

Henry Ford Health System: Taxonomy Strategy

Goal

Provide a comprehensive taxonomy strategy for doctors, locations, recipes, blogs, news, and events in a clear, usable manner, complementing the geolocation strategy, and dynamically promoting the breadth of offerings within the entire Henry Ford Health System.

High Level Overview

Taxonomy refers to the overall classification strategy of content. Taxonomy uses fields in Sitecore to identify the classification. The contents of this field are what we use to tag a page.

Taxonomy with Sitecore and in conjunction with the MedTouch modules allows content to dynamically filter within page elements based on matching “tagging” of terms. Tagging is how we categorize pages based on a set of standardized terms.

By tagging a page we generate:

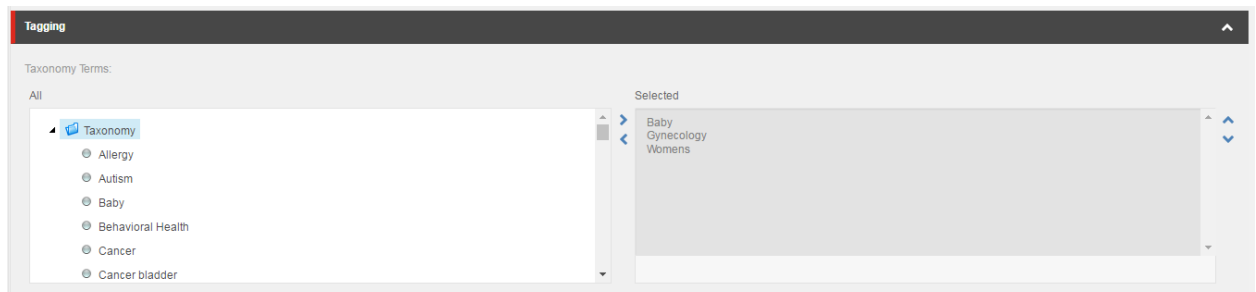
- Dynamically populated content which usually appears in the right hand column or within a portion of the body copy
- Linked content without manual implementation

Your Site

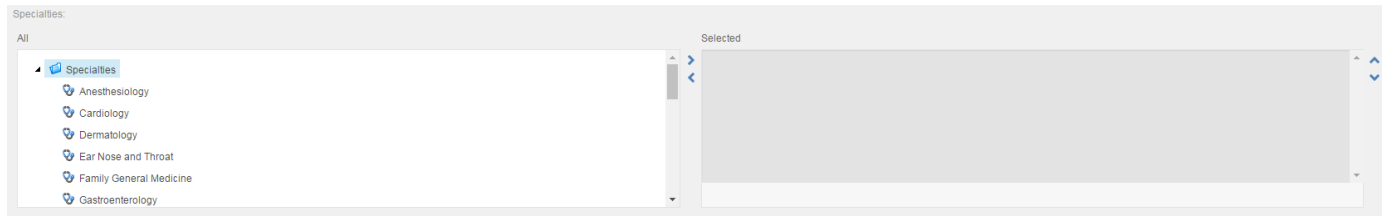
On your site two lists of taxonomy terms will be used: Your custom “Taxonomy” field list and your “Specialties” list which will populate through your Find a Doctor import file.

These two fields will be used to tag your content and module pages:

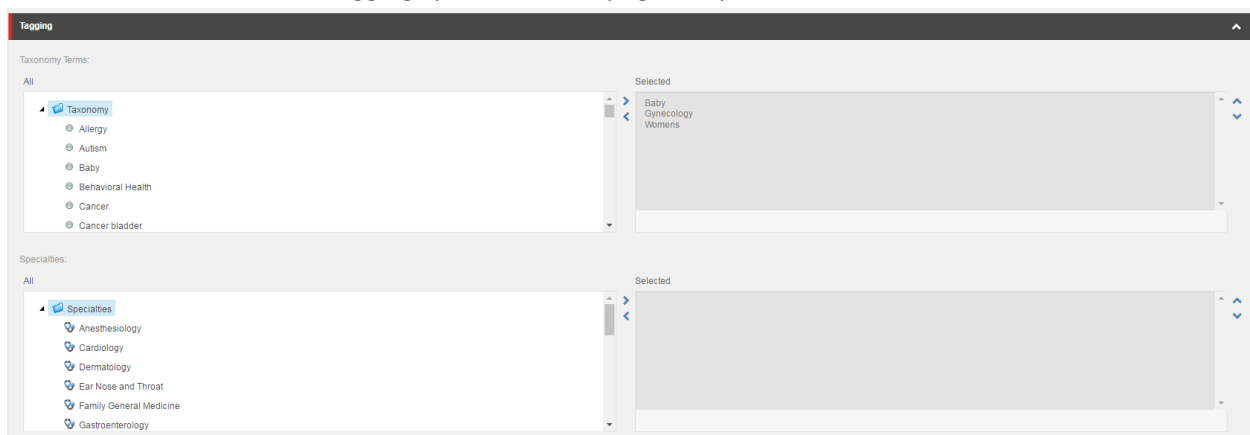
- 1) Taxonomy Field will be used to tag:
 - a. Services content
 - b. News
 - c. Classes
 - d. Blog
 - e. Locations
 - f. Recipes*
 - g. Clinical Trials* (*Related Control to be added post launch)



- 2) Specialties Field will be used to tag:
 - a. Doctors (automatically tagged with the Specialty terms associated with the imported profile data)
 - b. “Our Team” pages



Both fields are under the “Tagging” portion of the page template:



Geolocation Interaction

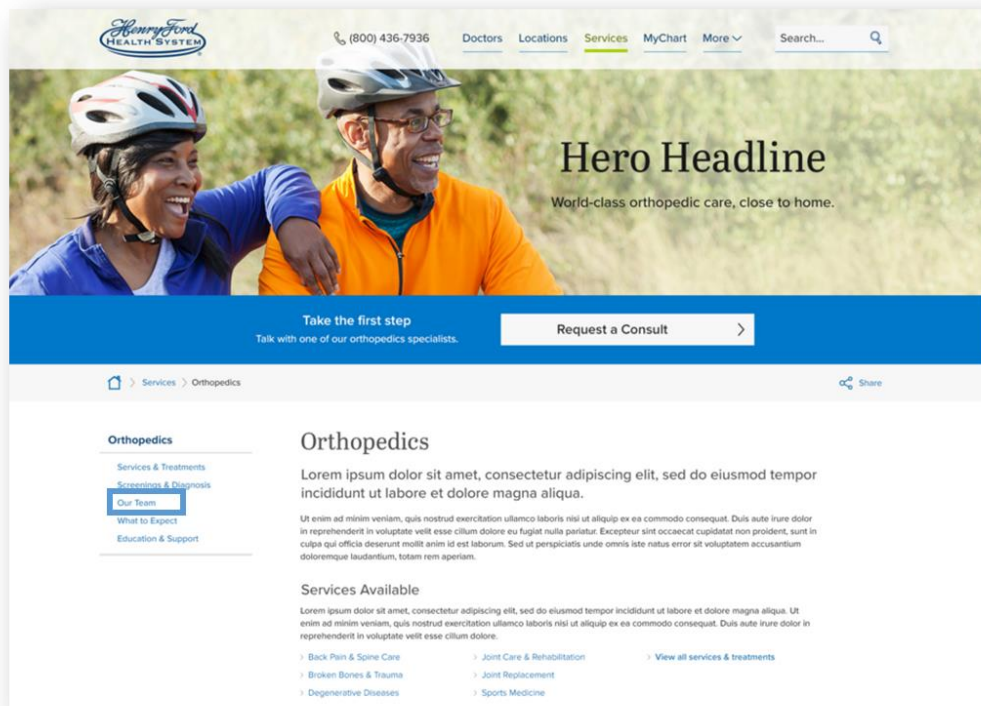
Your taxonomy terms will work in conjunction with geolocation user personalization. Geolocation will impact providers, locations, classes. Instead of showing “related providers” (note: “related providers” show within the “Our Team” pages), “related locations,” and “related classes” these elements will *also* sort related module content by the location – prioritizing “related” content closest to furthest from the user’s shared location.

Related Providers

On service line landing pages and service line interiors there will be a control that allows for linking to an “Our Team” page which will display related physicians.

- If the user’s geo-location is known, related (via taxonomy) physicians display in order from closest to farthest away.
 - There are no special ordering rules such as:
 - Primary location
 - Physician title
 - If all physicians are the within same distance, they will sort alphabetically.

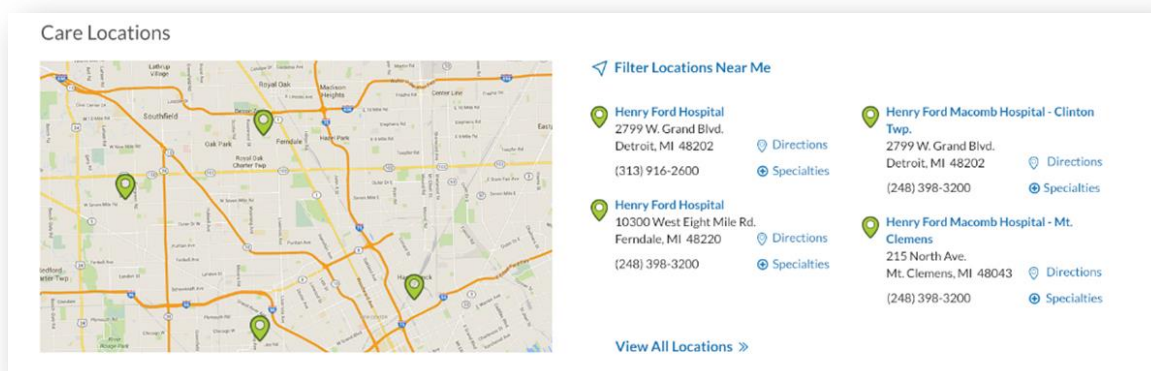
- If the user's location is unknown, the "Our Team" page will display related physicians in alphabetical order. The user may sort by distance on this page by sharing or entering their location.



Related Locations

On service line landing pages and service line interiors there will be a control that allows for linking to or displaying related locations.

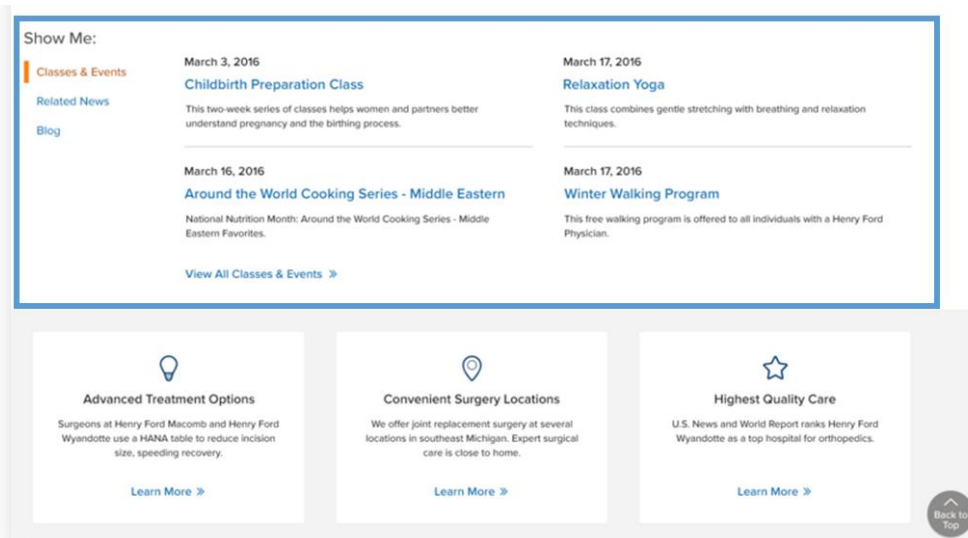
- If the user's geolocation known, the control shows up to four nearby related (via taxonomy) locations.
- If the user's location is unknown, the control will display related locations in alphabetical order along with a prompt to set location to filter by nearby locations.



Related Events

On all page templates, there will be a space reserved for 1-4 events which can be display according to geolocation rules.

- If location is known, features will display based on related (taxonomy) and distance from the user.
- If geo-location is unknown, related classes will display based on taxonomy.



Other Related Module Content

Recipe, News, and Blog content also have related controls. These related module controls are not associated with geolocation.

When used, the related News and related Blog content will display in the “Show Me” section of the page. If there is no matching related content, the latest content will show in the field instead.

Content Matrix Considerations

Tagging fields are included in the content matrix to ensure content migration associated appropriate pages with the correct taxonomy terms (column J, K, and L). The content matrix currently allows for three taxonomy terms to be added per page but there is no limit to the number of terms that can be added to the page. If additional terms are needed, they may be noted in the migration notes section.

The content matrix tagging fields pull from a manually updated list of taxonomy terms. If new terms are added into Sitecore, the content matrix needs to be updated to maintain the most accurate listing.

“Our Team” pages should be tagged using the specialty field terms, not the taxonomy field terms.

Additional Recommendations

Only tag within *one* field.

When you tag within one field, the connection rules act as an “OR.” Meaning, to match a service line page tagged with “Women’s Health, OB, and Weight Loss” the module content will need to be tagged “Women’s Health” OR “OB” OR “Weight Loss.” As long as one of the taxonomy terms match, the related content for the term will filter into the page.

Example of matching terms within one field:

Content Page Taxonomy Terms	Module Page (e.g. Class, Location) Taxonomy Term
Women’s Health	OB
OB	Baby
Weight Loss	

If you tag with two fields, the connection rules act as an “AND.” Meaning, to match a service line page tagged with “Women’s Health, OB” in the taxonomy field and “Obstetrics” in the specialty field, the module content will need to be tagged with either “Women’s Health” or “OB” AND “Obstetrics.” Tagging with two fields complicates content maintenance and often results in false negatives where related content should be showing but does not as the tagging does not meet the “AND” requirements on both the page and module content.

Example of matching terms within two fields:

Field 1: Taxonomy

Content Page Taxonomy Terms	Module Page (e.g. Class, Location) Taxonomy Term
Women’s Health	OB
OB	Baby

Field 2: Specialty

Content Page Specialty Terms	Module Page (e.g. Class, Location) Specialty Term
Obstetrics	Gynecology

Since there is not a match between the tagging in the Taxonomy field AND the Specialty field, the related content will not show.

Keep your Taxonomy list broad.

Aligning with your general medical service offerings ensures the list is the most logical for your content editors and matches module content categories well. It is okay to add more granular terms when additional specificity is required.

Freely add or replace taxonomy terms as needed.

If you add a new term, you will need to tag associated pages and module content to ensure the connections are made. For example, you may want certain news articles to filter into the “About Us” page; or, specific fund raising events and news articles to show on a Foundation page. You can easily add additional terms and tag as needed to establish the taxonomy connections.

If you replace a term, or rename it, all of the established tagging will persist. The replacement or edited term acts as a true replacement without any additional on-page tagging.

Future Additions

Related Recipes

When placed on a page, the control will display as a feature that spans the full-page width. It is configured in the bottom placeholder of the page, below all other elements in the main content area, content copy, lower copy, and accordions/tabs.

Related Clinical Trials

Clinical Trials module content may be added to the “Show me” section of the landing and interior pages and display based on taxonomy.