

4-day Information Organization & Access Master Class

Learn technologies and global best practices for Findability and Enterprise Search

Introduction

The Information Organization & Access (IOA) Certificate Program is designed from global best practices among our 50,000 members. The program covers concepts and technologies for;

- Enterprise search
- Content inventory and classification
- Categorization and clustering
- Fact and entity extraction
- Taxonomy creation and management
- Information presentation
- Information governance

AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organizations to capture, manage, store, preserve and deliver information to support business processes. We have existed for more than 60 years, and we are a non-profit organization.

Course Development

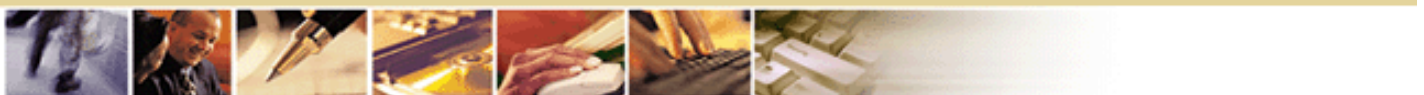
The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 50,000 members. These Education Advisory Groups have subject matter experts from the following companies:

| | |
|--------------------|---------------------------------|
| Accenture | Marion County Health Department |
| BearingPoint | Microsoft |
| Canon | Oracle |
| CCRM Associates | Ricoh |
| CMS Watch | Royal Mail |
| Crown Partners | Serco |
| EMC | Standard Chartered Bank |
| Fujitsu | The National Archives of UK |
| Gartner | TOWER Software |
| Gimmel Group | US Courts |
| GlaxoSmithKline | US Department of Treasury |
| Harris Corporation | Westminster College |
| JPMorgan Chase | ZyLAB |

The course materials were developed by CMS Watch based on requirements and best practices defined by the above members.

Course Description

The analyst company Gartner has in recent years been using the term "Information access technology" to include and expand on what they previously called "enterprise search technology". They use the term information access to include a collection of technologies to help you find organize and information.



AIIM introduced the term "Information Organization & Access" (IOA) instead of just "Information Access," since access to information relies on good organization of information. The AIIM Education Advisory Groups have also identified as a priority the development of professional skills focused on the organization of information such that enterprises can make it more readily accessible to further their business objectives. With digital information around the world doubling every three years (according to a UC-Berkeley study), there is an urgent need for "Information Organization & Access" within our industry.

There are three main ways in which people look for information:

- (1) Pattern Matching (aka search) – same physical attributes of the sought after information, it contains words or phrases, they exist in certain parts (e.g. title, author), certain words exist close to each other (e.g. clustering), etc.
- (2) Semantic Web Navigation, or traversal – knowing of a relevant asset that is linked to other assets, traverse the links looking at related information; sometimes with weighted links.
- (3) Classified or Categorized, that is, organized by topic browsing. – This is where we use classification taxonomies and related structured organizations of information.

The first approach relies exclusively on "search." However, the line between search and browse (either by link or by structure) is getting blurrier every day, as clustering and guided navigation enable new ways for enterprises to facilitate useful access to large repositories. At the end of the day, all three approaches rely heavily on metadata. Clearly, to access information properly, first you need to organize it properly.

The AIIM Education Advisory Groups have helped AIIM develop this new training program focusing on how to optimize Findability and Enterprise Search. The course objectives and content was defined and reviewed by the subject matter experts in our Education Advisory Groups, and the course materials were based on this developed by CMS Watch.

The IOA Master Training Class provides you with a detailed coverage of IOA with the main elements from AIIM's IOA Strategy, Practitioner and Specialist training programs in addition to case study exercises. This 4 day training program covers why, what and how to implement IOA.

- The **IOA Strategy** (Why IOA?) component provides you with the knowledge to get ownership and support by senior executives and users
- The **IOA Practitioner** (What is IOA?) component covers the parts of IOA, finding, inventorying, and analyzing content; taxonomy; metadata; ontologies, topic maps, and semantic networks; content modelling; introduction to access; content intelligence and text mining; advanced topics in findability; advanced search techniques; search interfaces, document structures; and content finding us
- The **IOA Specialist** (How to implement IOA?) component covers the implementation of programs and projects, and related tasks such as the business Case for how "IO" leads to better "A"; defining the problem and planning the project; building the right team; user analysis and scenarios; content inventory, aggregation, and analysis; taxonomy, metadata, and content modelling; architecting a standards-based content/data model; tagging and content organization models; optimizing information access tools; improving findability; governance; and maintenance and management



- The **IOA Case** (Putting it all together) component allows to you discuss, share and learn global best practices for IOA.

Course Objectives:

The information organization and access program covers a particularly broad range of issues and topics. As such, breaking it down into four key areas will make a highly complex and challenging topic area much more comprehensible. These segments focus on:

1. Information Organization Strategy
2. Data and Information Structures
3. Technologies
4. Information Access

In the area of information organization strategy, we consider approaches to discovering and preparing data, including content structure, taxonomy creation and management, content clustering, and text mining / entity extraction. We focus on various methods of discoverability and explore with you different ways of understanding an organization's content. We discuss content inventories, cleaning and normalization, and how to leverage subject matter expertise in an organization.

In the data and information structures area, we begin to answer the question of what to then do with our understanding of the information that must be managed and accessed. We include sample collections of information and allow you to take part in a hands-on exercise to create a small taxonomy based on hypothetical business goals. We also highlight considerations around information structure, content granularity, metadata standards, and how different technologies can help with the process of categorizing content. We also give guidance on folksonomies and other forms of customer-contributed information access methodologies, use case scenarios for information access, and how to maintain and incorporate ongoing input into a taxonomy.

We include consideration to managing access to and delivery of content in heterogeneous environments, and inform you of core issues around federation and collaboration issues regarding multiple data sources.

In the technologies area, we discuss the different technologies that take part in the end-to-end process of information access. Discovery, clustering, categorizing, storing, searching and then presenting content to the end user is often handled by a collection of technologies working in concert. Our training present an end-to-end view of the potential technologies involved in this full process. We also discuss how multiple data sources might play into this equation, and best practices around developing a single point of information access to multiple data sources, and methodologies for making that multiplicity invisible to the end user attempting to access the information. Throughout this segment, we focus on security and performance -- possibly the two greatest stumbling blocks to successful information access at an enterprise level.

Enterprise Search technology often plays a central role in information access strategies. The underlying concepts of indexing and search are deceptively simple, but actual implementations will vary substantially in emphasis, performance, and approach. Different technologies focus on different phases of the problem; for example, text-mining and auto classification-oriented tools tend to emphasize pre-processing content in the Collection and Indexing phases, while



clustering technologies focus on the Post-Processor phase. Enterprises need to plan accordingly.

Finally, our 4th segment reviews the presentation layer and best practices around the usability of information access technologies. What are the best ways to search and present results in different contexts? We touch on faceted browsing, parametric drill-down, and how to deal with the presentation of highly unstructured data in search results. We also touch on how technologies such as RSS use metadata to better target relevant information. We return to our initial list of use-cases and in particular contrast the needs of the information-grazing knowledge worker and data-seeking transaction processor.

Different information access scenarios require different types of technologies and interfaces. The knowledge worker may require a free text search interface, while the call center employee may need information access capabilities embedded directly into his separate customer care application.

A major component of the overall training is providing a detailed understanding of how core metadata impacts the entire IOA area. We tackle this both from a technology perspective and end-user perspective as historically many projects have failed due to an over-reliance of end users providing metadata.

It is also important to understand the difference between search and access on the internet, and within the enterprise. We review and instruct you in common terminologies such as fuzzy search, data mining, pattern matching, quorum search, relevance ranking, precision vs. recall, and other key terms.

Course Designation

You will be awarded the AIIM IOA Master (IOA^M) designation after passing the online exam and case study exercise. This is a new AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM IOA Master. You can use the associated logo and title on your business card, email signature, web page, etc. The exam and case study exercise are available via the Internet and you must pass these within 3 months of attending the training course.

Benefits of becoming IOA Master (IOA^M):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning and implementing IOA
- Discover real world solutions and best practices for challenges you face
- Learn from experts in the field who are able to answer your questions, available to address your comments, and willing to accept your feedback

Who should attend AIIM's IOA Master Class?

The IOA Master Class is designed for Business Managers, Business Analysts, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, and Information Managers, as well as for solution providers, sales consultants, project managers, and technical staff.



Audiences

- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Executives
- Change agents
- Users

Course Material

You will receive an IOA Workbook and access to supporting IOA online courses and exam.

- The **IOA Strategy** component will be accompanied by a succinct overview of what IOA covers; the strategy drivers for its introduction that should be considered; the benefits that can be realized; and the impact its introduction can be expected to have on an organization at all levels.
- The **IOA Practitioner** component will be accompanied by a handout that summarizes the key concepts, including references to authoritative publications and web resources.
- The **IOA Specialist** component is comprised of (multiple) one-page summaries and checklists summarizing the relevant topics.
- The **IOA Case** component provides you with a series of case study exercises that gives participants a feel for what is involved, the information that needs to be gathered and processed, the outcomes expected and the amount of effort likely to be involved in a real world situation.

Course Agenda

Strategy (Why IOA?)

What is IOA

- Learning Objectives
- IOA Defined
- Content Types
- Content Structure
- Content Retrieval
- Content Presentation
- Wrapping Up

Role of IOA in ECM

- Learning Objectives
- Content as information
- Content as infrastructure
- Content as process
- Wrapping Up



Business Case

Learning Objectives
Business Scenarios - Identifying the Problem
IOA "Soft" Benefits
IOA Sample ROIs
Wrapping Up

IOA as a Practice

Learning Objectives
The role of the information architect
Front-end IA
Back-end IA
Wrapping Up

IOA as a Project

Learning Objectives
Identifying the project
Typical roles on an IOA project team
High-level project structures
Wrapping Up

Caveats, Pitfalls and Best Practices

Learning Objectives
What IOA Project Won't Solve
What IOA Technology Won't Solve
Wrapping Up

Practitioner (What is IOA?)

Parts of IOA

Learning Objectives
Content Structure
Content Intelligence
Content Retrieval
Content Presentation
Wrapping Up

Finding, Inventorying, and Analysing Content

Learning Objectives
Finding Content
Inventorying Content
Analysing Content
Wrapping Up



Taxonomy

- Learning Objectives
- History
- Examples and Applications
- Controlled Vocabularies
- Folksonomies
- Wrapping Up

Metadata

- Learning Objectives
- Metadata Fundamentals
- Dublin Core
- Metadata Strategy
- Automated Metadata Collection
- Wrapping Up

Ontologies, Topic Maps, and Semantic Networks

- Learning Objectives
- Ontologies
- Topic Maps
- Semantic Networks
- Standards and Tools
- Wrapping Up

Content Modelling

- Learning Objectives
- Structured Content
- Content Components and Types
- Content Elements
- Semantic Structure and Framework
- Wrapping Up

Introduction to Access

- Learning Objectives
- Access via Browsing
- Access via Search
- Enterprise Search vs. Web Search
- Search within Applications
- Wrapping Up

Topics in Findability and Information Retrieval

- Learning Objectives
- Introduction to Findability and Information Retrieval
- Text Mining and Classification



- Pattern Search and Extraction
 - Indexing
 - Natural Language Processing
 - Clustering
 - Multilingual Search
 - Wrapping Up
- Search Techniques
- Learning Objectives
 - Keyword Search
 - Concept and Fuzzy Search
 - Taxonomy and Synonym Search
 - Parametric and Structured Search
 - Audio and Video Search
 - Wrapping Up
- User Experience of Information Access
- Learning Objectives
 - Access via Browse
 - Navigation
 - Faceted Browsing
 - Directories, Cabinets, Folders
 - Access via Search
 - Input
 - Results
 - Enhanced Results Features
 - Wrapping Up

Specialist (How to implement IOA?)

- Defining the Problem and Planning the Project
 - Learning Objectives
 - Project Prerequisites
 - Project Phases
 - Feature Prioritization
 - Wrapping Up
- Business Case: How “IO” Leads to Better “A”
 - Learning Objectives
 - Business Case Fundamentals
 - Types of Business Cases
 - IOA Business Case
 - Wrapping Up



User Analysis and Scenarios

- Learning Objectives
- Know Your Users
- Personas
- User Scenarios
- User Testing
- Wrapping Up

Content Inventory, Aggregation, and Analysis

- Learning Objectives
- Content Inventory
- Content Aggregation
- Content Analysis
- Content Security
- Wrapping Up

Taxonomy, Metadata, and Content Modeling: High-Level How To

- Learning Objectives
- Building a Taxonomy and Creating a Metadata Model
- Content Chunking and Granularity
- Developing Document Models
- Wrapping Up

Architecting a Standards-Based Content/Data Model

- Learning Objectives
- Why Use Standards?
- Standards' Effect on Access
- Content/Data Models and Standards
- Popular Standards
- Wrapping Up

Tagging and
Tagging Interfaces

- Learning Objectives
- Tagging
- Tagging Interfaces
- Wrapping Up

Content Organization Models and Tagging Processes

- Learning Objectives
- Content Organization Models
- Tagging Process Models
- Content Finding Us
- Wrapping Up



Optimizing Information Access Tools and Improving Findability

Learning Objectives

Access Tool Configuration and Tuning

Improving Findability with Use Case Scenarios and Analytics

Compensating for Bad Searches

Wrapping Up

Maintenance and Governance

Learning Objectives

Fundamental Maintenance Processes

Team Structures

Governance Processes

Maturity Models

Maintenance Tools

Wrapping Up

Case (Putting it all together)

Ethics

IOA Scenarios in Business Projects

Putting It All Together

Case Study

Exercise(s)

Summary

Training:

- IOA Master Class, 4-days, 9am – 5pm
- Includes access to 20 supporting web modules for 6 months (each approx 1 hour)
- Includes a case study exercise that must be answered within 3 months
- Includes 3 opportunities to take and pass the AIIM IOA Master web exam
- Includes English language delivery and all training materials

Please contact AIIM if you would like to know the price for organizing a private class for your organization: training@aiim.org

Please note that this AIIM IOA Certificate Program is designed to give all participants an appreciation of IOA. You should not expect to gain in-depth expertise in all aspect of IOA from this Program. If you need in-depth expertise you should refer to specialist courses, references or expert assistance.

Agenda is subject to change without notification.

