Taxonomies & Facet Analysis for Beginners

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Agenda

The Basics
Step 1: Scoping
Step 2: Designing
Step 3: Validating
A small problem...

Synonymy

Polysemy

Labels represent concepts, concepts attract information

Humans build common ground locally, not at scale
Why Taxonomies?

- Communicating with customers
- Process coordination
- Innovation, R&D
- Accessing knowledge in order to do something
- Risk and opportunity
How?

MAP

Discover

Navigation

Classify

Browse

Relationships

Keywords & Labels

Find

DESCRIBE

CLASSIFY
Forms

List
Controlled vocabulary

Hierarchy
Faceted taxonomy
Thesaurus

Relationships
BT, NT, RT, UF/USE

Ontology
Concepts, Attributes, Relationships

ANSI NISO Z39.19
ISO 25964
Facets

Distinct ways of approaching the same content

Orthogonality

Lighter, cleaner taxonomy structures used in parallel

Support progressive filtering
Facets

<table>
<thead>
<tr>
<th>Grape</th>
<th>Type (red, white, rosé)</th>
<th>Country, region</th>
<th>Vineyard</th>
<th>Vintage</th>
<th>Price range</th>
</tr>
</thead>
</table>

Facets are better at organizing very large collections for access by diverse communities

Distinct ways of approaching the same content

Orthogonality

Lighter, cleaner taxonomy structures used in parallel

Support progressive filtering
1. **Scope**

1. **Need:** business need and user needs?
2. **Scope:** the content to organise and describe?
3. **Form:** what taxonomy forms will you use?
Exercise: Web Resource for Taxonomy Professionals

1. Need: business need and user needs?
2. Scope: the content to organize and describe?
3. Form: what taxonomy forms will you likely use?
Evidence-led Design

Understand the information resources to be organized – **content warrant**

Understand the users and their key tasks – **user warrant**

Understand if information needs to be exchanged with other agencies in standard forms – **standards warrant**

Warrant – the evidence behind your design

Design = evidence + desired outcomes
Knowledge Mapping or Content Modeling?

**KNOWLEDGE MAPPING (internal orientation)**

- Document key activities
- Map/describe knowledge and information assets needed to perform the activities
- Collect the language of activities and assets from the maps and other sources
- Determine the facets that will be useful

**CONTENT MODELING (external orientation)**

- Collect use case scenarios & document how content is used/needed
- Model the content ecosystem
- Determine the facets and other metadata that will be useful
- Go looking for evidence of vocabularies
Use case scenarios

- Walk through the task
- Identify information sources
- Identify “next task”
- Use materials to collect vocabularies
## Use case scenarios

### Name of User Group/ User Type:
Faculty member (Assoc Dr yyyy)

### Main Activity of User Group:
Publication – Funded Research

### Task (short label):
Why Important:  |  When/Frequency:
Annual (once a year)

### Objective of Task:
To publish funded research articles

### Steps (information-related steps):
1. Funded research is awarded by institution
2. Dr aaaa (CRP) will announce regarding who will collaborate for the Funded Research.
3. Select research topic within scope of funding
4. Submit final draft for review to Dr bbbb, Dato cccc, Dr bbbb, Prof ffff through Email and Hardcopy.

### Information/Knowledge Resources Needed:

#### Internal Sources
- KMC Portal [kmportal.inceif.org](http://kmportal.inceif.org)
- Journal Database
  - Emerald, Zawya, Elsevier, Thomson Reuters
- Physical books in KMC
  - Waqf books
- Publisher Listing
  - List from CRP

#### External Sources
- Reputable publishers
  - Pearson
  - Palgrave-Macmillan
  - Oxford
- Academic Website
  - UIA website
- Organisation Website
  - IRTI, IDB,

### Links to/ Followed by other Tasks/Activities?
Quality research will be published in a book. Need to identify publisher and write book proposal.
Use case scenarios

Collectively, a diverse and representative range of use case scenarios produce a composite picture of:

- User warrant
- Content warrant
- Standards warrant

External Sources
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  - Pearson
  - Palgrave-Macmillan
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- Academic Website
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Links to/Followed by other Tasks/Activities?

Quality research will be published in a book. Need to identify publisher and write book proposal.
Content model (high level): Islamic Finance Taxonomy
Facets from content models: Islamic Finance Taxonomy

Document types
Event Types
Islamic Finance Topics
Institution Types
Islamic Finance Products
2. Design

1. Method: knowledge maps or content models?
2. Evidence: user warrant, content warrant, standards warrant?
3. Facets: what facets will you need?
Exercise:

1. Knowledge maps or content models?
3. Facets: what facets will you need?
Content model (high level): Islamic Finance Taxonomy
3. Validate

Open card sorts – discover common ways of organizing

Closed card sorts – test whether a structure is intuitive

Scenario-based tests – can users complete tasks quickly and successfully?
Questions?

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