Clean Up on Aisle 7

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Access Sciences

Presenters

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Key Discussion Topics

- What is the difference between taxonomy and metadata, and how do you explain their value to your business stakeholders?

- How can you develop an enterprise approach that balances consistency with the way individuals work?

- How can you move seamlessly from theory to action to outcomes for your business so your stakeholders receive a rapid return for their time investment?

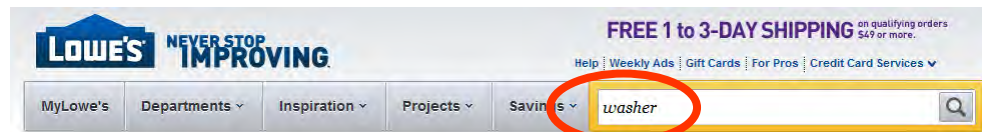- What are potential methods for implementing and managing your taxonomy and metadata model?

The Grocery Store

The Grocery Store

Shopping Online:
What We Are Used To…

(1) Enter Keyword

(2) Select Term

Shopping Online: Shouldn't our information environment be as easy as 1-2-3?

(3) Select Term

Shopping Online:
Search Improvement per Click

What's in Common?

Search-ability

Find-ability

Put-ability

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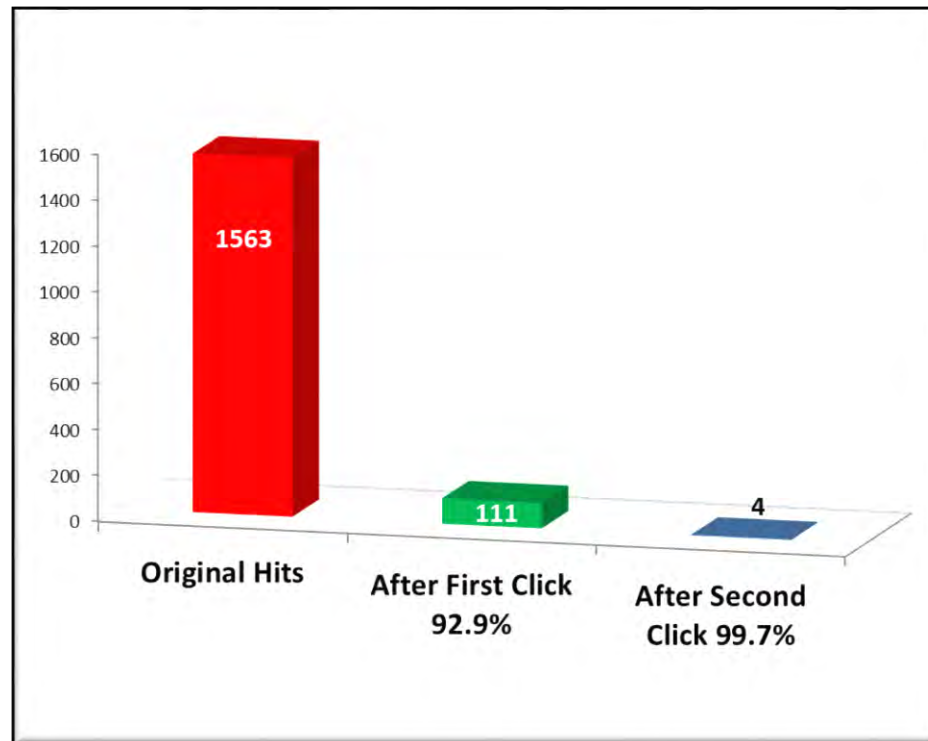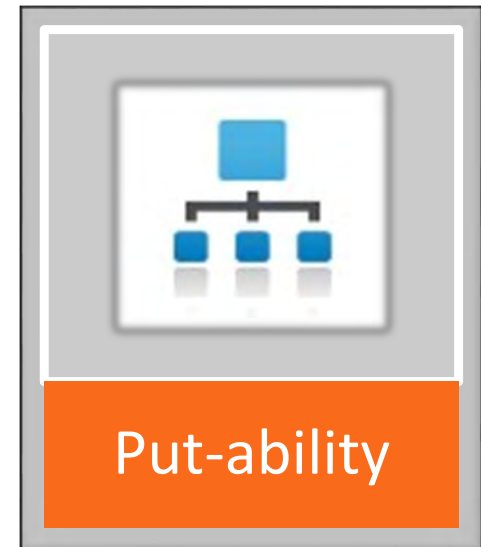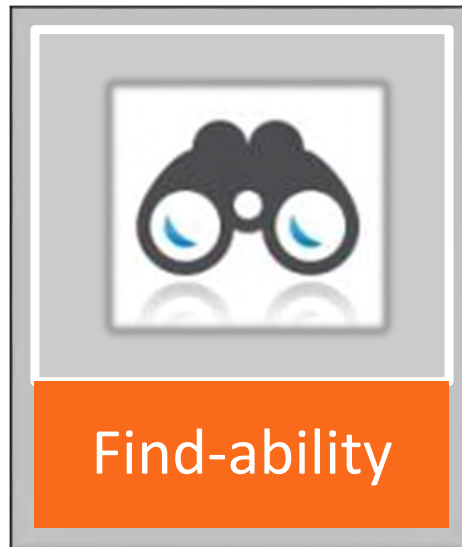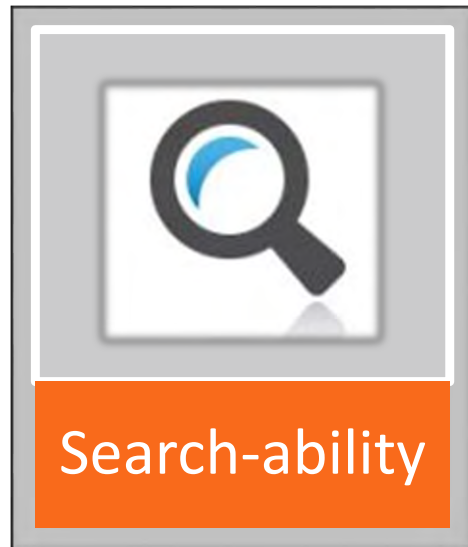
Information Architecture
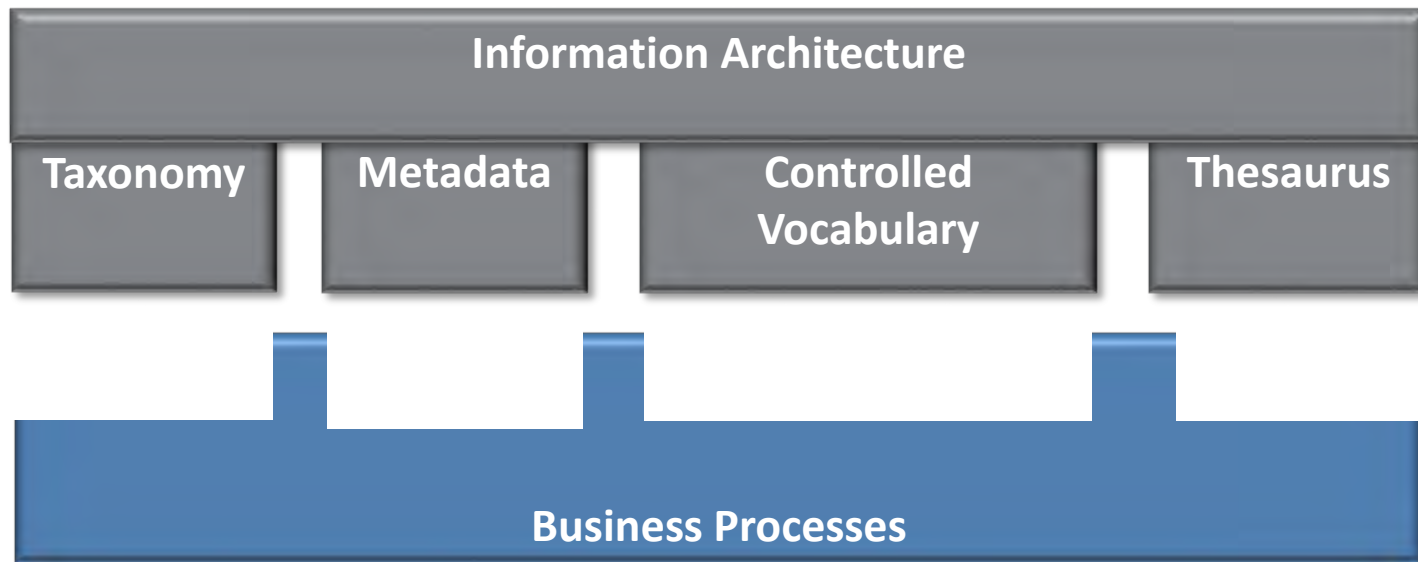
Information Architecture

Taxonomy

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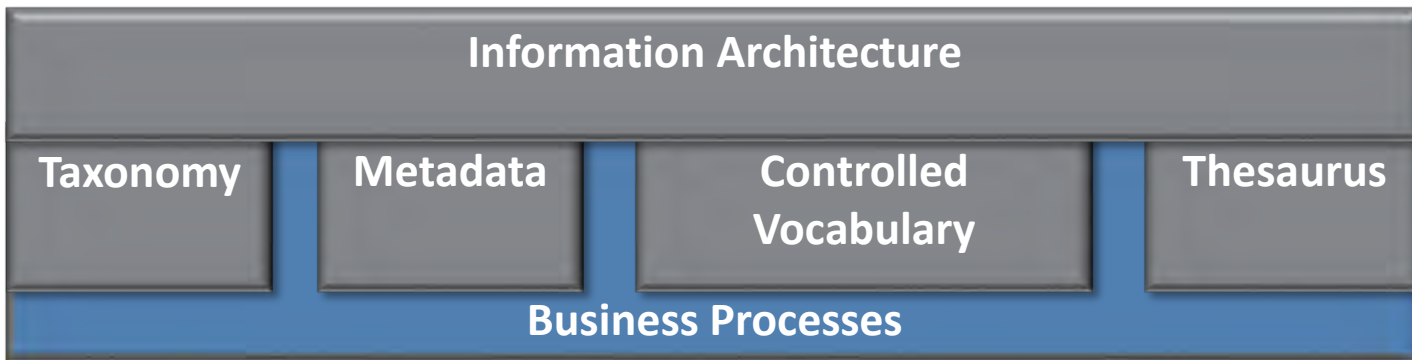
Taxonomy and Metadata

taxonomy

a system of classifying and organizing business information into logical categories called tags; e.g., "condiments"

metadata

a specific tag value; e.g., "ketchup"

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Taxonomy (tags) and Metadata (values)

Function

Activity

Role

System Admin Tags

Country

**Created By
Date Created
Date Last Updated
Last Modified By
Version Number
........**

Context Tags
Identifies the who, when, where, and why of document creation//update

Ownership Tags
Identifies document's organizational ownership and source; connects content to context

Content Tags
Identifies what the document is about

Associated Object Tags
Identifies document's relationship to other entities

Legal Entity

Business Unit

Document Class

Document Type

Record Tags

Security Classification

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14

Controlled Vocabulary and Thesaurus

Controlled Term

Soda

Alternatives

Pop

Coca-Cola

Pepsi
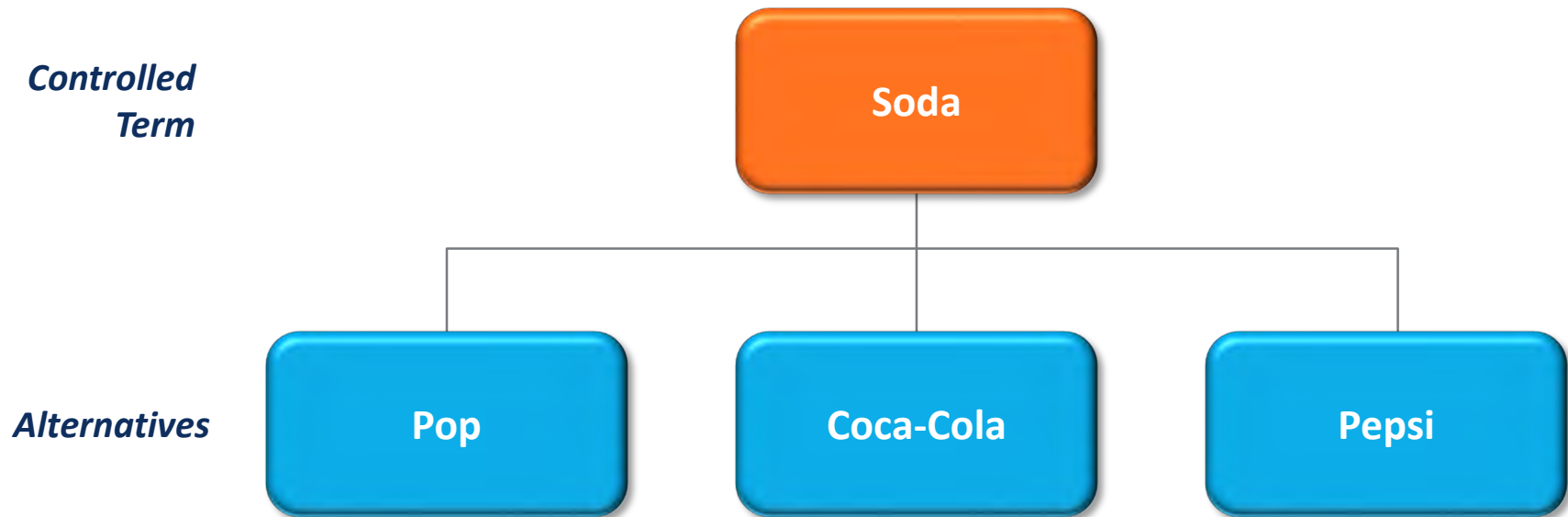
Developing the Information Architecture

Sprint 0

As the Business Sponsor, I need to set the boundaries of the Information Architecture so that it optimizes value and effort

Sprint 1

As a "xxx", I need to define how I store information so that I can "put it" and "find it" efficiently

As a "xxx", I need to identify how I label information so that I can "search it" efficiently

Sprint 2

As a "xxx", I need to determine how I will apply the IA to existing content so that I rapidly realize benefits

Sprint 3

As the Business Sponsor, I need to determine how the IA will be maintained so that it remains relevant and continues to deliver value

Sprint 0

Objective: Define the scope and scale of the Information Architecture

Sprint 0

As the Business Sponsor, I need to set the boundaries of the Information Architecture so that it optimizes value and effort

- What is the reach (systems and processes) of the Information Architecture?

- What is the optimal degree of consistency?

- How will the solution be sustained over time?

Sprint 1

Objective: Build Information Architecture components to achieve targeted objectives

Sprint 1

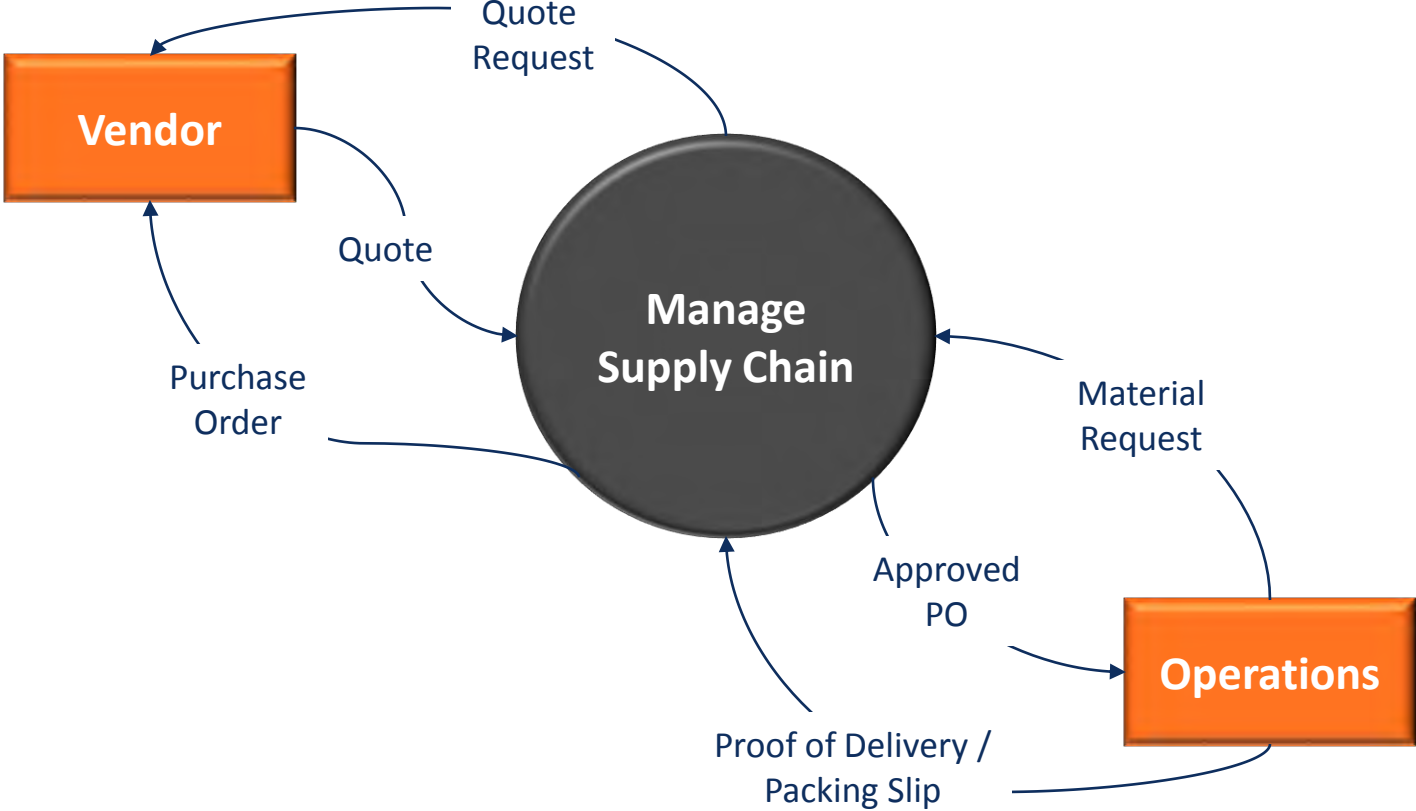As a "xxx", I need to define how I store information so that I can "put it" and "find it" efficiently

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- What information is produced and consumed in executing business processes?

- Where is the optimal location for storing my information?

- How do "novice" users find the same information as "expert" users?

Documenting Information Flows

Vendor

Manage Supply Chain

Operations

Quote Request

Quote

Purchase Order

Material Request

Approved PO

Proof of Delivery / Packing Slip

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Creating the Tags and Values

Function	Activity	Synonyms
Accounting		
	Accounting Support	
	Capital Accounting	
	Cash Collections	Accounts Receivable
	Cash Disbursements	Accounts Payable
	Compensation Accounting	
	Financial Accounting	
	Financial Advising, Analysis, and Planning	
	Fixed Asset Accounting	
	Inventory Accounting	
	Joint Venture Accounting	
	Reporting and Compliance	
	Revenue Accounting	

Document Class	Document Type	Record Series/Type	New RS Code
Journal or Ledger	Journal	Journal Vouchers and Subsidiary Ledgers (Journal Entries)	FIN018
Journal or Ledger	Journal Entry	Journal Vouchers and Subsidiary Ledgers (Journal Entries)	FIN018
Journal or Ledger	General Ledger	General Ledgers/Trial Balance	FIN016
Journal or Ledger	Subsidiary Ledger	Journal Vouchers and Subsidiary Ledgers (Journal Entries)	FIN018

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Conducting Iterative Reviews

Sprint 2

Objective: Design the migration strategy

Sprint 2

As a "xxx", I need to determine how I will apply the IA to existing content so that I rapidly realize benefits

- What content presents the broadest value to my organization?

- What are the risks associated with current information management processes?

- How do we balance the time required to migrate content and continue to run the business?

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FileLogic™

Analyze

- Create multiple migration profiles on centralized management console
- Set up multiple sources and destinations
- Evaluate existing metadata and determine exclusions

Organize

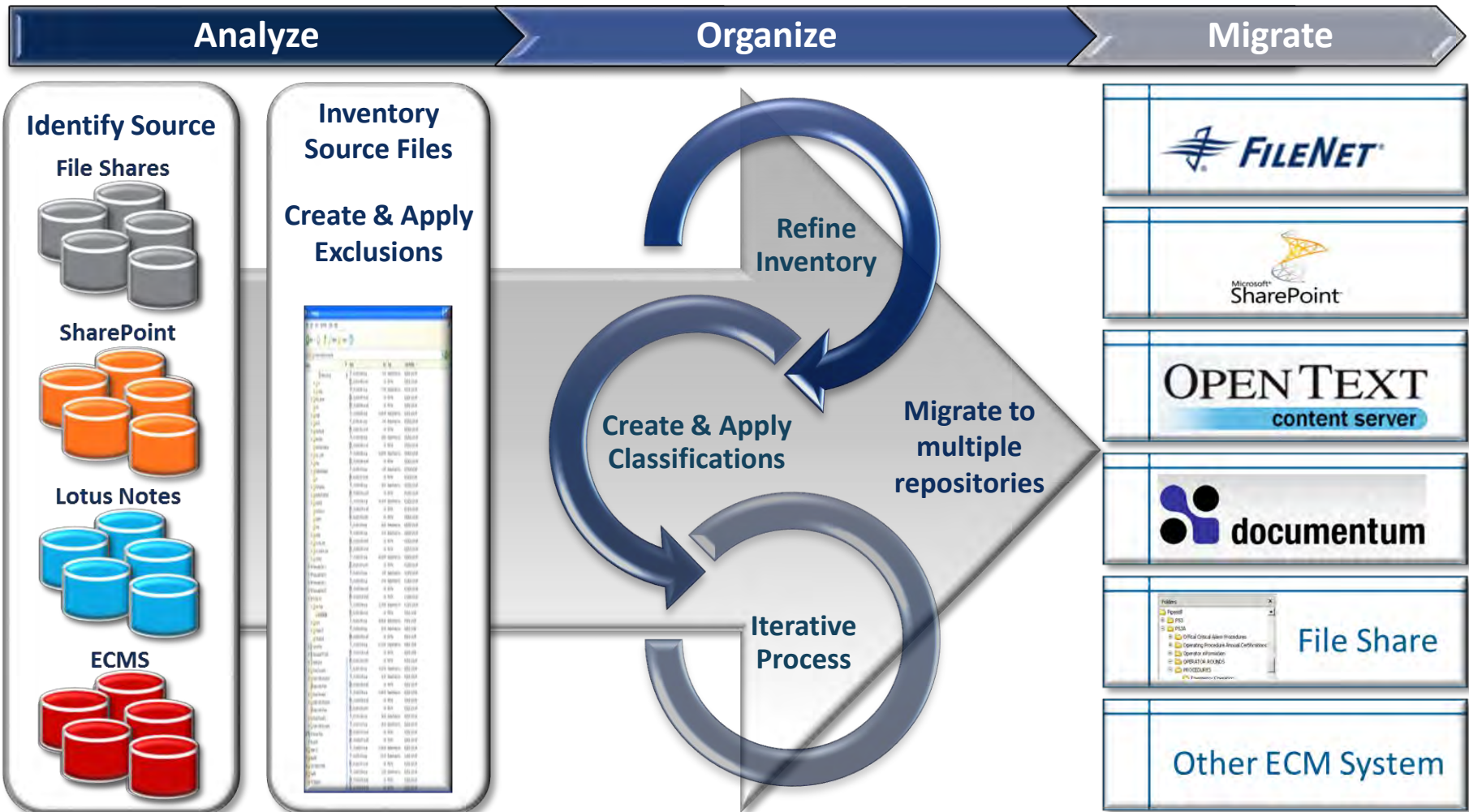- Classify content based on folder name, file name, and file content
- Add metadata based on user defined business rules
- Refine scope of migration through iterative classification process

Migrate

- Manage multiple migrations simultaneously using migration profiles
- Migrate files to the appropriate content management repository
- Perform migration one time or repeat when needed

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A Proven Methodology and Process with Subject Matter Expertise

Analyze → **Organize** → **Migrate**

Identify Source

File Shares

SharePoint

Lotus Notes

ECMS

Inventory Source Files

Create & Apply Exclusions

Refine Inventory

Create & Apply Classifications

Iterative Process

Migrate to multiple repositories

FileNet

Microsoft SharePoint

OpenText content server

documentum

File Share

Other ECM System

Sprint 3

Objective: Define the support strategy

Sprint 3

As the Business Sponsor, I need to determine how the IA will be maintained so that it remains relevant and continues to deliver value
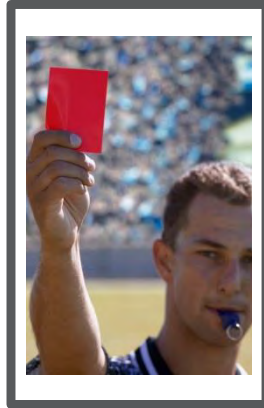
- What does sustainability mean for our business?

- What knowledge and skills will be required to evolve the Information Architecture?

- What needs to be supported centrally versus distributed to the business?
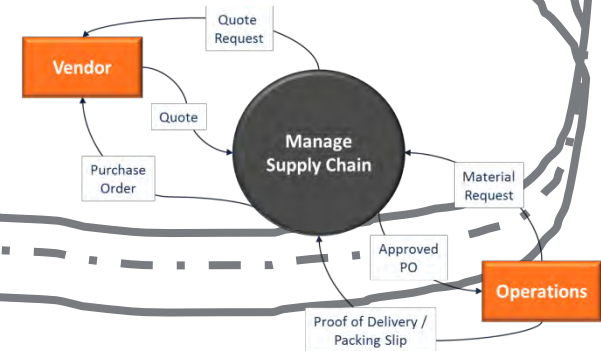
Cogniva's ISIS
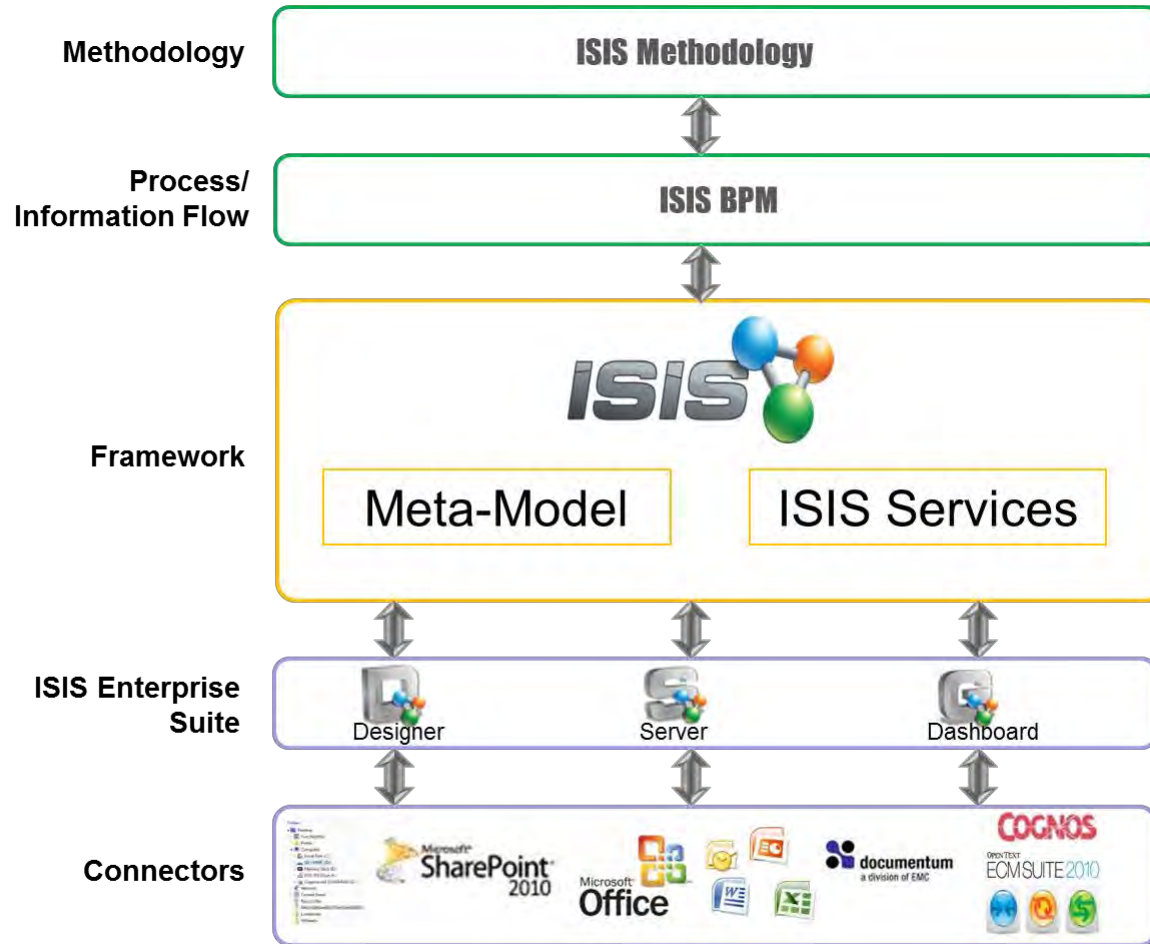
Implementation Challenges

Summary

Find-ability

Search-ability

Put-ability

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