Taxonomies, Categories, and Tags
Controlled Vocabularies in WordPress and Beyond

Heather Hedden
Taxonomy Consultant, Hedden Information Management
Senior Vocabulary Editor, Gale – A Cengage Company

WordCamp Boston
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About Heather Hedden

- 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

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
<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Categories</th>
<th>Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Categories, Tags, and Taxonomies in WordPress</td>
<td>Heathers Admin</td>
<td>Taxonomy terms</td>
<td>Blog post taxonomies, Categories, Tags, WordPress taxonomies</td>
</tr>
<tr>
<td>Creating Subject Terms for a Faceted Taxonomy</td>
<td>Heathers Admin</td>
<td>Faceted taxonomy</td>
<td>indexing, taxonomy creation, taxonomy terms</td>
</tr>
<tr>
<td>Related Terms in Taxonomies and Thesauri</td>
<td>Heathers Admin</td>
<td>Thesauri</td>
<td>Related terms (Associative relationships)</td>
</tr>
<tr>
<td>Subject Searching: Why a Taxonomy, Thesaurus, or Controlled Vocabulary Still Helps in the Age of Search</td>
<td>Heathers Admin</td>
<td>Faceted taxonomy, Taxonomy uses</td>
<td>Search</td>
</tr>
<tr>
<td>Taxonomies for Filtering and Sorting</td>
<td>Heathers Admin</td>
<td>Faceted taxonomy, User experience</td>
<td>Filtering, Sorting</td>
</tr>
</tbody>
</table>
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...

Read more

Creating Subject Terms for a Faceted Taxonomy

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
## Categories and Tags Overview

### 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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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

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.
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
## Taxonomies and Controlled Vocabularies

![Less Controlled Vocabularies - Complexity More](image)

<table>
<thead>
<tr>
<th>Pick List</th>
<th>Synonym Ring</th>
<th>Authority File</th>
<th>Taxonomy</th>
<th>Thesaurus</th>
<th>Ontology</th>
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</thead>
<tbody>
<tr>
<td>Ambiguity control</td>
<td>Synonym control</td>
<td>Ambiguity control (Synonym control)</td>
<td>Hierarchical relationships</td>
<td>Ambiguity control (Synonym control)</td>
<td>Semantic relationships</td>
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<tr>
<td></td>
<td>Synonym control</td>
<td>Synonym control</td>
<td>Hierarchical relationship</td>
<td>Synonym control</td>
<td>Classes</td>
</tr>
<tr>
<td></td>
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</tr>
</tbody>
</table>
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

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

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
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...
Taxonomies, Categories, and Tags in WordPress

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

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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

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.
Taxonomies, Categories, and Tags in WordPress

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
Converting from Tags to Categories
Converting from Categories to Tags

- **Add New Category**
  - Name: [field]
    - The name is how it appears on your site.
  - Slug: [field]
    - The “slug” is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.
  - Parent Category: [field]

- **Bulk Actions**
  - [bulk actions options]
  - [convert to tags]
    - categorization
      - Slug: auto-categorization
      - Count: 4
  - Conferences
    - Slug: conferences
    - Count: 15
  - Content management
    - Slug: content-management
    - Count: 4

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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.
Facet sets created with the premium plugin FacetWP

Taxonomies, Categories, and Tags in WordPress

- **Make**
  - Acura (6)
  - Alfa Romeo (2)
  - Aston Martin (3)
  - Audi (21)
  - Bentley (1)
  - BMW (27)
  - Buick (7)
  - Cadillac (10)
  - See 33 more

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

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

- **Price**

  - $2.99
  - $994.95
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

Labels – wording of terms
Hierarchies – creating broader/narrower term relationships
Synonyms – when to add synonyms/variants and their types
Taxonomy Creation Best Practices: Labels

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

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

![Diagram]

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

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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
Hierarchical relationships: Generic – Instance type

Common noun
– Proper noun/named entity

Child term “is a” parent term

Smartphones
- Samsung Galaxy

Rivers
- Nile

Festivals
- Oktoberfest
Hierarchical relationships: Whole – Part type

France
- French Alps

Gastrointestinal system
- Stomach

United Nations
- United Nations General Assembly

Child term “is in” parent term. An integral part that cannot be taken out.
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

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

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

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

Resources to develop taxonomy competencies

• *Accidental Taxonomist*, 2\textsuperscript{nd} ed. book and website links
  www.hedden-information.com/accidental-taxonomist/

• Taxonomies & Controlled Vocabularies online course
  www.hedden-information.com/courses-workshops/taxonomy-course/

• Presentations and articles on my website
  www.hedden-information.com/presentations
  www.hedden-information.com/articles

• Accidental Taxonomist Blog
  http://accidental-taxonomist.blogspot.com or
  www.hedden-information.com/the-accidental-taxonomist
Questions and Answers

Heather Hedden
Hedden Information Management
Carlisle, MA
www.hedden-information.com
heather@hedden.net
www.linkedin.com/in/hedden
978-467-5195