

## 2-day Information Organization & Access Practitioner Class

*Learn technologies and concepts for optimizing 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

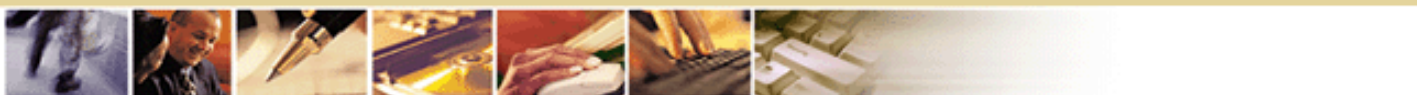
AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organizations to capture, manage, store, preserve and deliver information to support business 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 rely on a good organization of information.

The AIIM Education Advisory Groups 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 Practitioner Training Course covers the concepts and technologies of Information Organization and Access:

- The practice of IOA
- Finding, inventorying and analyzing content
- Develop and maintain a taxonomy
- Develop and maintain metadata
- Ontologies, topic maps and semantic networks
- Content modelling
- Access techniques
- Content Intelligence and Text Mining
- Advanced Topics in Findability
- Advanced Search Techniques
- Search Interfaces
- Finding Without Search: Content Finding Us

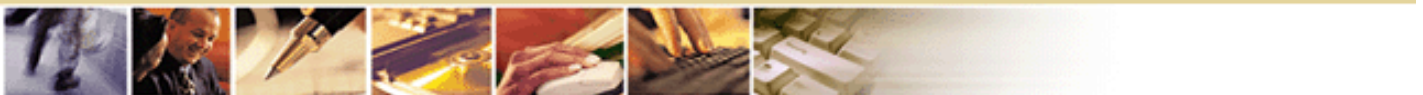
*Enterprise Search technology often plays a central role in information access strategies. The underlying concepts of indexing and search are deceptively simple, but actual implementations will vary substantially in emphasis, performance, and approach. Different technologies focus on different phases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

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

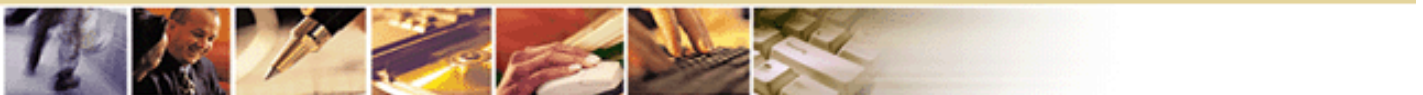
## Course Objectives:

At the end of this training course, you will be able to:

- Parts of IOA
  - Define the different major concepts within Information Organization and Access, including:
    - Content Architecture
    - Content Intelligence
    - Search & Retrieval
    - Findability



- Finding, Inventorying, and Analysing Content
  - Identify the eight key steps to information organization
  - Explain the essential importance of content analysis
  - Distinguish between a content audit and inventory, and articulate the relative value of both steps
  - List the 3 types of content “rot” and how to address them in the context of enterprise records management policies
- Metadata
  - Define metadata
  - Articulate how metadata brings value to the enterprise
  - Distinguish between implicit and explicit metadata and controlled and uncontrolled vocabularies
  - Describe the purpose and value of the Dublin Core standard elements
  - Identify the main dimensions of a metadata strategy
  - Assess the role and value of automated classification
- Taxonomy
  - Define what a taxonomy is
  - Discuss the past and current uses of taxonomies
  - Articulate the value of taxonomies in content management
  - Identify various types of taxonomies and their appropriate applications
  - Distinguish a “faceted” classification system from a monolithic taxonomy
  - Define folksonomy and its potential uses
- Ontologies, Topic Maps, and Semantic Networks
  - Understand what you can do in the short and medium terms to prepare enterprise content for semantic networks
  - Understand the role of topic maps and ontologies in developing semantic networks
  - Recognise common standards
- Content Modelling
  - Define key terms
    - Content Model
    - Content Type
    - Content Element
  - Distinguish between structured and unstructured content
  - Articulate the value and difficulty in exploiting structured content
- Introduction to Access
  - Understand the difference between browsing and searching for information, and relative advantages and drawbacks of each
  - Identify the different parts of a search engine
  - Differentiate clearly between public web search and enterprise search
  - Evaluate the effectiveness of existing intra-application search services
- Search Techniques
  - Understand key terminology around free text search
  - Learn different approaches for “tuning” search results
  - Articulate the difference between keyword vs. parametric search, as well as keyword vs. concept search
  - Identify the process and value of taxonomic search
  - List two approaches to searching video and audio



- Topics in Findability and Information Retrieval
  - Articulate the importance of information findability and how information retrieval technologies support findability
  - Define different methods by which information retrieval tools find and process content to increase findability
- User Experience of Information Access
  - Understand various ways to approach user interfaces used for information access
  - Learn how to determine which approach is best for their enterprise

## Course Designation

You will be awarded the AIIM IOA Practitioner (IOA<sup>P</sup>) designation after passing the online exam. This is a new AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM IOA Practitioner. You can use the associated logo and title on your business card, email signature, web page, etc. The exam is available via the Internet and you must pass it within 6 months of attending the training course.

Benefits of becoming IOA Practitioner (IOA<sup>P</sup>):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn concepts and technologies for Findability and Enterprise Search
- 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 Practitioner Class?

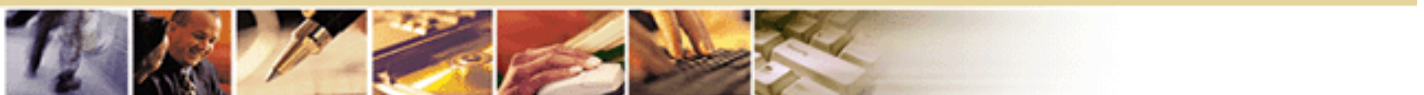
The IOA Practitioner Class is designed for Business Managers, Business Analysts, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, and Information Managers, as well as for solution providers, sales consultants, project managers, and technical staff.

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. This will be accompanied by a handout that summarizes the key concepts, including references to authoritative publications and web resources.



**Course Agenda**

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

**Summary**

## Training:

- IOA Practitioner Class, 2-days, 9am – 5pm
- Includes access to 10 supporting web modules for 6 months (each approx 1 hour)
- Includes 3 opportunities to take and pass the AIIM IOA Practitioner 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](mailto:training@aiim.org)

*Agenda is subject to change without notification.*

