

2-day Information Organization & Access Specialist Class

Learn global best practices for implementing 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

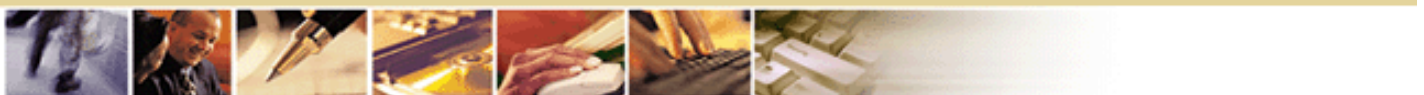
The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 50,000 members. These Education Advisory Groups have subject matter experts from the following companies:

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.

The IOA Specialist class covers global best practices for implementing solutions for IOA. You will at this course learn;

- Planning your project
- How to develop a business case for IOA
- Defining the problem and planning the project
- Building the right team
- User analysis and scenarios
- Content inventory, aggregation, and analysis
- How to build a taxonomy
- How to create a metadata model
- Architecting standard-based content/data model
- Tagging and information organization models
- Optimizing information access tools
- Improving findability
- Governance
- Maintenance and management

AIIM recommends that you take the IOA Practitioner course before starting the IOA Specialist course to get a good understanding of IOA concepts and technologies.

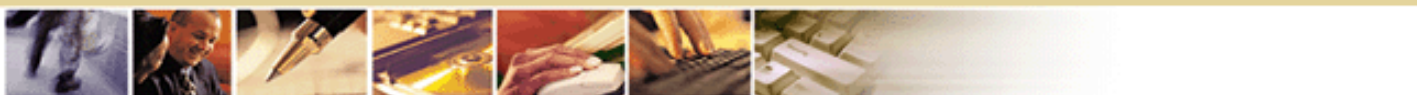
Enterprise Search technology often plays a central role in information access strategies. The underlying concepts of indexing and search are deceptively simple, but actual implementations will vary substantially in emphasis, performance, and approach. Different technologies focus on different phases 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.

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.

Course Objectives:

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

- Defining the Problem and Planning the Project
 - Catalog the different types of IOA problems
 - And identify the type of IOA project(s) needed for your situation
 - Build the right team for your project
 - Understand different phases in a typical IOA project
- Building a Business Case



- Identify the key elements of a business case
 - Recognize different types of business cases
 - Understand how to justify an IOA project
 - Use your business case to plan your overall project
- User Analysis and Scenarios
 - Identify various approaches to user analysis
 - Distinguish among different research approaches
 - Understand how to use personas and scenarios in the IOA requirements gathering process
 - Articulate their value to managers and peers
- Content Inventory and Analysis
 - Conduct a sample content audit and analyse the results
 - Create a draft spreadsheet or database table to hold inventory data
 - Decide which automated tools might assist you in this work
 - Understand the practical implications of an information organisation project
 - Articulate security implications of this work
- Developing Taxonomies, Vocabularies, and Content Models
 - List and plan the phases of a typical IOA project
 - Undertake a practical approach to developing your taxonomy and content models
 - Identify the promise and pitfalls of decomposing structured documents into re-usable pieces
- Architecting Standards-Based Information Models
 - Articulate the importance and value of standards
 - Describe several specific standards in information organisation and access
 - Distinguish between technology standards and information standards
 - Investigate guidelines, commercial models, and community efforts that may serve as informal standards
- Tagging and Tagging Interfaces
 - Review what tagging is and some best practices
 - Discuss the special use case of indexing scanned documents
 - Consider various tagging best practices for your enterprise
 - Identify best practices for tagging interfaces
- Content Classification Models and Tagging Processes
 - Identify content organization paradigms that might be right for your situation, based on user roles
 - Identify tagging processes and tagging best practices
 - Articulate some of the enhanced end uses of tags beyond browsing and searching
- Optimizing Search and Improving Findability
 - Identify ways to improve and “tune” the default results you get from your search and/or information access tools
 - Identify ways to analyze and improve search results based on scenarios and analytics
- Maintenance and Governance
 - Identify fundamental maintenance processes for your ongoing IOA efforts
 - Understand typical team structures for IOA governance and maintenance
 - Identify the level of metadata maturity in your organization



Course Designation

You will be awarded the AIIM IOA Specialist (IOA^S) 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 Specialist. 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 Specialist (IOA^S):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for implementing 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 Specialist Class?

The IOA Specialist 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

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 Modelling: 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

Summary

Training:

- IOA Specialist Class, 2-days, 9am – 5pm
- Includes access to 10 supporting web modules (each approx 1 hour) for 6 months
- Includes 3 opportunities to take and pass the AIIM IOA Specialist 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.

