

Common SharePoint Issues

- ❑ Search does not return relevant results
- ❑ Folders hide relevant information; not named well
- ❑ People do not take time to implement governance & taxonomy in advance
- ❑ Business users and IT do not value the same functionality and face communications and policy challenges as the system expands
- ❑ Resistance to change

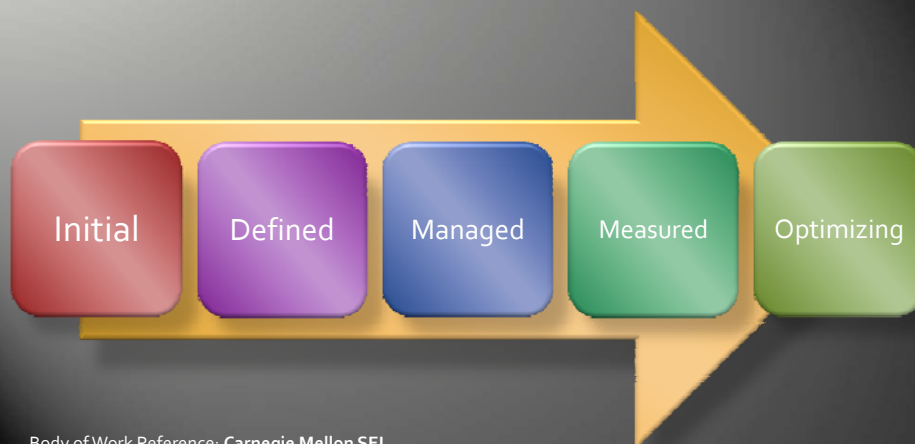
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Taxonomy for Business Users

Taxonomy: The practice and science of classification

- ▣ Taxonomy originally created for librarians
 - Dewey Decimal System, created 1876 by Melvil Dewey
- ▣ Hierarchical or parent/child relationships
- ▣ Adult mind works this way naturally
 - Precursor to pattern recognition
- ▣ Business environments have different needs
 - Sector specific terminology
 - Retail vs. Legal; Government vs. Entertainment
 - User friendly language
 - Distributed management techniques

CMMI: Capability Maturity Model



Body of Work Reference: Carnegie Mellon SEI
<http://www.sei.cmu.edu/cmmi/general>

Where are you at?





- ❑ Understanding the need requires continuing education on taxonomy implementations and your business
- ❑ Who will sponsor the project? Recruit executive leadership
- ❑ Implement at division or group level first – run a pilot project!
- ❑ Define management & update policies in advance

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Types of Taxonomies

| Method | Definition |
|-------------------------|---|
| Facet-based | Information categorized into multiple taxonomies or “stackonomies” based on unique characteristics including topic, function, etc. (Common on shopping sites) |
| Subject-oriented | Information categorized by subject or topic. |
| Functional | Information categorized by the process to which it relates |
| Organizational | Information categorized by corporate departments or business entities. |
| Document Type | Information categorized by the type of document |

Collaborative Resource: Bill Williams

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Taxonomy Committee

- ▣ Requires a taxonomy cheerleader as well as technical specialists
- ▣ Cross functional team for most valuable input
- ▣ Useful to have professional facilitation or skilled communicator for leadership
- ▣ Initial suggestions can be crafted in a small group and circulated for input
- ▣ Give people a visual representation of usage

The Right Resources



Steps for Success

- ▣ Create your core team – define roles
- ▣ Understand your existing data structures, taxonomies (official/unofficial)
- ▣ Map usage & success of existing tools
- ▣ Determine pilot test group
- ▣ Design & develop
 - Select taxonomy type
 - Document and review with business users
 - Populate with content
- ▣ Launch, train, repeat

Facts from the Field

- ▣ Good taxonomy will foster user adoption
- ▣ Integral part of governance strategy
- ▣ Required for best practices implementation of search and life cycling
- ▣ Creation process fosters collaboration across the enterprise
- ▣ Assists user community to think of data as owned by the enterprise not individual “tribes”
- ▣ It is never “done”

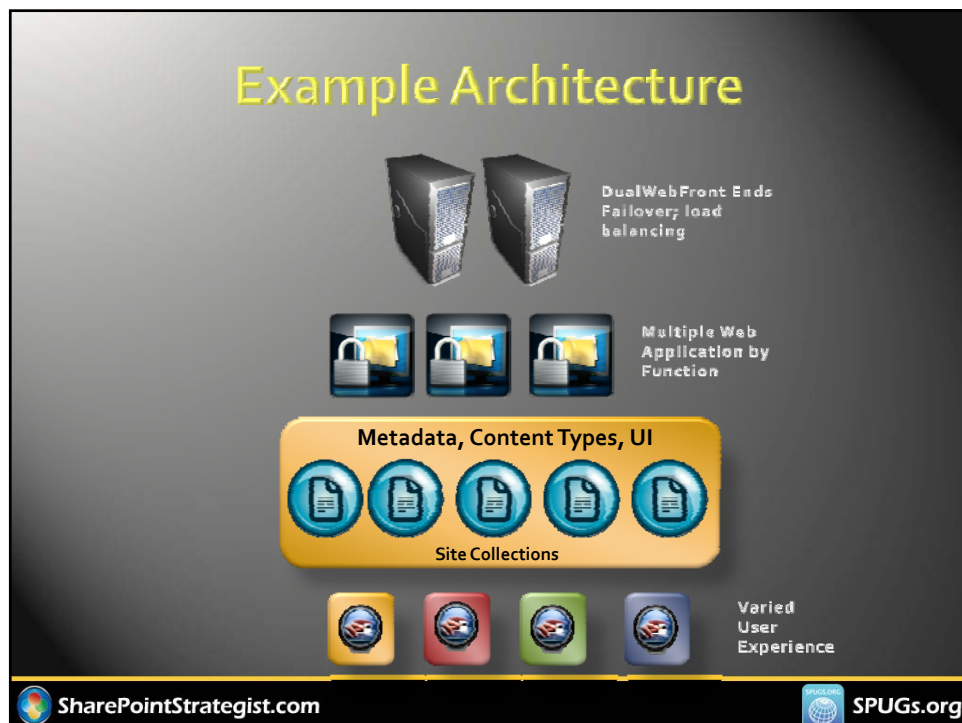
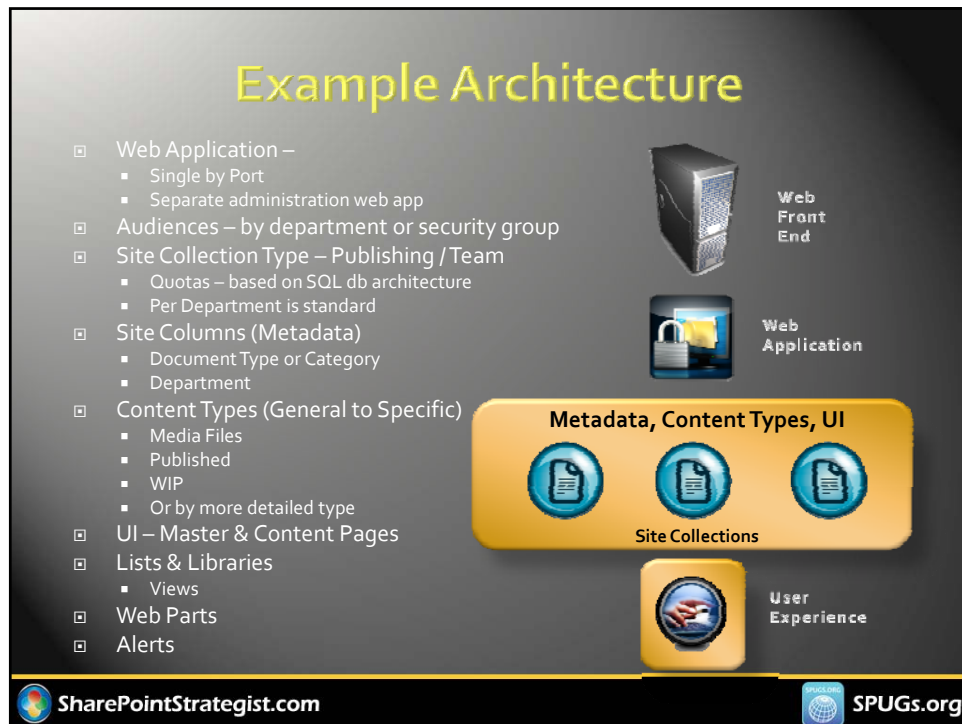
Design Considerations

- ▣ **Taxonomy** - How you classify data as expressed through:
 - Database & web app design
 - Content types
 - Custom columns
 - Other metadata
- ▣ **Legacy Integration**
 - Links to external databases & other LOB apps
- ▣ **Data Conversions**
 - Unstructured to Structured Data
 - File Stores

Compliance & Governance

- ▣ Information retention policy
 - Document & data life cycles
- ▣ Legal (litigation & other requirements)
- ▣ Executive management review/approval
- ▣ Enterprise change management policies
- ▣ SOX
- ▣ HIPPA

Each consideration can be handled by defining metadata with associated workflows, audit trails, publishing sites, content expiration and a taxonomy that identifies the owners & categorization of content.



Resources

- ▣ Microsoft TechNet
 - Architecture & Deployment tools
- ▣ MVP Community – Twitter, Blogs
- ▣ My Blog: SharePointStrategist.com
- ▣ Peers & User Groups
- ▣ Training