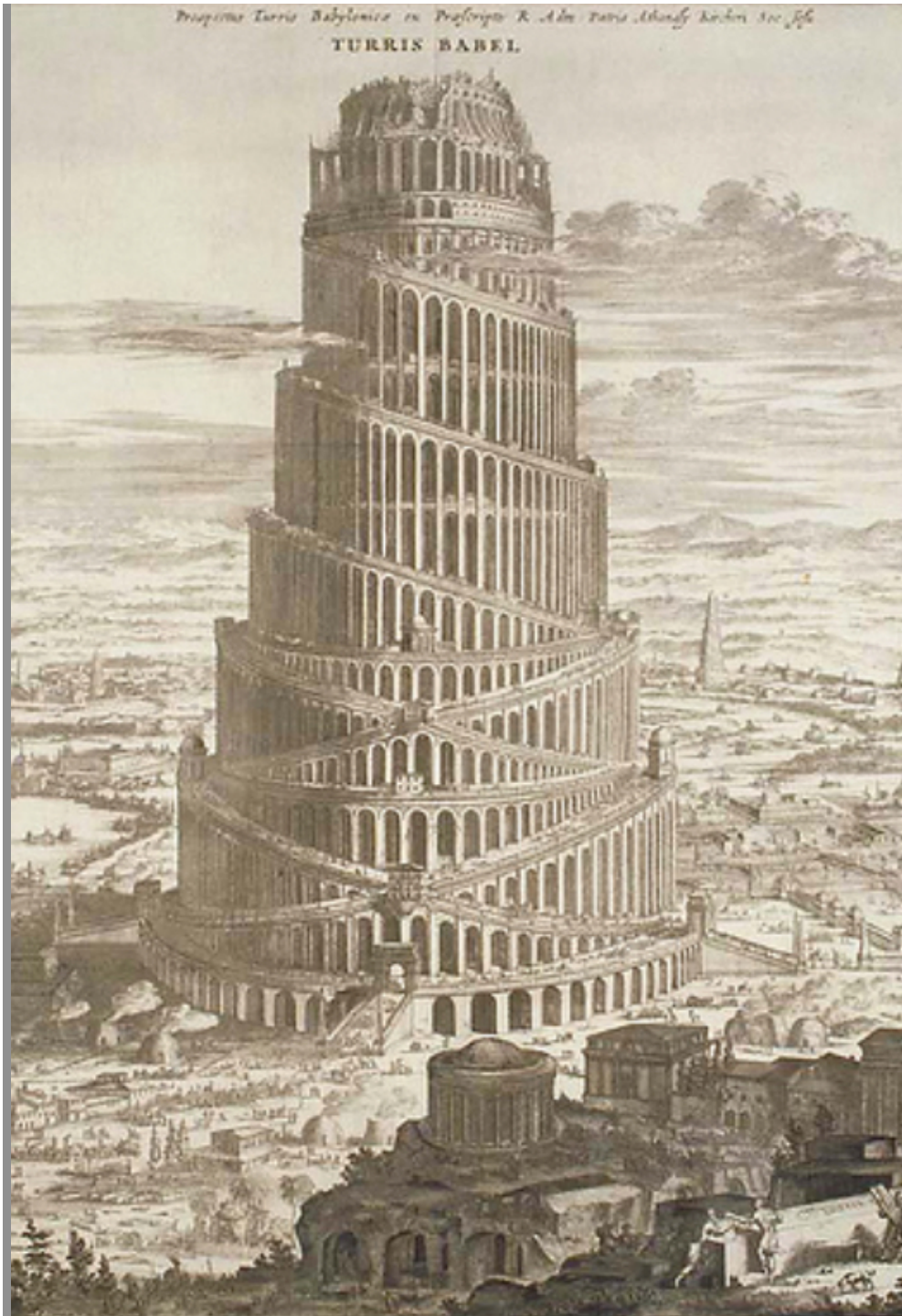


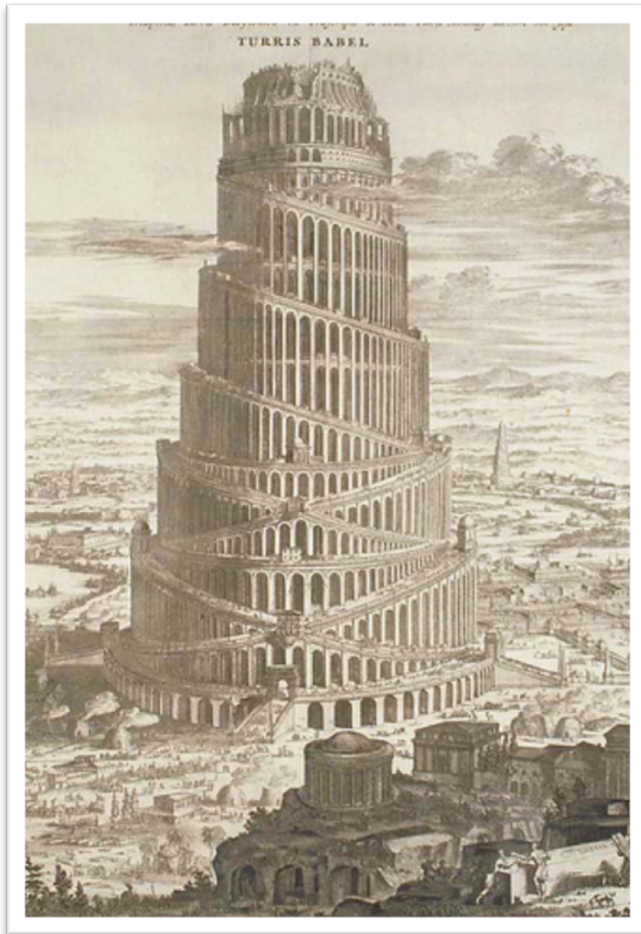


Taxonomies & Facet Analysis for Beginners

Patrick Lambe

November 2016

Agenda



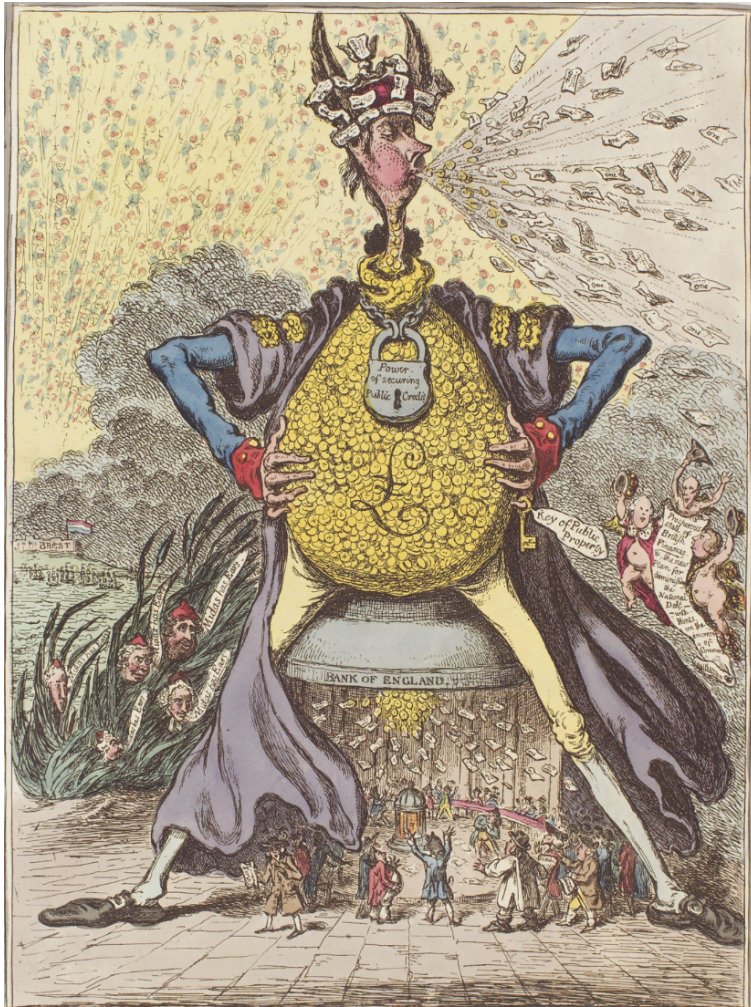
The Basics

Step 1: Scoping

Step 2: Designing

Step 3: Validating

A small problem...



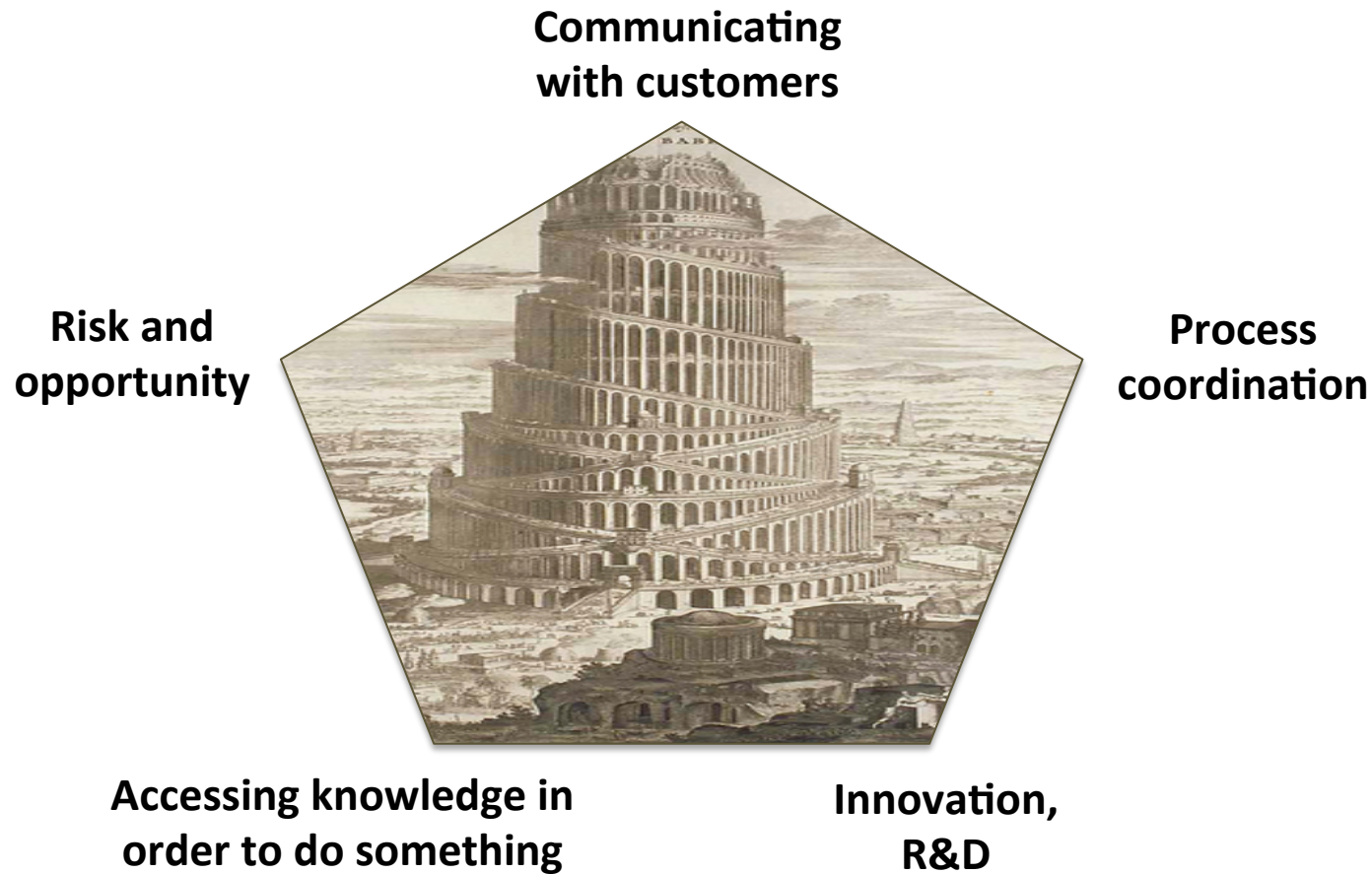
Synonymy

Polysemy

Labels represent
concepts, concepts
attract information

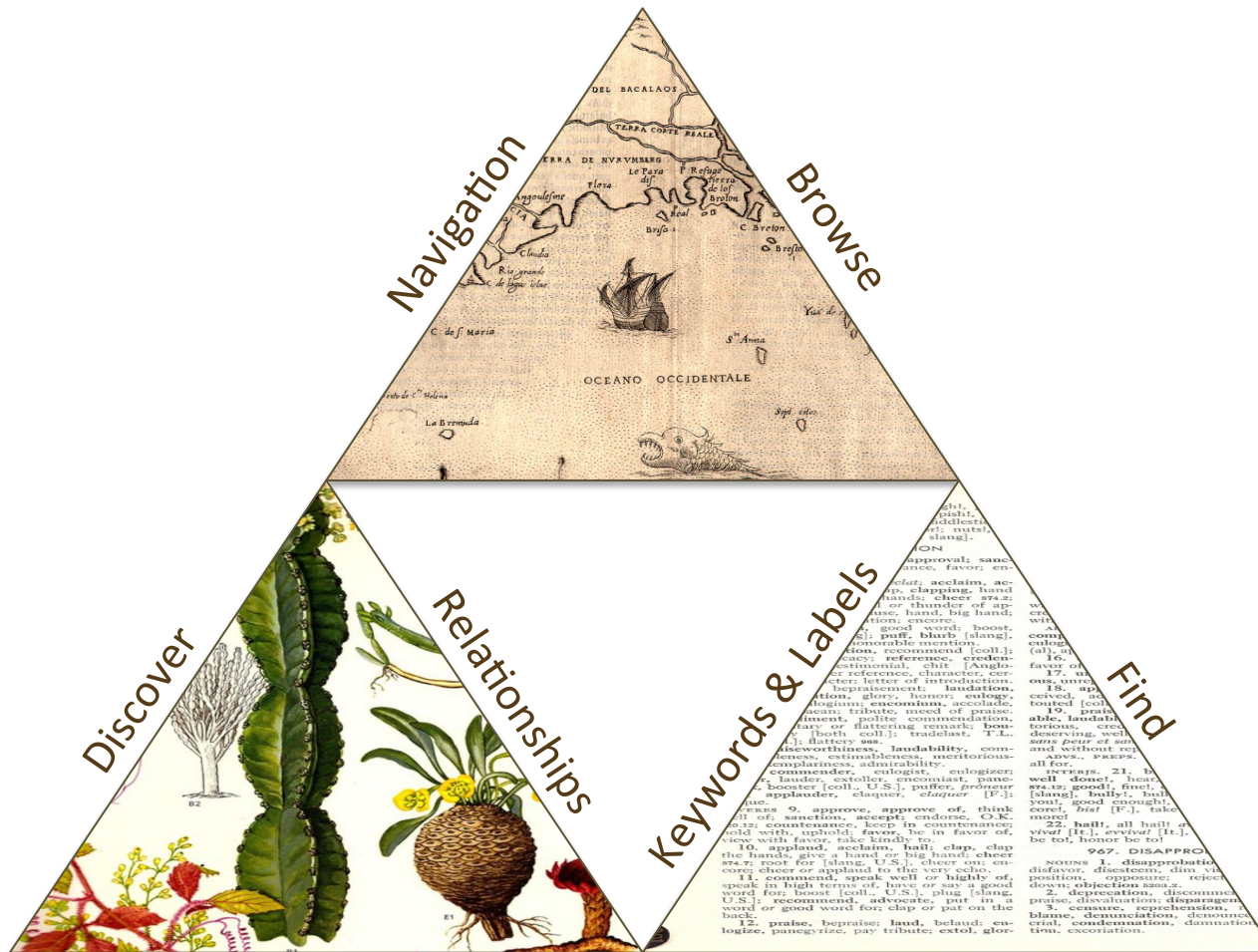
Humans build
common ground
locally, not at scale

Why Taxonomies?



How?

MAP



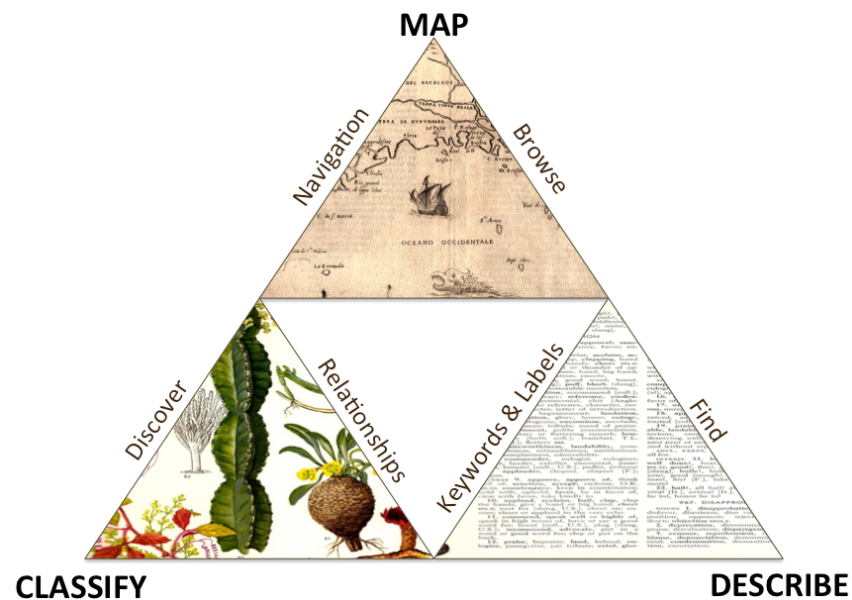
CLASSIFY

DESCRIBE

Forms

List

Controlled vocabulary



ANSI NISO Z39.19
ISO 25964

Hierarchy
Faceted taxonomy
Thesaurus

Relationships
BT, NT, RT, UF/USE

Ontology

Concepts, Attributes, Relationships

Facets



Distinct ways of
approaching the same
content

Orthogonality

Lighter, cleaner
taxonomy structures
used in parallel

Support progressive
filtering

Facets



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

Distinct ways of
approaching the same
content

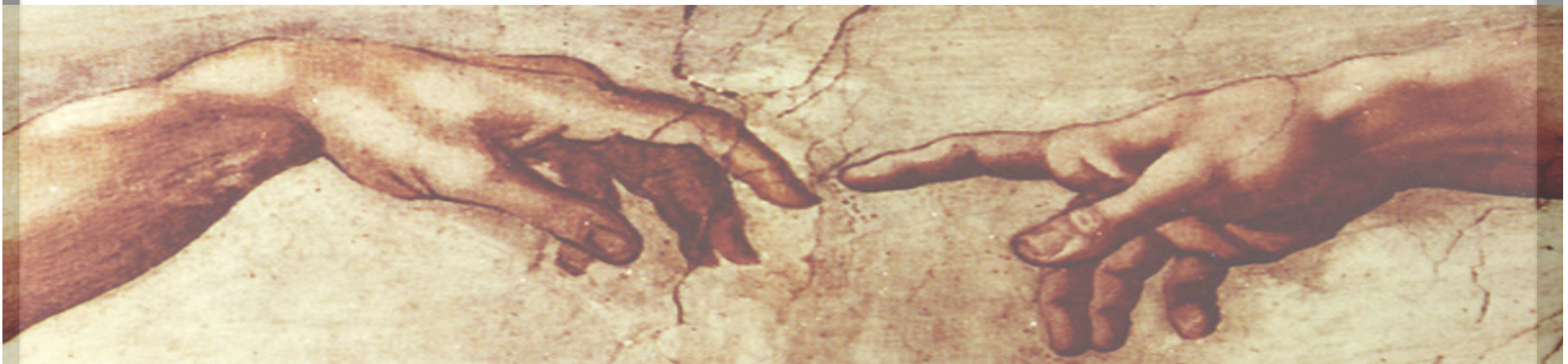
Orthogonality

Lighter, cleaner
taxonomy structures
used in parallel

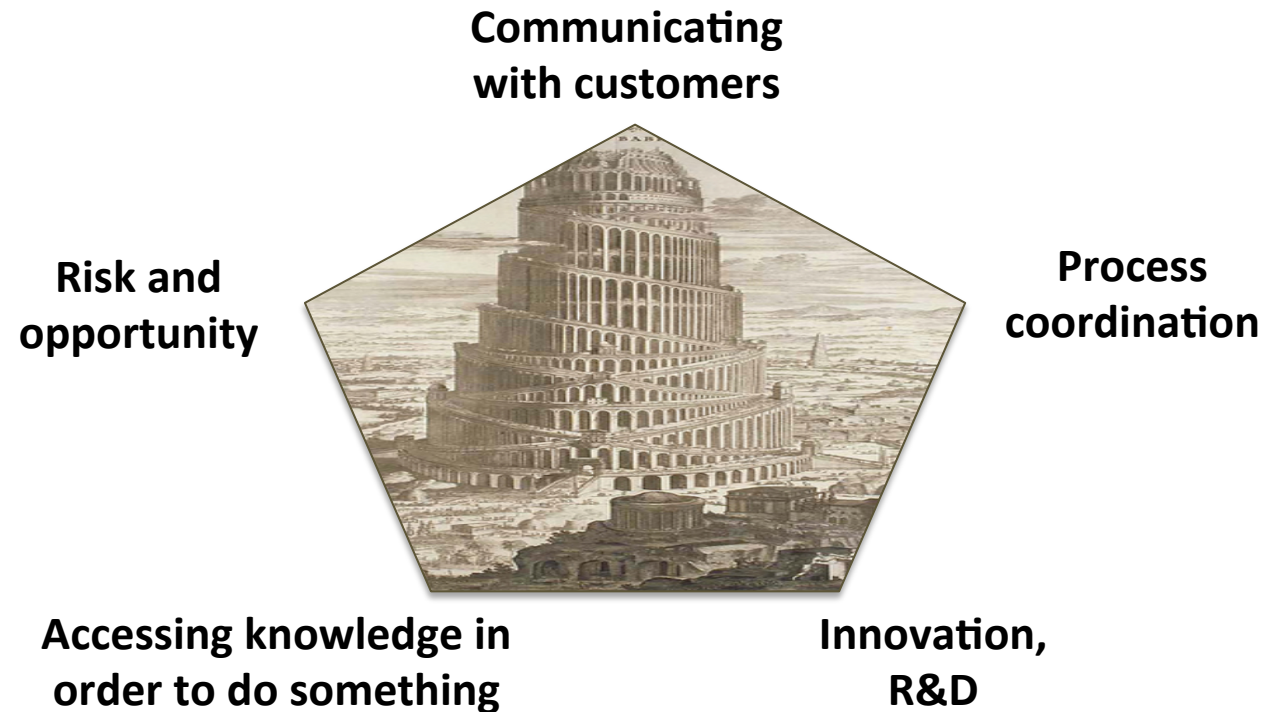
Support progressive
filtering

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**

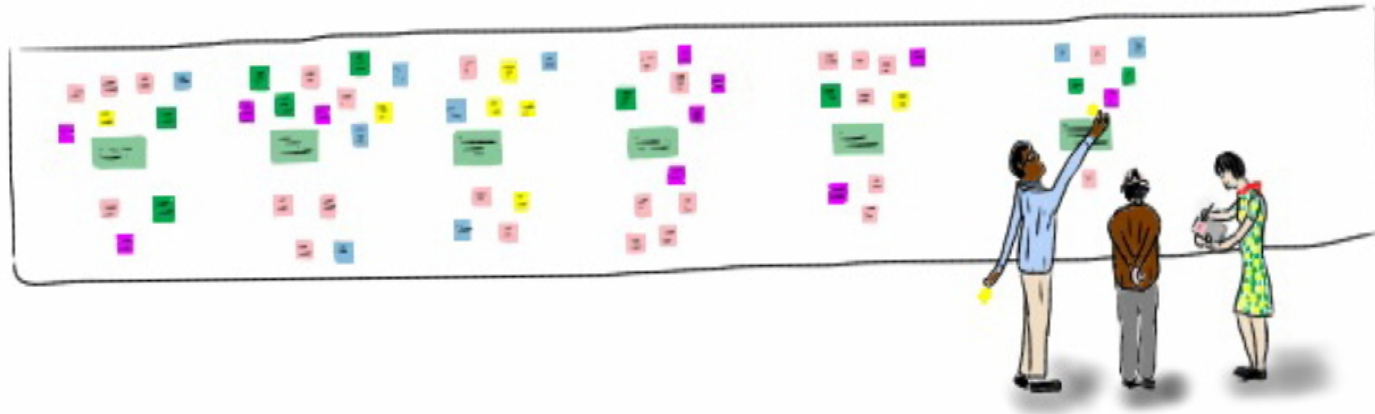
Understand the users and their key tasks – **user warrant**

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

Name of User Group/ User Type: Faculty (Assoc Prof Dr xxxxxx)	
Main Activity of User Group: Faculty member (as trainer)	
Task (short label): Training 1. Econometrics 2. How To Become a Leader? Transformation from Manager to Leader	
Why Important:	When/Frequency: Approximately 6 per year
Objective of Task: To conduct a Corporate Training	
Steps (information-related steps): 1. University/organisation organizing the training session will approach the faculty members and enquire their availability. 2. Topic of the training session is provided. 3. The faculty members usually attached themselves as an apprentice at first, and gradually grow into facilitator role. 4. Plan and conduct for training session. 5. Prepare the presentation slides. 6. Conduct research and understand the audience and their participation.	Information/Knowledge Resources Needed: Internal Sources • Based on previous research and presentation slides. External Sources • World Bank • Academic -UPM • Database online -Elsevier -Emerald • Enerdata Search www.enerdata.net • Research Gate www.researchgate.net • Google Scholars www.scholar.google.com • Meeting with Experts -Research Group: 'Jom Social Group' • UPM Library
Links to/Followed by other Tasks/Activities?	

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

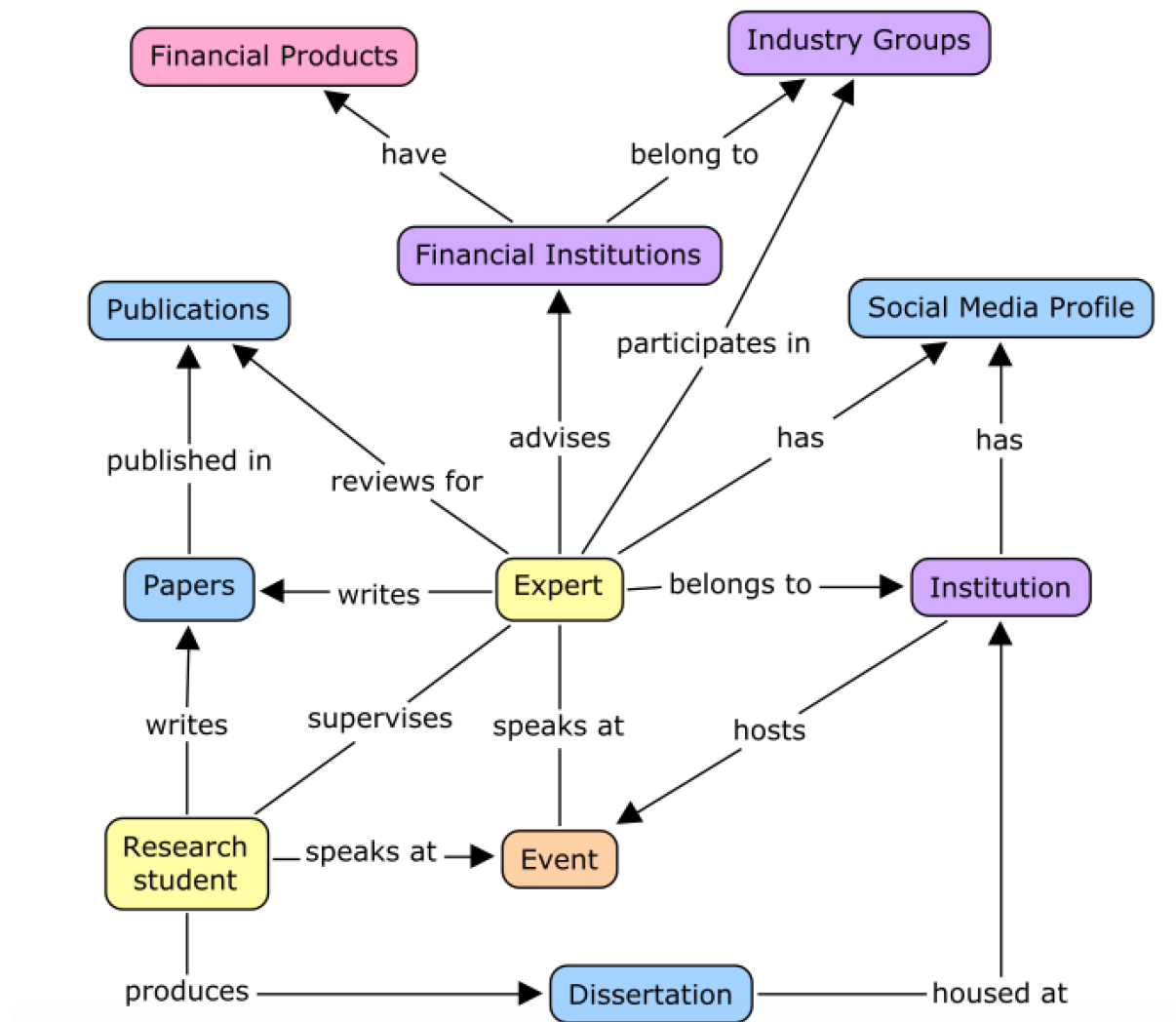
Use case scenarios

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: Annually (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 ccccc, Dr bbbb, Prof ffff through Email and Hardcopy.	Information/Knowledge Resources Needed: Internal Sources • KMC Portal kmcportal.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.	

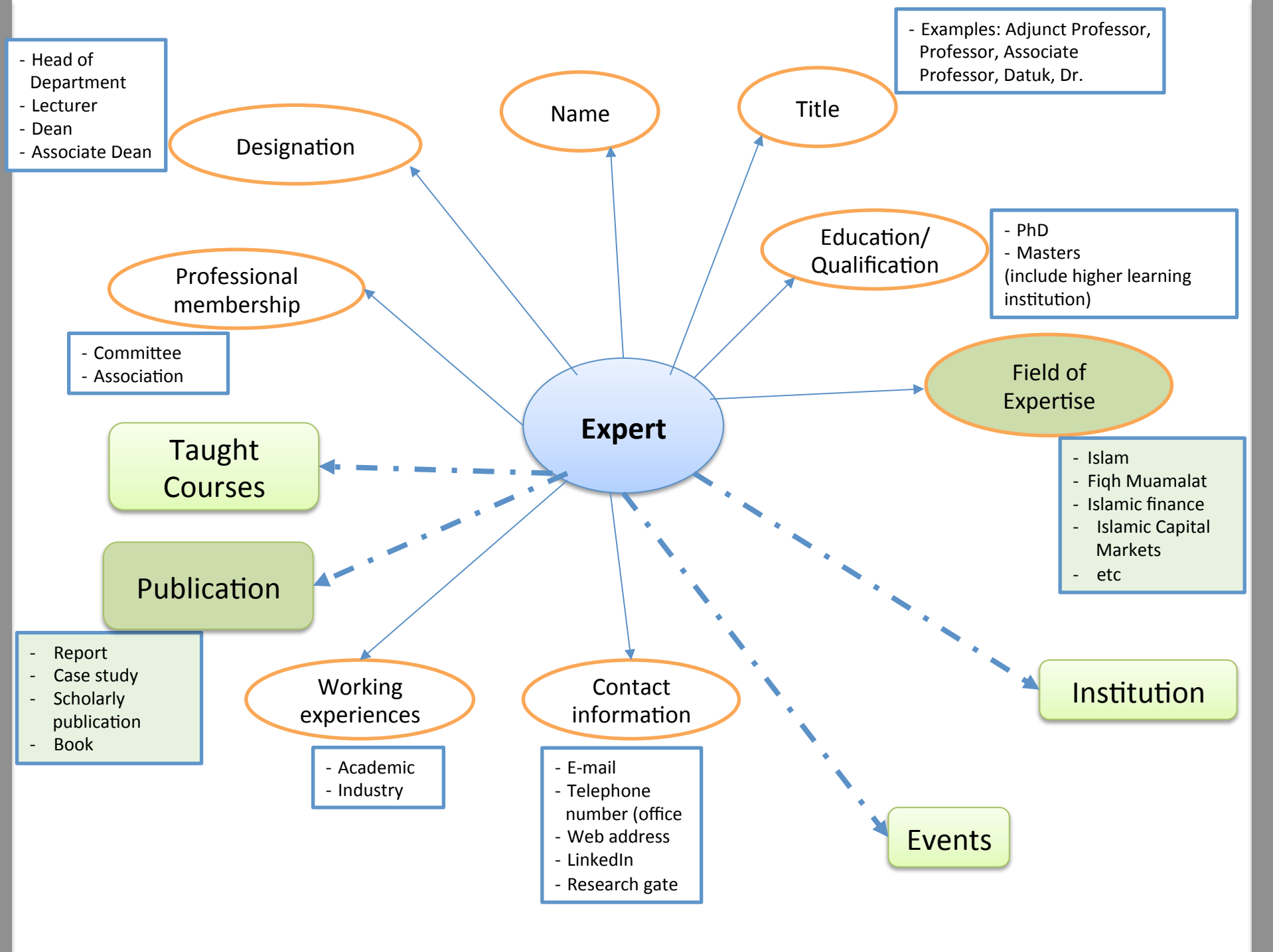
Use case scenarios

Name of Faculty (s)	Name of User Group/ User Type: Faculty member (Assoc Dr yyyy)	
Main Activity of Faculty member	Main Activity of User Group: Publication – Funded Research	
Task (short label)	Task (short label):	
Why Important:	When/Frequency: Annually (once a year)	
Objective of Task: To publish funded research articles		
Steps (information-related steps):	Information/Knowledge Resources	
Collectively, a diverse and representative range of use case scenarios produce a composite picture of • User warrant • Content warrant • Standards warrant		
Links to	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.		

Content model (high level): Islamic Finance Taxonomy







Facets from content models: Islamic Finance Taxonomy

Document types

Event Types

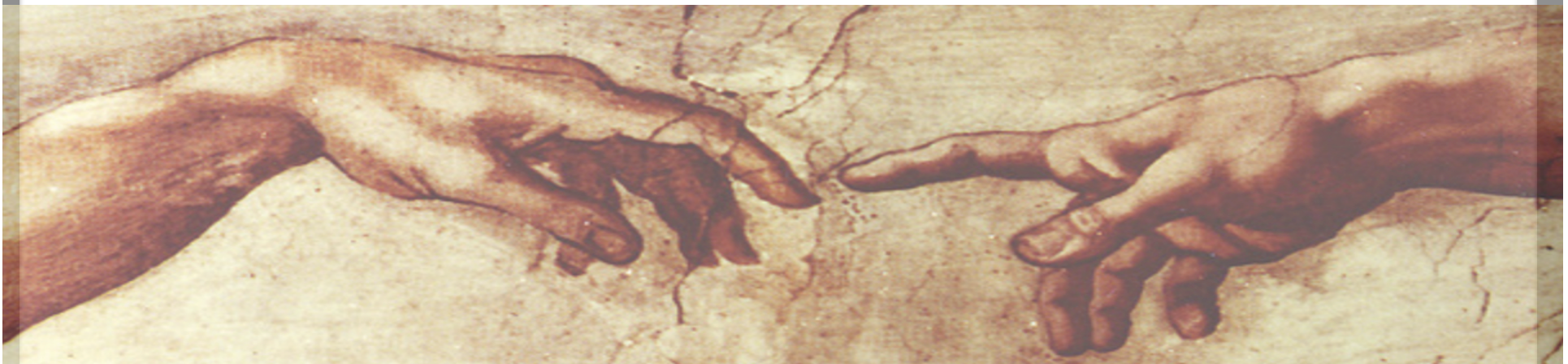
Islamic Finance Topics

Institution Types

Islamic Finance Products

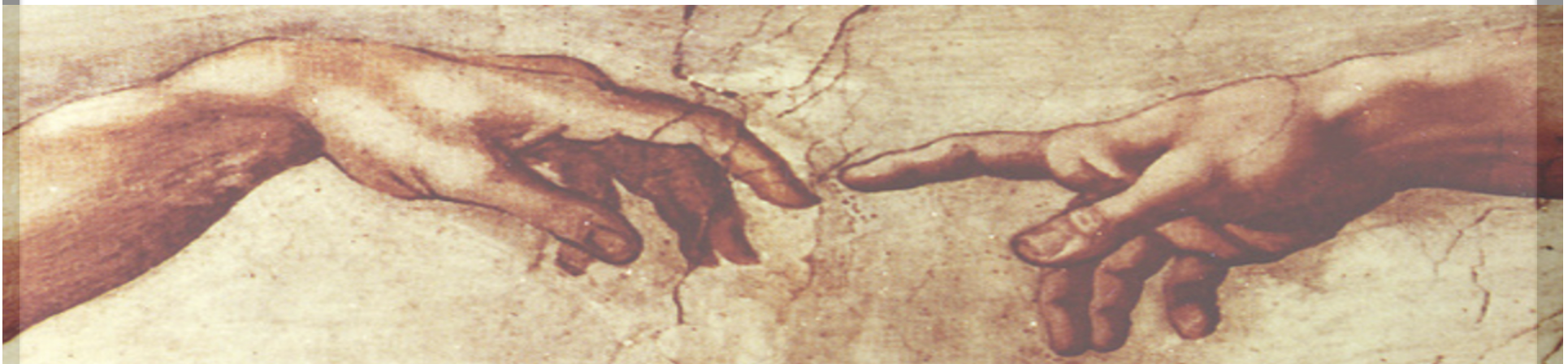
2. Design

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

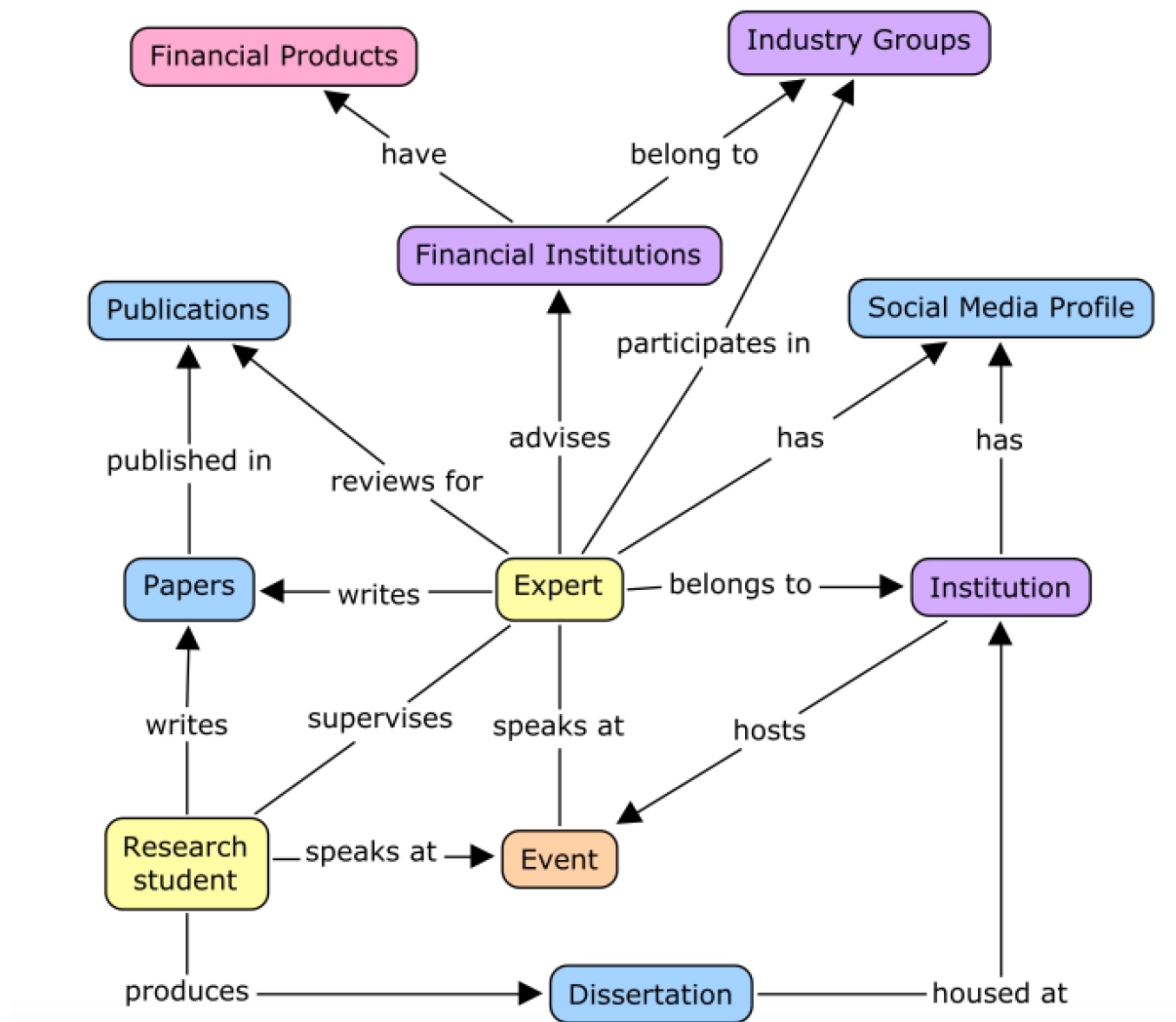


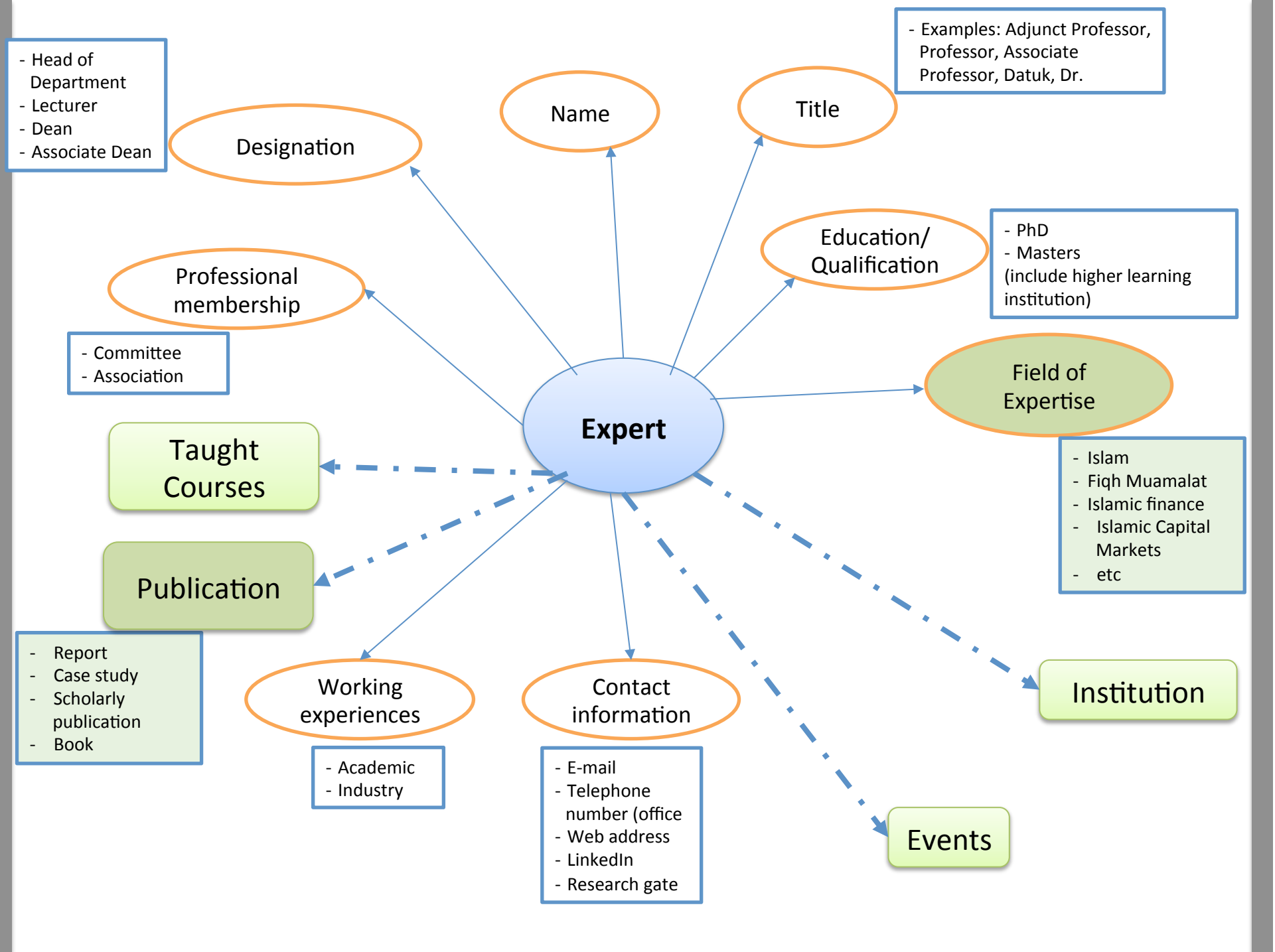
Exercise:

1. Knowledge maps or content models?
2. Which users? How will you engage? Which content? How will you discover? Which standards, and why?
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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www.straitsknowledge.com