



Taxonomy Management Software

Revised 2020

TOP 100
CHECKLIST

Synaptica has been providing taxonomy management software solutions to customers across the globe for over twenty-five 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 systems integration		
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	<input type="checkbox"/>
2	Compliance with ANSI/NISO Z39.19	<input type="checkbox"/>
3	Ability to model W3C SKOS vocabularies	<input type="checkbox"/>
4	Ability to model W3C SKOS-XL vocabularies	<input type="checkbox"/>
5	Ability to model W3C OWL ontologies	<input type="checkbox"/>
6	Provision of SharePoint term store connector	<input type="checkbox"/>
7	Provision of REST web services as well as database-level APIs providing external systems with read and write access to editorial functions and search and reporting tools	<input type="checkbox"/>
8	Ability for external systems to submit candidate concepts as well as posting counts, comments and other concept-level properties	<input type="checkbox"/>
9	Ability to manage how external human or machine indexing systems interface with the taxonomy system to deliver taxonomies that are customized for specific content sets	<input type="checkbox"/>
10	Ability to generate vocabularies pre-formatted for text analytics and auto classification tools	<input type="checkbox"/>
2. Flexibility to design diverse types of knowledge organization systems		
Users request that systems support flexible data modelling through the creation and management of a diverse set of Knowledge Organization Schemes (KOS) including: term-based, notation-based, concept-based, and name-authority-based vocabularies.		
1	Ability to create and manage concept-based knowledge organization schemes in which the concepts exist independent of their labels	<input type="checkbox"/>
2	Ability to create and manage terminology-based vocabularies such as thesauri and taxonomies	<input type="checkbox"/>
3	Ability to create and manage notation-based vocabularies such as decimal and alphanumeric classification schemes	<input type="checkbox"/>
4	Ability to create and manage inference-bearing class-subclass hierarchies	<input type="checkbox"/>
5	Ability to create simple look-up lists, lexicons, glossaries, and acronym lists	<input type="checkbox"/>
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 properties, etc.	<input type="checkbox"/>
7	Ability to create an extensible set of semantically expressive relationship types (ontological predicates) including inter-scheme predicates and mapping relationships	<input type="checkbox"/>
8	Ability to create property fields in one concept scheme that reference lookup lists in other concept schemes	<input type="checkbox"/>
9	Ability to create sets of alternative hierarchical pathways through a single conceptual base	<input type="checkbox"/>
10	Ability to allow different user communities to curate alternative sets of preferred terminology for a common conceptual base	<input type="checkbox"/>



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3. Controlled vocabulary validations and multilingual 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 (GUIDs and URIs) for all concepts	<input type="checkbox"/>
2	Automatic prevention of term duplicates (disambiguation)	<input type="checkbox"/>
3	Automatic inverse relationships	<input type="checkbox"/>
4	Automatic prevention of circular references	<input type="checkbox"/>
5	Support for poly-hierarchical structures	<input type="checkbox"/>
6	Detection of orphan terms	<input type="checkbox"/>
7	Enforce min/max cardinality constraints on properties	<input type="checkbox"/>
8	Support transitive and non-transitive hierarchies	<input type="checkbox"/>
9	Logical concept deletion / restoration and retention of withdrawn concepts with supersession links	<input type="checkbox"/>
10	Multilingual management using a single conceptual base with multiple language-typed labels and properties per concept	<input type="checkbox"/>

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 accessibility requirements	<input type="checkbox"/>
2	Ability to rapidly enter new concept labels and return later to develop concept properties and relationships as needed	<input type="checkbox"/>
3	Ability to fully develop a concept's properties, labels, and relationships from a single screen	<input type="checkbox"/>
4	Ability to import lists of candidate terms from spreadsheets and text files	<input type="checkbox"/>
5	Ability to edit hierarchies and associations in drag-and-drop mode	<input type="checkbox"/>
6	Ability to multi-select concepts and build relationships to them with a single action	<input type="checkbox"/>
7	Ability to view a concept's relationships as a flat list, a hierarchical list or a graph visualization	<input type="checkbox"/>
8	Ability to create new concepts without leaving the workflow of relationship editing	<input type="checkbox"/>
9	Ability to browse alphabetically	<input type="checkbox"/>
10	Ability to browse hierarchically and by visualization graphs	<input type="checkbox"/>

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	<input type="checkbox"/>
2	Ability to perform begins, contains, exact and wildcard searches	<input type="checkbox"/>
3	Ability to perform advanced parametric searches that combine multiple search criteria and status filters into a single query	<input type="checkbox"/>
4	Ability to perform faceted search queries across multiple vocabularies	<input type="checkbox"/>
5	Ability to perform Boolean searches using concept labels and properties such as notes fields	<input type="checkbox"/>
6	Ability to filter by inception or modification dates and date ranges	<input type="checkbox"/>
7	Ability to search preferred and alternative labels	<input type="checkbox"/>
8	Ability to filter by candidate / approval status	<input type="checkbox"/>
9	Ability to filter by active / deleted status	<input type="checkbox"/>
10	Ability to filter by custom workflow and governance statuses	<input type="checkbox"/>



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6. Collaboration, Workflow and Governance		
Users request that systems provide a collaborative environment with workflow and governance controls and the ability to share user-configurable management reports.		
1	Ability to manage multiple project teams and assign users and taxonomies	<input type="checkbox"/>
2	Ability to support granular control of permissions for users on a per project basis	<input type="checkbox"/>
3	Ability to create custom workflow and governance states to control the flow of work	<input type="checkbox"/>
4	Ability to create management reports that can be shared and reused by other users	<input type="checkbox"/>
5	Ability to track all editorial activities by activity type as well as date-time and UserID	<input type="checkbox"/>
6	Ability to share selected taxonomies with non-editorial stakeholders	<input type="checkbox"/>
7	Ability to dynamically generate website portals to publish read-only searchable / browseable vocabularies either for behind-the-firewall or for public access	<input type="checkbox"/>
8	Ability to generate alphabetical reports of concepts, properties and relationships	<input type="checkbox"/>
9	Ability to generate hierarchical reports including filtered extracts of a vocabulary	<input type="checkbox"/>
10	Ability to generate exception reports including: orphan terms, concepts with/without specified property values, concepts with/without specified relationships	<input type="checkbox"/>
7. Batch editing, archiving and versioning tools		
Users request that systems support batch editing tools as well as tools to export archival files and create internal vocabulary versions.		
1	Ability to build crosswalks between two taxonomies	<input type="checkbox"/>
2	Ability to perform global edits to concept properties based on parametric search criteria	<input type="checkbox"/>
3	Ability to perform global edits to relationships based on advanced parametric search criteria	<input type="checkbox"/>
4	Ability to schedule the automatic generation and distribution of data extracts	<input type="checkbox"/>
5	Ability to create new vocabularies that clone the business rules of other vocabularies	<input type="checkbox"/>
6	Ability to periodically generate publication and/or archival versions of a vocabulary or a collection of inter-related vocabularies	<input type="checkbox"/>
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	<input type="checkbox"/>
8	Ability to compare any version of a vocabulary with its antecedent versions and generate a comparison report identifying all changes	<input type="checkbox"/>
9	Ability to schedule reports and automatically distribute them to need-to-know users	<input type="checkbox"/>
10	Ability to generate transaction log reports, concept scheme metrics and activity metrics	<input type="checkbox"/>
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	View flat list search results across multiple schemes or grouped by scheme	<input type="checkbox"/>
2	View expandable hierarchies of a single scheme or spanning multiple schemes	<input type="checkbox"/>
3	Dynamically change the language for search and browse	<input type="checkbox"/>
4	Visualize the semantic schema for an entire project	<input type="checkbox"/>
5	Visualize and explore graphs of related concepts	<input type="checkbox"/>
6	Import and export in multiple RDF serializations	<input type="checkbox"/>
7	Import and export in CSV, TAB, and Excel file formats	<input type="checkbox"/>
8	Import and export in RDF SKOS	<input type="checkbox"/>
9	Import and export in RDF SKOSXL	<input type="checkbox"/>
10	Import and export in RDF OWL	<input type="checkbox"/>



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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	<input type="checkbox"/>
2	Ability to integrate with single-sign-on authentication including SCIM identity management	<input type="checkbox"/>
3	Ability to manage role-based group permissions and assign users to groups	<input type="checkbox"/>
4	Control permissions at the level of individual properties	<input type="checkbox"/>
5	Observer read only permissions	<input type="checkbox"/>
6	Commenter permissions (e.g. SME Comments)	<input type="checkbox"/>
7	Editor permissions	<input type="checkbox"/>
8	Approver permissions	<input type="checkbox"/>
9	Project-level administrator permissions	<input type="checkbox"/>
10	System-wide Super Administrator permissions	<input type="checkbox"/>

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	<input type="checkbox"/>
2	Manage namespaces and URIs for concept schemes	<input type="checkbox"/>
3	Manage namespaces and URIs for properties	<input type="checkbox"/>
4	Manage namespaces and URIs for relationships	<input type="checkbox"/>
5	Search cached or live Linked Data repositories	<input type="checkbox"/>
6	Store all taxonomies and ontologies in an RDF graph database	<input type="checkbox"/>
7	Map internal concepts to external resources	<input type="checkbox"/>
8	Ingest properties of mapped external resources	<input type="checkbox"/>
9	Adopt predicates and properties from external ontology authorities	<input type="checkbox"/>
10	Adopt and ingest external Linked Data Vocabularies	<input type="checkbox"/>



What's on your wish list?

Contact the Synaptica knowledge solutions team at

info@synaptica.com

to discuss your specific requirements and learn how we can help you to check boxes on your taxonomy management wish list.

www.synaptica.com

helping people to organize, categorize and discover enterprise knowledge