

## Taxonomies and Controlled Vocabularies

Instructor: Heather Hedden

### Workshop Outline

#### Lesson 1: Introduction to taxonomies

- Different definitions of taxonomy
- Various types of taxonomies (controlled vocabulary, thesaurus, hierarchy tree, facets, ontology)
- Purposes/uses of different taxonomies (periodical indexing, enterprise content management, web site information architecture)
- Looking at examples of different taxonomies via web links

#### Lesson 2: Software for taxonomies

- Over view of the different kinds of software tools
- MultiTes
- WebChoir TCS-10
- Term Tree 2000
- Freeware

(Students are encouraged to download free or demo software of their choice to use for practice thesaurus creation in lessons 3 and 4.)

#### Lesson 3: Hierarchical structure and term relationships

- Broader/narrower relationships
- Related/associated relationships and complex variations (ontologies)
- Issues in determining top level terms/facets and issues deciding on hierarchy depth and broadness

#### Lesson 4: Wording of terms and their variants

- Issues in wording terms (style and format, pre- vs. post-coordination, homonyms)
- Coming up with variants/non-preferred terms
- Differences in term names and variants needed for human vs. automated indexing; and for thesaurus vs. hierarchy vs. facets.

#### Lesson 5: Concluding topics and issues

- Taxonomy creation skills
- Processes for enterprise taxonomy implementation
- Taxonomy governance (ownership and maintenance)
- Folksonomies or social tagging
- Freelancing
- Resources

## **Workshop Basics**

### **Lessons**

Weekly lesson texts are comprised of a set of three to six web pages, one for each chapter of the lesson. Each lesson has some external links, and some lessons have associated graphics of screenshots. It is not necessary to go through an entire lesson at one sitting, but each chapter/web page is designed to be read at one sitting. The lessons and chapters vary somewhat in length, depending on the topic.

### **Exercises/Assignments**

Some lessons have assignments. Although you are not required to submit the assignments, you are welcome to submit them, as e-mail attachments, to the instructor, if you would like feedback. Questions to the instructor are welcome at any time.

### **Discussion Group**

A discussion group is part of this workshop. Students are encouraged to post lesson comments and questions to the Discussion List first before e-mailing the instructor directly, because other students might have similar issues.

### **Software**

Special software does not need to be purchased to complete the workshop, but students should download a free demo version of one or more of the software tools discussed in Lesson 2.

### **Texts and Readings**

No textbook or outside readings are required, but a list of suggested books is provided, and lessons will have links to external articles.

Aitchison, J., Gilchrist, A. & Bawden, D. (2000). *Thesaurus construction and use: a practical manual* (4th ed.). Chicago, IL, USA: Fitzroy Dearborn.

Lambe, Patrick. (2007). *Organising Knowledge: Taxonomies, Knowledge and Organisational Effectiveness*. Oxford, England: Chandos Publishing

ANSI/NISO Z39.19 (2005) *Guidelines for Construction, Format, and Management of Monolingual Controlled Vocabularies*.