# Tridium Taxonomy Project – Handoff Summary

## Project Context

This project involves the development of a Master Taxonomy Framework for Tridium products. The goal is to standardize product and documentation metadata using structured taxonomies. The project includes three main Excel workbooks: 1) Enhanced\_Taxonomy\_Workbook.xlsx (master taxonomy structure), 2) Updated\_Taxonomy\_Data.xlsx (script-generated product data), and 3) Tridium\_Taxonomy\_1.xlsx (raw financial system data).

## Key Taxonomy Layers

1. Product Taxonomy: Contains structured product metadata such as SKU, Product Model, Product Line, etc.  
2. Documentation Taxonomy: Contains metadata about documentation assets, including fields like Intent, Task, Persona, Platform, Region, etc.  
3. Document-SKU Map: A relational table that links documentation (via DOC-ID) to one or more SKUs.  
4. Crosswalk Table: Maps Product Models to documentation tags, OEM variants, and mapped intents.  
5. Subject Scheme (subjectscheme.xml): A conceptual taxonomy of Tridium product-related terms, tasks, audiences, and capabilities.

## What You're Observing

You're noticing that your Documentation Taxonomy is becoming document-centric—organized around DOC-IDs and their metadata. While this is useful for managing content, it risks drifting away from your original goal: to build a conceptual taxonomy that standardizes and organizes Tridium product information.  
  
Your original intent, as reflected in the subjectscheme.xml, was to define a hierarchy of product-related concepts—like:  
- Products (e.g., Niagara 4, JACE-8000)  
- Capabilities (e.g., Alarms, Drivers, ESignature)  
- Tasks (e.g., Installing, Configuring)  
- Audiences (e.g., Developer, OEM, Customer)  
- Versions, Status, Access levels  
  
This is a conceptual model—a controlled vocabulary or ontology—that can be used to tag, filter, and organize documentation, but is not itself driven by documents.

## Key Insight

You are actually building two complementary but distinct structures:  
  
1. Documentation Taxonomy: Metadata about documents (e.g., DOC-0001 is an install guide for JACE-8000).  
2. Conceptual Taxonomy (Subject Scheme): Vocabulary of concepts (e.g., 'Installing' is a task; 'JACE-8000' is a product).  
  
To get the best of both worlds:  
- Preserve the Documentation Taxonomy for managing and filtering documents.  
- Update and maintain the Subject Scheme as your authoritative concept model.  
- Link them by using the Subject Scheme terms as controlled values in fields like Task, Product Model, Platform, Persona, Region, Version Applicability, Support Status.  
  
This way, your document metadata is driven by the conceptual taxonomy—not the other way around.

## Next Steps

- Update the subjectscheme.xml to reflect your current product lines, capabilities, and terminology.  
- Use keys from the subject scheme as values in your Documentation Taxonomy fields.  
- Avoid duplicating the subject scheme structure in the document metadata—just reference it.  
- Continue using the Document-SKU Map to manage many-to-many relationships between documents and products.  
- Consider normalizing other multi-valued fields (e.g., Region, Platform) into mapping tables if needed.