

## UAS Mosaic - Taxonomies

### 1. Overview

#### 1a. What are taxonomies?

Taxonomies are ways of assigning organisational keywords to content on your Mosaic website. Using taxonomies is a way of organising your content.

A 'taxonomy' is the general category, and a 'term' is the specific attribute.

For example, if you were applying this to cars:

<b>Taxonomy</b>	<b>Terms</b>
Make	Honda, Toyota, Ford, etc
Colour	Silver, red, black, etc
Style	Hatchback, saloon, SUV, etc

#### 1b. Why use taxonomies?

Taxonomies have two primary purposes:

- To allow you to select what content is displayed on a specific webpage
- To allow your site visitors to filter your content according to what they want to see.

Based on the example above, you could use taxonomies to filter the content of the webpage so it showed only items relating to red cars. Or you could make all content available on the page and the visitor could filter to show only items relevant to them.

Using taxonomies to populate pages can be more efficient than creating the content within each page because it allows content to appear on multiple pages. For example, you can create a page for a silver, Honda SUV, and then use filters to have it appear on your page for 'silver cars' and on your page for 'Honda cars' and on your page for 'SUVs', rather than creating the content separately on each page.

#### 1c. When can taxonomies be used to filter content?

- You can use taxonomies to display selected content in a Grid or Listing widget.
- A visitor can use taxonomies to filter what they see when browsing pages which use those widgets.

### 2. Setting up taxonomies (contributors cannot set up taxonomies, but they can select the ones they want to use)

#### 2a. Taxonomies

- To set up a taxonomy go to *Manage Content; Site-wide content; Taxonomies; Taxonomy administration*:

# Content

Content All drafts Needs review Files Reusable content Shared content Site-wide content Templates

Navigation

Taxonomies

**Taxonomy administration**  
Manage custom taxonomies, rename them and choose the content they are associated with.

- Click 'Create a new custom taxonomy'
- In the next window, give a name to your taxonomy. This is the general category under which the specific attributes of the content will fall.
- Leave 'Controlled taxonomy' checked. Leaving it checked means that when creating content contributors must pick from the list given, rather than having the option to give their own term.
- Indicate to what types of content the taxonomy should be applied – if in doubt click all options. Once this has been set, anyone creating that type of content will be given the option of assigning a taxonomy term to it (see below). Click save.

## Create new taxonomy

Taxonomy 1

**Taxonomy name \***

Suitable overarching category name

Controlled taxonomy?

What types of content should the taxonomy "Taxonomy 1" apply to?

Article

Page

Person

Event

Save

### 2b. Terms

- Having created a new taxonomy you can define the terms which can be applied within that taxonomy.
- From your list of taxonomies, in the relevant one click 'List the terms for...'

Taxonomy 3 : Colour

List the terms for "Colour"

**Taxonomy name \***

Colour

Controlled taxonomy?

- On the following page click 'add term'. The title will be the term; the description is optional and is for other editors to understand the purpose of your taxonomy. This information does not display on your webpages. When you click save you will get the

chance to add another. To return to the list of terms you will need to navigate back to that page.

## Colour

[+ Add term](#)

[Show row weights](#)

Name	Operations
+ Black	<a href="#">edit</a>
+ White	<a href="#">edit</a>
+ Blue	<a href="#">edit</a>
+ Silver	<a href="#">edit</a>

[Save](#) [Reset to alphabetical](#)

- To delete a term, click 'edit' next to the term, and then 'delete' on the next screen.
- You can reorder how your taxonomy terms are displayed on the page, for example putting the more popular ones at the top. Using the arrows next to the name you can drag them to new positions in the list, or by clicking 'show row weights' you can assign a numerical value to each term which will reorder them when you click save (note that -1 is shown before 0).

[Hide row weights](#)

Items with smaller weights are displayed before items with larger weights. Click on 'Hide row weights' to return to drag-and-drop ordering.

Name	Weight	Operations
Black	<input type="text" value="1"/>	<a href="#">edit</a>
White	<input type="text" value="0"/>	<a href="#">edit</a>
Blue	<input type="text" value="2"/>	<a href="#">edit</a>
Silver	<input type="text" value="-1"/>	<a href="#">edit</a>

[Save](#) [Reset to alphabetical](#)

### 3. Creating content using taxonomies (available for contributors as well as editors)

#### 3a. Applying terms to content

- If a taxonomy has been applied to content type when it was set up, then when creating that content type you will have the option of applying to it as many available terms as you like.
- When creating the content, go to the 'details' tab. Within that tab, is a section labelled 'Taxonomies'. There you will see the available taxonomies that have been applied to that content type.
- Select the relevant terms in each category by clicking in the row, and selecting the term from the available list. Select as many as you require.
- You do not need to apply a term if you don't need to.



#### 3b. Using terms to populate a page

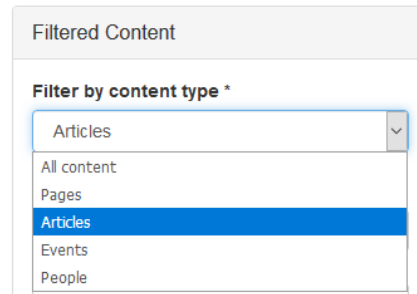
When creating a page which includes a grid or listing you can choose how you want to populate that grid from three options:

1. Filtered – Existing content is displayed based on selected content type and taxonomy term choices.
  - This means that you choose to populate the grid/listing with 'cards' with information taken from, and linking to, already created content which is marked with the specific taxonomy terms which you select further down the page.
2. Selected – Individual content items are specified
  - This means that you still populate the grid/listing with 'cards' with information taken from, and linking to, already created content, but you specify the exact pages to use. This may be advantageous over filtered content as it may allow greater specificity if many terms are being used. In this instance taxonomy terms are not used to select the content, but can be used to select how it is displayed (see 'sorting options').
3. Static – Items that are constructed within the widget by adding text and images
  - As the description indicates, this does not use existing content, and fresh content is created. In such instances taxonomies are not applicable.

Whichever option you pick will determine the options you are given in the section on the page below.

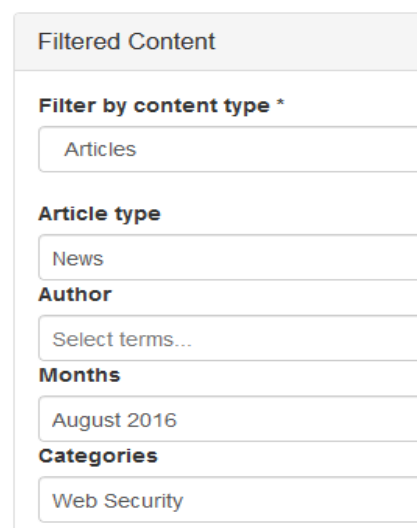
3b(i) Filtered content

- Firstly you indicate the content type you want to show in your grid:

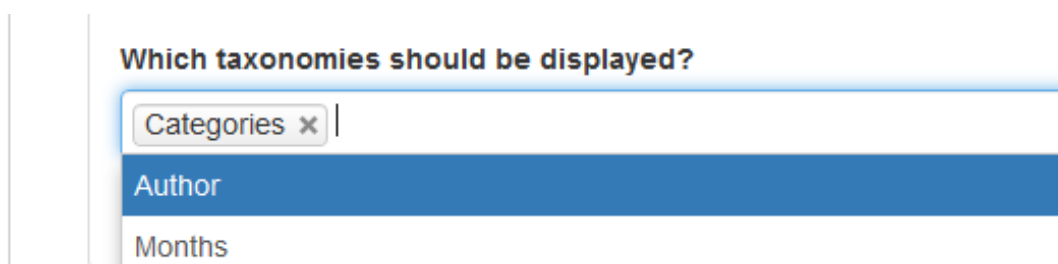


- You then can filter what content which appears in your grid by selecting from each taxonomy the terms you want included. You do not have to select a term for each taxonomy – you can leave it as 'select terms' and the content will therefore not be filtered based on that taxonomy.

- For content to appear it must be tagged with terms fitting the criteria of all taxonomies. In the adjacent example the page will include news articles tagged as being both created in August 2016 AND about web security, but by any author. It will not show articles about web security tagged as being from other months, or articles from August 2016 tagged as being about something other than web security.



- To allow visitors to your website to filter the content for themselves, include the appropriate taxonomies in the 'Which taxonomies should be displayed?' box.



- You can select some, all, or none of these. If none is selected, the user will not be able to filter what content they can view.
- If any/all are selected, when the page is displayed the user will see drop down menus from which they can choose to filter the content based on any terms within the selected taxonomy(-ies). This means they can deviate from any terms you have previously selected, so if you want them to be directed to focus on a single set of parameters you

should not allow users to filter content themselves.

The image shows three filter dropdown menus: 'Author' with '-All-' selected, 'Months' with '-All-' selected and a dropdown menu open showing 'June 2016', 'August 2016', and 'September 2016', and 'Categories' with '-All-' selected. There are 'Clear' and 'Apply' buttons.

### 3b(ii) Selected content

'Selected' content is another way of selecting what content populates your grid or list. Rather than using the taxonomies to filter the content, you name the specific pages you want included. To do this, enter the required page title, and as you type possible options appear from which you can select the page you want. To add more content, click 'add another item' and repeat the process.

The image shows a 'Selected content' input field with a plus icon on the left. The text 'Oxford' is entered, and a dropdown menu is open showing suggestions: 'Oxford Mosaic Accessibility Statement', 'Oxford Mosaic Privacy Statement', and 'Oxford Students'. There is an 'Add another item' button below the suggestions.

### 3b(iii) Sorting options

If you are using Filtered Content or Selected Content you can choose the order in which content is displayed. The default is the publication date, but you can sort by taxonomy terms.

The image shows a 'Sorting options' form. It has a 'Sorting method \*' section with two radio buttons: 'Default sort order (publication date)' and 'Custom taxonomy'. The 'Custom taxonomy' option is selected. Below this is a text input field labeled 'Which taxonomy's terms do you want to sort by?' with 'Categories' entered.

### 3b(iv). Static content

With the static content option you create what is included in your grid or listing on the editing page itself. Taxonomies are not used in this content.