BEYOND AWARENESS: Honing the Craft

Managing and growing a taxonomy
Taxonomy design concepts and strategies
Selecting the right metadata, taxonomy approach, and tools for your environment
Enhancing your information infrastructure with the right taxonomy
Case studies, lessons learned, and best practices
Evaluating auto-categorization schemes and tools
Creating and implementing successful taxonomies
New tools on the market and where the market is headed
Working collaboratively with your content and stakeholders
Measuring and demonstrating the business impact and ROI

www.TaxonomyBootCamp.com

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In recent years, more and more organizations have become aware of taxonomy and recognize its value. Taxonomy has gone from being a hard sell to a hot topic. In this new taxonomy-savvy context, I’m interested in how can we as taxonomy practitioners improve our work and meet the increasing demand. How can we advance the methodologies behind a craft that requires both practicality and artistry? How can we be better taxonomists? For 12 years, Taxonomy Boot Camp has been bringing together the foremost thinkers and practitioners in the field of information organization to spark conversations and provide insights into the complex world of taxonomies, ontologies and their application in real-world environments.

I’m excited to meet all of you who are working together to make taxonomy such a success: taxonomy experts pushing boundaries and developing best practices, vendors who have created tools to help us manage taxonomies and create new products, and novices who are answering the call and just getting started in the world of information organization.

I hope you enjoy the boot camp and have the opportunity to learn about tools and techniques you can use to improve your taxonomy development and implementation skills, and meet people who can help you be successful in your efforts.
### MONDAY, NOVEMBER 14

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<td>9:00 a.m. – 9:10 a.m.</td>
<td>Opening Remarks • Grand Ballroom, Salon 1/2 • Lemieux</td>
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<td>9:10 a.m. – 10:00 a.m.</td>
<td>OPENING KEYNOTE • Grand Ballroom, Salon 1/2 • In Search of Taxonomical Weirdness • Fast</td>
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<td>10:00 a.m. – 10:15 a.m.</td>
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<td>10:15 a.m. – 12:00 p.m.</td>
<td>TRACK 1 (Grand Ballroom, Salon 1/2) Getting Started: Taxonomy Nuts &amp; Bolts</td>
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<td>12:00 p.m. – 1:00 p.m.</td>
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<td>How Deep Is an Effective Taxonomy? • Liciardi</td>
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<td>2:00 p.m. – 2:30 p.m.</td>
<td>How Many Synonyms Should You Have? • Hedden &amp; Mage</td>
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<td>Discover Thousands of Terms Using This One Weird Trick! • Kasenchak</td>
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### TUESDAY, NOVEMBER 15

All sessions will take place in Grand Ballroom, Salon 1 unless otherwise noted.

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<td>WELCOME &amp; KEYNOTE • Capitol Ballroom • Hacking KM or How to Innovate! • Phillips</td>
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<td>9:45 a.m. – 10:00 a.m.</td>
<td>KEYNOTE • Capitol Ballroom • Thinking &amp; Searching Outside of the Box • Clarke &amp; Nichani</td>
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<td>Leveraging User Research for Taxonomy Design • Price &amp; Barrett</td>
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<td>Choosing Taxonomy &amp; Auto-Classification Software • Fabris &amp; Lee</td>
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<td>4:15 p.m. – 5:00 p.m.</td>
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<td>5:00 p.m. – 6:00 p.m.</td>
<td>Linked Open Data • Clarke &amp; Loh</td>
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<td></td>
<td>NETWORKING RECEPTION in the Enterprise Solutions Showcase</td>
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**Continental Breakfast** 8:00 a.m. – 9:00 a.m.

**WELCOME & KEYNOTE**

**Opening Remarks** 9:00 a.m. – 9:10 a.m. *Grand Ballroom, Salon 1/2*
Stephanie Lemieux, President, Dovecot Studio

**In Search of Taxonomical Weirdness** 9:10 a.m. – 10:00 a.m. *Grand Ballroom, Salon 1/2*
Karl Fast, Director, Information Architecture, Normative
Where should we look for new ideas in taxonomies? The natural place is on the frontiers of research and the work of leading practitioners. But new ideas and insights often arise from unexpected places. Exploring the weird can produce deep insights into the normal and help break new ground. Join Karl Fast, information architect and former professor of user experience, on a search for weirdness that could alter the taxonomical future.

**Coffee Break** 10:00 a.m. – 10:15 a.m.

**TRACK 1** 10:15 a.m. – 12:00 p.m.

**Taxonomies & Facet Analysis for Beginners**
10:15 a.m. – 12:00 p.m.
Patrick Lambe, Partner, Straits Knowledge
This workshop covers the fundamentals of building taxonomies in a digital environment, and the importance of understanding the different forms taxonomies can take. Learn about the different uses of taxonomies, why they are important, and how they complement navigation and search. See how taxonomy facets support multiple perspectives and pathways into the same body of content. The workshop includes the basics of facet analysis, how to identify which facets are salient, what makes a good facet array, and how to identify from test results how facets should be implemented (i.e., as primary search, as filters, as narrow-function facets).

**Attendee Luncheon** 12:00 p.m. – 1:00 p.m.

**How Deep Is an Effective Taxonomy?**
1:00 p.m. – 1:20 p.m.
Ben Licciardi, Manager, PwC
How many terms do you need? How many levels should you employ? How many people should you include in the research and development process? Explore interviewing, user testing, corpus analysis, and other methodological considerations with an eye toward limits. Drawing from real-life examples, learn how to effectively gather and prioritize requirements, understand how detailed a taxonomy needs to be given those requirements, and recognize signs of over-engineering.

**How Many Synonyms Should You Have?**
1:20 p.m. – 1:45 p.m.
Heather Hedden, Senior Vocabulary Editor, & John Magee, Director, Indexing & Controlled Vocabulary, Cengage Learning
Synonyms (variants, alternate labels, non-preferred terms) help to gather similar content in a single place and to bring your users to that place. But how many synonyms should a concept (term, topic, category) have? Too many synonyms waste effort and create clutter (mess, disorder, confusion) while too few lead to missed opportunities. So how many are desirable, appropriate, or ideal? The speakers debate the case for creating more or fewer synonyms by using real examples from Cengage Learning taxonomies.

**Discover Thousands of Terms Using This One Weird Trick!**
1:45 p.m. – 2:00 p.m.
Robert Kasenchak, Head, Product Development, Access Innovations
Learn how to use simple TDM (text & data mining) techniques to analyze a corpus of content for term/concept discovery.

**A Practical, Sustainable Model for Governance**
2:00 p.m. – 2:30 p.m.
Seth Maislin, Principal Consultant, Earley Information Science
A Boston-based financial management company successfully established a culture of proactive stewardship across the firm, transforming governance from crisis management into a core business practice. Learn how you can make governance meaningful to stakeholders, identify and promote the correct investments in taxonomy quality, establish accountability at the correct levels (for business and IT), create a programmatic approach for operationalizing insights, and establish sustainability at the business unit level. Participants have the opportunity to explore numerous artifacts and deliverables that got the job done once and (potentially) forever.

**Explaining Taxonomy ROI: Lessons From the JSTOR Thesaurus**
2:30 p.m. – 3:00 p.m.
Jabin White, VP, Content Management, ITHAKA/JSTOR
How do you make optimal use of your taxonomy investment? Although the return on investment (ROI) of your taxonomy might be perfectly clear to information workers, the people whose hands are on the checkbook might not be so quick to get it. This presentation touches on advocacy, education, and salesmanship for the people who have to approve the investment in a taxonomy, as well as the steps to take to set up for building and maintaining the taxonomy.

**Coffee Break** 3:00 p.m. – 3:15 p.m.

**AUTO-CLASSIFICATION 101** 3:15 p.m. – 4:15 p.m.

**Promises & Pitfalls in Auto-Classification**
Ahren Lehnert, Manager, Data & Taxonomy, Clorox
While auto-categorization cuts down the amount of time it takes to upload and tag information, there is typically a lot of work involved in implementing the tools and developing the rules and business processes. What promises does auto-categorization make for the capture and reuse of information? What pitfalls are often experienced in auto-categorization implementations and maintenance? Find out more from our experienced practitioner about what benefits and challenges are often experienced in implementing auto-categorization and how you can plan ahead to have a successful auto-categorization program.

**Rules-Based vs. Document-Based Bake-Off**
Jeff Fried, CTO, BA Insight
There is a broad range of categorization techniques, generally falling into the use of rules vs. the use of training sets. With all the buzzwords and hype around the subject, it can be hard to tell what is really meant by “semantic,” “cognitive,” and even “machine learning.” This session walks through several concrete use cases and shows where different techniques work or fall flat. Learn the best scenarios for applying different auto-classification techniques and demystify the jargon.
Creating & Managing Taxonomies With Limited Staff
4:15 p.m. – 5:00 p.m.
MODERATOR: Sharon Garewal, Senior Metadata Librarian, Taxonomy Manager, ITHAKA/JSTOR
PANELISTS:
Edee Edwards, National Fire Protection Association
Ashleigh Faith, Society of Automotive Engineers (SAE)
Kyle C. Carson, Kennedy Space Center Visitor Complex, Delaware North
Xi Van Fleet, American Society of Civil Engineers (ASCE)

How do you create and maintain a taxonomy or thesaurus with limited staff? Challenges to getting a thesaurus created are discussed as well as how it is maintained after creation. Hear about how to train other staff, how to be the sole “owner” of the thesaurus, and how to advocate for the usage of the taxonomy/thesaurus within your organization.

ENTERPRISE SOLUTIONS SHOWCASE
GRAND OPENING RECEPTION
5:00 p.m. – 6:30 p.m.

TRACK 2 • Honing the Craft
Capitol Ballroom, E/F

Walmart’s Universal Categories
10:15 a.m. – 10:45 a.m.
Seán Lightholder, Senior Taxonomy Manager, @WalmartLabs

When @Labs Taxonomy was asked to create a system of retail categorization that could be used across the enterprise, the issue at hand appeared to be discerning how legacy systems could be blended harmoniously. But before that could happen, an age-old problem needed to be acknowledged: Where do the initiatives of organization and definition converge or diverge, and what’s the best way to handle it when they do?

Building and Maintaining a Business-Oriented Knowledge Organization System at WSDOT
10:45 a.m. – 11:15 a.m.
Andy Everett, Metadata Librarian, Washington State Department of Transportation (WSDOT)
Denise Bedford, Adjunct Professor, Georgetown University

A well-designed business function classification needs to reflect changing business processes and functions in the organization. Developing a set of guiding principles and business rules to assist those who are tasked to govern the scheme is important to maintain the classification. Learn how the WSDOT developed its business function classification and how it fits within WSDOT’s core metadata framework and enterprise search strategy.

Taxonomy to Improve Collaboration at Merck Product Lifecycle
11:15 a.m. – 11:45 a.m.
Adam Duckworth, Associate Director, Knowledge Management, & Yunnie Jenkins, Business Analyst, Information Technology, Merck

Merck manufactures, packages, and distributes products to more than 140 markets via a global, integrated manufacturing network. Hear how taxonomy was implemented as a key enabler in improving product knowledge sharing. Explore successes and challenges related to taxonomy adoption, governance, user experience, metrics, and automated classification, with specific recommendations provided on how to approach each activity, the future road map, based on an aspiration to establish an enterprise manufacturing taxonomy, includes goals for semantic search.

Cognitive Meets Taxonomy
11:45 a.m. – 12:00 p.m.
Daniel Mayer, CEO, Expert System Enterprise

Taxonomy is essential in organizing information and delivering knowledge. But applying it at scale would be a challenge without automation. Cognitive
technology fills this gap by providing the connective tissue that aligns content, metadata, and taxonomy. But the impact of cognitive goes well beyond automation. It transforms a traditionally manual process that is fraught with collaboration difficulties into an efficient, organic workflow that lets taxonomists coordinate their work with subject matter experts and curators to save time and avoid errors. It also supports them throughout the taxonomy lifecycle by constantly learning from content and human feedback to adapt to change and simplify taxonomy creation and maintenance. This session showcases the latest developments in these areas and provides a comprehensive view of the workflow benefits derived from cognitive.

**Attendee Luncheon** 12:00 p.m. – 1:00 p.m.

**Effective Taxonomies After Migrations & Redesigns**
1:00 p.m. – 1:30 p.m.

David Hobbs, Early Digital Strategist, David Hobbs Consulting LLC

Taxonomies are an essential component of most digital migrations and redesigns, but the end result often does not meet expectations. Learn how migrations can be orchestrated to more effectively leverage taxonomy. Hobbs draws upon experience from planning transformations of large government and global sites to information-heavy, medium-sized websites such as research institutions. Hobbs covers examples of using metrics to realign a central taxonomy and techniques to automatically apply a revised taxonomy to existing content, as well as methods of tracking manual progress where automation is not possible.

**Migrating a Website to Ecommerce & Taxo in Drupal**
1:30 p.m. – 2:00 p.m.

Jessica Short, Digital Materials & Metadata Librarian, Tennessee State Library & Archives

Short shares the experience the Tennessee State Library & Archives had during the past year migrating its HTML platform web content to the Drupal CMS platform. She discusses some of the challenges and lessons learned, including creating taxonomy structures for a site within a site, transforming library and archives content to e-commerce platform in Drupal, working collaboratively with multiple departments in the state, as well as users and stakeholders to implement a taxonomy, testing, analytics and more.

**Taxonomy Quality Assessment: Tools & Techniques**
2:00 p.m. – 2:30 p.m.

Andreas Blumauer, Managing Director & CEO, Semantic Web

This talk addresses two questions: “How can the quality of taxonomies be defined?” and “How can it be measured?” See how quality criteria vary depending on how a taxonomy is applied, such as automatic content classification in ecommerce or a knowledge graph for data integration in enterprises. Distinguish between formal quality, structural properties, content coverage, and network topology. Investigate the advantages of standards-based and machine-processable SKOS taxonomies to be able to measure the quality of taxonomies automatically, as well as several tools and techniques for quality assessment.

**Knowledge Discovery With Applied Ontologies**
2:30 p.m. – 3:00 p.m.

James Morris, Senior Information Scientist, SmartLogic

Successful R&D organizations require a variety of disciplines, expertise and perspectives; each may use different terminology to describe similar or related concepts. Vocabularies from some disciplines are available from external sources, while others are unique to the organization. How does an R&D organization effectively leverage terminology from these multiple sources and apply them to specific business needs or different bodies of content? Learn how semantic standards such as SKOS, coupled with advanced text analytics, can be used to leverage multiple ontologies and facilitate knowledge discovery.

**Coffee Break** 3:00 p.m. – 3:15 p.m.

**AUTO-CLASSIFICATION 201**
3:15 p.m. – 4:15 p.m.

**Taxonomy Design for Auto-Classification**

*Annabel Snow, Senior Consultant, Optimization Group*

Designing for auto-classification is best described as expecting, or pre-empting, the unexpected. Leveraging a taxonomy or ontology for use in the automated classification of content comes with some specific design considerations. Get an up-close view of some of the considerations and outcomes, such as term nomenclature and settings, the role of relationships, and light rule design. See how ontologies are used in auto-classification to support search and findability.

**Combining Taxonomy, Ontology, Text, & Data**

*Tom Reamy, Chief Knowledge Architect, KAPS Group*

Reamy describes a pilot project designed to demonstrate the potential of text analytics to improve enterprise search for two government agencies. The elements of the solution included a broad ontology for a range of data categories as well as taxonomies of conceptual issues. Text analytics data extraction and auto-categorization powered the whole solution. Hear what made the project a success but also what components did not work very well, along with the issues involved in generalizing the solution from the initial agency to a second agency.

**Conducting Taxonomy Validation: Healthcare Example**
4:15 p.m. – 4:35 p.m.

Joseph Busch, Principal, Taxonomy Strategies

The goal of taxonomy validation is to provide persuasive evidence that the taxonomy is effective in meeting project goals. Taxonomy effectiveness can be measured in terms of search recall and precision against a test collection or completeness and consistency in indexing a test collection. Busch discusses a taxonomy validation method that was developed to provide incremental evidence of search effectiveness in a healthcare setting during an extended development process using increasingly sophisticated walk-throughs based on use cases gathered from query logs, literature reviews, and internal and external user interviews.

**Translating Medical Research for Patient Findability**
4:35 p.m. – 5:00 p.m.

Michael Panzer, Ontology Team Manager, Mayo Clinic

Recruitment is key for clinical trials, but the Mayo Clinic faced a problem. Users, both internal and external, could not find studies on the Mayo Clinic website. Panzer walks through the Mayo Clinic’s development of a metadata design that leveraged existing standard medical terminologies along with a clinical studies ontology that allowed for both greater findability for the lay user and research staff alike. The outcome has been a dramatic increase in the number of people contacting the research staff already having found studies they are interested in and fewer calls from people needing help.

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**GRAND OPENING RECEPTION**

Join us for a “taste of Italy” in the
ENTERPRISE SOLUTIONS SHOWCASE
Monday, November 14
5:00 p.m. to 6:30 p.m.

Enjoy a selection of tasty bites, drinks, and live music while visiting with our sponsors.
Continental Breakfast  •  8:00 a.m. – 8:45 a.m.

WELCOME & KEYNOTE

Hacking KM or How to Innovate!
8:45 a.m. – 9:45 a.m.  •  Capitol Ballroom
Jeffrey Phillips, Co-Author, OutManeuver: OutThink, Don’t OutSpend
See page 14 for complete description.

KEYNOTE

Thinking & Searching
Outside of the Box
9:45 a.m. – 10:00 a.m.  •  Capitol Ballroom
Dave Clarke, CEO, Synaptica
Maish Nichani, Co-founder, Ola Search
See page 14 for complete description.

Coffee Break  •  In the Enterprise Solutions Showcase
10:00 a.m. – 10:45 a.m.

Vocab Design: Language Arts for the Lizard Brain
10:45 a.m. – 11:15 a.m.
Andy Fitzgerald, Independent UX Designer
When designing communication systems for others, we frequently run into wild discrepancies between what we expect our users to understand and what our users actually understand. By understanding how these systems work—and what sometimes makes them work against us—we can learn to make smarter recommendations for vocabularies that not only technically “work,” but that also help us better facilitate user, experience, and business goals for our clients.

Leveraging User Research for Taxonomy Design
11:15 a.m. – 11:45 a.m.
Rachel Price, Information Architect/Partner, & Sarah Barrett, Senior Information Architect/Partner, Factor
We need to move beyond fundamentally well-informed taxonomies toward taxonomies that are informed by user needs by incorporating user research into taxonomy design. By learning how to do basic, up-to-date research and analyzing it using a rigorous framework, we can confidently gather evidence of user needs and support a fundamental shift from well-informed collections of headings to building taxonomies that reflect the reality of user experience. Learn basic steps for conducting research and examples of using evidence from research to make taxonomy design decisions.

Taxonomy-Driven UX
11:45 a.m. – 12:00 p.m.
Andreas Blumauer, Managing Director & CEO, Semantic Web
Consistency is crucial to a good user experience. Designers go to great lengths to create and test consistent visual designs. The structural design of an information environment, which is of equal importance to a good user experience, is too often ignored. Blumauer presents a “four-layered content architecture” for making sense of any information environment by clearly distinguishing between the content, metadata, and semantic layers and the navigation logic. He discusses several use cases for a taxonomy-driven user experience.

Taxonomists Improving Data Science Effectiveness
12:00 p.m. – 12:30 p.m.
Suzanne Carroll, Data + Taxonomy Product Manager, XO Group/The Knot
Taxonomists can play a variety of roles, and XO Group collocates taxonomists and data scientists within the same team so that both the human and machine elements of classification work side-by-side. This discussion delves into why taxonomists and data scientists should work together and how taxonomies can integrate and improve the effectiveness of data science solutions.

Attendee Luncheon  •  In the Enterprise Solutions Showcase
12:30 p.m. – 1:45 p.m.

ZEN & TAXONOMY COMMUNICATION
1:45 p.m. – 2:30 p.m.

The Art of Facilitating & Communicating Taxonomy
Zach Wahl, Principal, Enterprise Knowledge, LLC
Effective taxonomy efforts have a great deal to do with the “softer side” of design. The art of taxonomy design includes communications and facilitation, leveraging an array of approaches. Wahl covers the keys to discussing, communicating, and facilitating taxonomy design efforts. He offers proven approaches and best practices to ensure your taxonomy design efforts engage end users properly and get them invested in the benefits and outcomes of the taxonomy design effort.

Managing Taxonomy: The Value of Passion and Good Timing
Ari Kramer, Communications Officer, Robert Wood Johnson Foundation
Smart taxonomy development and implementation can go a long way in improving usability and cohesion across numerous types of information platforms. Often, the biggest challenge is choosing the right starting point. This presentation will share the story of one organization that has recently begun working to more proactively manage a taxonomy, and reinforce the value of factors such as passion and good timing when it comes to establishing a strong connection with key organizational stakeholders, needs and goals.

Choosing Taxonomy & Auto-Classification Software
2:45 p.m. – 3:30 p.m.
Monica Fulvio, Senior Taxonomist, National Geographic Partners
Lila Lee, Associate Director, Operations Analysis, Consumer Reports
How do companies go about surveying and selecting a taxonomy management and auto-tagging system? Hear from two organizations which recently went through a selection process. Fulvio gives a practical survey of how to go about determining requirements, surveying the options, and testing and selecting a tool, providing valuable insight from her experience at National Geographic. Lee shares lessons learned from Consumer Reports’ recent tool selection efforts, including how to involve IT in the evaluation and listen to stakeholder needs. Hear about developing an RFI, evaluating tool demos and test results, and ultimately choosing the tool that is right for your organization.

Coffee Break  •  In the Enterprise Solutions Showcase
3:30 p.m. – 4:15 p.m.

Linked Open Data
4:15 p.m. – 5:00 p.m.
Dave Clarke, CEO, & Gene Loh, Software Engineer, Synaptica
Adopting and reusing Linked Open Data taxonomies and name authorities can substantially compress enterprise taxonomy development timelines and reduce project costs. As gateways to additional content resources Linked Open Data vocabularies can also help an organization to enrich their internal content. Get a look at practical examples of publicly available Linked Open Data resources and see how this data can be accessed, stored and integrated with an enterprise’s existing taxonomies and content. Bring your burning Linked Open Data questions for our active Q&A discussion.

ENTERPRISE SOLUTIONS SHOWCASE NETWORKING RECEPTION
5:00 p.m. – 6:00 p.m.

(800) 300-9868  •  TaxonomyBootCamp.com