Taxonomy Management Software
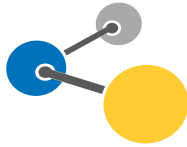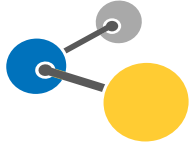
TOP 100 CHECKLIST

Synaptica has been providing taxonomy management software solutions to customers across the globe for over twenty years. This 'Top 100 Checklist' contains our most frequently requested features arranged by ten common taxonomy management tasks.

1. Compliance with industry standards and ease of integration with other systems

Users request that systems support national and international standards for the construction of controlled vocabularies and knowledge organization systems and ontologies. They also request Application Programming Interfaces (APIs) and connectors to support easy integration with other systems?

1	Compliance with ISO 25964	☐
2	Compliance with ANSI/NISO Z39.19	☐
3	Ability to model W3C SKOS vocabularies	☐
4	Ability to model W3C SKOS-XL vocabularies	☐
5	Ability to model W3C OWL ontologies	☐
6	Provision of SharePoint term store connector	☐
7	Provision of REST or SOAP web services as well as database-level APIs providing external systems with full read and write access to all editorial functions and all search and reporting tools	☐
8	Ability for external systems to submit candidate concepts as well as posting counts, comments and other concept-level attributes	☐
9	Ability to manage how external human or machine indexing systems interface with the taxonomy system to deliver terminologies that are customized for specific content sets	☐
10	Ability to generate vocabularies pre-formatted for text analytics and auto classification tools	☐

2. Flexibility to design and configure diverse types of knowledge organization schemes

Users request that systems support flexible data modelling through the creation and management of a diverse set of knowledge organization schemes including: term-based, notation-based, concept-based, and name-authority-based vocabularies.

1	Ability to create and manage terminology-based vocabularies such as thesauri and taxonomies	☐
2	Ability to create and manage notation-based vocabularies such as decimal and alphanumeric classification schemes	☐
3	Ability to create and manage concept-based knowledge organization schemes in which the concepts exist independent of their labels	☐
4	Ability to create and manage name-authority files that may need to disambiguate labels using multiple fields (e.g. first name + surname, etc.)	☐
5	Ability to create simple look-up lists, lexicons, glossaries, and acronym lists	☐
6	Ability to create an extensible set of concept property fields, such as indexer, source and scope notes, as well as foreign UIDs, posting counts, and named entity attributes, etc.	☐
7	Ability to create an extensible set of semantically expressive relationship types (ontological predicates) including inter-scheme predicates and mapping relationships	☐
8	Ability to create property fields in one concept scheme that reference lookup lists in other concept schemes	☐
9	Ability to create sets of alternative hierarchical pathways through a single conceptual base	☐
10	Ability to allow different user communities to curate alternative sets of preferred terminology for a common conceptual base	☐

3. Controlled vocabulary validations and multilingual term management

Users request that systems automatically perform validations for common controlled vocabulary and taxonomy management rules. Some users also request systems that support multilingual vocabulary management.

1	Unique Identifiers (UIDs) for all concepts	☐
2	Automatic prevention of term duplicates (disambiguation)	☐
3	Automatic reciprocal relationships	☐
4	Automatic prevention of circular references	☐
5	Automatic prevention of non-preferred terms from hierarchical and associative relationships	☐
6	Support for poly-hierarchical structures	☐
7	Automatic detection of orphan terms	☐
8	Logical concept deletion / restoration and the retention of withdrawn terms	☐
9	Multilingual management using monolingual vocabularies with language equivalency mappings	☐
10	Multilingual management using a single conceptual base with multiple language labels and attributes per concept	☐

4. Different editorial workflow modalities and an accessible user experience

Users request that systems support a diversity of ways to edit vocabularies and meet the needs of users with accessibility requirements.

1	User interface options that support the accessibility requirements of US regulation Section 508 https://www.section508.gov	☐
2	Ability to rapidly enter concept labels and return later to develop concept attributes and relationships as needed	☐
3	Ability to fully develop a concept's properties, labels, and relationships from a single screen	☐
4	Ability to import lists of candidate terms from spreadsheets and text files	☐
5	Ability to edit hierarchies in drag-and-drop mode	☐
6	Ability to multi-select concepts and build relationships to them with a single action	☐
7	Ability to view a concept's relationships as a flat list, a hierarchical list or a visualization graph	☐
8	Ability to create new concepts without leaving the workflow of relationship editing	☐
9	Ability to browse alphabetically	☐
10	Ability to browse hierarchically and by visualization graphs and charts	☐

5. Simple and advanced search modes

Users request that systems provide both simple 'fuzzy' search modes as well as advanced faceted and parametric search modes.

1	Ability to run simple 'fuzzy' word or phrase searches	☐
2	Ability to perform begins, contains, exact and wildcard searches	☐
3	Ability to perform advanced parametric searches that combine multiple search criteria and status filters into a single search	☐
4	Ability to perform faceted search queries across multiple vocabularies	☐
5	Ability to perform Boolean searches using concept labels and attributes such as notes fields	☐
6	Ability to filter by inception or modification dates and date ranges	☐
7	Ability to filter by preferred / non-preferred status	☐
8	Ability to filter by candidate / approval status	☐
9	Ability to filter by active / deleted status	☐
10	Ability to filter by custom workflow status	☐

6. An online collaboration environment with shared reporting tools

Users request that systems provide a multi-user environment that supports teaming and online collaboration, along with the ability to develop and share user-configurable management reports in a variety of data formats.

1	Ability to manage multiple project teams and assign users and vocabularies to each project	☐
2	Ability to support granular control of functional permissions for users on a per project basis	☐
3	Ability to track all editorial activities by activity type as well as date-time and UserID	☐
4	Ability to create management reports that can be shared and reused by other users	☐
5	Ability to create custom workflow and governance states to control the flow of work	☐
6	Ability to share selected vocabularies or parts of a vocabulary with non-editorial stakeholders	☐
7	Ability to dynamically generate website portals to publish read-only searchable / browseable vocabularies either for behind-the-firewall or for public access	☐
8	Ability to generate alphabetical reports of concepts, attributes and relationships	☐
9	Ability to generate hierarchical reports including filtered extracts of a vocabulary	☐
10	Ability to generate exception reports including: orphan terms, concepts with/without specified attribute values, concepts with/without specified relationships	☐

7. Batch processing, archiving and versioning tools

Users request that systems support batch processing editorial tools as well as tools to export archival files, internal vocabulary versions, support the comparison of two versions.

1	Ability to automatically build crosswalks between two taxonomies	☐
2	Ability to perform global edits to concept attributes based on parametric search criteria	☐
3	Ability to perform global edits to relationships based on advanced parametric search criteria	☐
4	Ability to schedule the automatic generation and distribution of data extracts	☐
5	Ability to create new vocabularies that clone the business rules of other vocabularies	☐
6	Ability to periodically generate publication and/or archival versions of a vocabulary or a collection of inter-related vocabularies	☐
7	Ability to generate publication and/or archival versions of a single vocabulary or a collection of inter-related vocabularies either as ad hoc or automated jobs	☐
8	Ability to compare any version of a vocabulary with its antecedent versions and generate a comparison report identifying all changes	☐
9	Ability to schedule reports and automatically distribute them to need-to-know users	☐
10	Ability to generate transaction log reports, concept scheme metrics and editorial activity metrics	☐

8. Multiple data formats for viewing, importing and exporting vocabularies

Users request that systems support multiple data formats for viewing reports and for the exchange of data by import and/or export.

1	Import and export in XML	☐
2	View, import and export in CSV	☐
3	View, import and export in TAB delimited text	☐
4	View in HTML	☐
5	View in Microsoft Word and Adobe PDF	☐
6	View, import and export in Microsoft Excel	☐
7	Import and export in Z-Thes	☐
8	Import and export in RDF SKOS	☐
9	Import and export in RDF SKOSXL	☐
10	Import and export in RDF OWL	☐
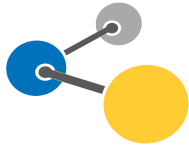
9. User account management and role-based permissions

Users request that systems support multiple role-based permissions and allow for both compartmentalized and collaborative workgroups.

1	Ability to generate and manage user accounts within the system	☐
2	Ability to integrate user account management with enterprise single-sign-on authentication	☐
3	Ability to assign editorial permissions individually per user per vocabulary	☐
4	Ability to re-assign project specific roles from one user to another	☐
5	Read only permissions	☐
6	Indexer permissions	☐
7	Editor permissions	☐
8	Senior editor / QC permissions	☐
9	Workgroup administrator permissions	☐
10	System wide Super Administrator permissions	☐

10. Linked Data vocabulary management

Users request that systems support the management of vocabularies as Linked Data, and the linking of internal concepts to external resources.

1	Generate unique HTTP URIs for concepts	☐
2	Declare namespaces and URIs for concept schemes	☐
3	Declare namespaces and URIs for properties	☐
4	Declare namespaces and URIs for relationships	☐
5	Search cached Linked Data repositories	☐
6	Search live Linked Data repositories (via SPARQL endpoints)	☐
7	Map internal concepts to external resources	☐
8	Ingest properties of mapped external resources	☐
9	Adopt predicates and properties from external ontology authorities	☐
10	Adopt and ingest external Linked Data Vocabularies	☐

What's on your wish list?

Contact the Synaptica solutions team at
solutions@synaptica.com
to discuss your specific requirements and learn how we can help you to check boxes on your taxonomy management wish list.

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