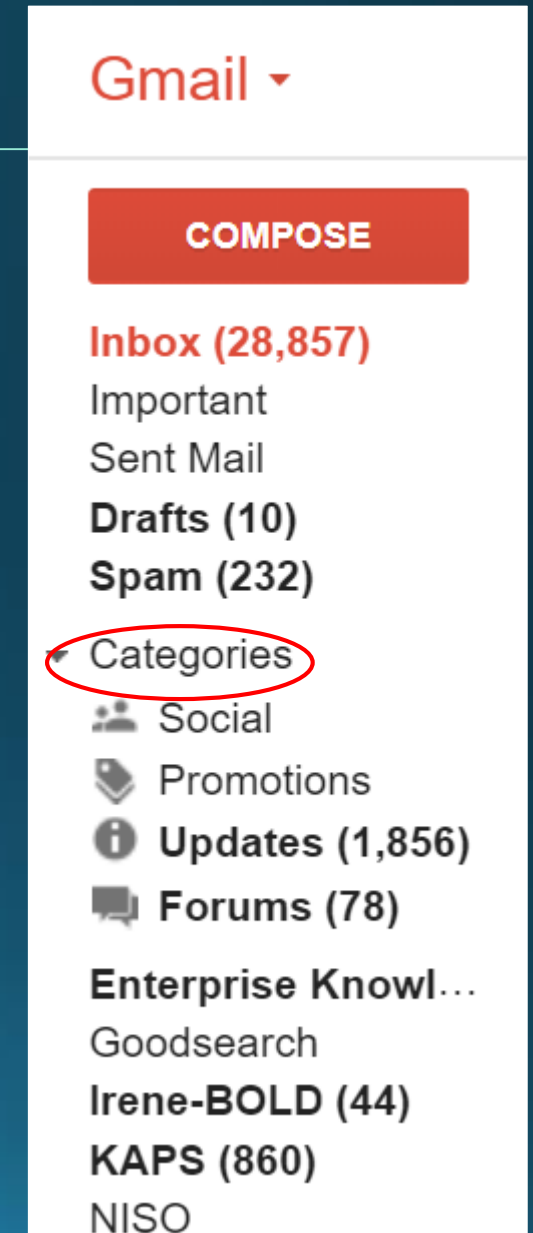
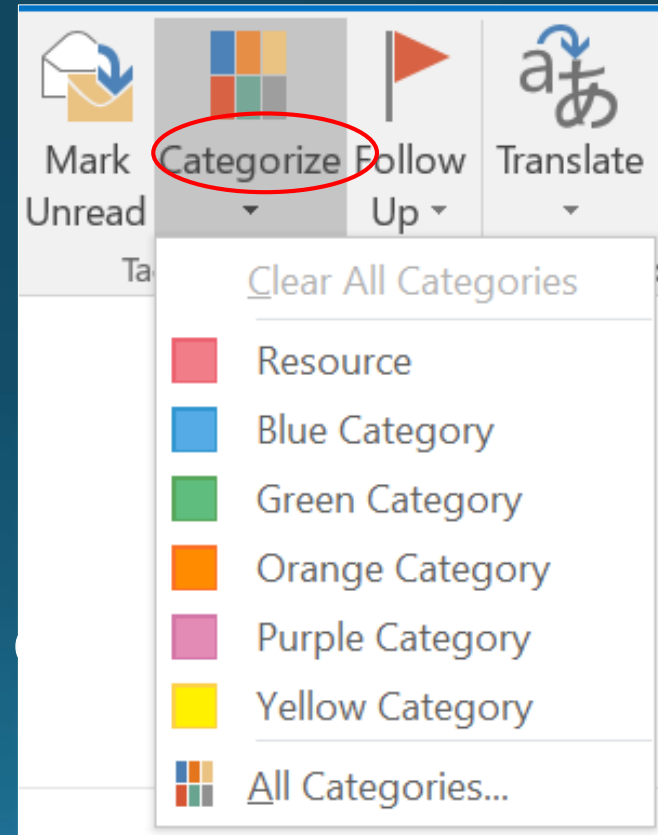
Familiarity and usage of categories and tags

## Categories

- Virtual (nested) folders

## Tags

- Hashtags on social media posts
- Tags on images in photo-sharing and stock image sites



# Categories

Documents

Library

Categories

Category Root

Format Type

Information Type

Languages

Marketing Materials

Product Segment Type

Regions

Software Document Classification

Supporting Materials Type

Tags

Tags

Search templates

Blank canvas

Category

Print size

POPULAR TAGS

YouTube cover

Facebook

Graduation

8.5 x 11 in

Instagram

Spring

Pinterest

Curved text

Summer

Wedding

Graphic

Color palette

Announcement

Brand board

Birthday

Show more

General Summary Statistics Contents Custom

Title:

Subject:

Author:

Manager:

Company:

Category:

Keywords:

Comments:

Hyperlink base:

Template: Business sales strategy proposal presentation

Save preview picture

OK

Cancel

- Dashboard
- Posts**
- All Posts
- Add New
- Categories
- Tags
- Media
- Team
- Testimonials
- Portfolio
- Pages
- Comments
- Appearance
- Plugins 6

# Posts [Add New](#)

All (86) | Mine (5) | Published (86)

Bulk Actions ▾ Apply All dates ▾ All Categories ▾ Filter 86 items

<input type="checkbox"/>	Title	Author	Categories	Tags
<input type="checkbox"/>	<a href="#">Categories, Tags, and Taxonomies in WordPress</a> <a href="#">Edit</a>   <a href="#">Quick Edit</a>   <a href="#">Trash</a>   <a href="#">View</a>	Heathers Admin	Taxonomy terms	Blog post taxonomie Categories, Tags, WordPress taxonom
<input type="checkbox"/>	<a href="#">Creating Subject Terms for a Faceted Taxonomy</a>	Heathers Admin	Faceted taxonomy	indexing, taxonomy creation, taxonomy terms
<input type="checkbox"/>	<a href="#">Related Terms in Taxonomies and Thesauri</a>	Heathers Admin	Thesauri	Related terms (Associative relationships)
<input type="checkbox"/>	<a href="#">Subject Searching: Why a Taxonomy, Thesaurus, or Controlled Vocabulary Still Helps in the Age of Search</a>	Heathers Admin	Faceted taxonomy, Taxonomy uses	Search
<input type="checkbox"/>	<a href="#">Taxonomies for Filtering and Sorting</a>	Heathers Admin	Faceted taxonomy, User experience	Filtering, Sorting


## Categories, Tags, and Taxonomies in WordPress

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 June 30, 2018  Heathers Admin

When I upgraded my Hedden Information Management website to WordPress a few months ago, I took advantage of WordPress's blog post feature and incorporated a copy this blog into the website (while also keeping its original location on Blogger.com). The difference between categories and tags in the different platforms became...

[Read more](#)

 [Taxonomy terms](#)  [Blog post taxonomies, Categories, Tags, WordPress taxonomies](#)  [Edit](#)

## Creating Subject Terms for a Faceted Taxonomy

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 May 22, 2018  Heathers Admin

Faceted taxonomies—those that allow users to limit or filter search results by selecting terms or attributes from each of several types/aspects—are becoming increasingly common. They are easy and effective for end-users with various abilities in searching. When it comes to designing facets, some of the facets and their terms for...

[Read more](#)

 [Faceted taxonomy](#)  [indexing, taxonomy creation, taxonomy terms](#)  [Edit](#)



# Categories and Tags Overview

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## Categories

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

## Tags

- What topics the content contains
- Like an index
- More specific
- More numerous
- Overlapping
- Unstructured
- Less controlled
- Ad hoc
- Supports searching

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# Taxonomies and Controlled Vocabularies

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## Taxonomy definitions

- *In WordPress:* “grouping mechanism” comprising a set of terms, whether categories or tags
- *Originally:* method of arrangement, from ancient Greek τάξις (taxis), meaning “arrangement,” and -νομία (-nomia), meaning “method”
- *Best known:* Linnaean classification of organisms
- *Traditionally and typically:* hierarchical arrangement of terms
- *Commonly:* any controlled vocabulary of terms used for indexing and retrieval (categories or tags)

# Taxonomies and Controlled Vocabularies

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## Controlled vocabulary definition

- 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
  - May or may not make use of synonyms, hierarchy, etc.
- 
- A set of categories is a controlled vocabulary.
  - A set of tags may or may not be a controlled vocabulary.

# Taxonomies and Controlled Vocabularies

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## Types of controlled vocabularies

- Term lists / pick lists
- Synonym rings / synonyms sets / search thesauri
- Name authority files
- Taxonomies
  - Hierarchical taxonomies
  - Faceted taxonomies
- Thesauri (according to ISO and NISO standards)
- Ontologies

# Taxonomy Examples

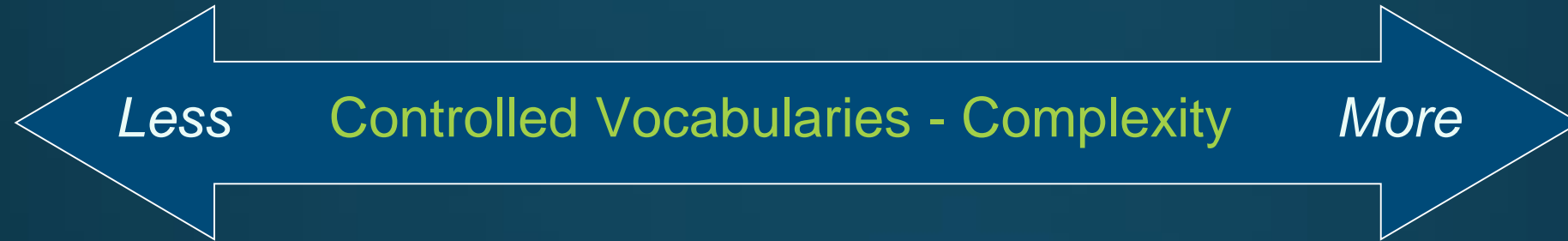
- Leisure and culture
  - Arts and entertainment venues
    - Museums and galleries
  - Children's activities
  - Culture and creativity
    - Architecture
    - Crafts
    - Heritage
    - Literature
    - Music
    - Performing arts
    - Visual arts
  - Entertainment and events
  - Gambling and lotteries
  - 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

## Faceted Taxonomy Example

# Taxonomies and Controlled Vocabularies



<b>Pick List</b>	<b>Synonym Ring</b>	<b>Authority File</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

# Taxonomies and Controlled Vocabularies

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## Taxonomy or controlled vocabulary purpose

- Enables visitors to find content on a selected topic.
  - More accurate than site search alone.
  - Enables visitors to explore related topics and related content.
  - Enhances user experience, user engagement.
  - Supports better organization and management of content.
  - Enhances SEO.
- 
- Also in WordPress: Enables visitors to subscribe to an RSS feed on a topic.



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# Taxonomies, Categories, and Tags in WordPress

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## Default types of taxonomies in WordPress

- Category
- Tag
- Link Category
- Post Format

## Option to additionally create Custom Taxonomies in WordPress

- With developer coding or with plugins
- Reason: You can only create one Category taxonomy and one Tag taxonomy, and you may want more taxonomy sets, such as for facets or custom posts.

# Taxonomies, Categories, and Tags in WordPress

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## WP Categories and Tags: similarities

- For posts, not pages (plugin: *Post Tags and Categories for Pages*)
- Displayed on individual posts
- Hyperlinked to a list of posts which share the same Category or Tag
- Can be used to generate Tag Clouds (optional widget)
- Multiple Categories or Tags can be assigned to a post
- Similar level of influence/non-influence on default site search
- Similarly impact on SEO

## Tags

Adjective terms **ANSI/NISO**

**Z39.19** Books on taxonomies

Broader-narrower relationships Business taxonomy Card

sorts **Categories** Classification

schemes Consultants Content types Digital

Asset Management Document types eCommerce

taxonomy Editorial style Filtering Folders Heuristic

evaluation Image taxonomies indexing **ISO**

**25964** Knowledge organization systems

Mapping taxonomies Mentoring Merging

taxonomies Multilingual taxonomies Multiple taxonomies

Navigation **NISO** Ontologies Polyhierarchy

Professional associations Related

terms (Associative

relationships) Search Semantic

relationships **SharePoint** SharePoint Term

Store SKOS Sorting Stakeholder engagement

**Tagging** taxonomy creation Taxonomy directories

taxonomy terms Text analytics Verb terms

## Categories

Auto-categorization

**Conferences** Content

management Controlled

vocabularies Enterprise taxonomy

**Faceted taxonomy**

Hierarchical taxonomy

Indexing **Information architecture**

Metadata Resources Software

**Taxonomists**

**Taxonomy creation**

Taxonomy definitions Taxonomy

evaluation Taxonomy governance

**Taxonomy maintenance**

Taxonomy software

**Taxonomy standards**

Taxonomy style **Taxonomy**

**terms** Taxonomy testing

Taxonomy users **Taxonomy**

**uses** Taxonomy validating Terminology

management Term relationships **Thesauri**

**Training** Translations Trends in

taxonomies Uncategorized Use cases

User experience **Workshops**

## Category: Taxonomy terms

### Categories, Tags, and Taxonomies in WordPress

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 June 30, 2018  *Heathers Admin*

When I upgraded my Hedden Information Management website to WordPress a few months ago, I took advantage of WordPress's blog post feature and incorporated a copy this blog into the website (while also

## Tag: WordPress taxonomies

### Categories, Tags, and Taxonomies in WordPress

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 June 30, 2018  *Heathers Admin*

When I upgraded my Hedden Information Management website to WordPress a few months ago, I took

# Taxonomies, Categories, and Tags in WordPress

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## WP Categories and Tags: differences

### Categories in WordPress

- Required (or else “Uncategorized”)
- Can be put into hierarchies (Parents)
- Can be alphabetically browsed by visitor
- Can be filtered upon in Dashboard
- Label appears in post URL
- Label appears in breadcrumb trail

### Tags in WordPress

- Not required on any post
- Cannot be put into hierarchies
- Not available as default (with plugin)
- Cannot be filtered upon
- Does not appear in post URL
- Does not appear in breadcrumb trail

# Taxonomies, Categories, and Tags in WordPress

www.hedden-information.com/taxonomy-terms/categories-tags-and-taxonomies-in-wordpress/

## Hedden Information Management

Home Services ▾ Training ▾ Events Book Art

Home / Taxonomy terms / Categories, Tags, and Taxonomies in WordPress

## Categories, Tags, and Taxonomies in WordPress

 June 30, 2018  Heathers Admin

When I upgraded my Hedden Information Management website to WordPress a few months ago, I took advantage of WordPress's blog post feature and incorporated a copy this blog into the website (while also keeping its original location on Blogger.com). The difference between categories and tags in the different platforms became clear. Blogger.com offers only "labels" to its bloggers, although these are listed as "Categories" on the displayed blog. WordPress, by contrast, offers both "Categories" and "Tags." When I

# Taxonomies, Categories, and Tags in WordPress

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## Categories and Tags in WordPress – more similarities than differences

Differences are not what you *can* do, but what you *choose* to do.  
Create your own taxonomy policy.

- Make Categories controlled and pre-determined, and make Tags uncontrolled, free-form (blogger can create new Tags with new posts)
- Limit the number of Categories and Tags that can be assigned per post, but allow a larger number of Tags.
- Categories provide organization of topics, and Tags supplement with additional, more specific topics.



## Tags

### Add New Tag

Name

*The name is how it appears on your site.*

Slug

*The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.*

Description

*The description is not prominent by default; however, some themes may show it.*

Add New Tag

## Categories

### Add New Category

Name

*The name is how it appears on your site.*

Slug

*The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.*

Parent Category

None

None

Auto-categorization

Conferences

Content management

Controlled vocabularies

Enterprise taxonomy

Faceted taxonomy

Hierarchical taxonomy

Indexing

Information architecture

Metadata

Resources

Software

Taxonomists

Taxonomy creation

Taxonomy definitions

Taxonomy evaluation

Taxonomy governance

**Taxonomy maintenance**

Taxonomy software

*hierarchy. You might have a Jazz category, and s for Bebop and Big Band. Totally optional.*

*y default; however, some themes may show it.*

# Taxonomies, Categories, and Tags in WordPress

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## Converting between Categories and Tags

- Convert high-use Tags to Categories (which could be subcategories)
- Convert low-use Categories to Tags

Import and activate the *WordPress Categories and Tags Converter* tool

# Taxonomies, Categories, and Tags in WordPress

## Converting from Tags to Categories

The screenshot shows the WordPress 'Tags' management page. On the left, there is a form to 'Add New Tag' with fields for Name, Slug, and Description. The main area displays a table of existing tags. A 'Bulk Actions' dropdown menu is open, highlighting the 'Convert to Categories' option. The table lists three tags: 'adjective terms', 'ANSI/NISO Z39.19', and 'Blog post taxonomies'.

	Description	Slug	Count
<input type="checkbox"/>	—	adjective-terms	1
<input type="checkbox"/>	ANSI/NISO Z39.19	ansi-niso-z39-19	6
<input type="checkbox"/>	Blog post taxonomies	blog-post-taxonomies	1

# Taxonomies, Categories, and Tags in WordPress

## Converting from Categories to Tags

The screenshot shows the WordPress 'Categories' management page. On the left, there is a form to 'Add New Category' with fields for 'Name' and 'Slug', and a 'Parent Category' dropdown set to 'None'. On the right, a table lists existing categories. A 'Bulk Actions' dropdown menu is open, highlighting the 'Convert to Tags' option. The table has columns for 'Description', 'Slug', and 'Count'.

Bulk Actions	Description	Slug	Count
<input type="checkbox"/> <b>Convert to Tags</b>	—	auto-categorization	4
<input type="checkbox"/> <b>Conferences</b>	—	conferences	15
<input type="checkbox"/> <b>Content management</b>	—	content-management	4

# Taxonomies, Categories, and Tags in WordPress

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## Faceted Taxonomies

- Multiple category sets / taxonomies / facets used in combination
  - Posts/content items are categorized in multiple ways (terms from each facet)
  - Each facet represents a different aspect (e.g. location, product type, market, owner)
  - Visitors select a combination of terms from different facets to filter, limit, or refine
- Faceted taxonomies can be created in WordPress with coding or plugins.

# Taxonomies, Categories, and Tags in WordPress

Facet sets  
created with  
the premium  
plugin  
FacetWP

Sort by ▾

### Make

- Acura (6)
- Alfa Romeo (2)
- Aston Martin (3)
- Audi (21)
- Bentley (1)
- BMW (27)
- Buick (7)
- Cadillac (10)

[See 33 more](#)

### Driven Wheels

Any ▾

### Price

### Meal Type

- Dinner (29)
- Lunch (27)
- Appetizer & Snacks (17)
- Pasta (13)
- Dessert (9)

### Cooking Style

- Quick & Easy (44)
- 30 Min or Less (37)
- Few Ingredient Dish (25)
- Vegetarian (12)
- Meat Optional (11)

### Shop Women

- Pants & Blouses
- Tops
- Footwear
- Accessories
- Swimwear
- Baselayers
- New Arrivals

### Brand

^

### Color

^

- Black
- Blue
- Brown
- Dark Grey
- Green
- Light Grey
- Orange
- Pink
- Purple
- Red
- White
- Yellow

### Gender

^

### Size

^

### Price

\$2.99 \$994.95

# Taxonomies, Categories, and Tags in WordPress

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## Synonyms in taxonomies

- Synonyms support search or searching for terms, when a taxonomy cannot be (easily) browsed.
- Useful for tags.
- Several WordPress search plugins support the creation of synonyms.

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# Taxonomy Creation Best Practices

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**Labels** – wording of terms

**Hierarchies** – creating broader/narrower term relationships

**Synonyms** – when to add synonyms/variants and their types

# Taxonomy Creation Best Practices: Labels

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## Term format and style

- Consistent capitalization: lower case or initial capitalization; not title caps  
**Corporate finance; corporate finance; *not* Corporate Finance**
- Single words or multi-word phrases
- Nouns or noun phrases
- Adjectives alone can be terms in special circumstances and where noun is obvious from context.
- Countable nouns are usually plural (especially for Categories, not always for Tags)
- Avoid term inversions (e.g. noun, adjective).

# Taxonomy Creation Best Practices: Labels

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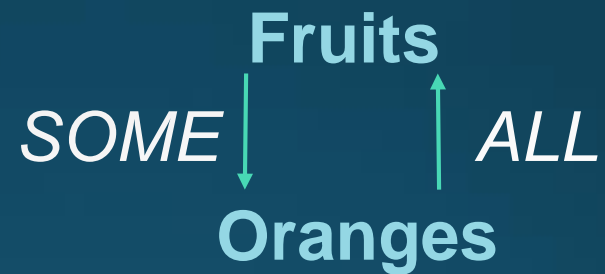
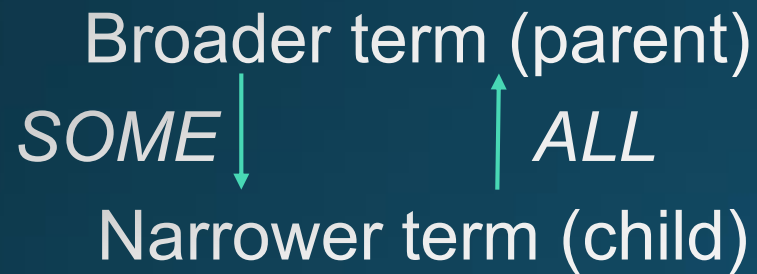
## Term creation tips

- Unambiguous – Each term stands for an unambiguous concept  
A taxonomy is set of *concepts*, not a set of words.  
Possibly ambiguous (depending on context): **Licenses, Examinations**  
Add a modifying word to the term to clarify.
- Concise (usually 1-3 words) for quick skimming/scanning  
**Employee discipline** instead of **Employee discipline policies**
- Start the term off strong, with a “key word” for alphabetic arrangement  
**Decision making** instead of **Making decisions**
- Use the language of your users/audience/visitors  
**Movies vs. Motion pictures**

# Taxonomy Creation Best Practices: Hierarchies

## Structuring hierarchical relationships between terms

Reciprocal (bi-directional) relationship, yet asymmetrical



Three types:

1. Generic – Specific
2. Generic – Named entity instance: Common noun – Proper noun
3. Whole – Part

# Taxonomy Creation Best Practices: Hierarchies

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## Hierarchical relationships: Generic – Specific type

Category or class

– members

– more specific types

Child term “is a” or  
“are a kind of” parent term

**Dogs**

- **Puppies**

**Financial services**

- **Investment services**

**Romance languages**

- **Italian language**

# Taxonomy Creation Best Practices: Hierarchies

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## Hierarchical relationships: Generic – Instance type

Common noun

– Proper noun/named entity

Child term “is a” parent term

**Smartphones**

- **Samsung Galaxy**

**Rivers**

- **Nile**

**Festivals**

- **Oktoberfest**

# Taxonomy Creation Best Practices: Hierarchies

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## Hierarchical relationships: Whole – Part type

Concept or entity

– Part

– Sub-entity

Child term “is in” parent term.

An integral part that cannot be taken out.

**France**

- **French Alps**

**Gastrointestinal system**

- **Stomach**

**United Nations**

- **United Nations General Assembly**

# Taxonomy Creation Best Practices: Hierarchies

## Hierarchical relationships: Polyhierarchy

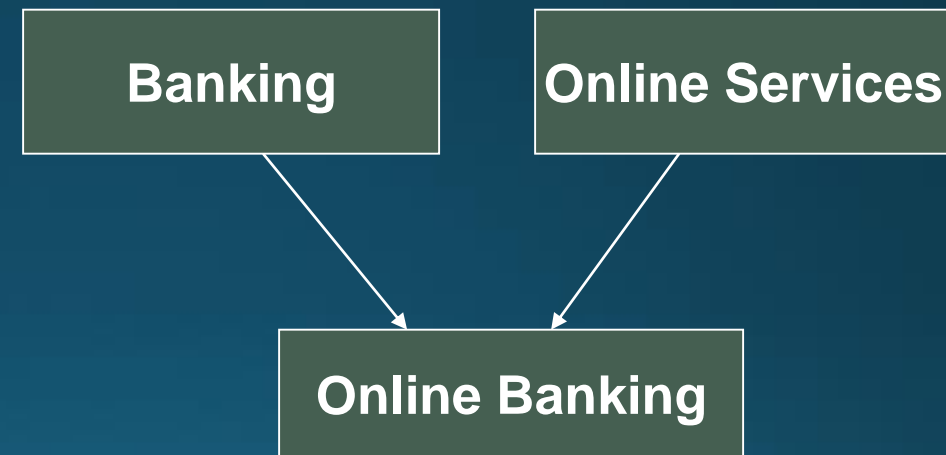
Sometimes a term may logically have more than one parent.

**Banking**

- **Online Banking**

**Online Services**

- **Online Banking**



The term *appears* repeated under more than parent, but it is the same term tagged to the same content in both places.



# Taxonomy Creation Best Practices: Synonyms

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## Synonyms / variants / alternative labels / nonpreferred terms

- **Defined:** Approximately synonymous words or phrases to refer to an equivalent concept, for the context of the taxonomy and the set of content. Synonymous for any and all of that content
- **Purpose:** To capture different wordings of how different people might describe or look up the same concept or idea.
  - Differences between that of the author and the user/visitor
  - Differences among different users/visitors
- **Used:** when a taxonomy cannot be (easily) browsed: is either too large or not available (such as the set of Tags)
  - Serving as “multiple entry points” to look up and retrieve the desired content.
  - Enables consistent indexing/tagging

# Taxonomy Creation Best Practices: Synonyms

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## Types include:

- synonyms: **Cars / Automobiles**
- quasi-synonyms: **Politics / Government**
- variant spellings: **Taoism / Daosim; Email / E-mail**
- lexical variants: **Selling / Sales; Hair loss / Baldness**
- foreign language names: **Ivory Coast / Côte d'Ivoire**
- acronyms/spelled out: **GDP / Gross domestic product**
- scientific/popular names: **Neoplasms / Cancer**
- antonyms (for characteristics): **Flexibility / Rigidity**
- older/current names: **Near East USE Middle East**
- narrower concepts not terms: **Genetic engineering USE Biotechnology**

# Taxonomy Creation Best Practices: Synonyms

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## Guidelines for synonyms:

- A concept may have any number of (multiple) synonyms, or it may have only a single preferred name and no synonyms.
- A synonym points to only a single preferred term.
- Synonyms are displayed at the backend to the person assigning the tags; they may or may not be displayed to the end-user.
- Synonyms need to follow the same editorial style as the preferred labels.

# Taxonomy Resources

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## Resources to develop taxonomy competencies

- *Accidental Taxonomist*, 2<sup>nd</sup> ed. book and website links  
[www.hedden-information.com/accidental-taxonomist/](http://www.hedden-information.com/accidental-taxonomist/)
- Taxonomies & Controlled Vocabularies online course  
[www.hedden-information.com/courses-workshops/taxonomy-course/](http://www.hedden-information.com/courses-workshops/taxonomy-course/)
- Presentations and articles on my website  
[www.hedden-information.com/presentations](http://www.hedden-information.com/presentations)  
[www.hedden-information.com/articles](http://www.hedden-information.com/articles)
- Accidental Taxonomist Blog  
<http://accidental-taxonomist.blogspot.com> or  
[www.hedden-information.com/the-accidental-taxonomist](http://www.hedden-information.com/the-accidental-taxonomist)

# Questions and Answers

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