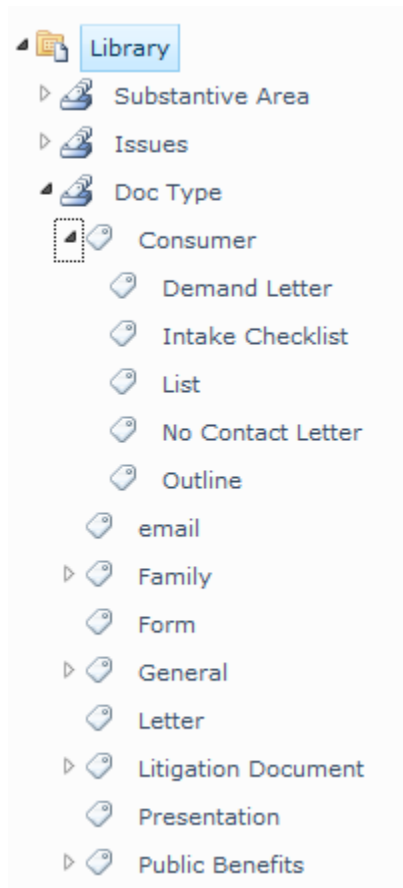


# Reworking a Taxonomy

A	B	C	D	E	F
	name	photographer	title	description	depicted_people
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Avaro-Enrique-2.jpg	hayfestival-2016-Avaro-Enrique-2.jpg	Andrew Lih (User:Fuzhee)	Hay Festival 2016 - Avaro Enrique		
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Band.jpg	hayfestival-2016-Band.jpg	Andrew Lih (User:Fuzhee)	Hay Festival 2016 - Band		
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Beatrix-Potter-1.jpg	hayfestival-2016-Beatrix-Potter-1.jpg	Andrew Lih (User:Fuzhee)	Hay Festival 2016 - Beatrix Potter posing	Hay Festival 2016 - Beatrix Potter reading	Beatrix Potter
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Beatrix-Potter-Book.jpg	hayfestival-2016-Beatrix-Potter-Book.jpg	Andrew Lih (User:Fuzhee)	Hay Festival 2016 - Beatrix Potter with book	Hay Festival 2016 - Beatrix Potter reading	
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Beatrix-Potter-Gesture.jpg	hayfestival-2016-Beatrix-Potter-Gesture.jpg	Andrew Lih (User:Fuzhee)	Hay Festival 2016 - Beatrix Potter gesturing	Hay Festival 2016 - Beatrix Potter reading	
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Beatrix-Potter-Reading.jpg	hayfestival-2016-Beatrix-Potter-Reading.jpg	Andrew Lih (User:Fuzhee)	Hay Festival 2016 - Beatrix Potter reading	Hay Festival 2016 - Beatrix Potter reading	
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Bookcase.jpg	hayfestival-2016-Bookcase.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Booktable-Shadow.jpg	hayfestival-2016-Booktable-Shadow.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Bronson-Essedu-Peske.jpg	hayfestival-2016-Bronson-Essedu-Peske.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Bruce-Robinson-Portrait-2.jpg	hayfestival-2016-Bruce-Robinson-Portrait-2.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Bruce-Robinson-Portrait.jpg	hayfestival-2016-Bruce-Robinson-Portrait.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Bus.jpg	hayfestival-2016-Bus.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Crowd.jpg	hayfestival-2016-Caitlin-Moran-Crowd.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Cu-Face.jpg	hayfestival-2016-Caitlin-Moran-Cu-Face.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Cu-Hand-2.jpg	hayfestival-2016-Caitlin-Moran-Cu-Hand-2.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Cu-Hand.jpg	hayfestival-2016-Caitlin-Moran-Cu-Hand.jpg	Andrew Lih (User:Fuzheado)			
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ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Signing-4.jpg	hayfestival-2016-Caitlin-Moran-Signing-4.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Signing-5.jpg	hayfestival-2016-Caitlin-Moran-Signing-5.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Signing-6.jpg	hayfestival-2016-Caitlin-Moran-Signing-6.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Wide.jpg	hayfestival-2016-Caitlin-Moran-Wide.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Caitlin-Moran-Widestage.jpg	hayfestival-2016-Caitlin-Moran-Widestage.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Carpark.jpg	hayfestival-2016-Carpark.jpg	Andrew Lih (User:Fuzheado)			
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ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Fleur-Alexander-2.jpg	hayfestival-2016-Fleur-Alexander-2.jpg	Andrew Lih (User:Fuzheado)			
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ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Goldsmith-Enrique-Vasquez.jpg	hayfestival-2016-Goldsmith-Enrique-Vasquez.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Halway.jpg	hayfestival-2016-Halway.jpg	Andrew Lih (User:Fuzheado)			
ms://ih/Documents/Wikipedia/Hay Festival/photos/hayfestival-2016-Haysign-Day.jpg	hayfestival-2016-Haysign-Day.jpg	Andrew Lih (User:Fuzheado)			

To help describe documents in the IKE Library, we have a set of tags for designating the document type (i.e. article, motion, waiver, etc.). Some Doc Types are only specific to one substantive area while others are used by all. The varied use of Doc Types by different users presented a challenge in organizing the taxonomy. In this post I talk about the taxonomy we started with and the steps taken to rework it.



### Current taxonomy organization of Doc Type

Seen in the image above, a few levels of terms existed in the first (and current) state of the Doc Type taxonomy. For instance, some tags were nested beneath others, such as Demand Letter under Consumer. This was done to know which Doc Types were most relevant to a substantive area.

As the taxonomy grew, duplicate tags began to crop up and so cleaning needed to be done. Having second-level tags nested under tags named for substantive area within Doc Type was also becoming problematic and redundant since users are already asked to enter the substantive area in a document's metadata (a separate taxonomy for substantive area already exists).

To start cleaning, I put all the tags into an Excel file.

<b>Family</b>	<b>General</b>	<b>Litigation Document</b>	<b>Public Benefits</b>
Discovery	Advocate Correspondence	Affidavit	Article
Deposition	Article	Answer	Case Law & Decisions
Interrogatories	Law Report	Brief	Declaration/Statement
Motion for Sanction	Legal Outline	Certificate of Service	Depositions
Motion to Compel	Lit Kit	Complaint	Discovery Schedule (Motion/Stipulation)
Request for Admission	Manual	Conclusion of Law	Evaluation Form
Request for Production	Presentation	Confirmation of Joinder	Information/treatment of request as discovery vs. public disclosure act request
Mediation	Video	Confirmation of Service	Interrogatories
Settlement Letter		Court Summons	Med/Other Records Fee Waiver
Pleadings		Declaration	Public Disclosure Act Request
Mandatory (Court Form)		Finding of Fact	Request for Admissions
Non-Mandatory		Interrogatory	Subpoenas (with or without duces tecum)
Research		Judgment	Email
Article		Jury Demand	Historical Document
Case Law		Motion	Letter
Memo by Interns		Note for Motion Docket	Common Advice Letter

### Grouping tags in Excel by color-coding

Tags that were in more than one top-level group (groups in bold in first row) were highlighted. Words within tags that were present more than once I colored red. The latter helped indicate specific types of a doc type, such as Demand Letter being a specific type of Letter.

Law Report
<b>Letter</b>
Demand Letter
No Contact Letter
Settlement Letter
Request Letter
Common Advice Letter
List
Lit Kit
Manual
Meeting Minutes
<b>Memo</b>
Memo by Interns
Internal Memo
Legal Memo
Brief/Memo of Law
<b>Motion</b>
Motion for Sanction
Motion to Compel
Discovery Schedule (Motion/Stipulation)
Motion Continuance
Motion Convert from Hearing to Pre-Hearing Conference
Motion Dismissed
Motion For More Time
Motion/Reply Supp Record
Motion Summary Judgment
Note for Motion Docket*+
<b>Notice</b>
Notice of Appearance (NOA)
Notice of Deposition

Portion of new taxonomy grouped by doc types used in all areas and broader doc type names

A new taxonomy structure was beginning to appear out of the Excel rainbow of information. The Doc Types could be organized on the top-level with 1) Doc Types found in more than one categorization (such as Article) and 2) broad name Doc Types, such as Letter. Specific types of a broad Doc Type would be nested underneath their broader tag.

**Pro to this taxonomy structure?** Probably easier for users new to the Library to find and tag documents

**Cons?** This resulted in a long top-level list of tags to scroll through

<b>Pleadings</b>
<b>Discovery</b>
Deposition
Interrogatories
Motion for Sanction
Motion to Compel
Request for Admission
Request for Production
<b>Pre-Trial</b>

An alternative taxonomy structure groups doc types based on phase or stage of a case. This is building off the organization proposed by one of our family law lawyers.

**Pros?** Based on interviews with different lawyers, this structure would support how some would like to browse for documents

**Cons?** May be difficult for a new user to browse through

## Next Steps

To discover which taxonomy is preferable (if one is at all), we should perform A/B testing with NJP users with the two new taxonomy structures.. This means giving users tasks to perform in the IKE Library with one design using the first taxonomy structure and then giving the same tasks with a design using the other taxonomy. Results should allow us to compare and contrast the ease of use of the two structures.

Last updated on November 16, 2023.

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