WideNARROW

Taxonomy User Guide 2023

Guide for Superusers and Superusers with Admin permission.

This guide helps you to create, manage and use the Taxonomy in Wide Narrow Admin.
It also includes our recommendations and tips and tricks.

Introduction

The purpose of the Taxonomy

The taxonomy makes it possible to categorize, search and filter information in Wide Narrow easily. It also makes it easy to sort out information for different target groups and deliverables.

Why we have a Taxonomy in Wide Narrow

The taxonomic classification system makes it easy to:

- Categorize content to enable search and filtering of content
- Create and save searches
- Create advanced filters to optimize Inboxes
- Display a spectrum of different content on Dashboards
- Send automatic newsletters with various content to different target groups
- Integrate and view selected information from Wide Narrow on other platforms

How the Taxonomy simplifies your work

The taxonomy simplifies your work in Wide Narrow in several ways:

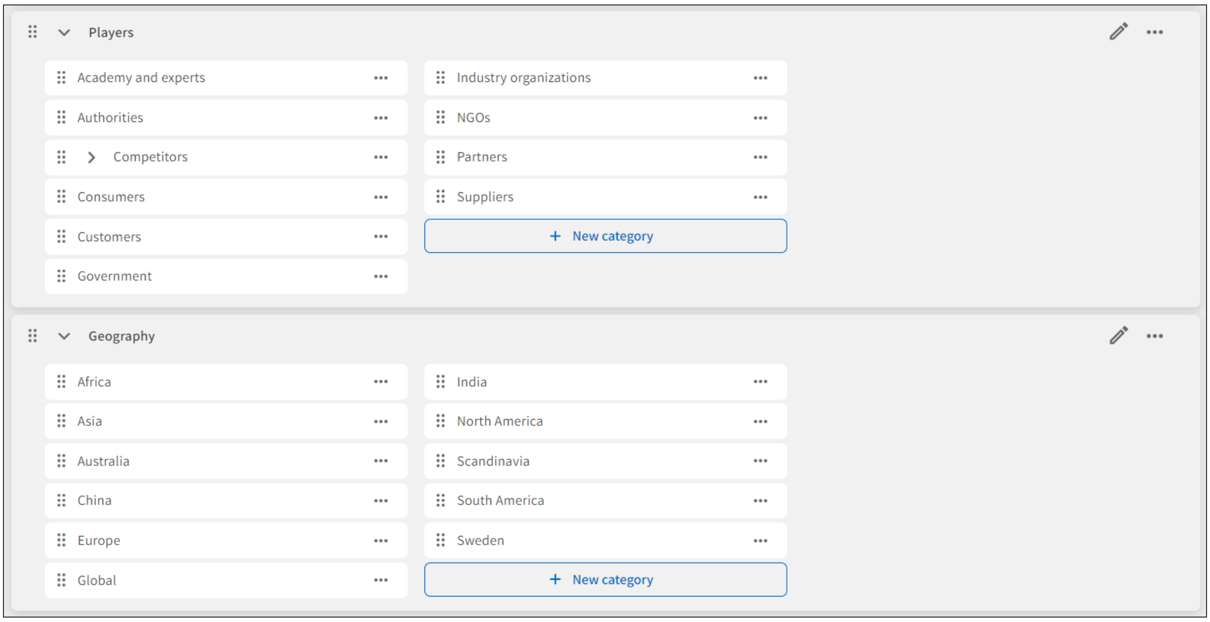
- Easy to find relevant information
- Easy to select content from the database, to share in newsletters, reports, and other deliverables
- Easy to create advanced filters and saved searches to optimize Inboxes and enable auto-qualification

How the Taxonomy is organized

The taxonomy is organized into fields with subject-related categories and subcategories.

The standard taxonomy fields are Topics, Players, and Geography.

Other common fields are Information Type and Business Area or Product Area.



Concepts and terminology

Concepts and terminology used in the Taxonomy hierarchy:

Field – overall categories defined as, e.g., Subjects, Players, Geographies

Category – categories in a field

Subcategory – subcategories to a category in a field

All Taxonomies are customized

All customers have unique portals with their tailored taxonomy containing various fields, categories, and subcategories relevant to their industry, organization, and use of Wide Narrow.

We recommend starting with only 3-4 fields and the most commonly used categories to define your business environment and use case.

How the Taxonomy works

When a new portal is created, a standard taxonomy is produced and adjusted manually to adapt to each organization's needs and use of Wide Narrow.

Some categories are standardized in all taxonomies following the content and familiar concepts, and some are customer specific.

The taxonomy is not dynamic and needs to be updated manually. Changes are made on the Taxonomy page in the Admin module. Note that only Superusers with Admin permission have access to the Admin module.

Taxonomy Administration

Taxonomy administration permissions

Taxonomy administration requires access to the Admin module. Only superusers with Admin permission can make changes to the taxonomy.

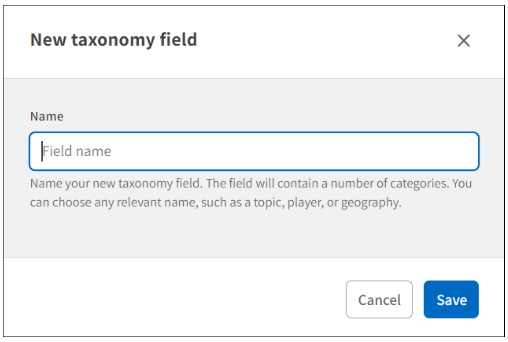
How to create a new Taxonomy

The Taxonomy is created on the Taxonomy page in the Admin module.
Note that only superusers with Admin permission have access to the Admin module.

The Taxonomy is based on fields, categories, and subcategories.

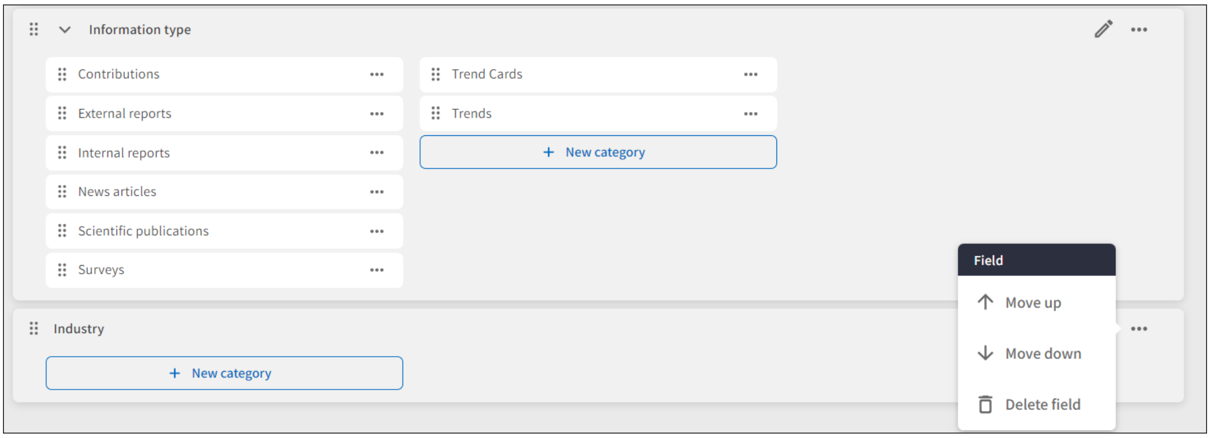
To create a new Taxonomy:

1. Navigate to **Admin** in the navigation menu.
2. Click **Taxonomy** in the Admin menu.
3. Click the **New field** button on the top right of the page and enter a field name to add a new field. Use a short name that clearly describes your field (e.g., Players, Geography, Product Areas). Click **Save**.



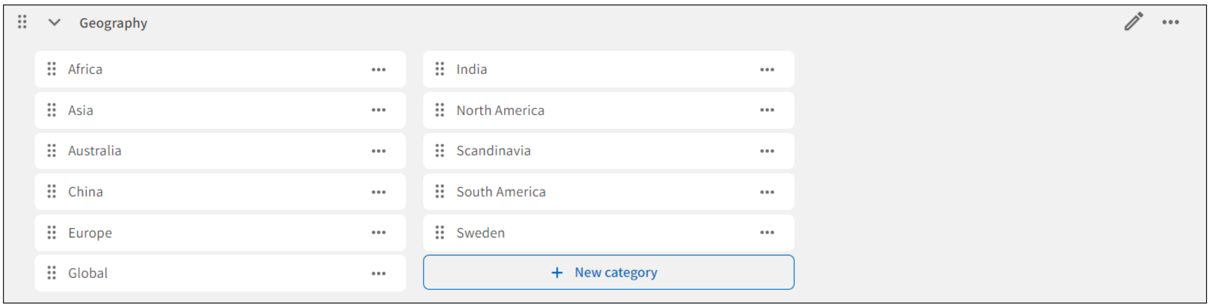
Drag and drop the field or click the **More** icon (three dots) and then select **Move up** or **Move down** to place the field in the desired order.

Use the arrows beside the field name to **collapse** and **expand** the field.



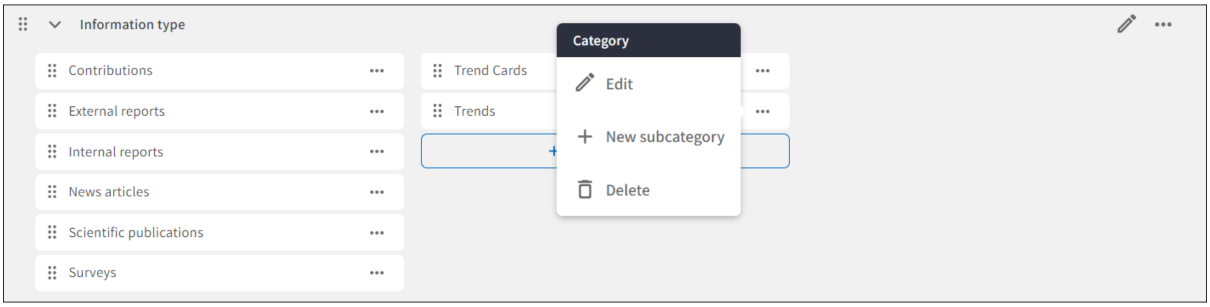
4. Click the **Edit** icon (pen icon) to change a field's name. Click the **More** icon (three dots) and then select **Delete field** to delete a field.
5. Click **New Category** and enter a category name to add a new category within a field. Use a short name that clearly describes your category. Click **Save**.

All topics are sorted automatically in alphabetical order.



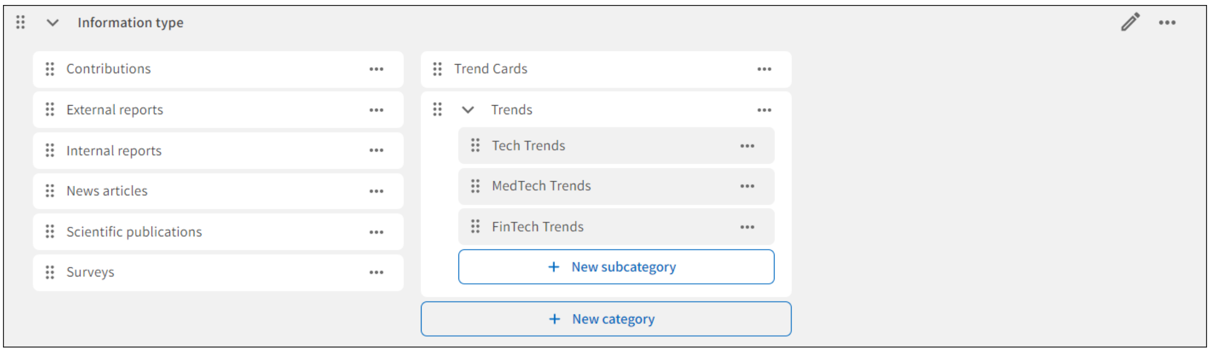
6. Click the **More** icon (three dots) on a category and select **Edit** to edit the category.

   Select **Delete** to delete the category.



7. **Subcategory:** Click the **More** icon (three dots) on a category and select **New subcategory** to add a subcategory. Enter a name and click **Save**. Use a short name that clearly describes your subcategory. All subcategories are sorted automatically in alphabetical order. Click the arrows to display all subcategories.

8. Click the **More** icon (three dots) on a subcategory and select **Edit** to edit the subcategory. Select **Delete** to delete the subcategory.



Our recommendations when creating the Taxonomy

Fields: We recommend building a taxonomy with 3-5 fields.
Too many fields make the taxonomy confusing.
Make sure your fields represent at least answers to the questions:

- What? Topics
- Who? Players
- Where? Geography

Categories: You can add an unlimited number of Categories in each field, but our recommendation is to keep the taxonomy as limited and straightforward as possible.

Sub-categories: A flat taxonomy is better than a deep taxonomy. If you can, you should stick to one level (categories) and avoid subcategories.

Remember not to have concepts that overlap either between different fields or within a field. The taxonomy should be used by combining categories from various fields.

Avoid using ambiguous terms and abbreviations that cannot be assumed to be known to all users. Users should be able to understand and use the taxonomy easily.

Appoint a responsible person/gatekeeper who accepts or refuses changes to the taxonomy. The gatekeeper needs Admin permissions to make changes in the taxonomy.

DO – Our recommendations

Keep the taxonomy short and intelligible.

Use market standards or established concepts and terms. Make it simple for users to select categories.

Keep it relevant for your business (e.g., geographical markets, don't let the user find out what EMEA stands for if it's not known within the organization)

Inform all users if there are any Fields and Categories that should always be marked or are more critical than others (e.g., always tag private vs. public or business area or geographical market).

AVOID – Our recommendations

Don't use overlapping categories or names

Don't establish new, unusual, and unknown concepts and terms (use market standards as much as possible)

For the AI to work as well as possible:

- Avoid large taxonomies with many fields, categories, and subcategories
- Avoid subcategories
- Avoid internal names on categories
- Avoid similar terms within both the same field and various fields
- Make sure to train the AI when the taxonomy is new or after new updates

Invite users to contribute with input on the taxonomy and new categories. In the process of accepting new proposals, an Admin user needs to be a gatekeeper.

How to make changes in the Taxonomy

The taxonomy needs to be updated manually. Changes are made on the Taxonomy page in the Admin module. Note that only superusers with Admin permission have access to the Admin module.

The Taxonomy is based on fields, categories, and subcategories.

To make changes in the Taxonomy:

1. Navigate to **Admin** in the navigation menu.
2. Click **Taxonomy** in the Admin menu.
3. **Change field order: Drag and drop** the field or click **More** (three dots) and then select **Move up** or **Move down** to place the field in the another order.
4. **Add more fields:** Click **New field** and enter a field name to add a new field.
5. **Edit or delete fields:** Click **Edit** (pen icon) to change a field's name. Click **More** (three dots) and then select **Delete field** to delete a field.

9. **Add, edit and delete categories:** Click **New Category** to add a new category. Click **More** (three dots) on a category and select **Edit** to edit the category. Select **Delete** to delete the category.
10. **Add, edit and delete sub-categories:** Click **More** on a category and select **New Sub-category** to add a new sub-category. Click **More** (three dots) on a sub-category and select **Edit** to edit the sub- category. Select **Delete** to delete the category.

Our recommendations when updating the Taxonomy

Evaluate your taxonomy regularly, preferably every year, when the business changes or when adding new inboxes.

Delete categories you never use: Use Wide Narrow statistics to evaluate what to keep and delete or adjust. Contact Wide Narrow Support for statistics.

Our recommendation is to be careful when making changes in the taxonomy, as all categorized posts will be affected.
If you delete a category (or subcategory) in the taxonomy, the category will disappear from all posts in the database. If you edit a category (for example, changes the name), the category name will change on all tagged posts.

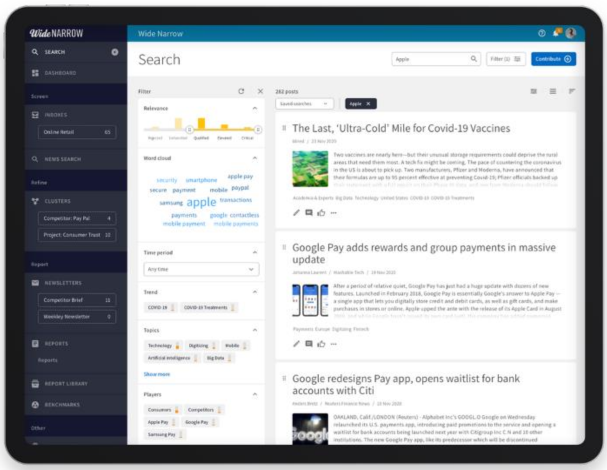
If you delete a parent category with a subcategory, you must move or delete the sub-category before deleting the parent category.

Moving categories from one field to another may affect saved searches and dashboard widgets, RSS feeds and automated newsletters based on the saved search. Contact Wide Narrow Support for more advice.

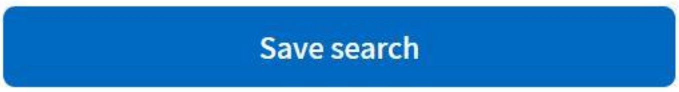
Using the Taxonomy

How users can use the Taxonomy

All users can use the Taxonomy to **filter information in Search**.

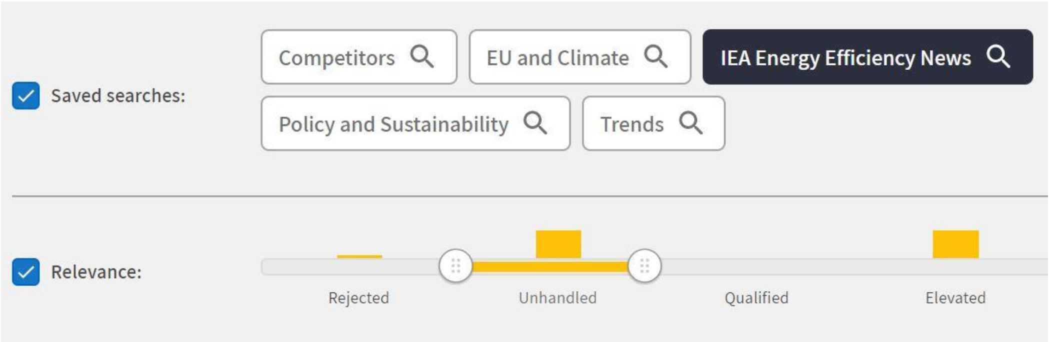


All users can **create personal saved searches** and **personal email subscriptions** based on a saved search.



Superusers with Inboxes are using the taxonomy to **classify the posts** before qualifying. The inbuilt categorization AI tool will learn from the superusers' classification behavior. This means that your behavior (i.e., qualifying posts) helps the AI to categorize posts before you have to do it. Note that your categorization behavior never leads to new categories in the taxonomy.

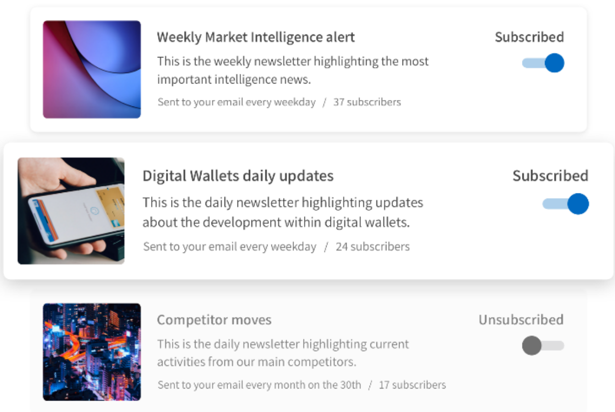
Superusers with Inboxes are also using the taxonomy to **create filters and saved searches** in the Inboxes. Saved searches can be personal or shared and are helpful when you have a broad information scope or when several people share an inbox.



All users can categorize Contributions in the same way as other posts in Wide Narrow. Categorized contributions are searchable and can be used the same way as all other posts in Wide Narrow. Note, however, that the AI classification tool does not learn from a user's contribution behavior as in inboxes.

Superusers can **categorize a Summary** similarly to posts when using the Summary function in Inboxes and Clusters. Categories from posts that are already tagged are automatically included in the Summary.

Superusers setting up **automated newsletters** can use the taxonomy to create saved searches for the auto-selection of content to the newsletter.



Superusers with Admin permissions can use the taxonomy to create **system saved searches and subscriptions** available for all users in a portal. They can also use the taxonomy categories to **create dashboard widgets** with selected information for different target groups. In addition, they can use the taxonomy filters to **generate RSS feeds** and **integrate content from Wide Narrow on other platforms.**

How to categorize posts in Wide Narrow

Posts, Summaries, and Contributions are marked in the same way in the taxonomy in Wide Narrow:

1. Open the post (summary or contribution) edit form.

2. Click the Taxonomy tab to open the taxonomy.

3. Tag the post (summary or contribution) with all relevant tags.

4. Click Save.

Our recommendations when using the Taxonomy Categorization

- Categorize all qualified posts, summaries, and contributions to make them easily searchable and usable in automated newsletters, dashboards, and other deliverables.
- There is no limit to the number of categories you can select but avoid any overlapping categories. Make sure that all perspectives of the post content are specified.
- You can add several categories within the same field.
- Don't forget to add tags in all fields if applicable.
- "Who?" (players), "what?" (topics), and "where?" (geography) are good questions to ask when categorizing posts.
- When there are subcategories to a category, we recommend tagging both the parent category and relevant subcategories. If you only want to categorize a specific subcategory, don't tag the parent category.