

Create and View Taxonomy

Jenny Kongkalai - 2023-12-06 - Manage Content

[Create and View Taxonomy](#)

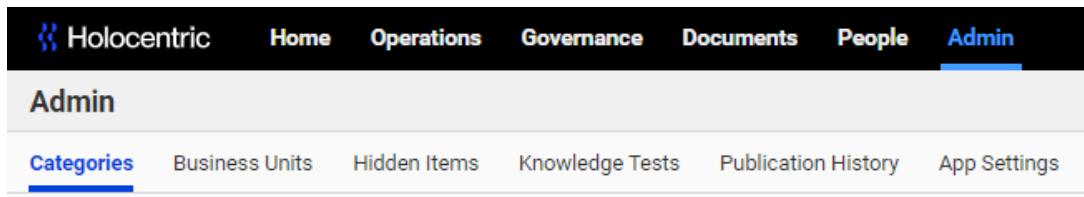
To manage taxonomies, a user must have one of the following permissions in Holocentric Connect:

- Model Administration
- Administration

Functional Taxonomy is a hierarchical framework that is used to group items by their business functions and capabilities to provide clarity by clearly defining the different functions and responsibilities within the organization.

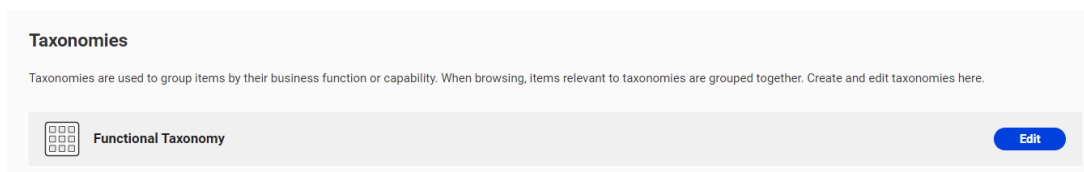
[Creating the Taxonomy](#)

1. Go to **Admin** then select **Categories**

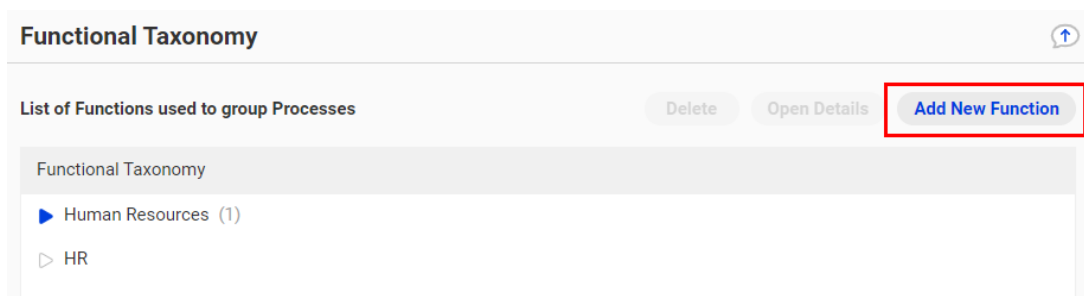


**Image is for illustrative purposes only. Menu bar options vary based on your permissions or organisation's subscription .*


2. Under **Taxonomies** section, select Functional Taxonomy then click **Edit**




3. Click **Add New Function**



4. Enter the **Function name** and **Description**

Add a new Function 


Function name:  Cancel

Description: Save

Processes: Add

Function is contained in: Move to

5. To add Processes in this Function, click **Add** to display the list of all processes

Add a new Function 

Function name: Cancel

Description: Save

Processes: Add


Function is contained in: Move to


6. A list of processes will appear for you to select. You can select multiple processes by holding down the shift Ctrl key and select the processes.


Link to a Process

Process name

filter process names to text entered here

 Add and connect decision point


 Another Process

 Create a new process


 External Position Fulfillment

 Hire new position


 Internal Position Fulfillment

 Onboard New Position

 Onboard New Volunteer

 Populate process content

 Position Evaluation

 Position Fulfillment Preparation

11 items

Cancel

Select

7. If the function belongs to a parent function. It can be added to the **Function is contained in** field

Function is contained in:

move this function so that it is contained within another funct...

Move to

8. Select the parent function from the list then click **Select**

Select a Function

Function name

filter function names to text entered here

- HR
- Human Resources (1)**

2 items

[Cancel](#) [Back](#) [Show Contents](#) [Select](#)

9. Use the left and right arrows to turn the selected category into a subcategory.

Functional Taxonomy ↑

List of Functions used to group Processes [Delete](#) [Open Details](#) [Add New Function](#)

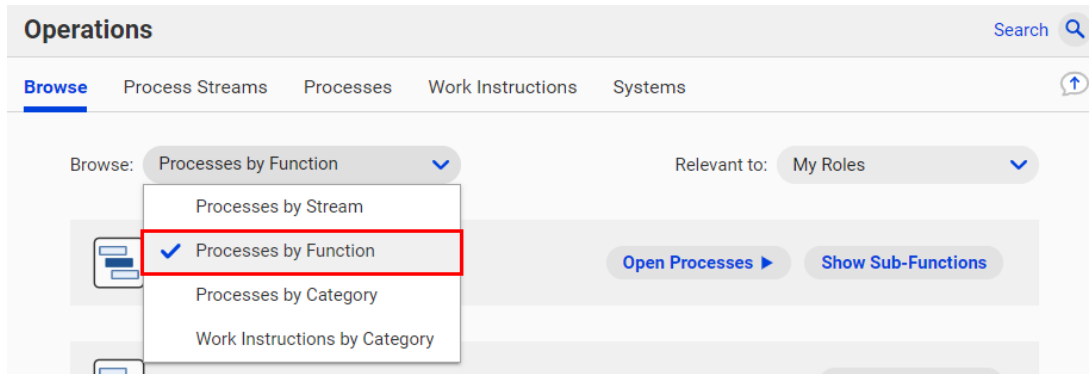
Functional Taxonomy

- ▶ Human Resources (1)
- ▷ **Finance**
- ▷ HR

Move: ↑ ↓ ← →

Viewing the Taxonomy

1. From the Home page, click on the **Operations** tab
2. Select **Processes** by **Function** to view the functions

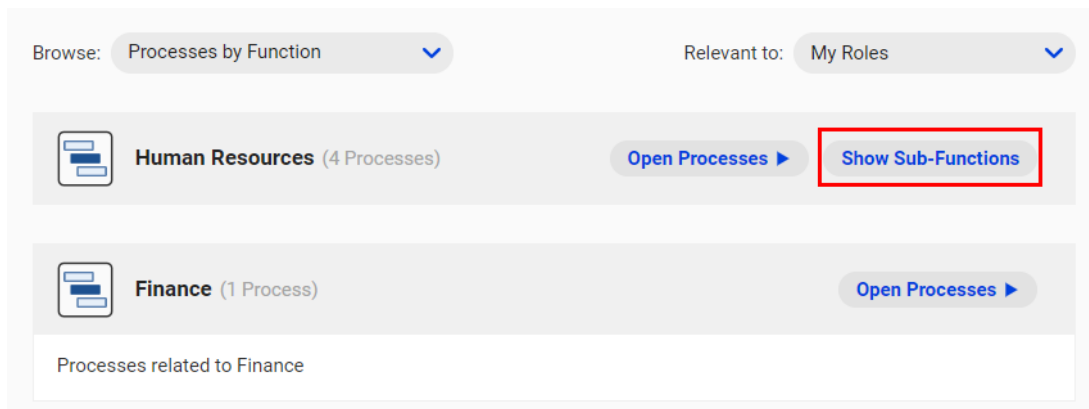


The screenshot shows the 'Operations' page with a search bar and navigation tabs: 'Browse', 'Process Streams', 'Processes', 'Work Instructions', and 'Systems'. The 'Browse' tab is active. A dropdown menu is open, showing options: 'Processes by Stream', 'Processes by Function' (highlighted with a red box and a checkmark), 'Processes by Category', and 'Work Instructions by Category'. The 'Relevant to' dropdown is set to 'My Roles'. There are buttons for 'Open Processes' and 'Show Sub-Functions'.

TIP

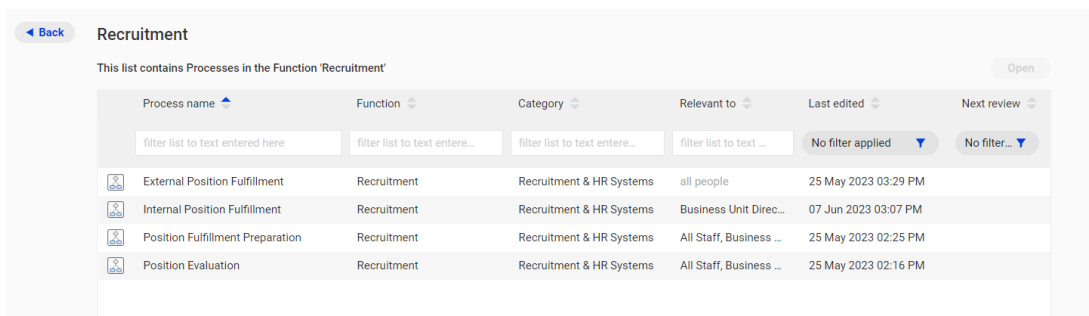
The Browse tab is a curated view of processes relevant to your Role. Refer to [Role-Based Views](#)

3. Click **Show Sub-Functions** to display any sub-functions.



The screenshot shows the 'Operations' page with the 'Browse' dropdown set to 'Processes by Function' and 'Relevant to' set to 'My Roles'. Two function categories are displayed: 'Human Resources (4 Processes)' and 'Finance (1 Process)'. The 'Show Sub-Functions' button for 'Human Resources' is highlighted with a red box. Below the 'Finance' category, there is a section titled 'Processes related to Finance'.

4. The **Open Processes** button will display processes that belong to this function along with their category, relevant roles.



The screenshot shows the 'Recruitment' page with a 'Back' button and a title 'Recruitment'. Below the title, it says 'This list contains Processes in the Function 'Recruitment'' and an 'Open' button. A table lists the processes with columns for Process name, Function, Category, Relevant to, Last edited, and Next review. There are filter input fields for each column and a 'No filter applied' dropdown.

Process name	Function	Category	Relevant to	Last edited	Next review
External Position Fulfillment	Recruitment	Recruitment & HR Systems	all people	25 May 2023 03:29 PM	
Internal Position Fulfillment	Recruitment	Recruitment & HR Systems	Business Unit Direc...	07 Jun 2023 03:07 PM	
Position Fulfillment Preparation	Recruitment	Recruitment & HR Systems	All Staff, Business ...	25 May 2023 02:25 PM	
Position Evaluation	Recruitment	Recruitment & HR Systems	All Staff, Business ...	25 May 2023 02:16 PM	

END