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Enterprise Taxonomy Management Software Feature Checklist

Revised 2022

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	☐
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 web services as well as database-level APIs providing external systems with read and write access to editorial functions and search and reporting tools	☐
8	Ability for external systems to submit candidate concepts as well as posting counts, comments and other concept-level properties	☐
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	☐
10	Ability to generate vocabularies pre-formatted for text analytics and auto classification tools including transparent semantic tagging rules	☐
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	☐
2	Ability to create and manage terminology-based vocabularies such as thesauri and taxonomies	☐
3	Ability to create and manage notation-based vocabularies such as decimal and alphanumeric classification schemes	☐
4	Ability to create and manage inference-bearing class-subclass hierarchies	☐
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 properties, 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	☐

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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	☐
2	Automatic prevention of term duplicates (disambiguation)	☐
3	Automatic inverse relationships	☐
4	Automatic prevention of circular references	☐
5	Support for poly-hierarchical structures	☐
6	Detection of orphan terms	☐
7	Enforce min/max cardinality constraints on properties	☐
8	Support transitive and non-transitive hierarchies	☐
9	Logical concept deletion / restoration and retention of withdrawn concepts with supersession links	☐
10	Multilingual management using a single conceptual base with multiple language-typed labels and properties 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 accessibility requirements	☐
2	Ability to rapidly enter new concept labels and return later to develop concept properties 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 and associations 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 graph visualization	☐
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	☐
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 query	☐
4	Ability to perform faceted search queries across multiple vocabularies	☐
5	Ability to perform Boolean searches using concept labels and properties such as notes fields	☐
6	Ability to filter by inception or modification dates and date ranges	☐
7	Ability to search preferred and alternative labels	☐
8	Ability to filter by candidate / approval status	☐
9	Ability to filter by active / deleted status	☐
10	Ability to filter by custom workflow and governance statuses	☐

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	☐
2	Ability to support granular control of permissions for users on a per project basis	☐
3	Ability to create custom workflow and governance states to control the flow of work	☐
4	Ability to create management reports that can be shared and reused by other users	☐
5	Ability to track all editorial activities by activity type as well as date-time and UserID	☐
6	Ability to share selected taxonomies 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, properties 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 property values, concepts with/without specified relationships	☐
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	☐
2	Ability to perform global edits to concept properties 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 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	View flat list search results across multiple schemes or grouped by scheme	☐
2	View expandable hierarchies of a single scheme or spanning multiple schemes	☐
3	Dynamically change the language for search and browse	☐
4	Visualize the semantic schema for an entire project	☐
5	Visualize and explore graphs of related concepts	☐
6	Import and export in multiple RDF serializations	☐
7	Import and export in CSV, TAB, and Excel file formats	☐
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 with single-sign-on authentication including SCIM identity management	☐
3	Ability to manage role-based group permissions and assign users to groups	☐
4	Control permissions at the level of individual properties	☐
5	Observer read only permissions	☐
6	Commenter permissions (e.g. SME Comments)	☐
7	Editor permissions	☐
8	Approver permissions	☐
9	Project-level administrator permissions	☐
10	System-wide Super Administrator permissions	☐
10. Ontology Schema and Linked Data vocabulary management Users request that systems support the management of vocabularies with ontology schema and/or the linking of internal concepts to external resources Linked Data resources.		
1	Generate unique HTTP URIs for concepts	☐
2	Manage namespaces and URIs for concept schemes	☐
3	Manage namespaces and URIs for properties	☐
4	Manage namespaces and URIs for relationships	☐
5	Search cached or live Linked Data repositories	☐
6	Store all taxonomies and ontologies within an RDF graph database	☐
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
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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