6.2.5. Thesaurus tutorial

Introduction

This tutorial explains how to develop a thesaurus for an extended controlled vocabulary. Before you start developing a scheme, read the project assignment and assigned materials on indexing and controlled vocabulary, then read through the entire tutorial.

As you build your thesaurus, base decisions on both literary and user warrant.

Example

Cookbook collection in a cooking school. Users are students and faculty. Entity level for database record is whole book.

1. **Choose a field.**

   One field only
   Usually a subject field if you have one
   Field with the most complex terms

Example

Ingredients field

2. **Determine domain and scope.**

   Decisions are only for the chosen field
   Same kinds of concepts are represented

Example

Domain: Ingredient themes

Scope: Main ingredient (chicken) or dietary restrictions (diabetic).

**Note:** If the domain has no special scope limitations, simply say in the narrative, "The domain and scope are [subject]."
3. **Determine specificity and exhaustivity.**

   **Example**
   
   Specificity: Low. Broad ingredient themes of cookbooks.
   
   Exhaustivity: Low. Themes of whole book and/or major sections, not individual recipes.

   **Note:** If you state high exhaustivity for your system, it is understood that you cannot demonstrate this in your sample thesaurus or indexed records.

4. **Choose terms.**

   Minimum one term to describe each object in sample collection.

   **Example**
   
   chicken  kosher
   diabetic  meatless
   hamburger  sugarfree

5. **Determine equivalent relationships.**

   Can be near-synonyms
   Must indicate preferred term

   **Example**
   
   meatless USE vegetarian
   sugarfree USE low/no sugar

6. **Determine hierarchical relationships.**

   Broadest terms must be narrower than thesaurus domain.

   **Example** [not final display]
   
   poultry
   chicken
   meat
   beef  hamburger

7. **Determine associative relationships.**

   **Example** [not final display]
   
   poultry RT meat
   diabetic RT low/no sugar
8. **Adjust and edit.**

Adjust for balance.
- Limit addition of terms for sample thesaurus.
- Not every broad term needs multiple narrow terms.
- Not every term needs a relationship (don't create relationships that aren't there).

Edit for style.
- Do not invert terms or precoordinate strings of terms (e.g., sugar, no/low; kosher--history).
- Do not use all caps; prefer all lowercase or sentence style.
- Use word forms if necessary to clarify meaning (e.g., catalogs vs. cataloging).

**Example** [not final display]

```
poultry
  chicken
  turkey
poultry RT meat
diabetic RT low/no sugar
meat
  beef
    hamburger
kosher
meatless USE vegetarian
sugarfree USE low/no sugar
```

9. **Add mandatory reciprocals.**

Show each relationship in two places: USE and UF, NT and BT, RT and RT.
- Maintain the same order of relationships under one term (e.g., UF, NT, BT, RT).
- Make USE the only relationship entry under a lead-in term.
- In three-level (or larger) hierarchy, show only one level up/down from a term.

**Example** [one hierarchy only]

```
beef
  NT hamburger
  BT meat
hamburger
  BT beef
meat
  NT beef
```
10. **Check reciprocals and finalize editing.**

Minimum one of each type of relationship  
All mandatory reciprocals included  
Consistent style for spelling, capitalization  
Alphabetized, including within relationships

**Example** [final display: terms presented flush left with preferred terms boldfaced]

```
beef          meat
  NT hamburger  NT beef
  BT meat
chicken       poultry
  BT poultry
  RT meat
  RT poultry
  USE vegetarian
diabetic      diabetic
  RT low/no sugar
  NT chicken
  NT turkey
hamburger      turkey
  BT beef
  RT meat
  USE low/no sugar
kosher        sugarfree
  low/no sugar
  UF sugarfree
  RT diabetic
  UF meatless
  USE meatless

Final checkpoints

To ensure success with your thesaurus . . .

- Check your reciprocals! They're called mandatory reciprocals because each relationship is shown twice: USE and UF, BT and NT, RT and RT. Points may be deducted for errors.

- Apply the thesaurus in indexing! Points may be deducted for failing to do so. Indexing guidelines:
  - Enter only preferred terms from thesaurus.
  - Enter exact spelling and punctuation.
  - Index exhaustively within limits of sample thesaurus.

- Write only enough narrative to respond to assignment: let thesaurus illustrate detailed decisions.