

Orchestrating An Intranet for Knowledge Management

TAXONOMY
Centrally managed set of categories and topics used to tag documents and other resources intended for sharing in the Intranet. Different facets should cover different attributes of the content - eg the Business Activity referred to, the Document Type, the Customer Type, etc. The taxonomy is managed as part of the **METADATA SCHEMA**.
There are two standards for taxonomy and thesaurus development - ANSI/NISO Z39.19 (2005) and ISO 25964 (2011-12)

METADATA
Data that is captured about content (e.g. Author, Title, Topic, Security Classification) so that it can be managed and retrieved in a system.
Most elements of a Metadata Schema should be selected from predefined set of values known as a controlled vocabulary - each Taxonomy facet comprises a controlled vocabulary, as does a list of departments or staff names.
Each controlled vocabulary needs a designated manager and processes for updating.
A widely used standard for information resources metadata is the Dublin Core metadata standard (www.dublincore.org).

FILE CLASSIFICATION PLAN (FCP)
A classification of groups of records by the matters that they document. Business rules about archiving and disposal of the records are typically assigned to the different sections of the FCP.
FCPs typically grow incrementally, relate only to corporate records, are not managed as usable navigation structures, and are rarely suitable as an enterprise taxonomy. They can provide input for a taxonomy, however.
Since corporate records need to be retrieved and accessed alongside other documents, the taxonomy and the FCP should be aligned.

FILE NAMING CONVENTION
A standard way of naming files so that the contents and currency of a document can be rapidly assessed from a list of filenames in search results. This may be an important pre-requisite for document migration to avoid import problems with illegal filenames.

DOCUMENT TEMPLATES
Templates for frequently used types of document will help in document writing, ensure completeness, and can lessen the burden of tagging with metadata and taxonomy if tags are embedded in the template.

VIRTUAL LIBRARIES
Virtual libraries pull sharable documents together around common topics (based on taxonomy tags), while allowing them to be created and managed in their "home" department document libraries.

TAG CLOUDS
Tag clouds show the most frequently used tags, scaled by size according to the frequency of use. On the internet they are frequently user defined tags. On the intranet taxonomy tags are probably more useful.

SEARCH CLOUDS
Search clouds are similar to tag clouds but show the most frequently used search terms at the moment. They can be linked to "Best Bets" results pages by linking the search terms to taxonomy terms.

BEST BETS
Best bets are rules that tell the search engine which documents are the "best" results for any given search terms. They can be enhanced by linking frequently used search terms to taxonomy tags.

THESAURUS
A file that contains all the taxonomy terms and relationships between taxonomy terms, as well as known alternate terms that point a search engine towards the relevant taxonomy terms.

Knowledge and Information Management Governance
KIM Governance involves having an integrated set of policies, processes and defined roles covering:
Intranet Content Management and Maintenance
Taxonomy and Metadata Management and Maintenance
Records Management
Information Security
Knowledge Sharing
Data Management

Virtual Libraries on topics of common interest using taxonomy tags and pre-set search queries to pull relevant documents together
Templates Library with embedded metadata and taxonomy tags

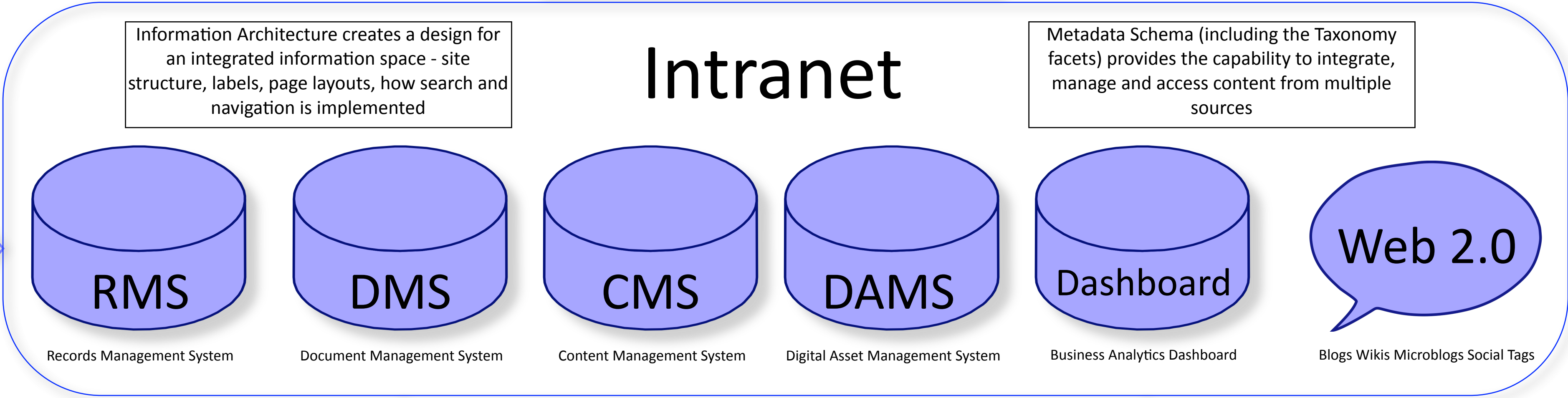
Faceted Taxonomy to accommodate different perspectives on the content
Search Clouds showing frequent search terms

Thesaurus containing alternate keywords pointing to taxonomy terms
Best Bets pointing to high value documents

Taxonomy governance includes review of search logs and user tags to assess candidates for Thesaurus or Taxonomy

Use Tag Clouds to show contribution profiles of Intranet users

Enterprise Search



Can emails be converted into corporate records?
Records Management education and awareness

Records Management Policy
Records Management Metadata
File Classification Plan with retention rules
Digitization - converting paper records into digital format - must include metatagging

Content Migration Plan (incl housekeeping)
File Naming Convention

Master Data Management to harmonize with Taxonomy and Metadata Schema

MASTER DATA MANAGEMENT (MDM)
Processes to ensure consistency and standardization in the use of data across different systems and platforms. In an Intranet environment, metadata for documents needs to be consistent with metadata and data fields from structured databases (e.g. customer names, product names, project names, etc). This is especially important when data and documents are being combined in management dashboards. There is an open source standard for MDM called MIKE2.0 at <http://mike2.openmethodology.org/>

RECORDS MANAGEMENT
Processes to ensure the maintenance, preservation accessibility and proper disposal of documents that record decisions, transactions and activities of an organization, to serve the purposes of ongoing management, evidence, or historical value.
In the era of paper files records management used to be the responsibility of records managers. Records management has not adapted well to the digital environment, where all creators of documents need to be conscious of their record keeping responsibilities.
The ISO standard for Records Management is ISO 15489 (2001).

INFORMATION SECURITY MANAGEMENT
Processes to assess information security risks on a regular basis, to implement measures and controls to avoid and mitigate risk, and to recover from security breaches. People assume that information security refers mainly to IT systems, but in fact it also covers the security of physical environments, people to people transmission and documents. Information security needs to be balanced with an appraisal of the need for information sharing. The ISO 27000 family of standards covers this.