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METADATA AND TAXONOMY MANAGEMENT IN SHAREPOINT 2010

Debbie Ireland

Manager/Trainer

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New Zealand

Debbie Ireland



A LITTLE ABOUT ME

- SharePoint Trainer – envisionIT (Tauranga based)
- SharePoint User Group Leader – NZ
- MVP (Most Valuable Professional award from Microsoft)
- PMP (Project Management Professional)
- SharePoint Conference Organiser

AGENDA

Managed
Metadata Term
sets

Folksonomy

- Enterprise
Keywords

Columns and
Content Types

- Creating and
Consuming

Navigation and
Search

- End Users
Perspective

Power User

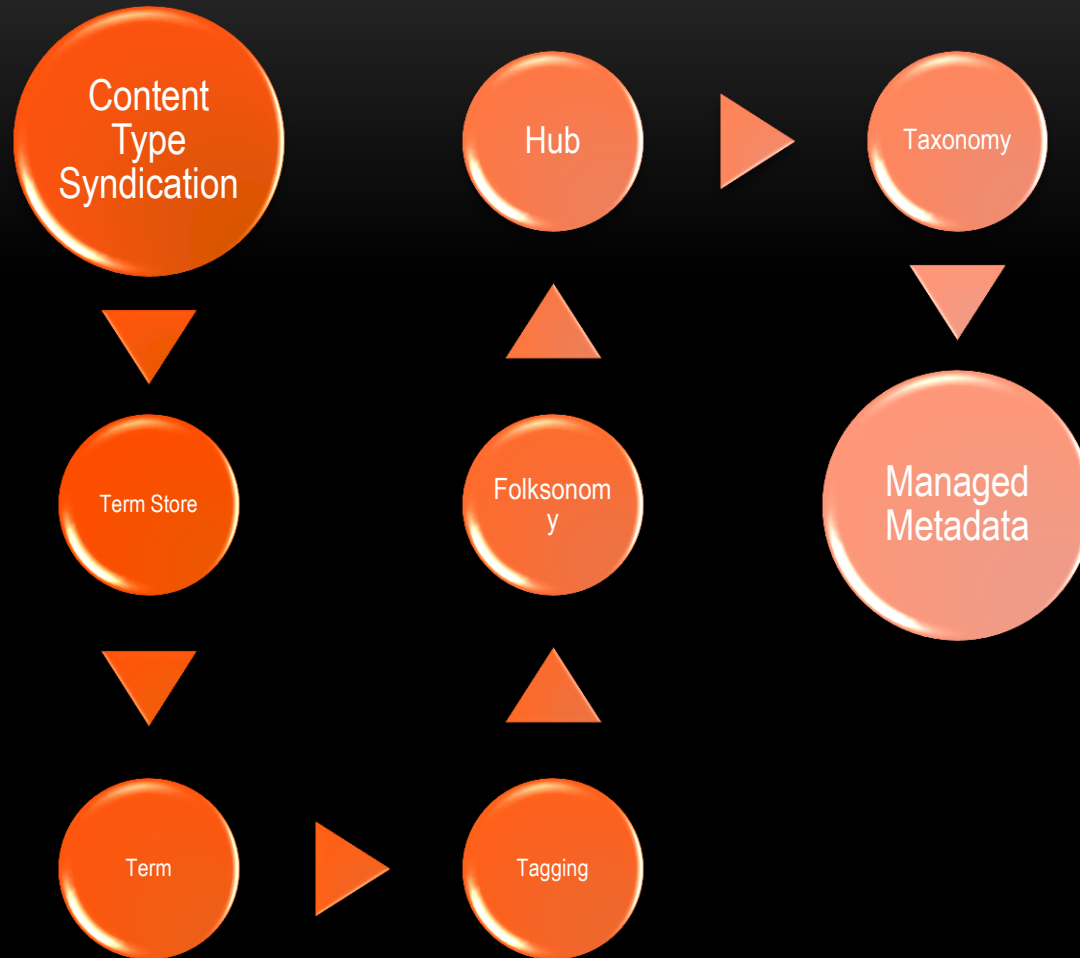
Portal/Site Administrator

End User

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NEW TERMS FOR 2010



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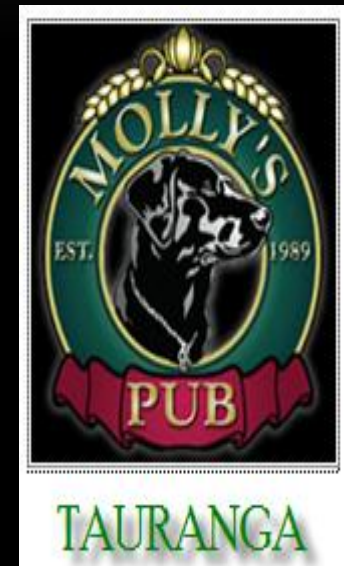
CHALLENGES WITH MOSS 2007

- Content Types per Site Collection
 - Duplicated effort to deploy
 - Hard to maintain consistency and standards
- No Hierarchy with metadata
 - Needed multiple columns to explain same thing
 - Couldn't drill down as needed
 - 3rd Party tools didn't work well
- Governance vs. Individuality
 - Structured vs. Unstructured?



OUR SCENARIO – MOLLY'S PUB

- Molly's Pub started in Tauranga....
- We started with a team site....
- On one Site Collection...



MOLLY'S SP SITE ARCHITECTURE – TEAM SITE



Molly's Pub

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MOLLY'S DATA BECOME UNMANAGEABLE...

- What is Metadata?
 - “Data that describes other Information”
 - Helps you Organise and Categorise Items.
- Why do we need it?
 - Workflow can leverage Meta Data
 - To make decisions - E.g. Review date for documents
 - Search ability (more on this later)
 - More relevant results

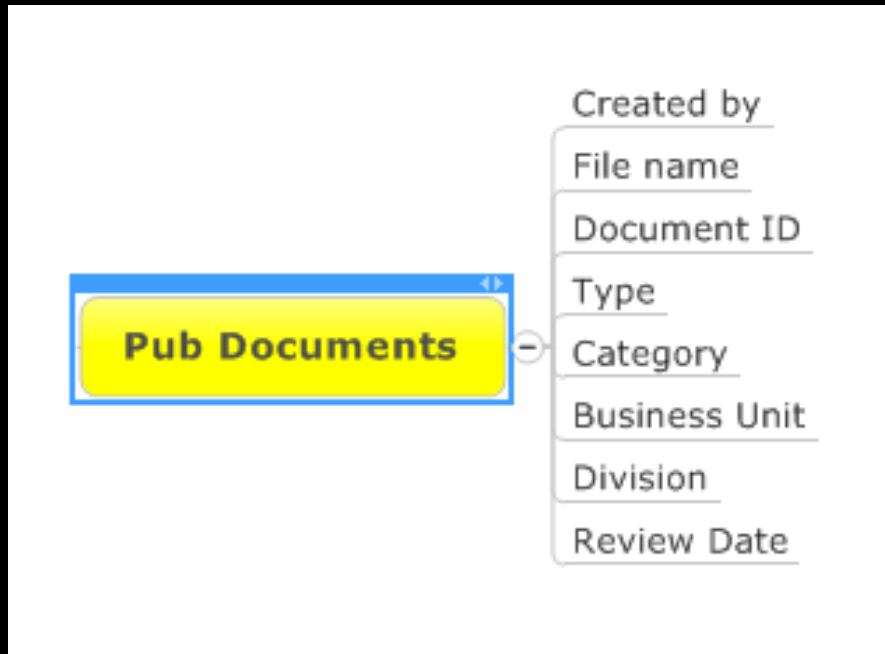
DOCUMENT METADATA



WINE METADATA



METADATA



Molly's Pub Intranet – Team Site and
Metadata in Lists and Libraries

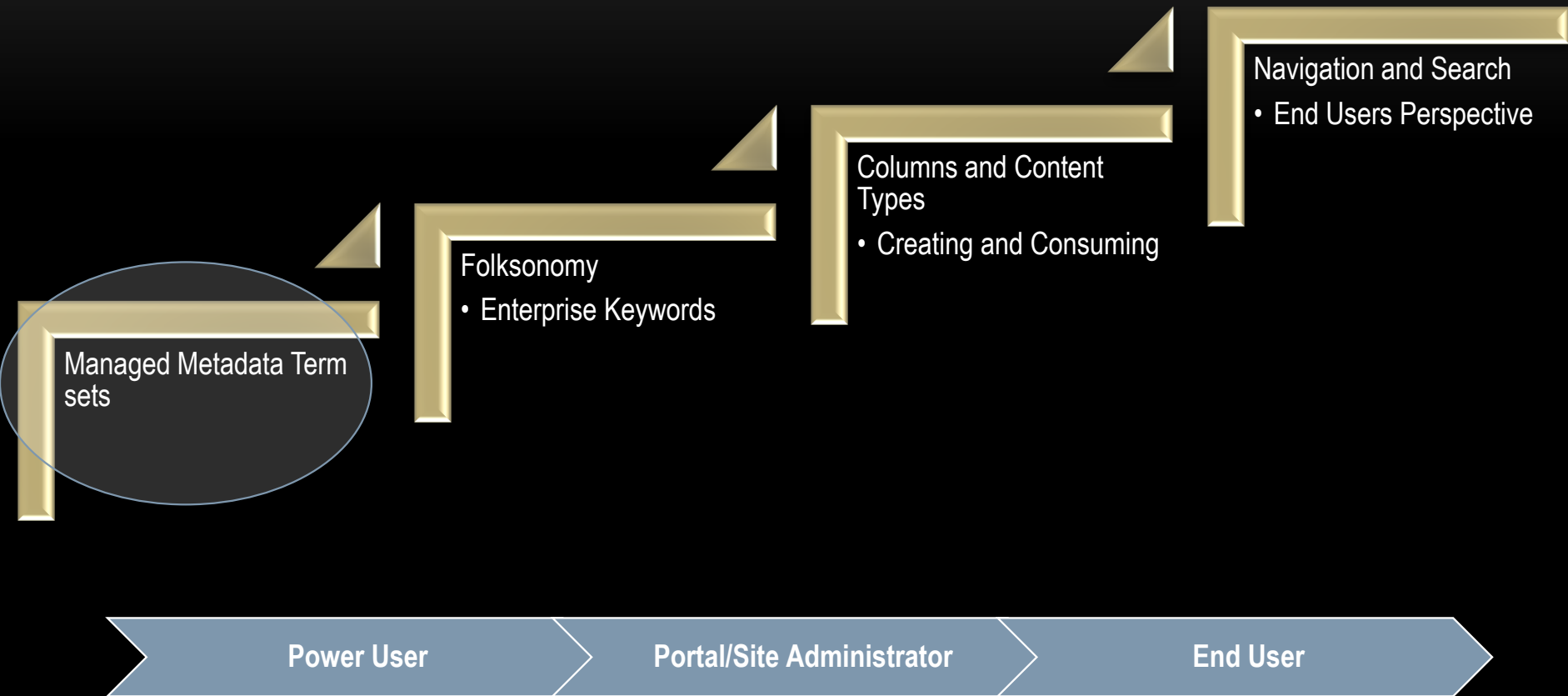
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MANAGED METADATA



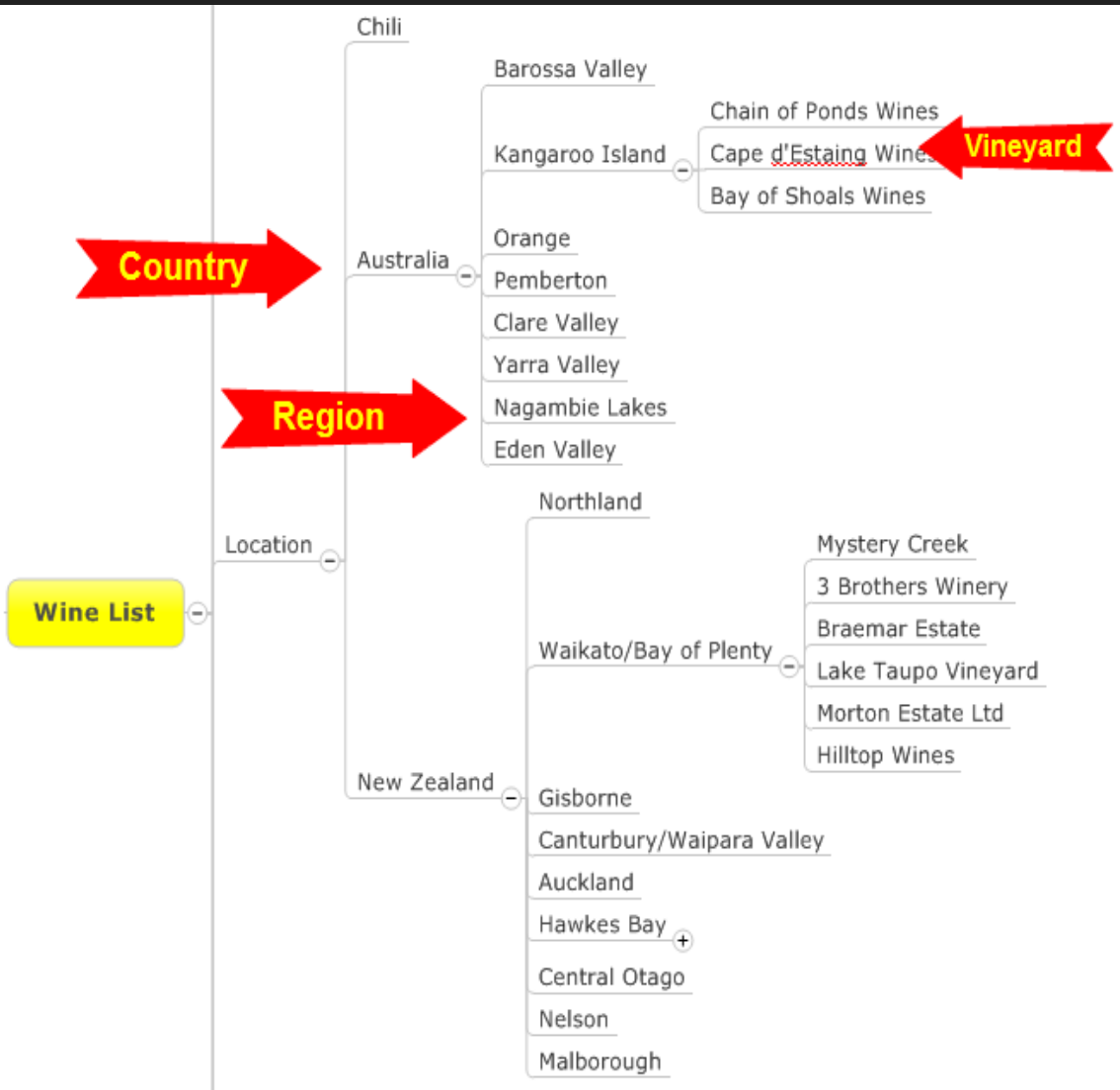
INTRODUCING MANAGED METADATA

- *Managed metadata* is a hierarchical collection of centrally managed terms that you can define, and then use as attributes for items in Microsoft SharePoint Server 2010.



- Instead of three separate columns for describing data.....

HIERARCHICAL MANAGED METADATA



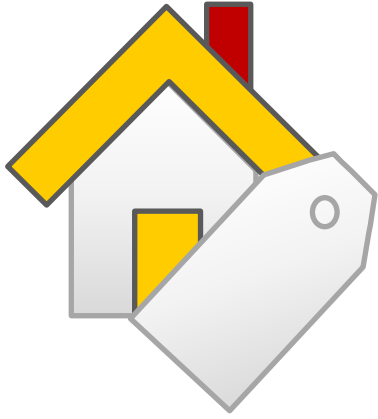
- One column can describe all three hierarchically
...

BENEFITS OF USING MANAGED METADATA

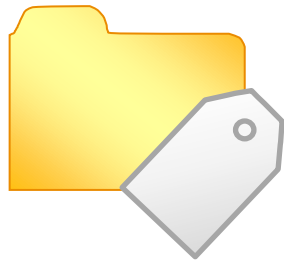


- **More consistent use of terminology**
 - Only authorized users can add new terms
 - Consistent use = higher degree of confidence that it is correct
- **Better search results**
 - Users are guided to terms that have already been used - those terms—and not synonyms—are more likely to be applied to items
 - Retrieve more relevant results.
- **Dynamic**
 - Modification made in one place and is filtered through to everywhere it is used. (Unlike Choice column)
 - Keep SharePoint in sync

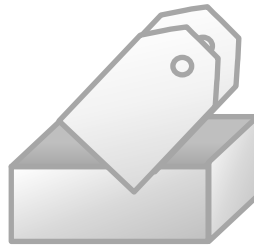
Term Store Management



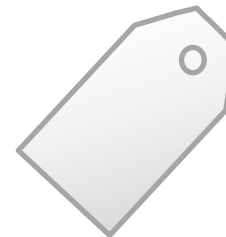
Managed Metadata Service



Group



Term Set



Term

WHERE DOES IT HAPPEN?

Central
Administration

- Managed Metadata Service

Site
Administration
Settings

- Term Store Management
 - Local
 - Shared

List/Library
Settings

- Managed Metadata Column
- Metadata Navigation Settings

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TERM STORE MANAGEMENT



- Add yourself as Term Store Administrator to enable ability to create new Term Stores
- Local Term Sets – per Site Collection
- Global Term Sets – for every Site Collection to use – can be owned by individual Site collections
- Copy vs. Reuse
 - Copy – when creating copy, does not update original – it is a copy
 - Re-Use – can reuse a term under another group – changes will be reflected in the original

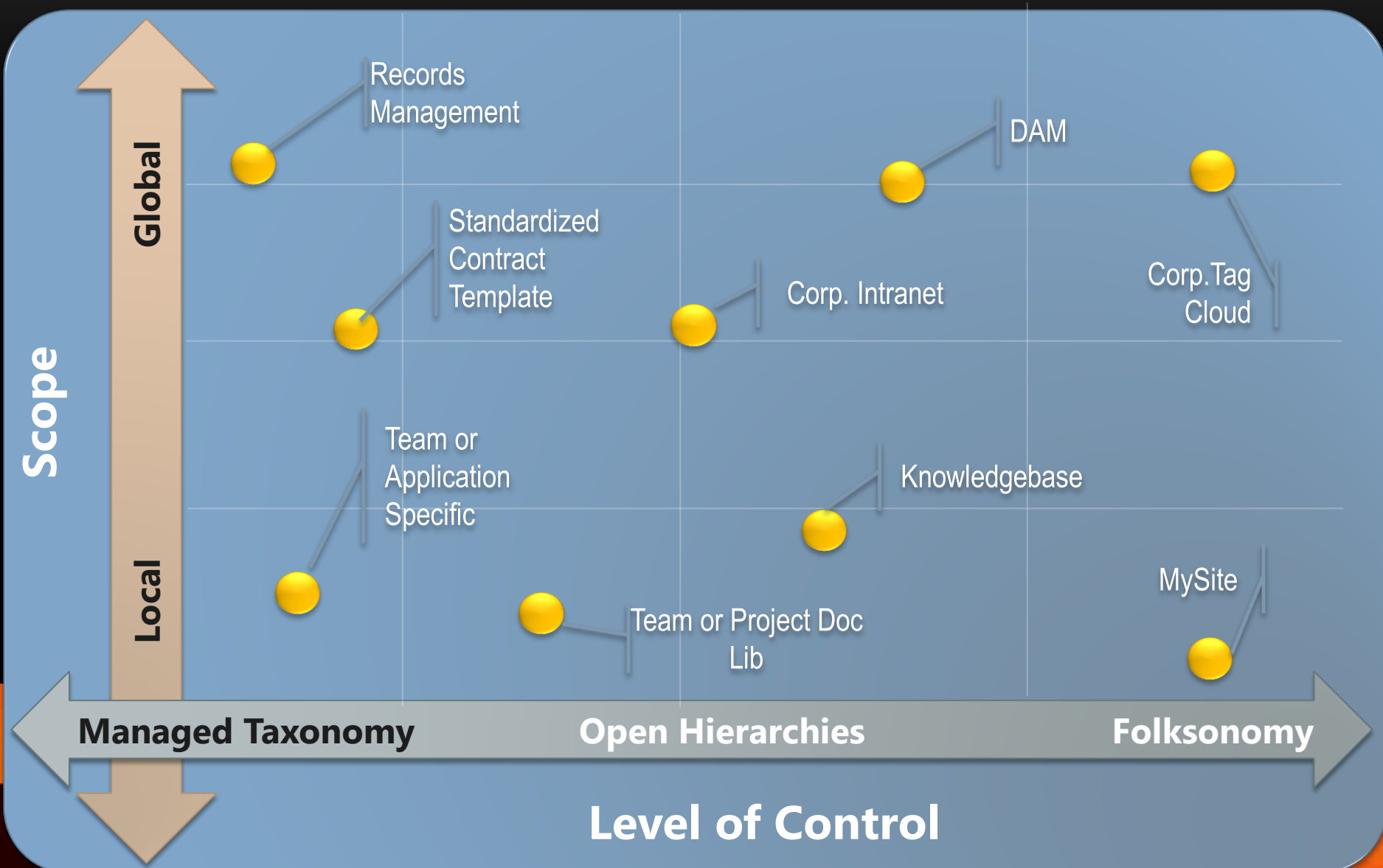
Term Store Management and Managed Metadata Columns

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INTRODUCING KEYWORDS

- **Managed Terms:** A controlled term that can only be created by those with appropriate permissions. **Term sets** (taxonomy facets) are collections of related terms that can be hierarchically structured.
- **Managed Keywords:** User-generated keywords (aka tags) kept in a non-hierarchical list called the *keyword set*.
 - Folksonomy, Informal taxonomy
 - Non Structured
- Tags that can be used later for Filtering, Finding and Searching

METADATA DRIVEN SCENARIOS



KEYWORDS



- You can turn managed keywords into managed term sets – good for using what users have defined...but
 - Watch out, as the interpretation may not be the same, if moved
- You can also prohibit users from adding their own enterprise keywords to items, and require them to use existing ones.
- Users are guided to terms already used.
- Searching returns more relevant results.

WHERE DOES IT HAPPEN?

Site
Administration
Settings

- Term Store Management
- System>Keywords

List/Library
Settings

- Permissions and Management
- Enterprise Metadata and Keyword

End User

- Adhoc Entries



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Creating Enterprise Keywords

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CONTENT TYPES

Managed Metadata Term sets

Folksonomy
• Enterprise Keywords

Columns and Content Types
• Creating and Consuming

Navigation and Search
• End Users Perspective

Power User

Portal/Site Administrator

End User

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CONTENT TYPES

- WHY? – to enable looking at different types of data within the same list or Library
- TWO CONCEPTS
 - Site Columns – reusable metadata
 - Site Content Types

SITE COLUMNS

- Define Columns of Meta Data at the site level.
- OOTB Site Columns
- Reused across multiple lists
- Scoped in the Site Column Gallery
- Visible within site collection to all child sites
- Ideal for standardising on Meta Data

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Full HTML content with formatting and constraints for publishing
- Image with formatting and constraints for publishing
- Hyperlink with formatting and constraints for publishing
- Summary Links data

MULTIPLE CONTENT TYPES

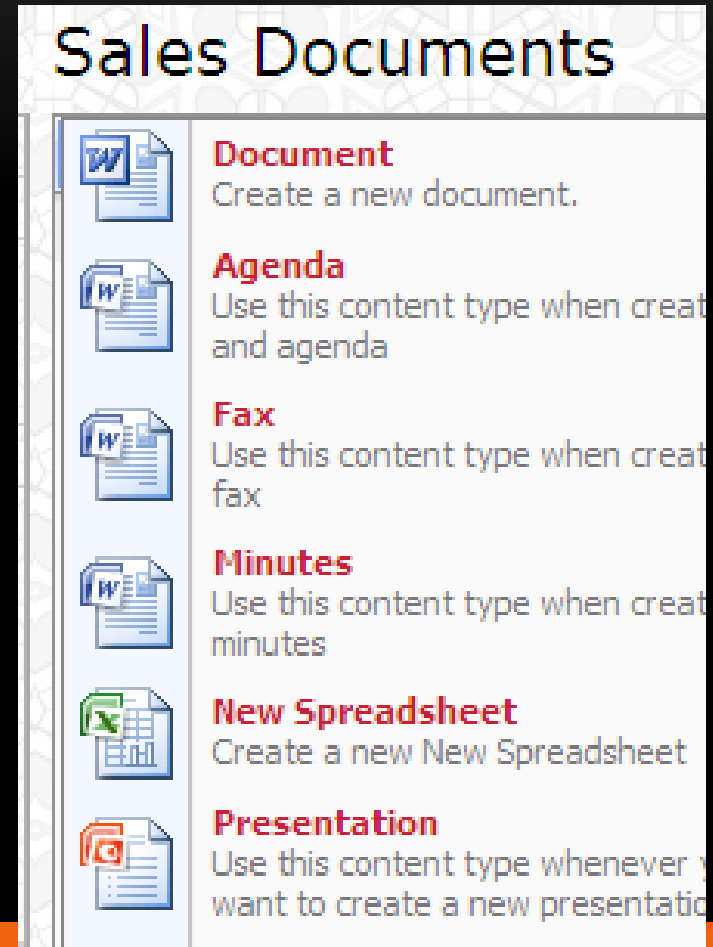
- Content Type Toolbar
- Allows different types
- Different Views
- Relevant Information
- Building Blocks







Content Type

Site
Column

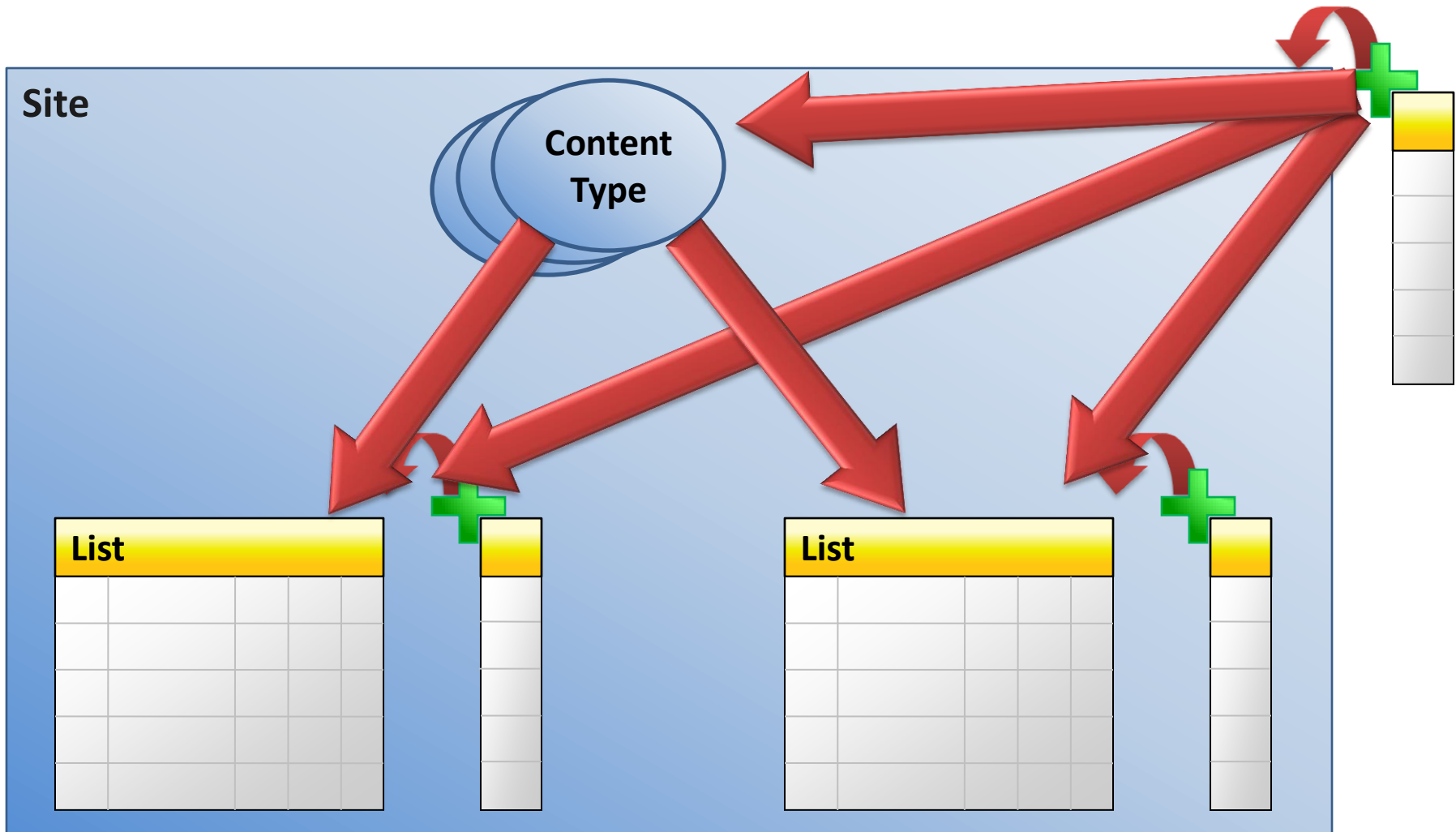
Site
Column

Site
Column

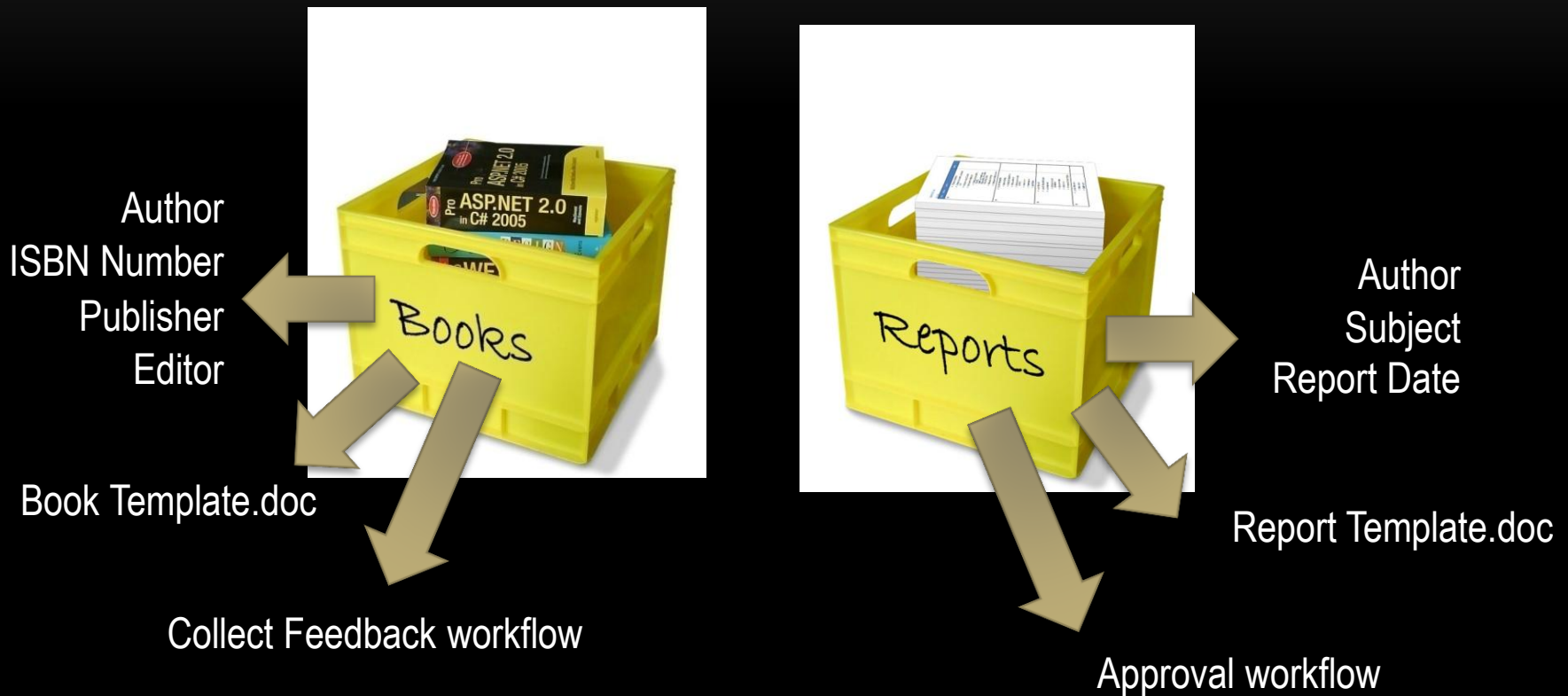


Icon	Content Type	Description
	Document	Create a new document.
	Agenda	Use this content type when creating an agenda
	Fax	Use this content type when creating a fax
	Minutes	Use this content type when creating minutes
	New Spreadsheet	Create a new New Spreadsheet
	Presentation	Use this content type whenever you want to create a new presentation

BIG PICTURE (USING COLUMNS)

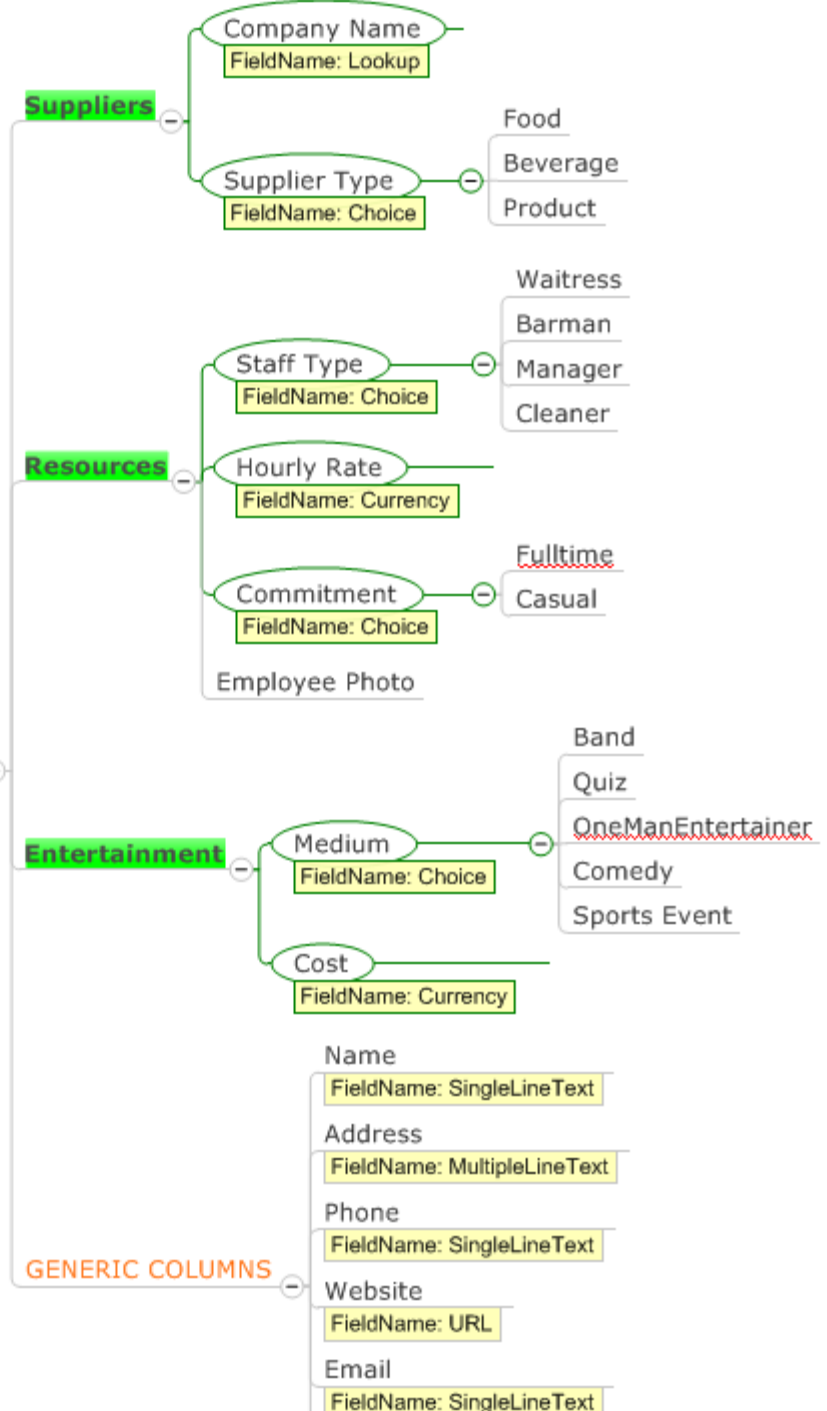


CONTENT TYPES



INFORMATION ARCHITECTURE – CONTENT TYPES

Contacts List



WHERE DOES THIS HAPPEN?

Site
Administration
Settings -
CREATE

- Site Columns Gallery
- Site Content Gallery

List/Library
Settings - ADD

- Advanced Settings
 - Allow Management of Content Types
 - Add from Existing Content Types



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Content Types

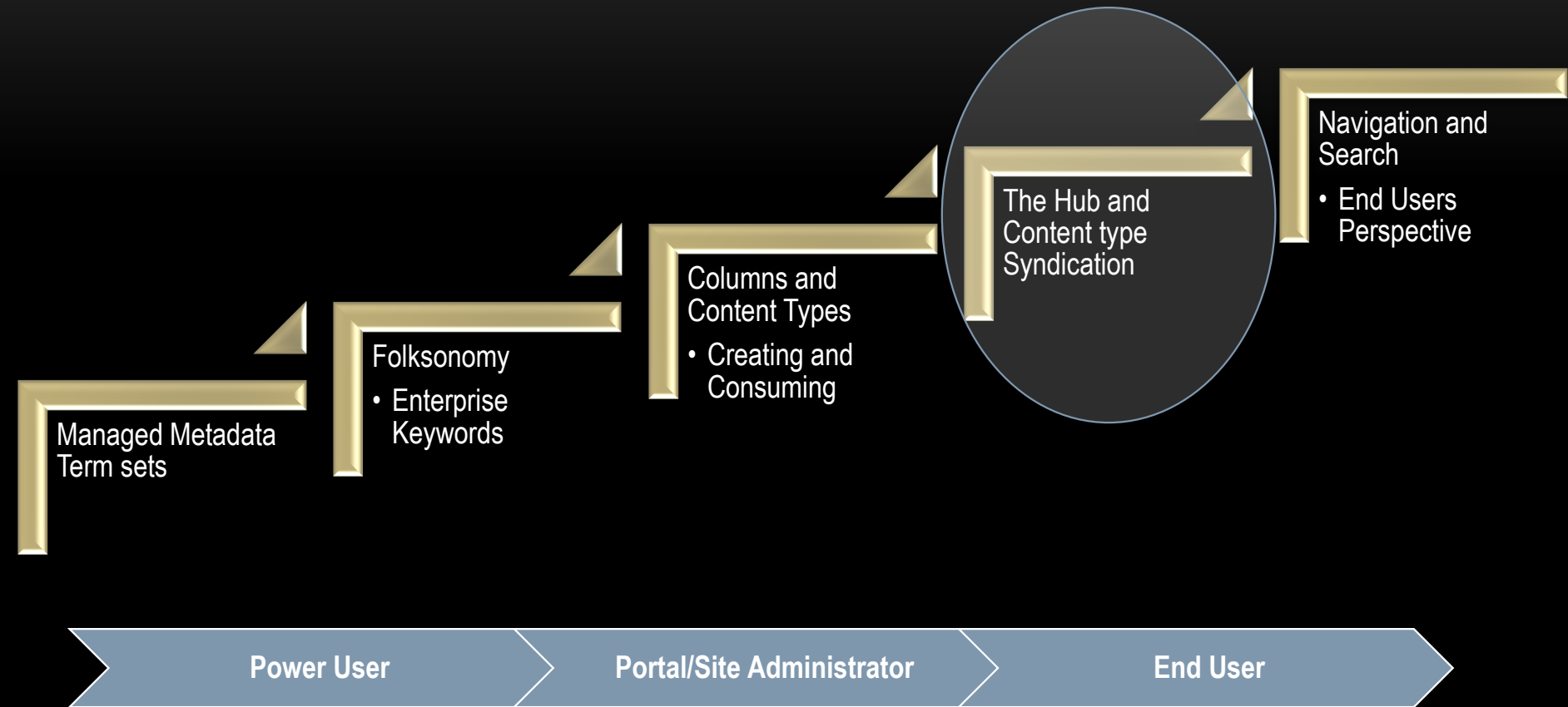
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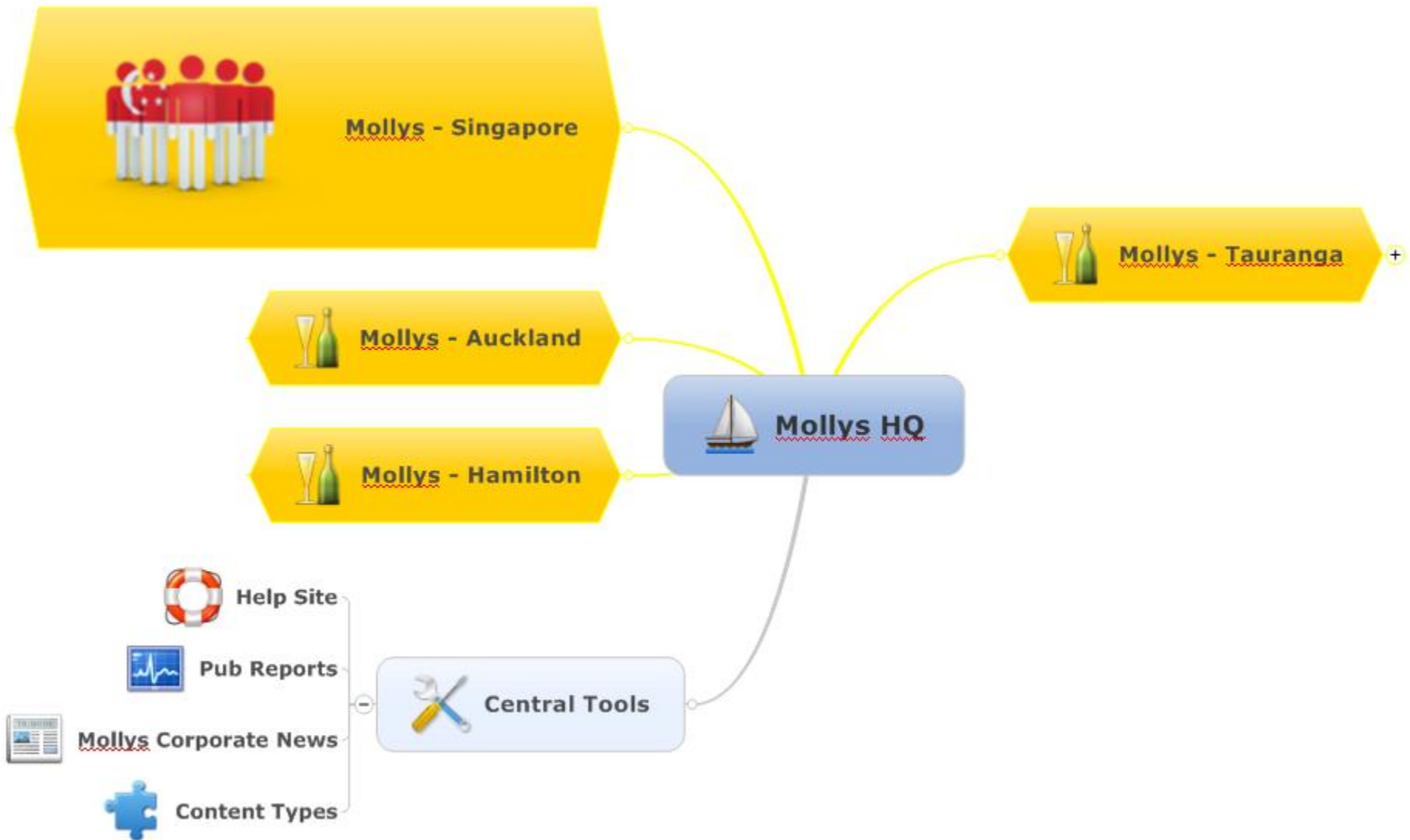
HUB AND CONTENT TYPE SYNDICATION



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MOLLY'S IS EXPANDING - NEW SITE COLLECTIONS



INTRODUCING THE HUB AND CONTENT TYPE SYNDICATION..

- **MOSS 2007 - Content Types per Site Collection**
 - Duplicated effort to deploy
 - Hard to maintain consistency and standards
- **SharePoint 2010 – one hub**
 - Can choose which Site Collection
 - This site collection needs Publishing Infrastructure Feature
 - Can Have multiple Managed Metadata Services (MMS) within Central Admin
 - **Beware:** You cant change the content type hub once created! You will need to create a NEW MMS

WHERE DOES IT HAPPEN?

Central
Administration

- Managed Metadata Service
- Timer Jobs

Site Collection
Administration

- Hub – Content Types - Publish

Site

- Consume Content Types

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METADATA NAVIGATION & SEARCH



- Why do we need metadata?
- *Navigation is enhanced; Search is refined*
- Context
- Discoverability

NAVIGATION

- **Metadata Navigation**

- Only SharePoint Server, not Foundation
- The purpose is to filter or refine the result set based on taxonomy that has been bound to Managed Metadata columns.

- **1. Navigation Hierarchies**

- Expandable and collapsible hierarchy
- Applying a filter displays only those documents that have been tagged with that term.
- Associated children are included by default as part of the filter.

- **2. Key Filters**

- Provide the ability to apply multiple filters from the navigation pane.
- Key Filters, (unlike Navigation Hierarchies) are returned through auto-suggest functionality.
- Alternatively, selecting the tags icon displays a popup window containing a browsable list of terms from which to select.



Metadata Navigation and Filtering

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TAKE AWAYS

- Plan, Plan, Plan!
 - Information Architecture...
 - Managed Metadata Service (s)
 - Site Collections – the hub?
 - Which Site Collections consume from which service?
 - Your Taxonomy and Term Sets – and ownership
 - Your Content Types
 - Your Site Columns

CONNECT

- Linked In - <http://nz.linkedin.com/in/debbieireland>
- Facebook – debbie@spevents.co.nz
- Twitter - @debbieireland

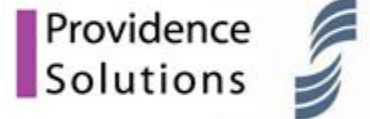
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