

Taxonomy Task Team meeting summary

Date of meeting	August 12, 2025	
Topic	Tags related to people, groups, and organizations	
Background information	See the People, groups, and organizations document on the website	
Upcoming meetings	Date TBD	Thematic tags including identifiers
	Date TBD	Subject and specialty
	Date TBD	Asset Classes
	Date TBD	Ratings, weightings, estimates, and actions
	Date TBD	Financials
	Date TBD	Components, episodes, and related products
	Date TBD	Events and interactions
	Date TBD	ISO codes

The tag sets for information about people, groups, and organizations are used in all standards. While a research report generally would include only high-level information about its author – name, title, phone number and email – the roster update and coverage update list standards may include more in-depth information about the people, groups, and firms publishing research content. Additionally, interaction records include information about not only analysts who publish research, but also a wide range of other participants in an interaction: buy-side professionals, third-party experts, corporate representatives and IR contacts, and a wide range of sell-side contacts. As such, not all tags available to describe people, groups, and organizations are applicable in all circumstances, and some values in the enumeration lists may only apply for certain uses.

See the link above for the discussion document that guided this meeting, as it contains the list of enumeration lists and values that are covered in this meeting recap.

Below is a summary of the input we received before and during this meeting, along with answers to some questions that came up during the meeting requiring additional research. As with all meetings in this series, we are still looking for more input, so feel free to send your thoughts regarding the below.

Summary

ContactInfoNature, PhoneLocation, and PhoneType

- In *ContactInfoNature*, the “Business” option would almost always be used, particularly for research. However, since this tag set is used across all RIXML standards, the “Personal” option is available for instances where there are not compliance considerations. For example, an outside expert’s contact information in an interaction record may use a personal mobile phone number or email address.
- Firms may be able to hard code these values, particularly for research content; for example, if a publisher only includes each author’s office land line, the publisher could hard code *ContactInfoNature=Business*, *PhoneLocation=Office*, and *PhoneType=Voice*.
- We are planning to retire the term “Pager” in the *PhoneType*. Please let us know if your firm still requires this.
- We are adding “PhoneAndText” as a phone type to allow a publisher to indicate that the number is a cell phone that can accept both voice calls and text messages. Participants requested that the documentation should note that compliance considerations may prevent communication using text messaging, communication on personal devices, etc.
- Is the term *Text* in the *PhoneType* list clear enough, or would *TextMessaging* be more clear?

ContactInfoPurpose

- This tag is not used for Research (it is available, but the documentation recommends omitting it) or in the list standards; it is applicable only for interactions or events.
- This tag allows the publisher to indicate what purpose a phone number or email address serves in the context of the event or interaction: is it used to register for an event, to dial in for participation, etc.?
- This tag was created before video calls were widely used, so the available options skew toward phone-based conference calls.
- The *ContactInfoPurpose* list will be discussed in more depth when we review the other tags used for events and interactions.

Role

- In most research content, publishers can hard code Role=Author for each author or author group, and Role=Publisher for any contact information provided about the publishing firm. The remaining values are relevant for event and interaction records.
- Recommended additions involved in the pre-publication workflow: Editor, Coordinator. These would particularly be used by firms that use RIXML for their end-to-end workflow.
- Clarification: a participant asked whether there is a way to flag an author as the primary author. Yes, there is a primary author flag; additionally, a publisher can indicate the order in which multiple authors appear.
- Question: a participant asked whether there is a way to flag an author as a Reg AC author (Regulation Analyst Certification, see <https://www.sec.gov/rules-regulations/2003/02/regulation-analyst-certification>). There currently is not, but we will investigate. We would appreciate input from member firms.
- Recommended additions: SalesContact and IRContact.
- We would like additional input regarding what role(s) would be helpful across all RIXML standards. We will revisit this list when discussing events and interactions.

OrganizationType

- The intended uses for this tag are different than that covered by an entitlement code.
- Suggested addition: BusinessUnit. Some uses:
 - to add additional granularity when the “isResearch” flag is used – to indicate which research department published the report
 - when a department is “branded” or well-known, and users would want to search by it specifically
 - to convey information to aggregators, in particular when one “pipe” is used for research from multiple groups, with content intended for different areas of the aggregator’s ecosystem
 - to help publishers manage content, with content from different business units intended for display in different areas of the publisher’s website
- Question for aggregation vendors: when multiple departments/divisions/groups from a firm send content to you, is there a mechanism in your current system to distinguish between them?
- Question for sellside firms and other content creators: would BusinessUnit as an option in the OrganizationType be helpful to you, or do you handle the scenarios above in a different manner?
- Since there wasn’t pushback, we will add this term to the enumeration list. We would still like additional input on the above to help guide the documentation we provide.
- Suggested addition: ExpertNetwork. This will be added.

OrganizationNameType

- The preferred default option is *Display*.
- Clarification: the *Trading* option is used to indicate a firm's trade name; sometimes is different from the official name in cases where a firm uses a DBA, has a name that is used in marketing but is not their official name, etc. While "trading name" and "trade name" are considered synonyms, we may want to consider changing the term in this list to "trade name" to avoid confusion, particularly since we use "trading" frequently in the standards referring to the trading of securities.

OrganizationID.idType

- The OrganizationID.idType attribute is currently a free-text field; however, we would like to discuss whether converting this to an enumerated list would make sense.
 - PRO: This attribute allows the publisher to indicate what type of identifier an OrganizationID is – is it an internal term, the code a particular aggregator assigned, etc. As a free-text field, different publishers may refer to the aggregator in different ways; standardizing the list would eliminate that.
 - CON: content is sent to so many aggregators and other entities that it would be impossible to create a cohesive list.
 - NOTE: even though this will not capture all possible values, and those values may change over time, it would still provide significant standardization. As an organization, we also need to discuss how to allow for inter-release updates to enumeration lists. This will be covered in a future meeting.
 - POSSIBLE SOLUTION: we could ask our aggregator member firms to let us know what value(s) they would like contributors to use, AND we could ask our member firms that publish content to let us know what firms' codes they would like to include. While this will not capture all organization ID codes, it will allow for significant streamlining, with the PublisherDefined option available for all other codes.
 - TBD: The aggregation vendors would likely benefit most from this change, because then all publishing firms would use the same value in the idType when sending content to that aggregator. We would like to gather additional input from our aggregation vendor member firms, and are happy to reach out also to other aggregators that our member firms would find helpful.

StandardizedRole

- This tag exists in the Interactions standard but is not currently used in the other standards. It was introduced for the Interactions standard to provide a standardized way to indicate the role someone plays in their organization, with terms covering consumer (buyside) firms, corporates, third-party participants, and provider (sellside) firms.
- We want the common schema to be the same across all standards, so we will be adding the tags to the Common schema and the list to the Enumerations schema.
- Our documentation will provide guidance for use or omission in each of our standards.
- We think that the values in the "Provider" section of this list could be helpful for the roster updates and/or coverage updates list, and will update the documentation to reflect this as an optional attribute.

AudienceTypeEnum

- We only had a few minutes to discuss the last list in this set, and will revisit it at a later meeting.
- The AudienceType tag was formerly used in the entitlements tag set, but is no longer used for that purpose in v3.0 because we have streamlined the entire entitlements tag set.
- In v3.0, this attribute is used to indicate the intended audience for the title, subtitle, abstract, synopsis, and in the sourceline used in a component.