

Taxonomy Speed Dating: Find the Right Match So Your Organization Can Live Happily Ever After

April 21, 2015

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www.AccessSciences.com



Session Objectives – Find and Meet Your Match!

This session will help you

- Identify and define requirements for a taxonomy
- Learn factors involved in deciding whether to build vs. buy a taxonomy
- Learn how to measure a return on investment



Agenda

- Understanding taxonomy
- Defining purpose and requirements
- Build vs. buy a taxonomy
- Measuring the value of a taxonomy
- Using a taxonomy in SharePoint (demo)
- Meet Acordis™
- Access Sciences' Product Suite
- References



Understanding Taxonomy



Taxonomy Definition

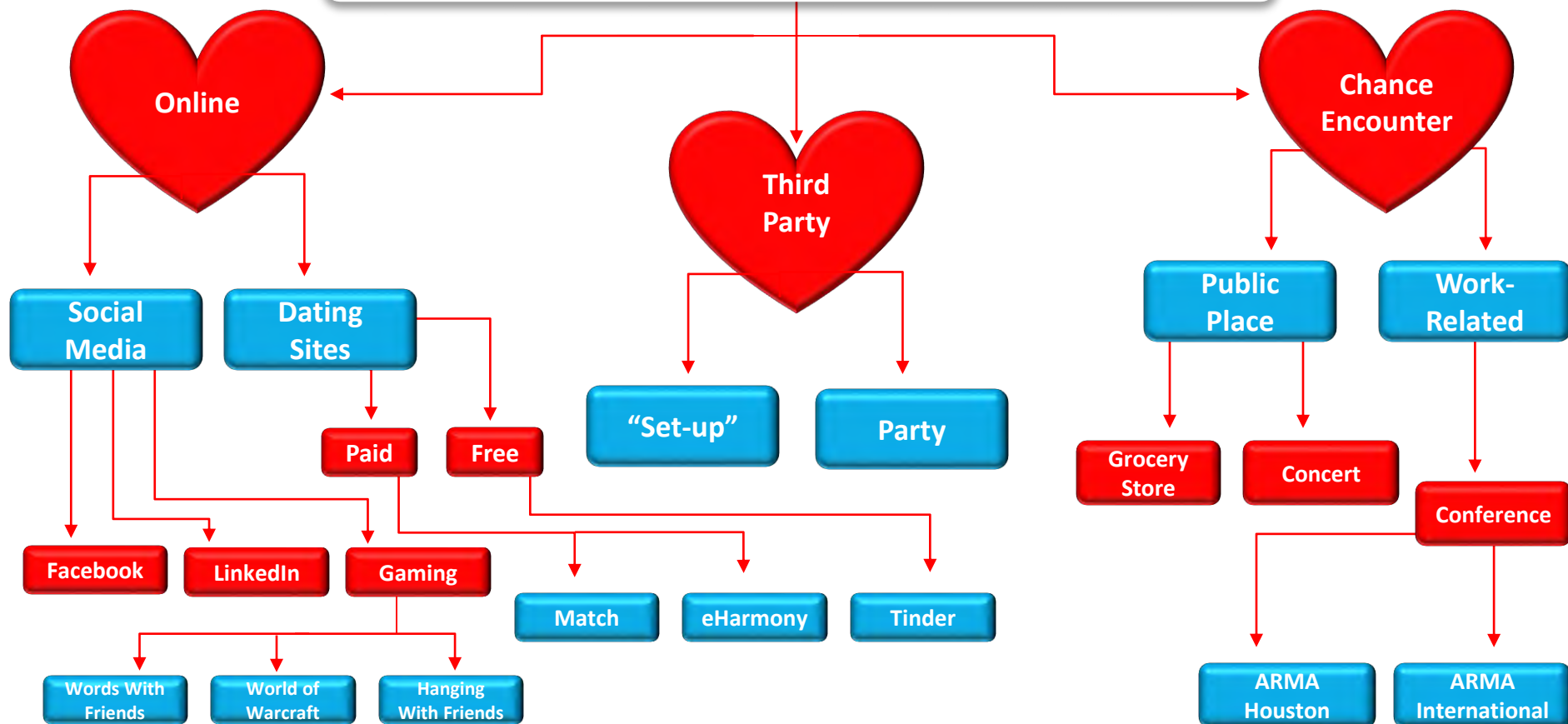
- A **taxonomy** is a **structured set of names and descriptions** used to **organize information** and documents **in a consistent way**. It provides a **common language** to describe business processes.
 - A **hierarchical classification** of entities of interest to an enterprise or organization, enabling users to browse and search via the paths in the hierarchy, e.g., folder structure or web site
 - A **faceted taxonomy** provides multiple perspectives or characteristics as metadata for tagging documents, enabling users to search and navigate along multiple paths



- Parent-Child Relationships
- Tree-Like Structure
- Defined Paths

Hierarchical Taxonomy

How to Meet That Special Someone



Faceted Taxonomy

- FACETS – categories identifying the characteristics of an item (or person)
- TERMS – selectable values (also called “tags”) for each facet

Congratulations!

You've been matched with TXGUY4U



STATUS

- Single
- Divorced
- Has Children
- Wants Children

EMOTIONAL ASPECTS

- Mature
- Calm
- Adventurous
- Rational
- Free-Spirited

PHYSICAL ATTRIBUTES

- Taller than 5'9"
- Shorter than 5'9"
- Brown Eyes
- Blue Eyes
- Green Eyes

LEVEL OF EDUCATION

- High School
- Some College
- Bachelor's Degree
- Advanced Degree
- School of Life

INTERESTS & HOBBIES

- Sports
- Volunteerism
- Reading
- Gardening
- Travel

IDEAL EVENING IS SPENT

- Partying with Friends
- Watching a Movie
- Reading a Book
- Cooking at Home



Defining Taxonomy Purpose and Requirements



What are you looking for in a taxonomy?

Search

Navigation

Sharing and
Reuse

Data
Management

Information
and Records
Management

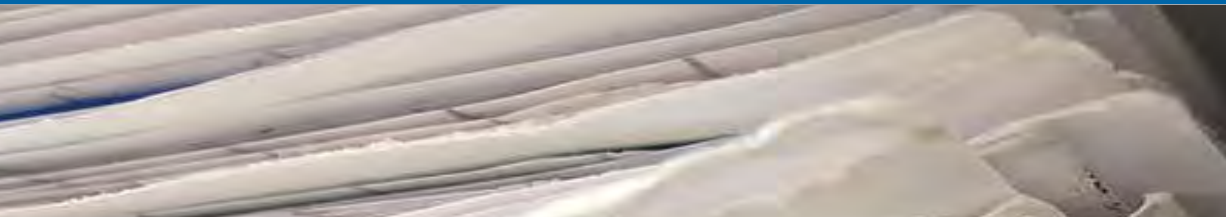
Reporting
and
Analysis

Synchronization
/ Harmonization



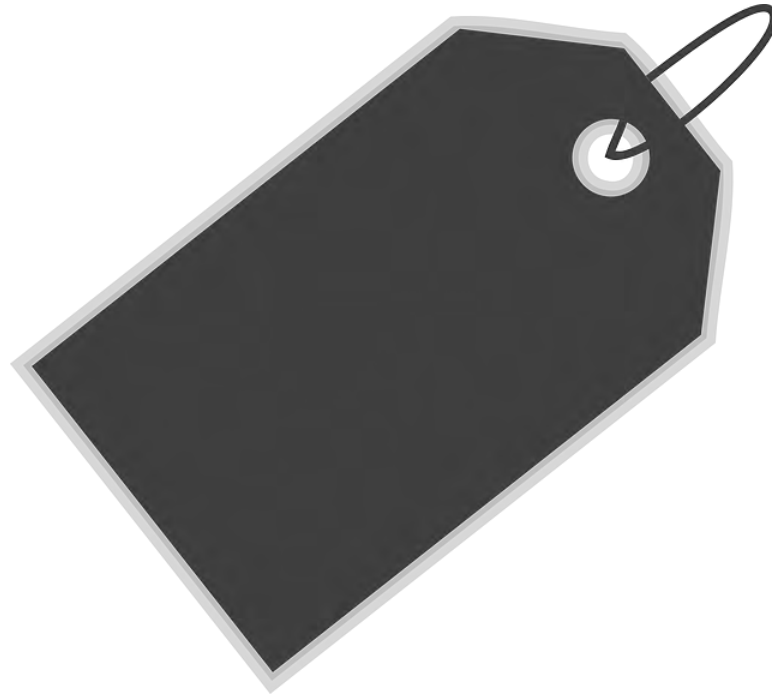
What do you want to classify?

Fare Basis ⬆️	Airline ⬆️	Booking Class ⬆️
TA14A0SP	DL	T
TA03A0SG	DL	T
UA10A0UY	DL	U



How will taxonomy terms be applied?

- By many users with little or no training
- Auto-classification
- SME or SME Team



Outside influences

- Taxonomy terms/values - regulations, industry standards
- Mergers and acquisitions
- Taxonomy structure - target application systems, source application systems



Where and how will users encounter the taxonomy?

Browsing / Searching

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WOMEN'S CLOTHING

Casual Clothing
 Dress Clothing
 Athletic Clothing
 Tops
 Pants
 Jeans
 Shorts
 Skirts
 Dresses
 Coats & Outerwear
 Swimsuits
 Sleepwear
 Intimates

MEN'S CLOTHING

Casual Clothing
 Dress Clothing
 Athletic Clothing
 Shirts
 Hoodies & Sweatshirts
 Pants
 Jeans
 Shorts
 Blazers & Jackets
 Suits
 Coats & Outerwear
 Swimsuits
 Sleepwear



Where and how will users encounter the taxonomy?

Uploading and Classifying

- Document Class
- Agenda
- Alert
- Analysis
- Approval
- Assessment
- Audit
- Award
- Bid
- Brochure
- Budget

Business Activity
Document Class
Document Type
Document Status
Employee Status

- Business Activity
 - Engineering
 - Finance
 - Human Resources
 - Benefit Planning
 - Compensations
 - Compliance

Benefit Planning

pr

Suggestions

- Practice [Document Class]
- Presentation [Document Class]
- Procedure [Document Class]
- Process [Document Class]
- Proposal [Document Class]



Where and how will users encounter the taxonomy?



Best Restaurants in Houston, TX

Restaurants Dessert Coffee & Tea Bakeries Ice Cream Waffles & Crepes Juice & Smoothies

\$-\$\$\$\$
Price

Cuisine

Dining options

Neighborhoods

Sorted by:
Ranking ▼



Peli Peli



#1 of 6,840 restaurants in Houston
 527 reviews
"Best Cheesecake ever!" 04/05/2015
"Amazing food and great atmosphere!" 04/05/2015
Price: \$20 - \$80
Cuisines: American, Steakhouse, African, International, Fusion
[Map](#) | [Visitor photos \(58\)](#)

[Reserve](#)

Hotels travelers are raving about...



Omni Houston Hotel
 1,059 Reviews
Houston, Texas Gulf Coast

[Read reviews](#)



Hotel ZaZa Houston
 1,087 Reviews
Houston, Texas Gulf Coast

[Read reviews](#)



The Houstonian
 494 Reviews
Houston, Texas Gulf Coast

[Read reviews](#)

[All hotels in Houston \(461\)](#)

Taste of Texas Restaurant



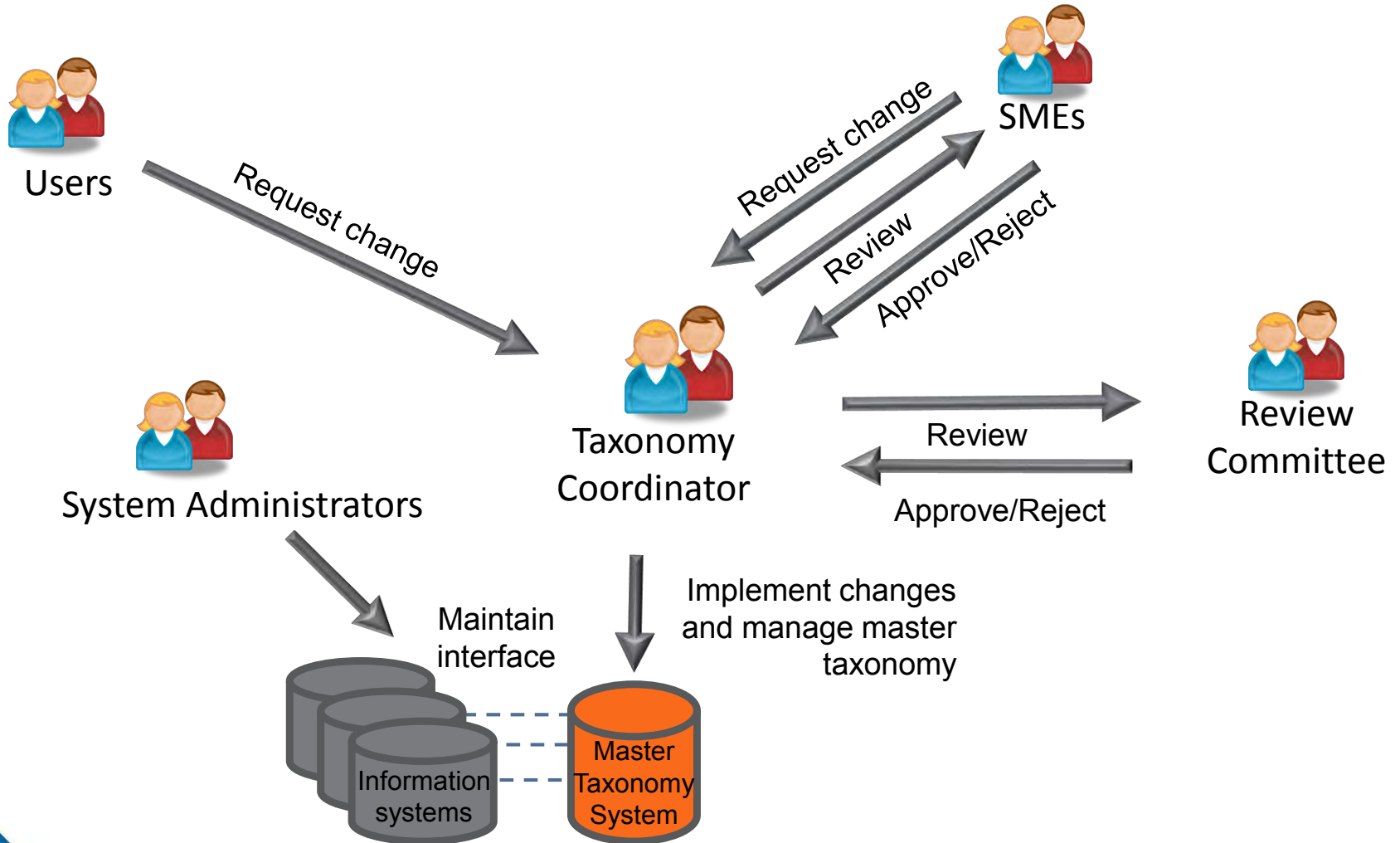
#2 of 6,840 restaurants in Houston
 1,053 reviews



Taxonomy TLC



Taxonomy TLC: Sustainability



Taxonomy TLC: Customization

- Add additional facets
- Expand terms within a facet to accommodate areas not originally covered
- Modify terms to fit your company's vernacular



Taxonomy TLC: Geographic needs

- Preferred terms/synonyms
- Translation



Training

- Taxonomy awareness
 - Purpose
 - Benefits
 - Scope
 - Design
- How and when to request changes
- Tools and applications



Build vs. Buy



Buy if...

- You need a starting point, and you're not sure where to begin
- Resources are limited
 - Time
 - Money
 - People to both develop and manage
- Taxonomy exists with industry standards suited to your purpose
- You need a “load and go” taxonomy to get started in SharePoint™ or another repository



Build if...

- You need a highly customized taxonomy
 - Unique business operations
 - Industry standards either do not exist or do not meet all your requirements
- You have the resources available to:
 - Identify and build out all facets and terms
 - Manage changes to the taxonomy over time
- You are not constrained by time

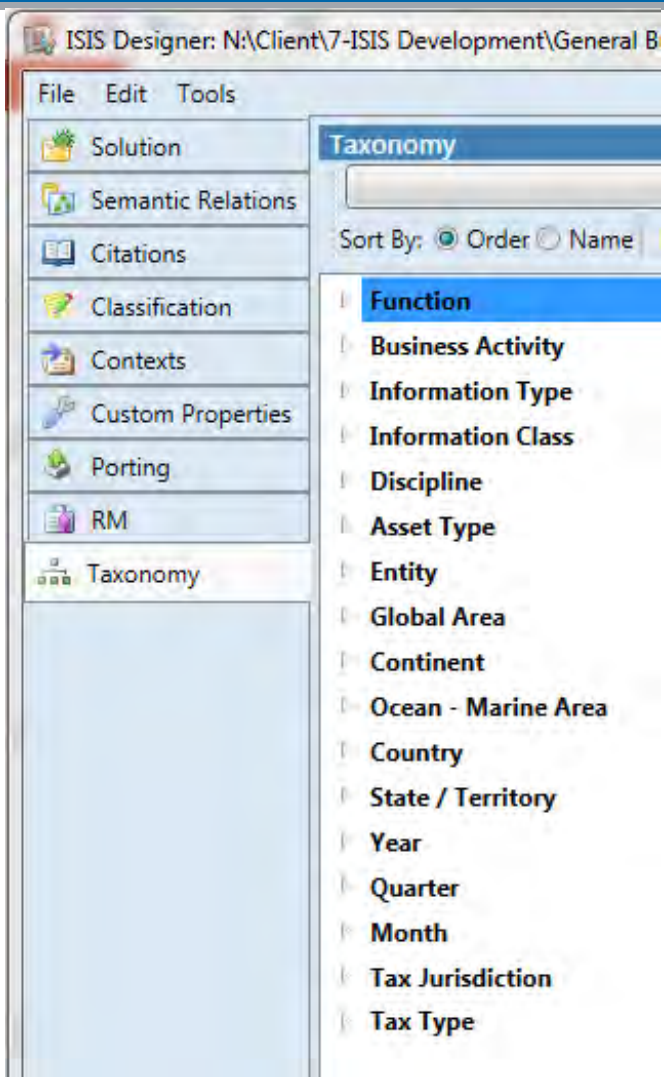


Develop a hybrid taxonomy if...

- A taxonomy exists for parts of your organization but not for all
- Want to spend resources on high value activities
- Off-the-shelf taxonomy covers all high-level subjects or functions, and you need more granular sub-categories
- Have lists of terms and want to organize them into distinct facets, e.g. Information Types, Processes, Regions, Roles, etc.
- Need help building relationships among facets and terms
 - E.g., Human Resources
 - Recruiting
 - Staffing
 - Compensation Planning ...



One Solution for Buy and Hybrid Options



- Function**
 - Administration
 - Business Development, Advertising, and Sales
 - Facilities Construction and Maintenance
 - Finance and Accounting
 - Health, Safety, and Environmental
 - Human Resources and Benefits
 - IT and Data Management
 - Legal and Corporate Governance
 - External Relations
 - Supply Management
 - Exploration and Production
 - Tax



One Solution for Buy and Hybrid Options

ISIS Designer: R:\7-ISIS Development\GB - Semantic Relations Updated

File Edit Tools

- Solution
- Semantic Relations
- Citations
- Classification
- Contexts
- Custom Properties
- Porting
- RM
- Taxonomy

Algebra Products

+ Add Product - Delete Facet Filter: [dropdown]

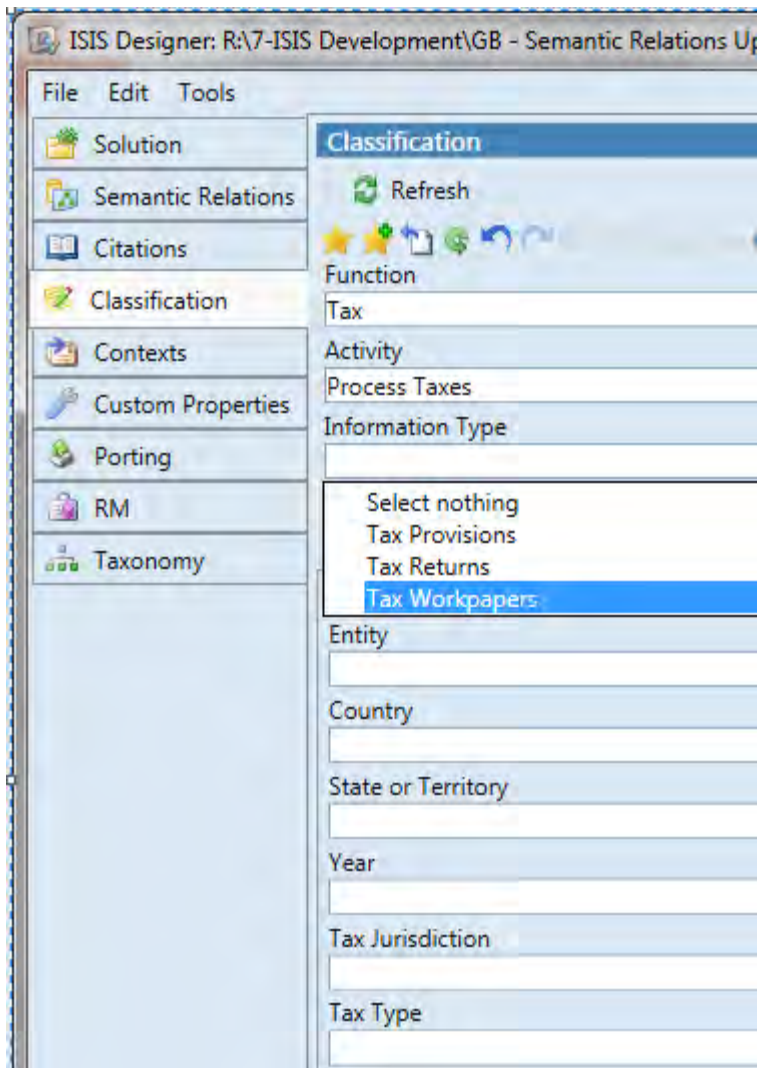
Type	Facets
Plus Business Activity	Function
Plus Business Activity	Function Informa
Plus Business Activity	Information Type
Plus Country	Global Area
Plus Country	State / Territory
Plus Information Class	Information Type
Plus Month	Quarter

Algebra Compounds

+ Add - Delete

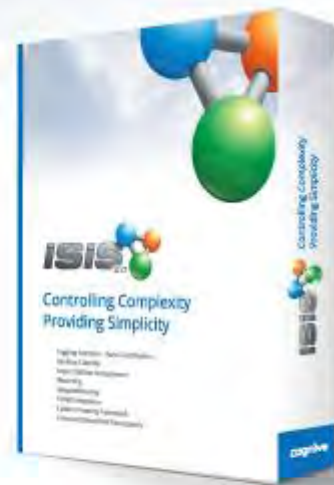
Business Activity	Function	Information Class	Information Type
Conduct Compliance Audits	Administration	Schedule	Compliance Audit Plans and Sched
Conduct Compliance Audits	Administration	Workpapers	Compliance Audit Fieldwork
Conduct Compliance Audits	Administration	Plan	Compliance Audit Plans and Sched
Conduct Compliance Audits	Administration	Audit	Compliance Audit Findings and Rep
Conduct Compliance Audits	Administration	Investigation	Compliance Audit Fieldwork

One Solution for Buy and Hybrid Options



Use a Taxonomy Management Tool to Build One

Cogniva ISIS



ISIS 2.0

Controlling Complexity
Providing Simplicity



Smartlogic™

THE CONTENT
INTELLIGENCE COMPANY

Semaphore Solutions



synaptica®

knowledge organization systems



SharePoint

Managed Metadata Service

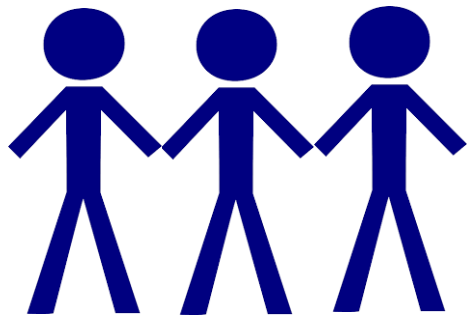


Measuring the Value of a Taxonomy



Measuring the value of a taxonomy

Perform an initial assessment to identify current costs related to the problem you are trying to solve



Labor costs

- Time spent searching for content
 - **36%** of a knowledge worker's (KW) day is spent looking for information
 - Information is found only **56%** of the time (Schubmehl and Vesset (IDC) 2014)
- Time spent recreating content that couldn't be found
 - Up to **90%** of time spent creating "new" content is actually spent creating content that already exists (Feldman and Sherman (IDC) 2004)
- Time spent maintaining mappings among different application systems
 - 61% of KWs access 4 or more systems to find information needed to do their jobs
 - Almost 15% access 11 or more systems (Schubmehl and Vesset (IDC) 2014)



Example cost calculations

Time spent searching

- Average knowledge worker (KW) annual salary plus benefits \$80,000 (\$38.46/hr)
- Hours/day spent searching for information 2.88 = 748.8 hours per year (or 93.6 days/year)
- Employee cost per year = $\$38.46 \times 748.8 = \$28,799$.
- Number of KWs X \$28,799
 - E.g., 1000 KWs: \$28,799,000

Cost of Reworking information

- Knowledge Deficit \$5,850 per worker per year (2003)
(Feldman and Sherman (IDC) 2004)
- Number of knowledge workers X \$5,850
 - E.g., 1000 KWs: \$5,850,000 per year



Return on investment

- Perform a post-implementation assessment to determine changes from initial assessment:
 - Average time per day spent searching for information
 - Maintenance rework, fines, fees
 - Online sales
 - Reduction in storage costs
 - New opportunities related to content sharing and reuse



Using a Taxonomy in SharePoint



PertempoTM

Views and filters



Home Departments ▾ Resource Center Search Project Central ↗

Policies, Procedures and Templates

Home

Administration

Policies, Procedures and
Templates

Health & Incidents

Safety & Risk

Approved Permits List

Site Contents

✎ EDIT LINKS

⊕ new document or drag files here

All Documents

DocClass

Quick Edit

...

Find a file



Name

Modified

Modified By

Document Class

Document Status

▸ **Document Class : Policy** (1)

▸ **Document Class : Procedure** (122)

▸ **Document Class : Process** (1)

▸ **Document Class : Tool** (1)



Views and filters



Home Departments ▾ Resource Center Search Project Central EDIT

Employee Files

[All Documents](#) [Active Employees](#) [Quick Edit](#) [...](#)

Name Modified Modified By Document Class Document Status Employee Name

Business Activity : Benefit Planning (108)

- Document Type : 401k Plans (27)
- Document Type : Dental Insurance Plans (27)
- Document Type : Health Insurance Plans (54)

Business Activity : Compensations (68)

- Document Type : Overtime (14)
- Document Type : Profit Sharing Plans (27)
- Document Type : Salary Compensation Plans (27)

Business Activity : Medical Management (54)

Business Activity : Payroll Maintenance (127)

me

Administration

Policies, Procedures and
Templates

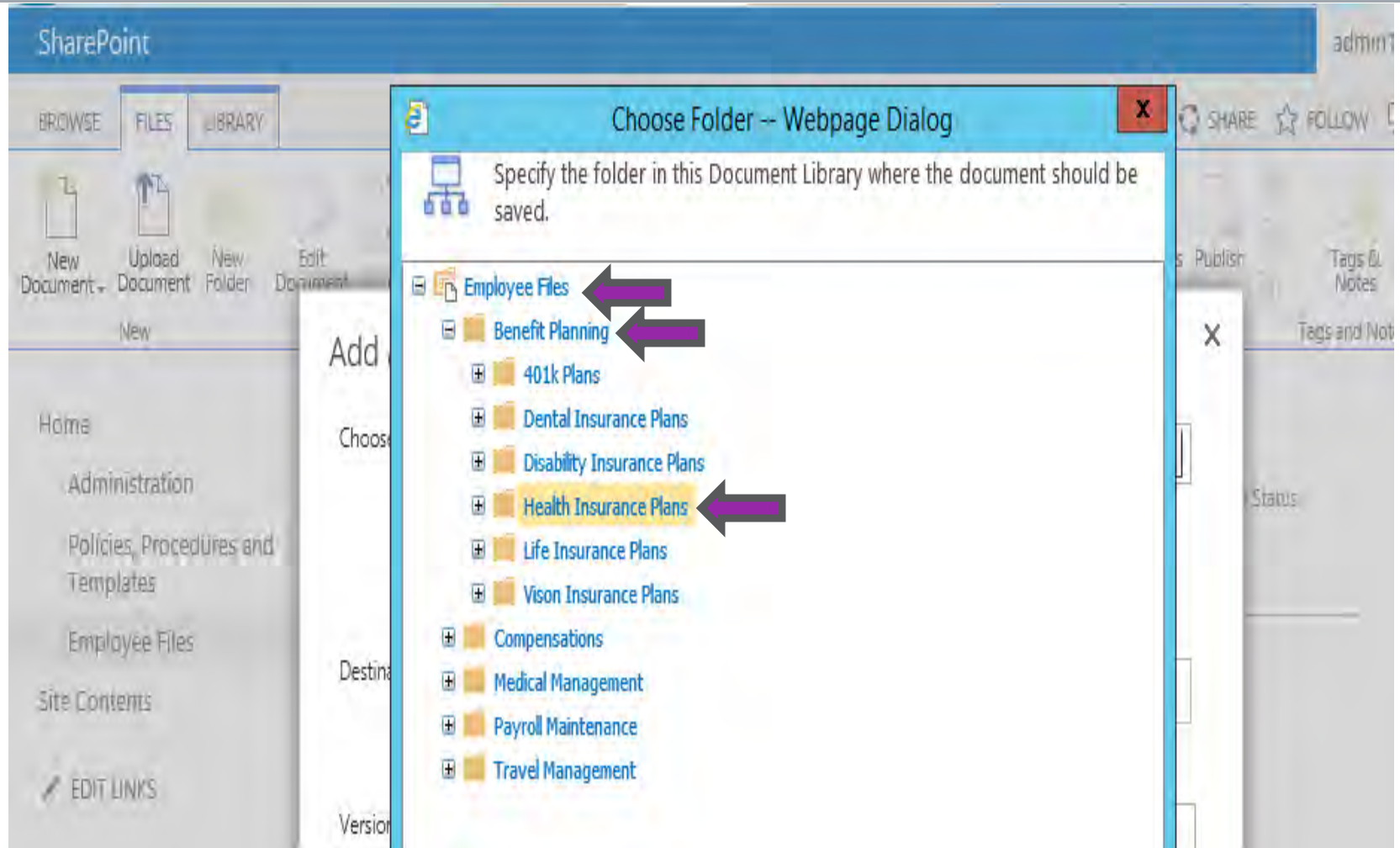
Employee Files

Contents

EDIT LINKS



Default metadata tagging



Default metadata tagging

The screenshot shows the SharePoint metadata tagging interface for a document titled "Employee Files - Test.docx". The document name is "2015 Benefits Plan.docx". The metadata fields are as follows:

Field	Value
Content Type	Employee Documents
Name *	2015 Benefits Plan .docx
Title	
Business Function	Human Resources
Business Activity	Benefit Planning
Document Class	Plan
Document Type	Health Insurance Plans
Document Status	Draft
Employee Status	Active
Employee Name	
Enterprise Keywords	

Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse

Five orange arrows point to the Business Function, Business Activity, Document Class, Document Type, and Document Status fields.



Improved Search

The screenshot shows a SharePoint search results page for the query 'plan'. The interface includes a search bar at the top with the text 'plan' and a magnifying glass icon. Below the search bar, there are tabs for 'Everything', 'People', 'Conversations', and 'Videos'. A dropdown menu for 'Preference for results in English' is visible. The search results are categorized into 'Business Function', 'Business Activity', 'Document Class', 'Document Type', and 'Country'. On the left side, orange arrows point to the 'Business Function' section (Project Management, Engineering), 'Business Activity' section (Project Planning, General Practices, Design and Drawing Man...), 'Document Class' section (Plan, Approval), 'Document Type' section (Drawing Approvals, Safety Plans, QA/QC Plans, Design Basis), and 'Country' section. On the right side, a large orange arrow points to the search results list. The search results list contains several entries, each with a document icon, a title, and a URL. The titles are: 'Layout Drawing (Plot Plan) - T1 16', 'Layout Drawing (Plot Plan) - T2 1207', 'Layout Drawing (Plot Plan) - T2 1694', 'Layout Drawing (Plot Plan) - T2 65', 'Layout Drawing (Plot Plan) - T3 114', and 'Quality Assurance Testing Plan Period 174'. The URLs are: 'sp/sites/Portal/HR', 'sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot Plan) - T1 16.docx', 'sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot Plan) - T2 1207.docx', 'sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot Plan) - T2 1694.docx', 'sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot Plan) - T2 65.docx', 'sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot Plan) - T3 114.docx', and 'sp/projects/pc/.../Quality Assurance Testing Plan Period 174.docx'. The Mako Manufacturing logo is visible in the top left and middle right of the page.

SharePoint admin1

MAKO
manufacturing

plan

Everything People Conversations Videos

Preference for results in English

Human Resources

Mako Manufacturing is proud to provide our employees a stable, flexible environment in which to work ... With equal opportunities for learning and both ... New Dental Insurance **Plan** Options ...
sp/sites/Portal/HR

Layout Drawing (Plot **Plan**) - T1 16
sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot **Plan**) - T1 16.docx

Layout Drawing (Plot **Plan**) - T2 1207
sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot **Plan**) - T2 1207.docx

Layout Drawing (Plot **Plan**) - T2 1694
sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot **Plan**) - T2 1694.docx

Layout Drawing (Plot **Plan**) - T2 65
sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot **Plan**) - T2 65.docx

Layout Drawing (Plot **Plan**) - T3 114
sp/projects/pc/ADD/Eng/.../Layout Drawing (Plot **Plan**) - T3 114.docx

Quality Assurance Testing **Plan** Period 174
sp/projects/pc/.../Quality Assurance Testing **Plan** Period 174.docx

Business Function

Project Management

Engineering

Business Activity

Project Planning

General Practices

Design and Drawing Man...

Document Class

Plan

Approval

Document Type

Drawing Approvals

Safety Plans

QA/QC Plans

Design Basis

Country



Acordis™

Off-the-Shelf Faceted Taxonomies



Acordis™



Proven Faceted Taxonomies

Acordis™ allows organizations to classify information in a consistent manner so the information can be found when needed, regardless of who created it and where it is stored.

With the explosion of electronic content, organizations are challenged by having information in too many places without any consistent classification or tagging. Instead of leveraging what they have, knowledge workers find themselves recreating content, being forced to make decisions without all the facts, and feeling the pain of sorting through multiple names for the same item when responding to eDiscovery requests.

Acordis™ is an out-of-the-box taxonomy that can be applied to any repository. Access Sciences currently offers Acordis™ with facets and terms covering general business processes, as well as add-on modules for specific industries (such as Oil & Gas). Acordis™ comes pre-loaded in a full-function taxonomy management application, allowing an organization to customize and maintain it as well as other taxonomies. For those interested in just the basic information, Acordis™ can also be delivered in an Adobe pdf file.



Acordis™

- Enables consistent classification so information can be found when needed
- Can be used out of the box and/or customized with additional facets and terms
- General business facets plus add-on taxonomies for oil and gas, education, and other industries
- Constructed based on how an organization does its business vs. subject categories alone
- Comes with descriptions of facets and terms
- Can be applied to any content repository
- Can be delivered in a taxonomy management tool



Acordis™

- Accommodates synonyms in the version delivered within a taxonomy management application. This allows users to classify information using familiar terms and search for it using those terms while **Acordis™** stores the information under common, preferred corporate terms
- **Acordis™** is records aware, meaning each information type can be mapped to a common set of regulatory requirements
- Includes pre-coordination of core facets -- Business Function, Business Process, Information Type, and Information Class -- to facilitate automated classification/tagging



Acordis™ works with the entire Access Sciences Product Suite



ContentLogic™

Content Migration, Classification, & Clean up

Acordis™ provides a classification scheme for target repository in a content migration

Modus™
Records & Retention

Records Retention Schedule Development and Management

Acordis™ provides a Classification Scheme where each Information Type maps to a single record series

Users can classify using the **Acordis™** taxonomy and systems can classify the document to the right record series automatically

Pertempo™

SharePoint Site Design and Deployment Methodology

Acordis™ provides a classification scheme for a SharePoint™ folder or library structure, enabling auto tagging



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References

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Questions?



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