

❖ SchemaLogic Overview

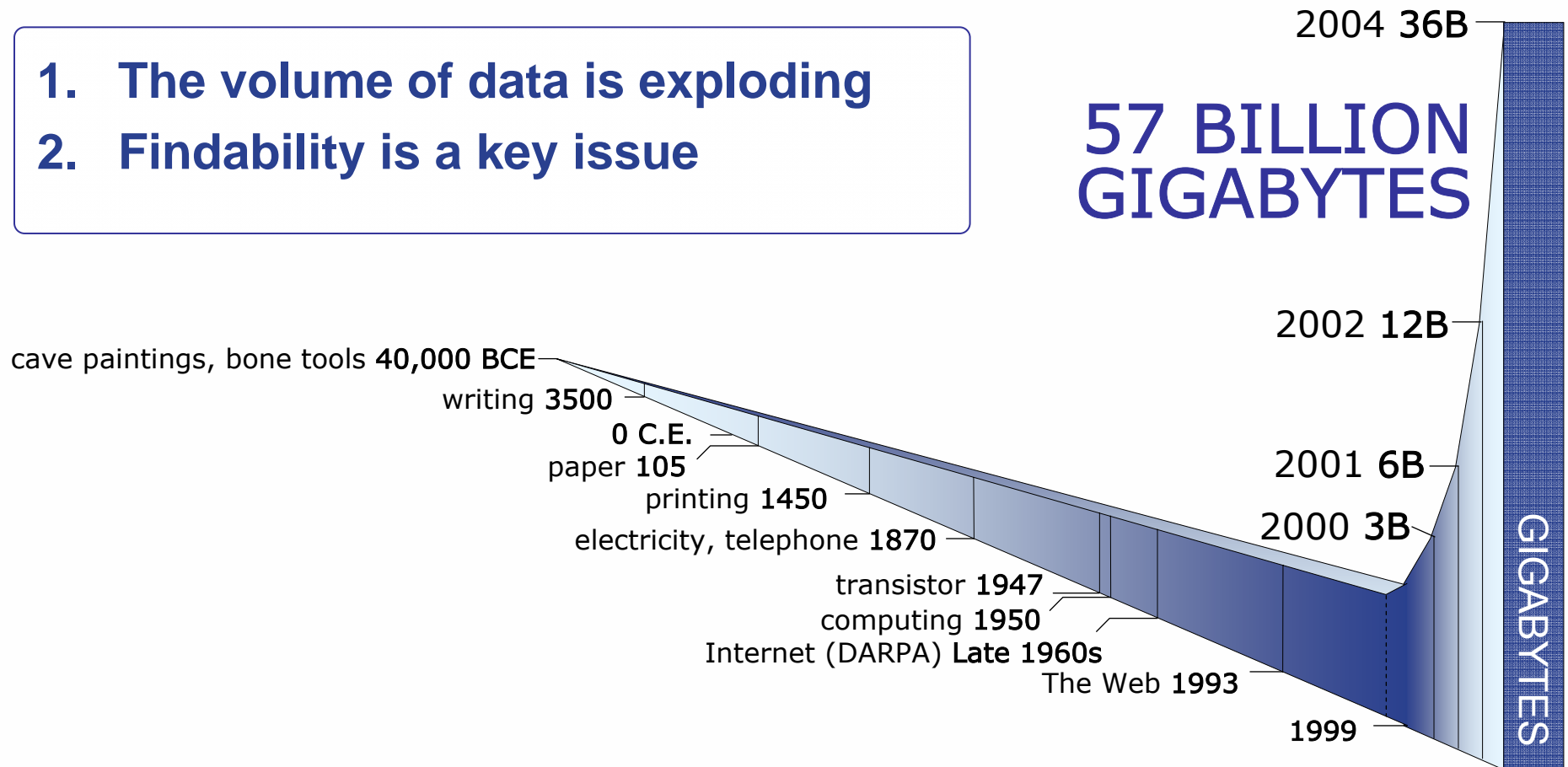
Enterprise Metadata and Taxonomy Management

Wednesday, December 7, 2005



A Problem of Immense Scale

1. The volume of data is exploding
2. Findability is a key issue



Source: UC Berkeley
School of Information Management and Systems

93% of all data is born digital!



Analyst Review – Why Enterprise Taxonomies Matter

- ❖ “Through 2006, more than 70% of firms that invest in unstructured information-management initiatives won't achieve their targeted return on investment, due to underinvestment in taxonomy building (0.7 probability).” **Gartner**
- ❖ “By 2007, 60 per cent of information access implementations will combine taxonomy, search, ontology and information visualization technologies.” **Gartner**
- ❖ “Businesses spend an estimated \$750 Billion annually seeking information necessary to do their job. 30-40% of a knowledge worker's time is spent managing documents.” **Gartner**

Gartner

The Top 10 Technologies

- ▶ Instant messaging
- ▶ Wider use of WLANs
- ▶ Taxonomies
- ▶ IP telephony
- ▶ Software as services
- ▶ Real-time infrastructure
- ▶ Utility computing
- ▶ Grid
- ▶ Network security convergence
- ▶ RFID tags

Source: Gartner

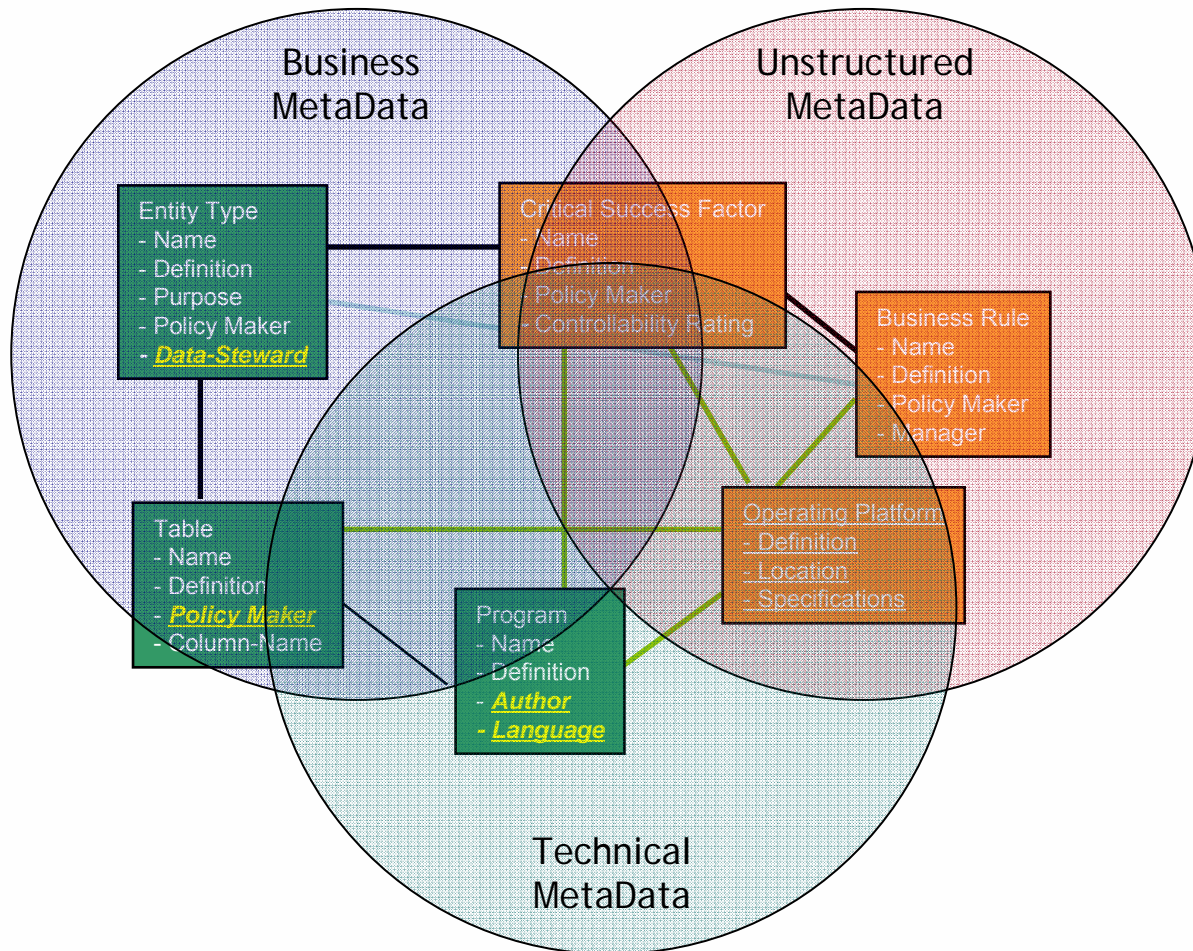
What is an Enterprise Metadata Model used for?

- ❖ A Codification of corporate knowledge and information assets
- ❖ A way of identifying, maintaining, and updating relationships between different types of information
- ❖ A tool that can be used to help users get faster access to the most relevant information needed for analysis and decision making
- ❖ A way of standardizing the way information is described and accessed across an organization
- ❖ Linking information

Characteristics of an Ideal Enterprise Information Modeling Environment

- ❖ **Convergence of structural data modeling with taxonomic/reference-data modeling and management**
- ❖ **Simple but complete model that Business Domain Experts and IT professionals can both get behind**
- ❖ **Rewards standardization and reuse while respecting the need for variation in local extension and presentation, all within the repository.**
- ❖ **Pro-active impact analysis, change control and consensus enforcement mechanism to manage the implication of model sharing**
- ❖ **An active publication/subscription framework that allows model changes to be implemented and automated**

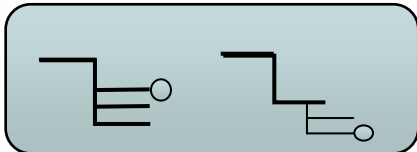
Metadata effects all IT systems



- most MetaData initiatives (and vendor products) organize themselves around something called a "MetaModel".
- this helps to bring "structure" to metadata definitions and objects
- it also helps organize the points of overlap or intersection

Ambiguity

*One context:
different expressions*



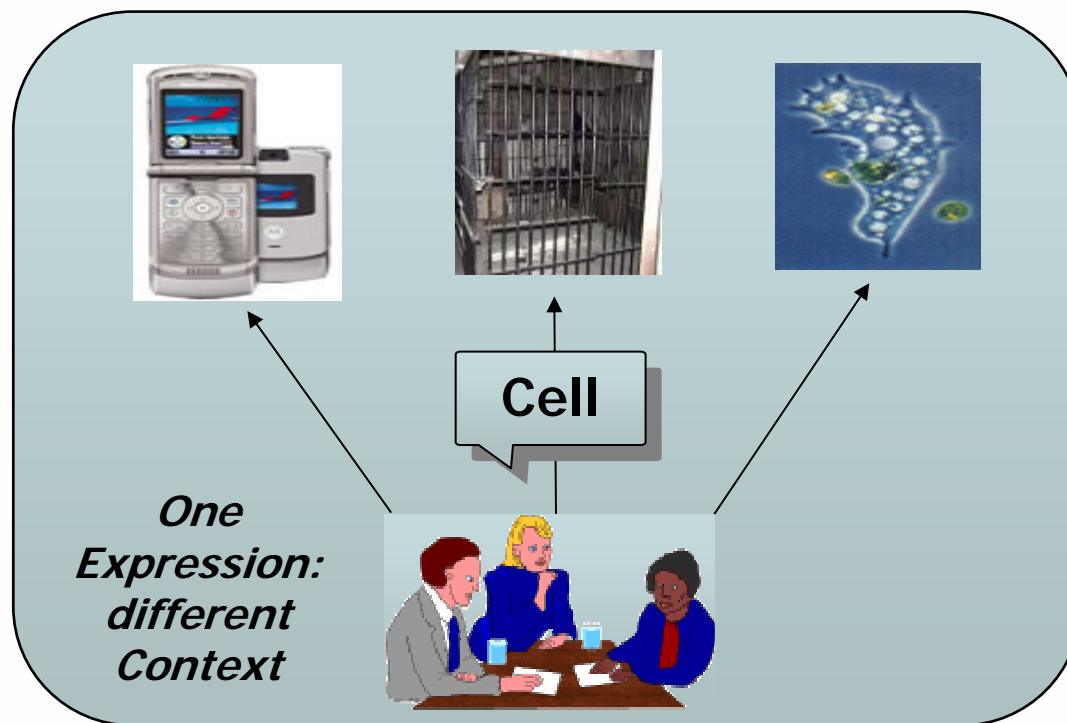
Cust_ID
Customer#
Client_no
CUST1

- Contributor
- Author

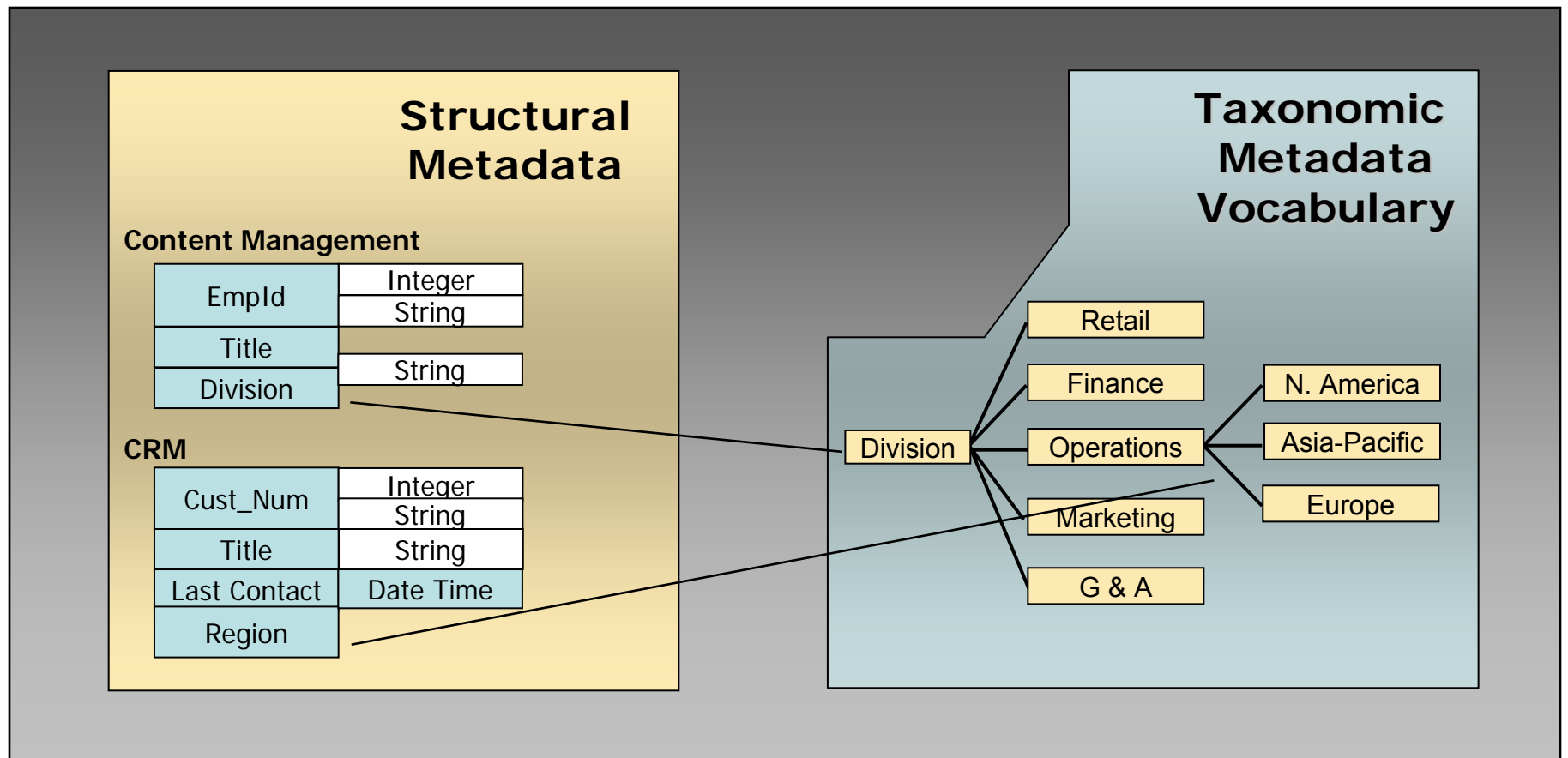
Price:
Cost:

Severity = 1
Sev_Code = A

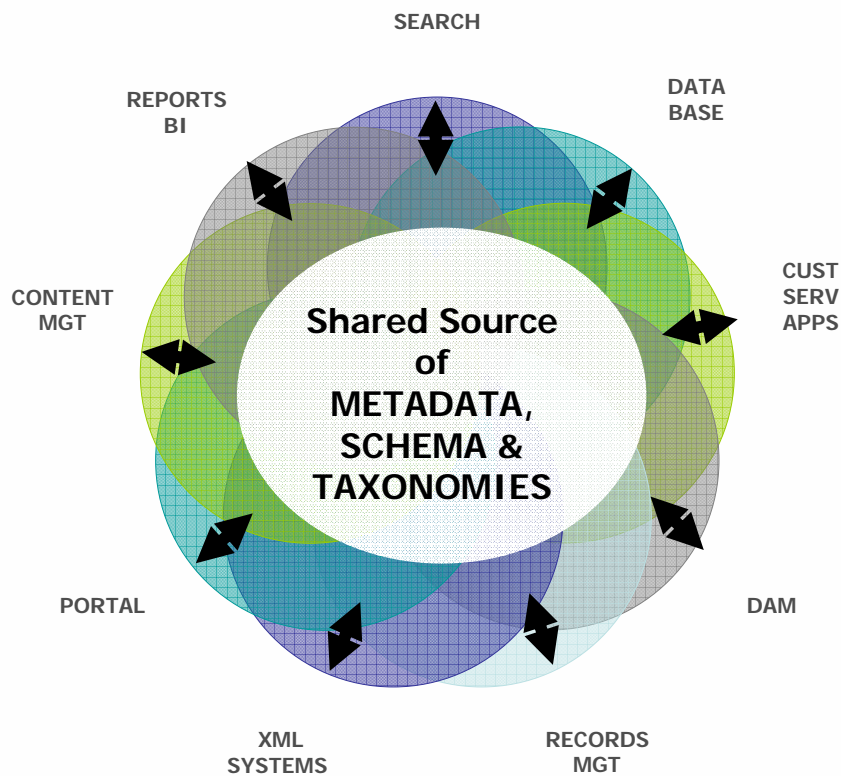
Duration = 1
Duration = 1



Modeling Inconsistency



Authoritative Source



Functionality

- Coordinate and Maintain Shared Metadata
- Vocabulary and Taxonomy Management
- Collaboration and Reconciliation
- Governance and Change Management
- Synchronization of Standards

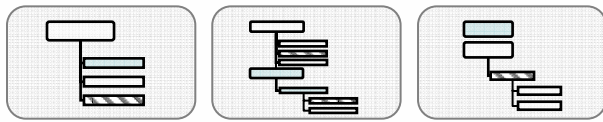
Benefits

- Findability
- Governance
- Agility/Change
- Efficiency

Users

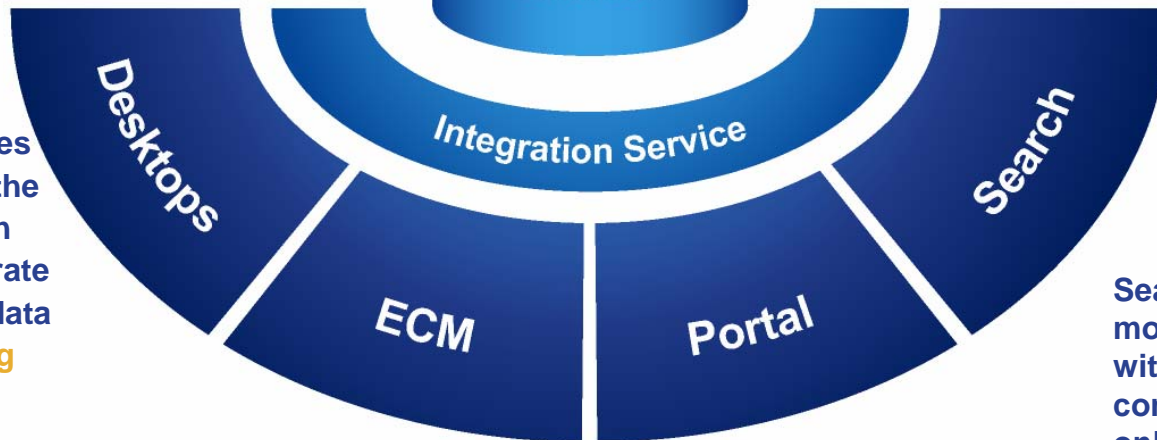
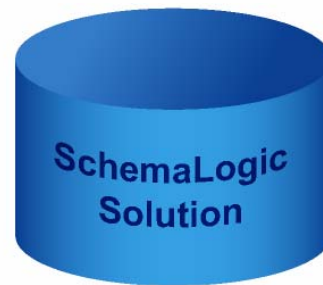
- Portal and Content Management Teams
- Enterprise Information Architects
- XML Development Teams
- Taxonomists, Analysts, Library Sciences
- Database Managers

The SchemaLogic Solution



Taxonomies and Classification Models imported from source systems and synchronized into enterprise taxonomy

Business subject matter experts & knowledge engineers can collaborate on global terminology and classifications driving information findability



Standard vocabularies can be integrated at the point of information creation driving accurate document-level metadata & context ... **Linking Desktop Search to Enterprise Search**

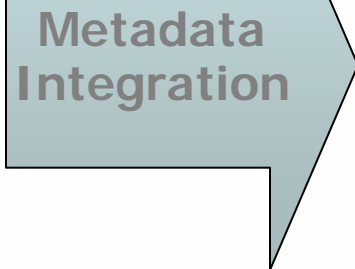
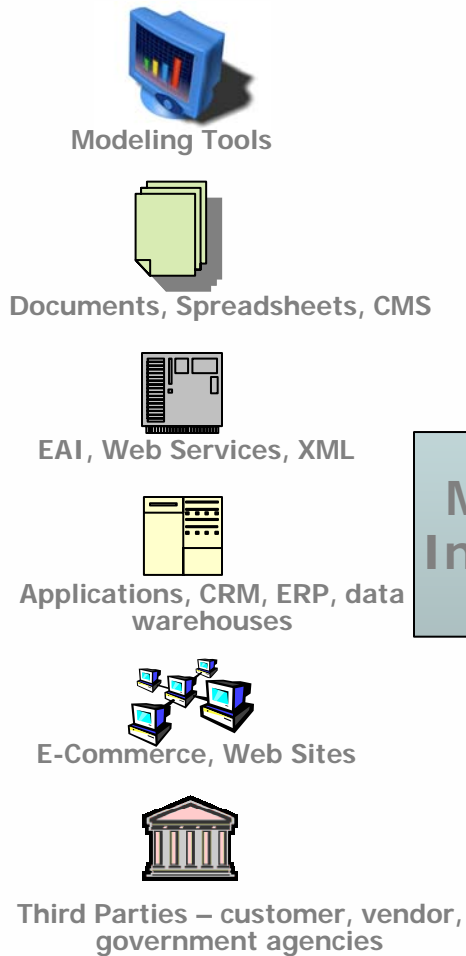
Search engine results more closely aligned with user-oriented concepts vs. key-word only

Standard classifications applied to all content silos ensure content-store metadata is consistent and complete

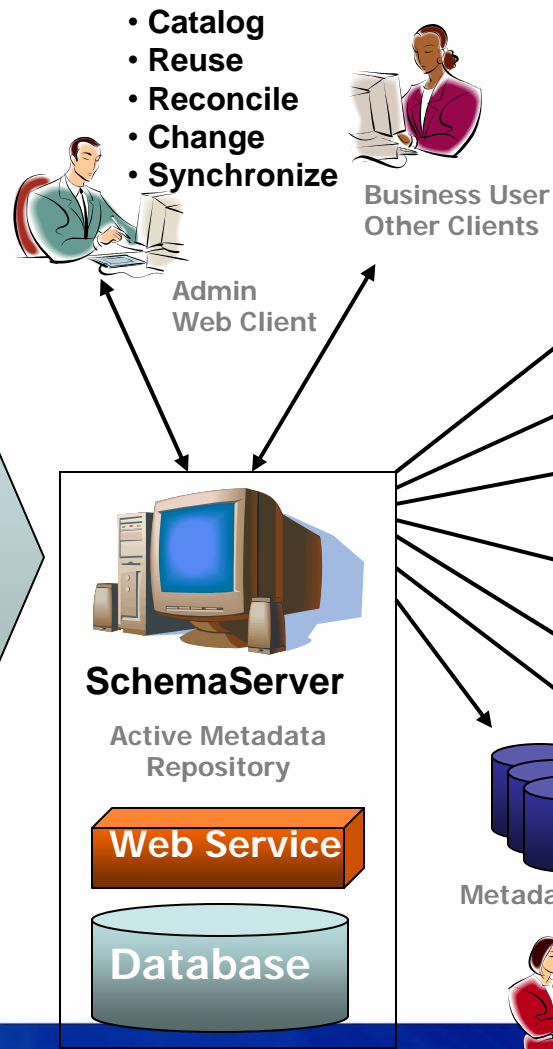
Better support of faceted navigation... "I'm not sure what I'm looking for but I know how to get there..."

Managed Environment

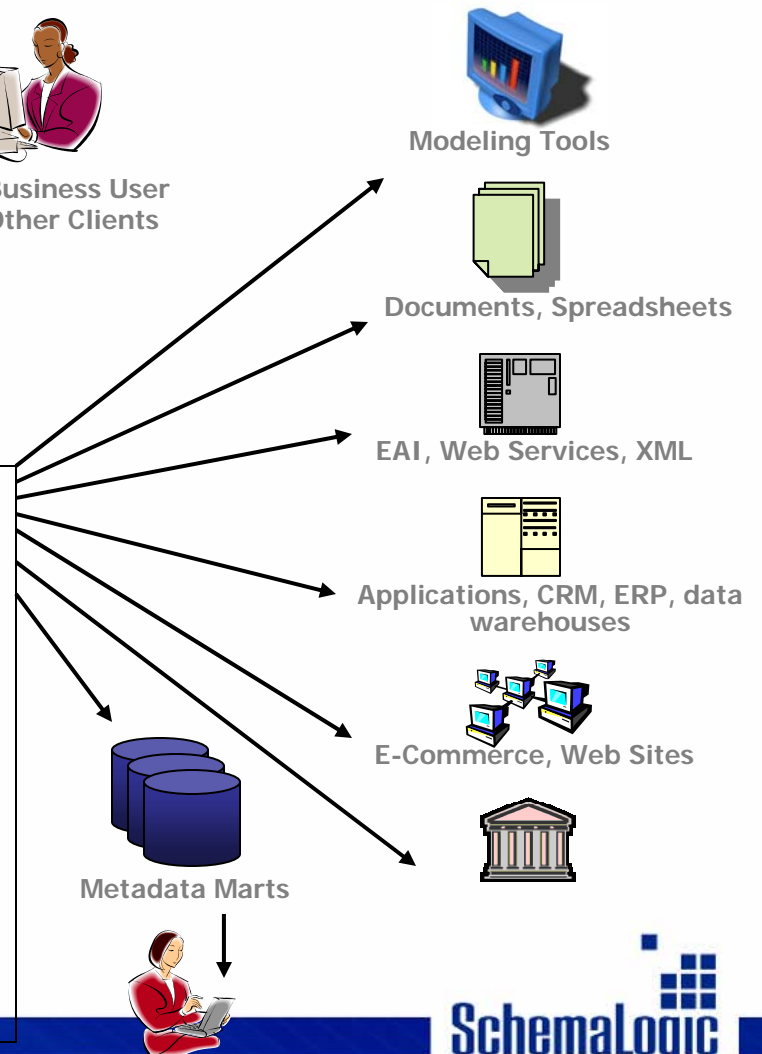
Metadata Sourcing



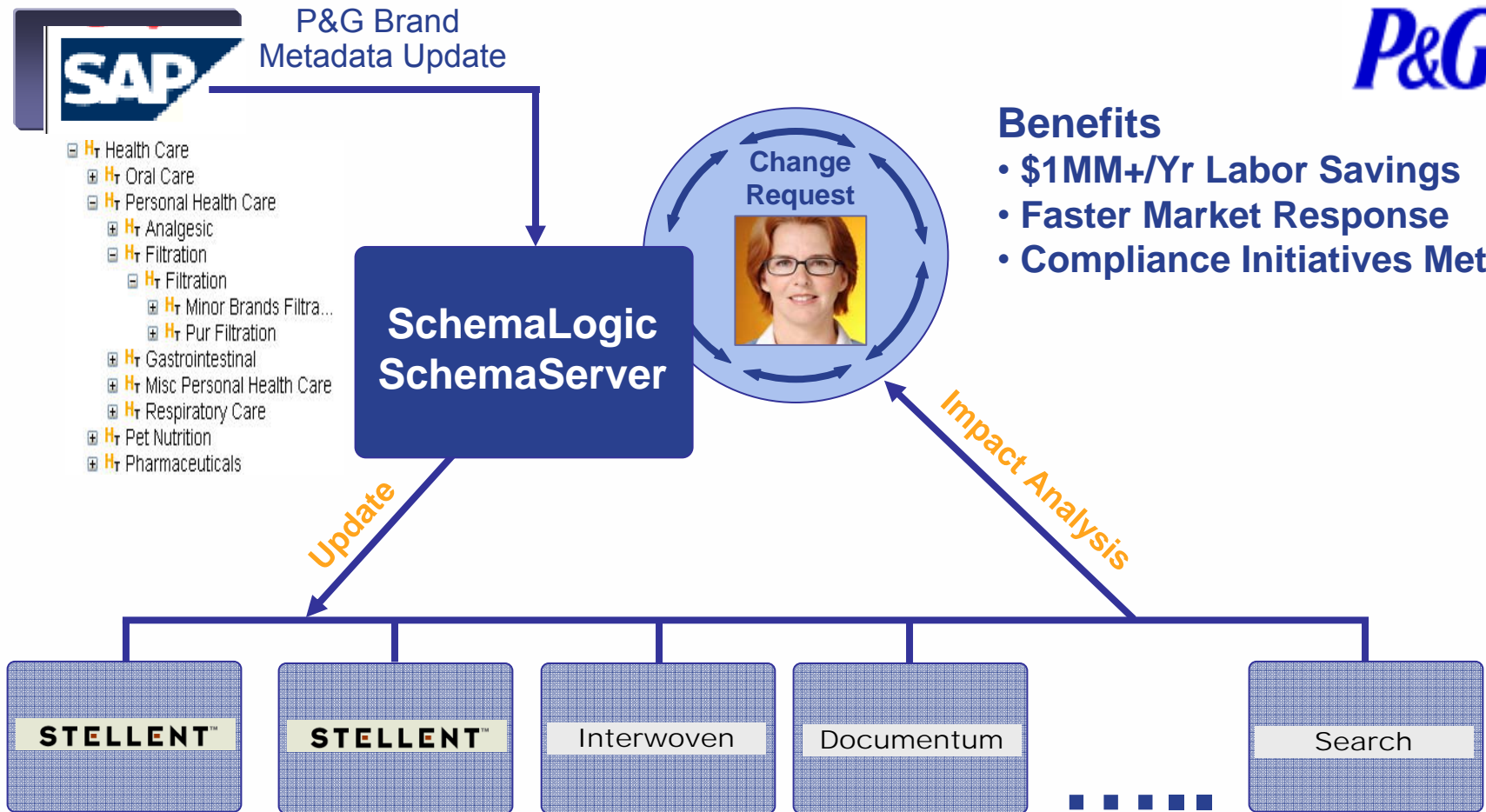
Metadata Management



Metadata Delivery



Customer Scenario 1: Distributing “P&G Brand” Metadata to all Unstructured Content Systems



Benefits

- \$1MM+/Yr Labor Savings
- Faster Market Response
- Compliance Initiatives Met

70+ Systems with P&G Brand Metadata



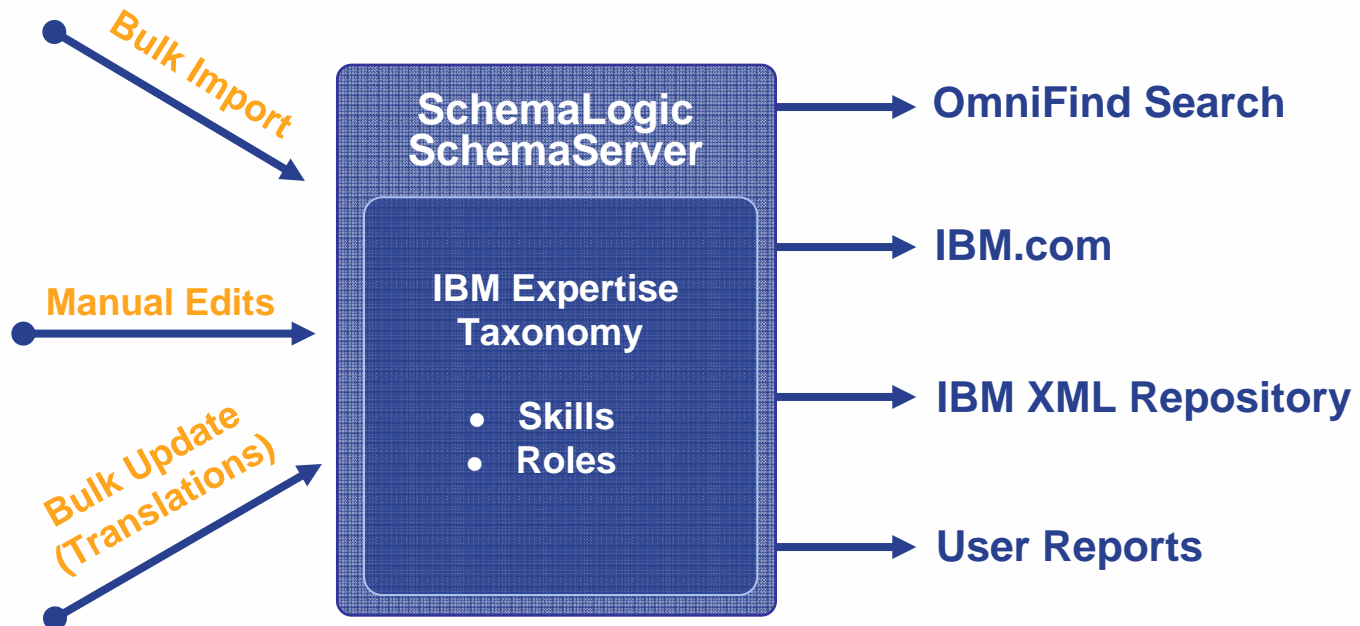
Customer Scenario 2: Enterprise Taxonomy Management for W3 Global Employee Portal



“In 2005, SchemaLogic will enable management of the Expertise and Enterprise Taxonomies that support Bluepages and the On Demand Workplace.”



On Demand Workplace

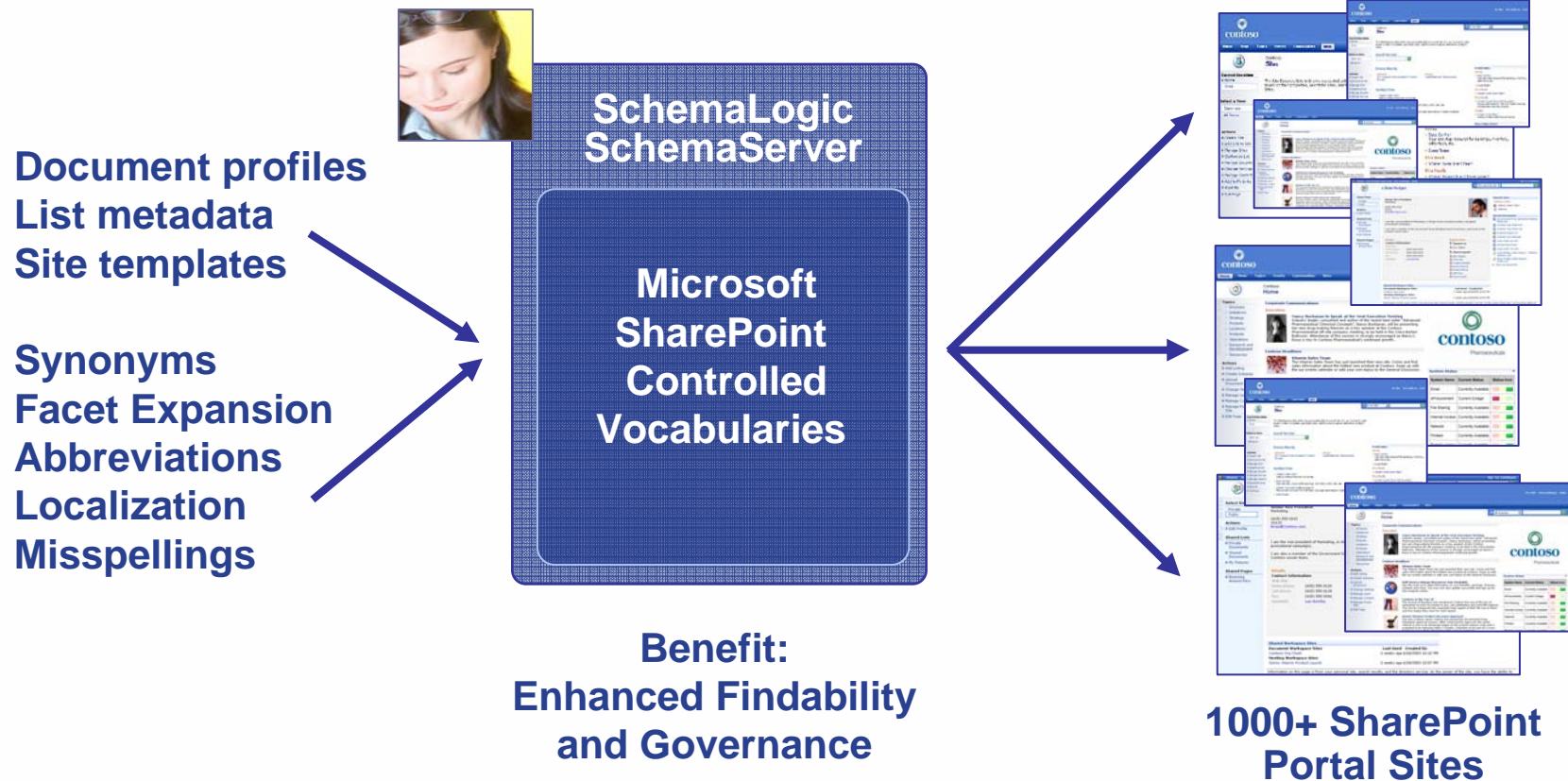


“Workplace is helping consultants find niche skills and get to work on contracts faster, factors that could help boost revenue, not just cut costs.”

— Wall Street Journal, August 2005

Customer Scenario 3: Pfizer

Centralized Governance, Thesaurus and Search for Windows SharePoint Services and SharePoint Portal Server



In Summary, SchemaLogic's Approach

- ❖ **reduce time-to-action**

 - New vocabularies and schema updated in all systems

 - Enterprise content, search, portal implementation & integration

- ❖ **minimize labor for manually synchronizing unstructured content systems**

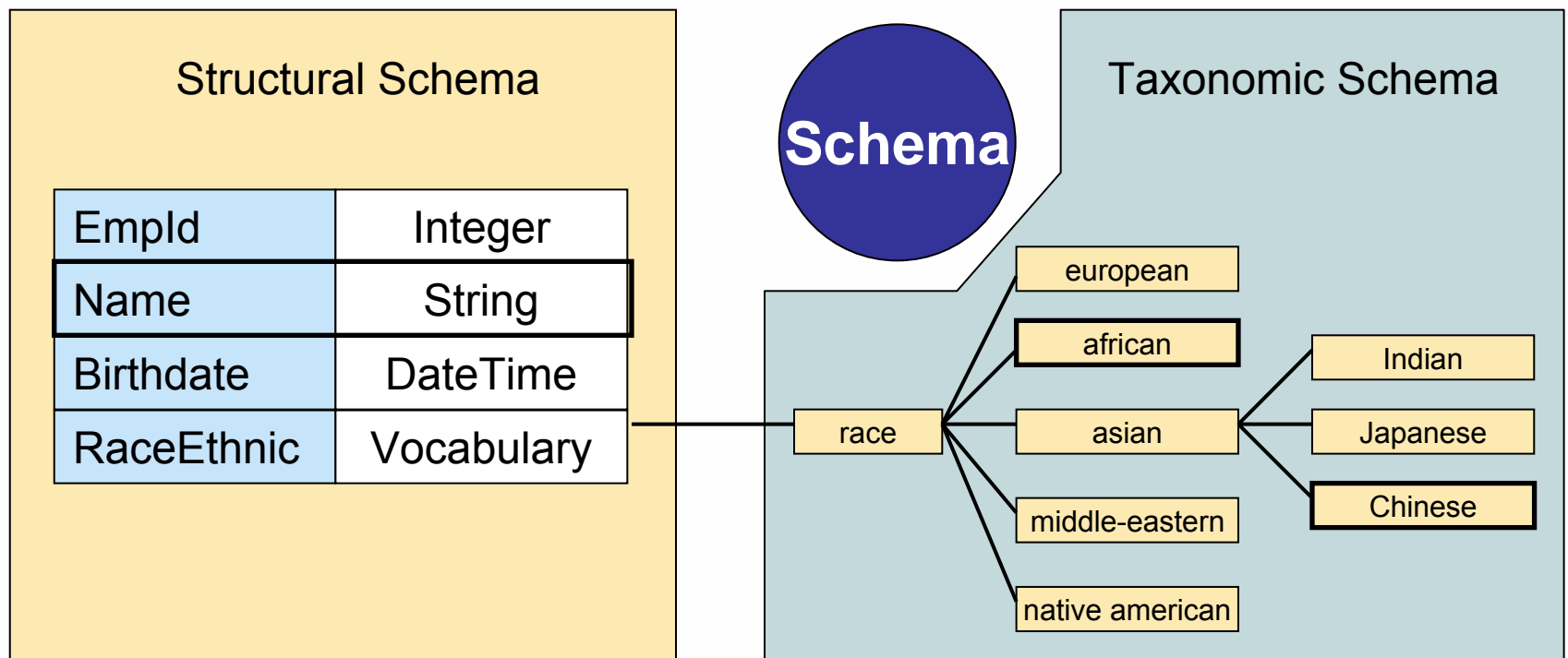
- ❖ **provide governance with change management of corporate vocabularies and history of terms**

- ❖ **improve auto categorization and search quality**

 - More accurate, more complete results

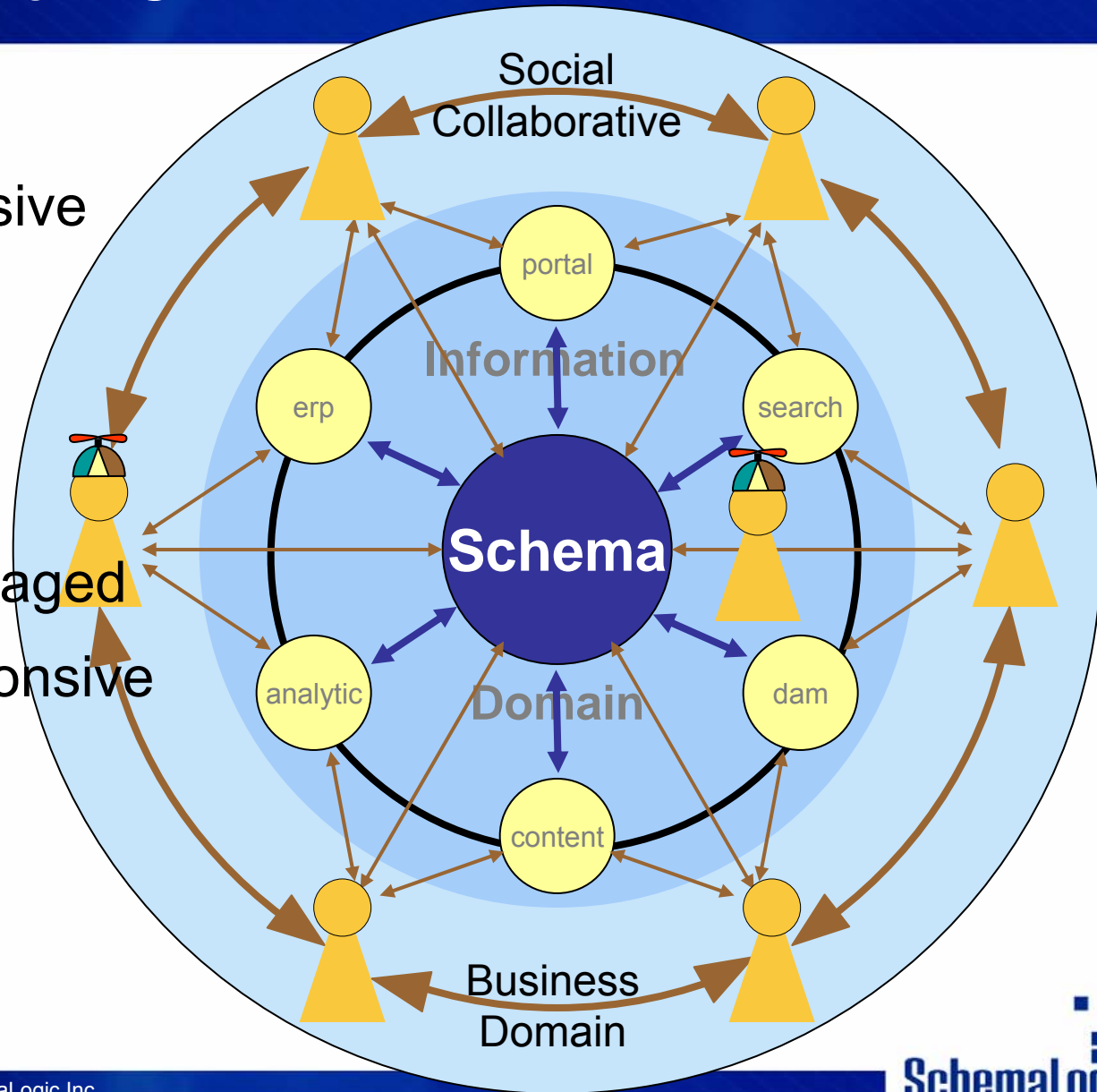
Eight Principles of ESM

Comprehensive
Granular



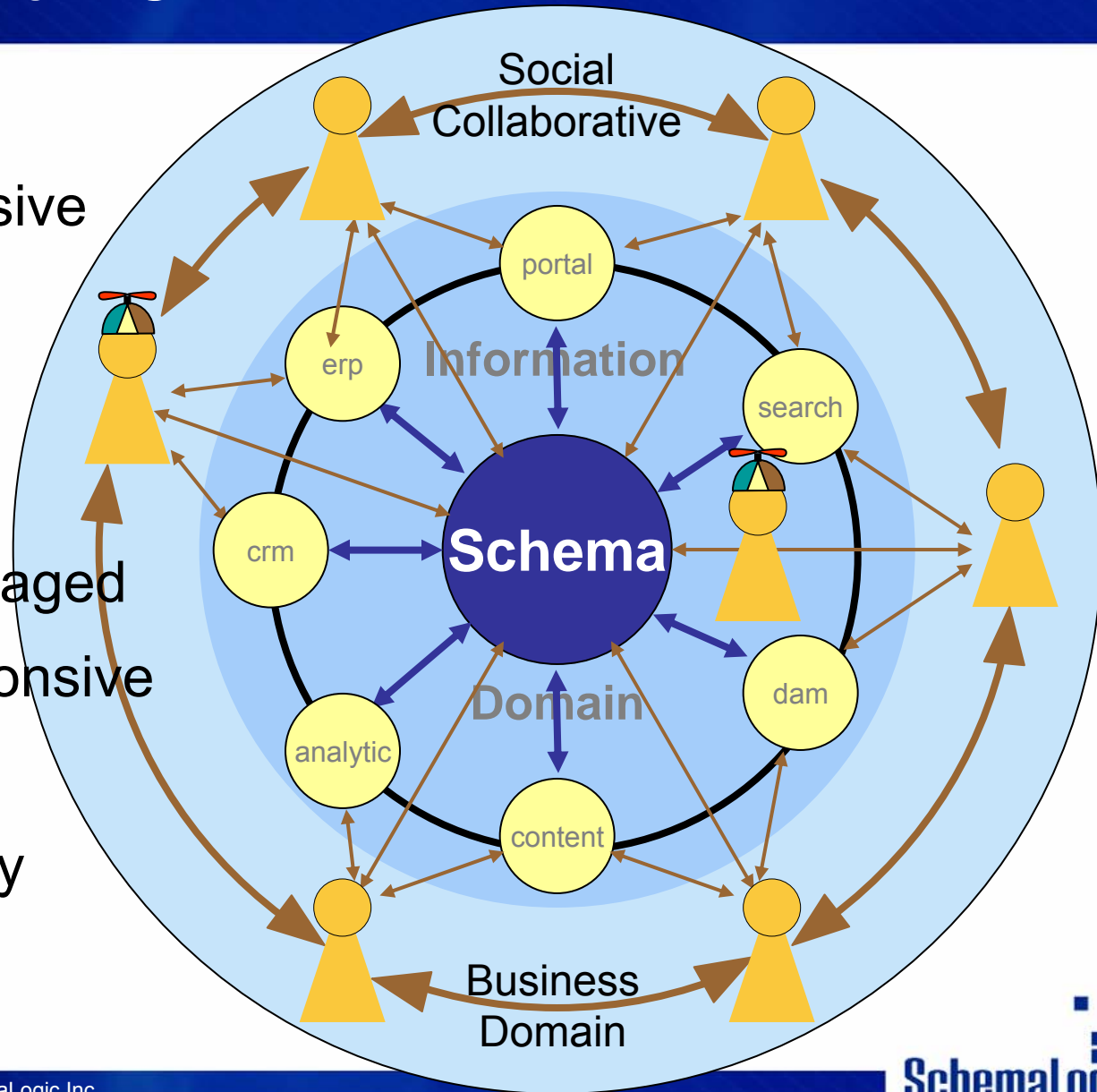
Eight Principles of ESM

- Comprehensive
- Granular
- Flexible
- Actionable
- Consensus Managed
- Culturally Responsive
- Humanistic



Eight Principles of ESM

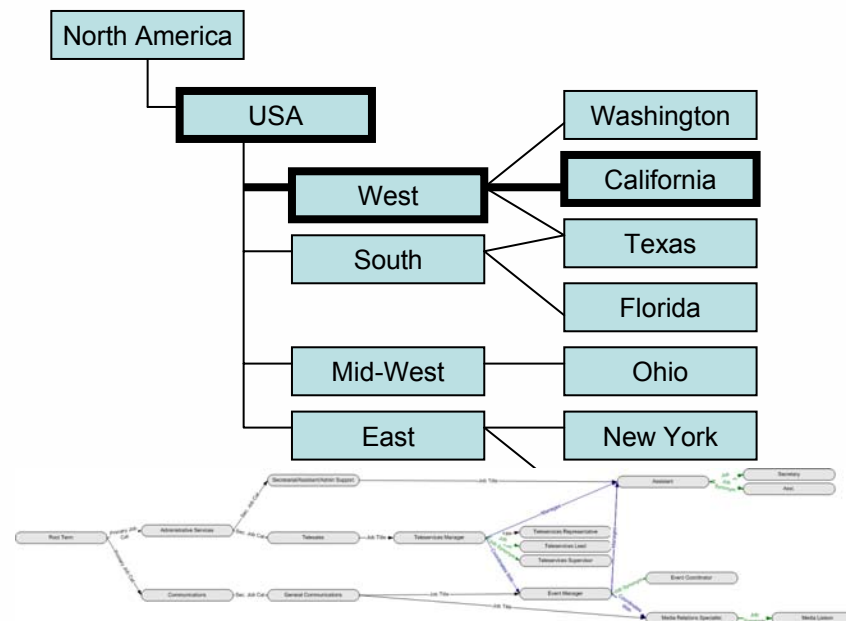
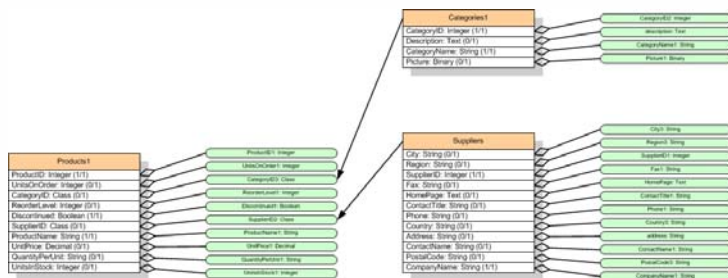
- Comprehensive
- Granular
- Flexible
- Actionable
- Consensus Managed
- Culturally Responsive
- Humanistic
- Evolutionary



Comprehensive

- Manages both “Structural” and “Taxonomic” Schema
- Structural and taxonomic definitions are essential for real-world applications
- Both element definitions and vocabulary/term definitions require permission, change control and impact analysis
- Impacts ripple from terms to “class” definitions

EmpId	Integer
Name	String
Birthdate	DateTime
Gender	Vocabulary
Ethnicity	Vocabulary
Dependents	Class

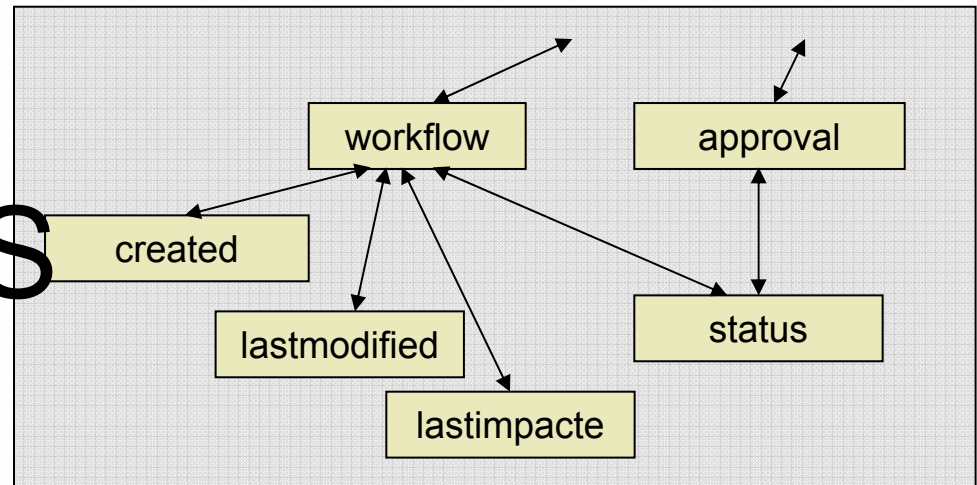


Granular

- Define and manage schemas as small “atomic” units: elements, classes, terms etc. to achieve maximum reusability and manageability
- Management of schema as passive, monolithic documents impairs discoverability, re-usability, impact analysis, permission control, semantic mapping

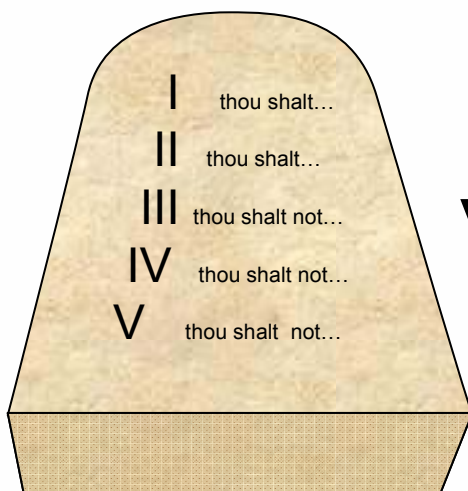
```
<?xml version="1.0"?>
<Schema
  xmlns="urn:schemas-microsoft-com:xml-data"
  xmlns:dt="urn:schemas-microsoft-com:datatypes" >
  <ElementType name="workflow" content="textOnly" >
  <AttributeType name="created" dt:type="dateTime" />
  <AttributeType name="lastmodified" dt:type="dateTime" />
  <AttributeType name="lastimpacted" dt:type="dateTime" />
  <AttributeType name="status" dt:type="int" />
```

VS

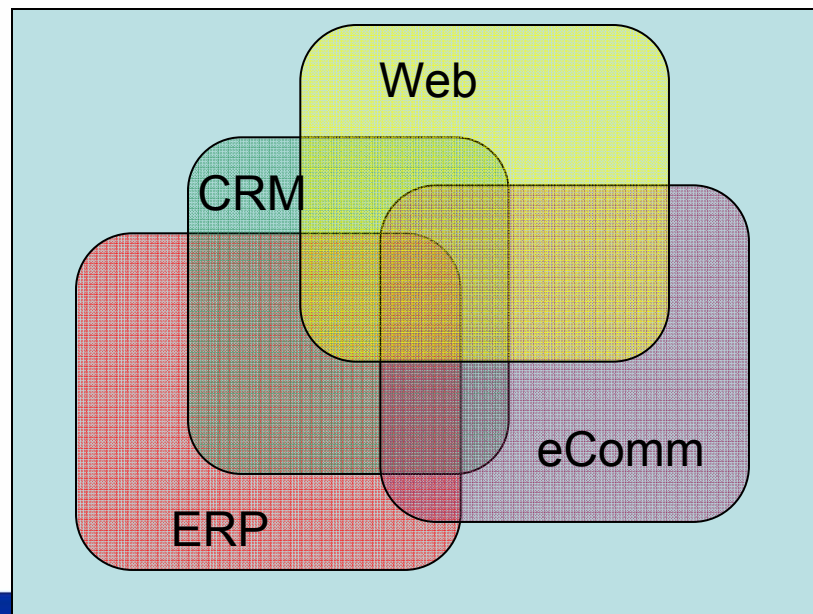


Flexible

- Respects the inevitability of diversity and heterogeneity within the standards management process
- When Schema Standardization becomes the monolithic “Standard Schema” adoption is compromised and/or progress is dramatically slowed



VS



Actionable

- ❖ Schema Standards should be general enough to apply to all systems
- ❖ Specific enough to actually “drive” and control repositories and mapping infrastructures
- ❖ SQL Schemas apply only to (some) relational systems
- ❖ XML schemas don't contain enough information to drive system configuration



VS



Consensus Managed

- ❖ Implements guarantees to stakeholders that schema definition entities placed into the shared domain will be managed in such a way that their interests will be accounted for
- ❖ Change management processes must be guaranteed to achieve stakeholder buy-in

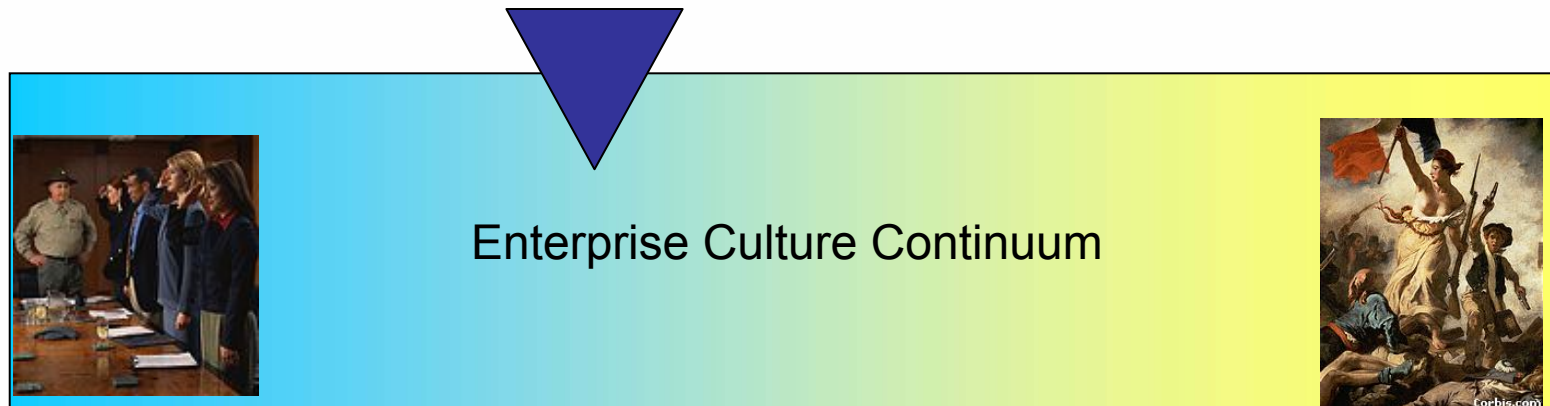


VS



Culturally Responsive

- ❖ Allows change management processes to be customized and "tweaked" at all levels of the organizational tree
- ❖ Change management processes must adapt to the pace and style of the organization and sub-organization



Humanistic

- ❖ Schema Standards should include human-readable labeling and descriptive information and appropriate validation and display tips necessary to drive client interactive functions
- ❖ The model, process and tools for schema management must be understandable and usable by business information specialists and stakeholders, not just the propeller head priesthood



VS



Evolutionary

- ❖ Is a full-lifecycle system that not only sets the standard but makes it practical and workable to keep the standards current, both in the repositories and in the systems described and controlled by the schema definitions
- ❖
- ❖ Accommodate change and diversity, impact analysis and change control, distribute schema changes to client systems, address the impacts of schema change on populated repositories



VS



An essential discipline

- ❖ Schema management has not been viewed as a singular organizational discipline but a collection of unconnected tactical issues
- ❖ Most organizations already do some aspects of ESM... poorly
- ❖ Enterprises should consider ESM as much of a “no brainer” as a financial accounting system or CRM system

Contact Information



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