Session 2: Designing Information Architecture for SharePoint: *Making Sense in a World of SharePoint Architecture*
Welcome

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About Concept Searching

- Company founded in 2002
  - Product launched in 2003
  - Focus on management of structured and unstructured information
- Technology
  - Delivered as a web service
  - Automatic concept identification, content tagging, auto-classification, taxonomy management
  - Only statistical vendor that can extract conceptual metadata
- 2009 and 2010 ‘100 Companies that Matter in KM’ (KM World Magazine) and Trend Setting product of 2009 and 2010
- Authority to Operate Enterprise wide USAF and Enterprise wide NETCON US Army
- Locations: US, UK, & South Africa
- Client base: Fortune 500/1000 organizations
- Managed Partner under Microsoft global ISV Program - “go to partner” for Microsoft for auto-classification and taxonomy management
- Microsoft Enterprise Search ISV, FAST Partner
- Product Suite: conceptSearch, conceptTaxonomyManager, conceptClassifier, conceptClassifier for SharePoint, contentTypeUpdater for SharePoint

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About PPC

Energy/Environment
Green strategies for government and industry:
- Air quality and climate change
- Greenhouse gas reduction
- Carbon management
- Environmental risk mitigation
- Environmental impacts of transport
- Information and data management

Multi-disciplinary team of scientific & technical experts
- Scientific subject matter experts
- Systems engineers and architects
- Policy and regulatory specialists
- Project management professionals
- Certified Information technology experts
- Security professionals

Infrastructure
- Systems Engineering and Technical Assistance (SETA)
- Capability Maturity Model Integration (CMMI)
- Earned Value Management
- Configuration Management
- Technical and Advisory Support
- Independent Verification & Validation (IV&V)

Enterprise Solutions
- Master Data Management and Data Governance
- Business Intelligence
- Adaptive Data Warehousing
- Enterprise Architecture
- Infrastructure Systems Engineering
- Knowledge Management
- Portal Solutions
- Enterprise Content Management
- IT Optimization/Virtualization

Information Management
- Program and Project Management
- Earned Value Management
- Performance Measurement
- Program Assurance and Evaluation
- Business Process Improvement
- Security Policy and Compliance
- Communications/Outreach and Facilitation

1,200-person multi-disciplinary team of scientific & technical experts
- Scientific subject matter experts
- Systems engineers and architects
- Policy and regulatory specialists
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Expert Webinar Series
Agenda

Information Architecture

1. Definitions
2. Determine Content Organization
3. Determine Key Metadata Fields
4. Validating Your Information Architecture
5. Demo
1. Definitions
Taxonomy and Metadata

Metadata

1. Data about data

Taxonomy

1. The classification of organisms in an ordered system that indicates natural relationships
2. The science, laws, or principles of classification; systematics
3. Division into ordered groups, categories, or hierarchies
Taxonomy and Metadata

- Primary tools to provide structure to unstructured information
- Depending on system design and use, may be front-end or back-end functionality
- Taxonomy (categorization) is often actualized by applying metadata to documents
- Enable findability
Controlled Vocabulary

• A pre-selected list of words or phrases used to tag information
• Promotes easy retrieval through web browsing or searching
• Can be used in taxonomies
• Leverage controlled vocabularies to improve tagging consistency across lists and libraries in SharePoint

Product Taxonomy
• Sports & Recreation
• Home Entertainment
• Personal Use
• Yard & Garden
• Home Maintenance
• Home Furnishings & Fixtures
  • Bathroom Fixtures
  • Beds, Mattresses, Pillows
  • Carpets, Rugs
  • Chairs, Sofas, Sofa Beds
  • Desks, Cabinets, Shelves
  • Ladders, Stools
  • Lamps
• Heating, Cooling, Ventilation
Enterprise Taxonomy Design

- Work with librarians and functionally- or subject-based individuals or focus groups
- Content-driven; may reveal new associations of information
- Subdivide categories as necessary to build taxonomy

**Metadata**
- Document Type
- Location
- Subject

**Subject Taxonomy**
- About the Company
- Facilities
- Finance and Travel
- Human Resources
- Information Technology
- Legal
- Product Development
- Sales and Marketing
2. Determine Content Organization
Determine Organization

• Leverage Taxonomy for Site Structure and Hierarchy

Sites may overlap with the subject taxonomy

Top-Level Sites

- About the Company
- Facilities
- Finance and Travel
- Human Resources
- Information Technology
- Legal
- News and Events
- Product Development
- Sales and Marketing
Determine Organization

- Leverage Taxonomy for Site Structure and Hierarchy

Top-Level Sites
- About the Company
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Sites may not align with the taxonomy
Organization and Navigation

- Organization
  - Site collections
  - Sites

- Site Navigation
  - Top-Link bar with fly-outs
  - Quick launch bar
  - Tree view
  - Browse by metadata
  - Breadcrumbs
3. Determine Key Metadata Fields
Determine Key Metadata Fields

- Define the Term Sets for document libraries
- Think about audience, business needs, content types
- Define the values/terms for each metadata field/term set

### Metadata For All Content
- Document Type
- Location
- Subject

### Metadata By Subject
- Customer
- Event Type
- Product Line
Enabled by Tagging

- Content is tagged when it is uploaded to SharePoint
Browse and Filter in Libraries

- Metadata tags allow users to find the information they need
Users can sort the library by the values in any column.
Filtering by Metadata

Users can apply filter(s), using custom metadata values.
Filtered Results

- Displays the parent tag and its descendents (if *Include Descendents* is selected)

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<tr>
<th>Type</th>
<th>Name</th>
<th>Modified</th>
<th>Modified By</th>
<th>Event or Activity</th>
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<td>6/21/2011 11:44 AM</td>
<td>Rachel Sondag</td>
<td>Community Outreach: Adopt a Highway</td>
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<tr>
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<td>NMF Brochure</td>
<td>6/21/2011 11:44 AM</td>
<td>Rachel Sondag</td>
<td>Community Outreach: Newton Marasco Foundation</td>
</tr>
</tbody>
</table>
Faceted Search

- Enables users to browse for information by a specific content tag
Advanced Metadata Properties

- You can add descriptions, synonyms, and multi-lingual tags
4. Validating Your Information Architecture
Validating Your Information Architecture

• Manual approach
  – Document Gathering into Groups
  – Subject Matter Expert Interviews
  – Tedious, time consuming, hard to validate

• TaxonomyManager approach
  – Leverage SMEs
  – Build out faster
  – Validate easier
  – Align with core information

• Taxonomy Manager Demo + Alignment with SharePoint 2010
The first number represents the total documents about your IA.

The second number represents the total number of documents in the branch.

As an example:

- There are 4 documents that have been tagged with “Government, politics and public administration”.
- There are 93,392 documents in the branch itself.
However, If We Dig a Little Deeper...

We see that we can evaluate not just the original term, but we can classify against topics about the term. If the score is above 50, we classify that document against the topic. If a document contained the term, “politics” + “public administration” + “government,” we would tag the document about this topic.
It’s Easy to Evaluate New Terms
Click on Suggest Clues
All Statistically-Relevant Concepts are Returned
You Can Test Your Non Preferred Terms As Well
There Are Many Ways to Classify an Item
5. Demo
Contact

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Leveraging Taxonomy Term Store for SharePoint: Defining a Multi-taxonomy Structure for Content Management
August 10th - 11:30am-12:30pm EST
This webinar will focus on providing strategy and best practices to designing a taxonomy and metadata schema to work with the Term Store for SharePoint 2010. There are a number of ways to manage content by leveraging this new service, whether the intent is for social collaboration or rigid categorization. PPC will review the different strategies you may take to leverage the Term Store effectively and in a manner that suits the business objectives and culture of your organization. We also review the difference between proprietary taxonomy solutions that replace the term store and those that integrate natively with the term store and why that is important to both end users and the Enterprise. Concept Searching will demonstrate their Term Store integrated Taxonomy and Auto-Classification solution that leverage PPC’s strategy and best practices.

SharePoint Governance: Managing Content Sprawl
September 14th - 11:30am-12:30pm EST
Once deployed within your company, SharePoint’s popularity has the potential to become viral. This session will focus on how to apply a governance strategy against the SharePoint sites and objects, and how best to manage user expectations for leveraging SharePoint within your company. We also look at how using Concept Searching’s Concept Classifier for SharePoint you might automate much of the process designed to deliver a consistent user experience at retrieval time using taxonomy and automatic content tagging. Furthermore we explore using the tool to apply your Governance strategy to identify and lock down sensitive information such as PII from being published on uncontrolled portals.

De-mystifying Content Types: Four Key Content Types to Leverage
October 19th - 11:30am-12:30pm EST
Content types are a powerful feature of SharePoint 2010 and are largely under-utilized. Learn more about content types, what they can do and how to implement them across your SharePoint environment. PPC will also share four key content types to implement that span multiple industries. We also review Concept Searching’s Content Type Updater, an automatic content tagging solution that can apply content types based upon vocabulary and metadata. The solution, fully integrated with SharePoint 2010 and the Term Store can then workflow specific types of content based upon policy and guidelines addressing such business issues as preservation and disposition, risk, and Governance.