
Project Profile—Designing a Content Taxonomy

By Peter R. Hybert

Summary

A client gave us the opportunity to apply the principles behind our content inventory design approach to designing an organization scheme for documents shared across their organization.

We used a combination of design and iterative testing to address the various needs of content owners and multiple users. While computers allow for a great deal of flexibility in display and access of content (i.e., through links, databases) there is still a need for a logical structure for storing documents. That structure depends on the users and the type of document (e.g., information/record, template/form, or reference).

What is a Content Taxonomy?

The simple answer is to compare it to the file structure in your computer (or office). The taxonomy is the organizational scheme for whatever content. Like any organization scheme, it is important that it works for the people who have to use it, not just the person that designed it.

Recently we did a project to design a document taxonomy for a client. They were a small organization but, as it turns out, they seemed to need most, if not all, of the same structural elements as a larger organization. In fact, that was a key learning—there is probably a semi-standard structure for content that works for most businesses. The primary variable would be the *amount* of content (and subdivisions).

The Business Situation

The client was purchasing a Documentum system to manage their organization's documents, including plans, reports, and even correspondence. So, before moving all their current files from company and department network drives (and individual drives) they wanted to think through an organizational scheme for that content.

They contacted PRH Consulting after attending a presentation we did at an ISPI conference. Our approach for defining curriculum content and performance competencies seemed to the client like a natural fit with the task. Our bias was to organize from a task perspective (i.e., who needs to do what with the content) vs. the content itself (i.e., what is it). More on this later.

Our charge was to work with a designated set of “content stewards” in the client organization to determine how the documents would be labeled and organized for use by both their “home office”

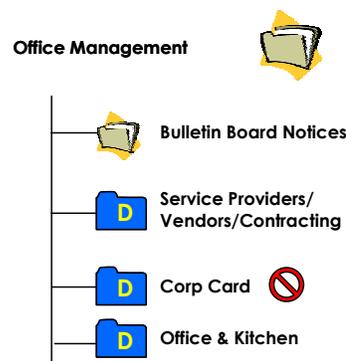
and approximately 30 satellite offices. They were in a hurry so we decided to use a two-day group working session to accelerate the process.

The Solution

The result of the project was a simple design document that could also be used as a job aid once the files were reorganized. The design document/job aid used a graphical layout to show

- Folders and subfolders
- Access limitations
- Document naming conventions.

Below is an example of a series of folders with a given function. Access to some of the folders was limited to those within the department and others were limited to those with a password.



Project Process and Team

As mentioned above, the first step for us¹ (after getting familiar with the business through a series of phone interviews) was to meet with the content stewards as a group to begin the process of defining the file structure.

In the meeting we first refined a straw model of the stakeholder segments (e.g., populations of users with common needs). This gave us a common framework and vocabulary and an initial understanding of the overall business requirements.

¹ Actually, the first step for the client was naming and orienting the content stewards. It took some doing given the existing workload and the “unknown” of a role that didn’t previously exist in the organization.

We then stepped through a “requirements-first” process that ended up with a Post-it® straw model of the various folders, sub-folders, and example contents. Then the stewards² refined the model by talking through various scenarios—common work activities in which they would need to access information and confirm that the straw model worked (or changed it so that it worked).

The final activity of the process was defining access rules and file naming conventions.

Conclusions

The key organizing principle/the “independent variable.” Should the content be stored according to its use, according to who owns or publishes it, alphabetically by name? We started by organizing files based on who would use them for what purpose. This structure ensures that people who browse will be able to find it. (People who search or have shortcuts will find the file anyway.)

Occasionally, there were files with multiple uses—in those cases we based their location on the contents.

The type of document drives access needs. There are a large number of documents in any organization. There are contracts, compatibility tables, databases of customer information, correspondence, reports, presentations, etc. For storage in the taxonomy structure, three categories can address the majority of documents.

- Records
- Templates/Forms
- Reference

Records are any documents that store historical information. Typically, correspondence and contracts fall into this category. They primarily need to be kept but are not added to and rarely referenced.

Templates and forms also have a defined use pattern. They are copied and then used to create other documents.

Reference documents are used for “look-up.” They need to be stored in a locations where the primary users will naturally look for them. These also should be kept within a low number of “clicks” to ensure people *will* look for them.

File/folder hierarchy and structure. We also defined some standard structures for within folders. For example, this organization had a large number of programs for which it provided oversight. So, for each program, a similar set of sub-folders were defined so that users would know that contracts, for example, were always kept inside the program folder rather than looking in “Admin” and then

² In many cases, we were able to work with one function (and one content steward) at a time to reduce the drain on the organization. Then, near the end, we brought the group together.

“Legal” and wading through files on the building leases, intellectual property rights, etc. The principle is that the user isn’t looking for some legal stuff, they are looking for information related to a specific program.

A more subtle challenge arises when you shift away from the mental picture of a filing cabinet towards a hyperlinked file structure in a computer. In the previous example, you could easily have the contract stored *anywhere* and just put links in the program folder and admin/legal folders. And you can define key words so a user won’t even have to consider where to look—they can just do a search. So, how should we think about file/folder organization when the option exists to offer multiple organizations?

We made some assumptions

- ◆ Often computer searches are unsatisfactory.
- ◆ The original file still has to be stored somewhere and you only want one copy or you will have version control problems.
- ◆ People can still relate more easily to the physical storage model.
- ◆ Many users like to hunt...in fact, they often don’t make use of the organization structure much at all.

So, we didn’t want to rely on the links to provide the organization. Instead we built a logical base organization scheme for the original files to which any additional “windows” (e.g., website links) could connect.

How deep into the data storage layers do you want to dig? Do you want to manage drives that are common across the entire company, shared across a single department or project, individual drives? Do you want to include content that exists in a database?

Our focus was on the shared content, however, we ended up getting down to department-only folders in many cases. And we did define a generic recommended structure for individual drives (but it is a little unrealistic to think you will control how people organize their own desktops...and there is little return for the amount of effort it would take).

How do you want to work the transition to the new structure? Figuring out the new file structure is really the easy part...the hard part is moving all the files! Just like when you move into a new house, you don’t really want to move junk you should really throw out. One approach is to move the files that have been recently accessed and then make a decision on those that are less recently used. Another is to set up the structure and let people move files in as they use them. Then in a year or so you can remove and archive any that remain in the old structure.