

SharePoint 2010 Enterprise Metadata Mgmt

St. Louis SharePoint Users Group (STLSUG)

Agenda

- Overview of SharePoint 2010 EMM
- EMM "roles"
 - Administrator
 - End-user
 - Developer
- Questions

Why is Tagging so Important?

High-quality search results

- Relevancy
- Best bets
- Faceted search (refinement)

Navigating by metadata

- Faceted navigation
- Filter/sort in lists
- Create SharePoint views

Personalization

- Show content from certain category
- Hierarchical association

Alternative navigation

- Suggestions
- Synonyms

EMM Overview

- SharePoint Server 2010 feature
- Stored centrally in the database
- Hierarchical
- Managed Terms and Managed Keywords enable both restricted taxonomy and "folksonomy"

EMM Features

- End-user
 - Tag Cloud web part
 - Suggest as you type
- Administrator
 - Term Store management tool
- Developer
 - Taxonomy API

EMM Applications

- Search
- Metadata-driven Navigation
- Common Vocabulary
- Social Relevance
- Custom Applications

Taxonomy Types

- Supported
 - Equivalent
 - Synonyms
 - e.g. "LOL" = "Laughing out loud"
 - Hierarchical
 - Parent/Child
 - e.g. "Sports Equipment" -> "Ball"
- Not Supported
 - Associative
 - Concept/Concept
 - e.g. "Bouncy Things" ~ "Ball"
 - Ontologies
 - Domains of controlled vocabularies

Definition

- *Managed metadata* is a hierarchical collection of centrally managed terms that you can define, and the use as attributes for items...

Terms

- *Managed Keyword* – A word or phrase that has been added to SharePoint Server 2010 items. All managed keywords are part of a single, non-hierarchical term set call the “keyword set.”
- *Managed Term* – A term that can be created by users only with the appropriate permissions and often organized into a hierarchy.
- *Term Set* – A collection of related terms.
- *Group* – In the term store, all term sets are created in groups. A group is the parent container for term sets.
- *Term Store* – Database for terms and keywords.

Source: SharePoint Server 2010, TechNet
<http://technet.microsoft.com/en-us/library/ee424402.aspx>

Central Taxonomy

The screenshot displays the 'Term Store Management Tool' interface. The main content area is titled 'TAXONOMY TERM STORE' and shows a tree view of a taxonomy structure. The root node is 'Managed Metadata Service', which is expanded to show several groups: 'Electrical goods', 'Computers', 'Home audio/TV', 'Peripherals', and 'System'. The 'Home audio/TV' group is further expanded to show term sets: 'HiFi/Home theatre', 'Speakers', 'Televisions', and 'Screen type'. The 'Screen type' term set is expanded to show individual terms: 'LCD' and 'Plasma'. A context menu is open over the 'Screen type' term set, listing actions such as 'Create Term', 'Copy Term', 'Copy Term with Children', 'Reuse Terms', 'Merge Terms', 'Deprecate Term', 'Move Term', and 'Delete Term'. Three red arrows point from the right side of the image to the 'Managed Metadata Service' node (labeled 'Group'), the 'Home audio/TV' node (labeled 'Term set'), and the 'Screen type' node (labeled 'Term').

Term Store Management Tool

Site Actions

TAXONOMY TERM STORE

English

- Managed Metadata Service
 - Electrical goods
 - Computers
 - Home audio/TV
 - HiFi/Home theatre
 - Speakers
 - Televisions
 - Brand
 - Features
 - HDMI ports
 - Screen size (inches)
 - Screen type
 - LCD
 - Plasma
 - Peripherals
 - System

Available Service Applications

A site may consume multiple metadata services to see in the tree view.

Sample Import

The SharePoint metadata manager can import metadata from a JTF-8 CSV format file. Use the same file to import files. Then import files to create a new term set.

Term Set Administrators

You can enter user names, group names, and roles. Separate them with semicolons. The administrator can create new term set groups and assign the manager role.

Default Language

Select the default language for all terms. All terms must have a label defined in the default language.

Create Term

Copy Term

Copy Term with Children

Reuse Terms

Merge Terms

Deprecate Term

Move Term

Delete Term



EMM Administrator

● Taxonomy Hierarchy Rules

Term Store Management Tool - Windows Internet Explorer

http://sp2010hal:43218/_Layouts/termstoremanager.aspx?tsid=4fad6e1-f31e-4dd7-a89c-55dae84b5d60

Live Search

Term Store Management Tool

Site Actions

Give Feedback Stephen Cawood

Microsoft SharePoint 2010 Central Administration > Site Settings > Term Store Management Tool

I Like It Tags & Notes

Search this site...

SEARCH

TAXONOMY TERM STORE

English

- Managed Metadata Service
 - Africa
 - South Africa
 - Cape Town**
 - Africa2
 - Game of Life
 - System
 - Site Collection - sp2010hal

PROPERTIES

Cape Town

Available for Tagging
Select whether this term is available to be used by end users for tagging. When unselected this term will be visible but not enabled in tagging tools.

Language
Select a language of the labels for the term you would like to edit. English

Description
Descriptions will help users know when to use this term, and to disambiguate amongst similar terms. This is the city term for Cape Town

Default Label
Enter one label as the default for this language. Cape Town

Other Labels
Enter synonyms and abbreviations for this term. (You can enter a word or phrase per line.) Cape of Good Hope
add new label

Member Of

Term Set Name	Term Set Description	Parent Term	Source Term	Owner
South Africa		South Africa		METALOGIX\cawood

Done

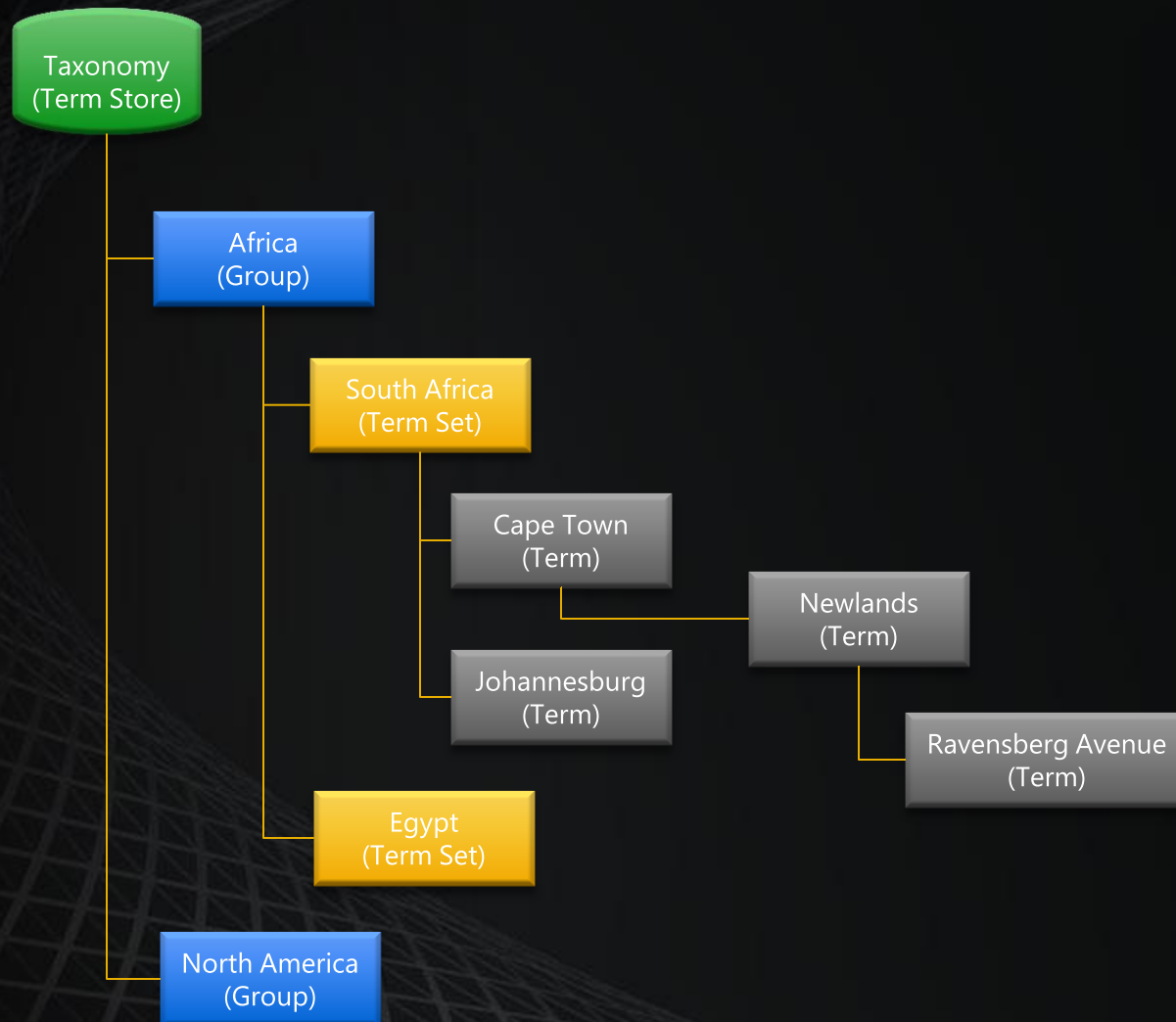
Local intranet | Protected Mode: Off 100%



EMM Hierarchy Rules


- When a Managed Metadata service is created, a term store will be created. Once you have a term store, you can create a group. A group is a security boundary.
- Once you have a group, you can create a term set. A term set must be the child of a single parent group. You cannot delete a group that contains term sets.
- Under a term set, terms can be created. A term can be a child of a term set, or of another term.
- A term can be added as a child of another term.
- Terms can be nested to seven levels.

Example Hierarchy



Metadata-Drive Site Column

Use a managed term set:
Find term sets that include the following terms.



Electrical goods

- Computers
- Home audio/TV
 - HiFi/Home theatre
 - Speakers
 - Televisions
 - Brand

Customize your term set:
Description

[Edit Using Term Set Manager](#)

Allow 'Fill-in' choices:

Yes No

Administrator Demo

- Display a Term Store
- Manage the Term Store with the Term Store Management Tool
- Add a Managed Metadata column to a list

EMM End-User

- Taxonomy and “folksonomy”
- Tag Cloud web part
- Features for “disambiguation” and faster tagging

Tagging Example

The screenshot shows a document metadata form for 'expenses.txt' in a SharePoint environment. The form includes fields for Name, Title, Managed Keywords, and Managed Metadata. The 'Managed Metadata' field is active, showing a search for 'Cape' with suggestions for 'Cape Town [South Africa]' and '(Cape of Good Hope) [South Africa]'. A tooltip for the selected suggestion provides additional context: 'Cape Town[South Africa]', 'This is the city term', and 'Synonyms: Cape of Good Hope'. A yellow warning banner at the top states: 'Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. More information on content approval.'

DocLibTest - expenses.txt

Edit

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. [More information on content approval.](#)

Name * expenses .txt

Title

Managed Keywords Cape Town;

Managed Metadata Cape

Suggestions

Cape Town [South Africa]
(Cape of Good Hope) [South Africa]

Version: 2.0
Created at 1/7/2010 7:09 PM by metalogix\cawood
Last modified at 1/7/2010 7:15 PM by metalogix\cawood

Cape Town[South Africa]
"This is the city term"
Synonyms: Cape of Good Hope

Tag Cloud Example

The screenshot shows a Windows Internet Explorer browser window displaying a SharePoint 2010 page titled "Pages - TagCloudTest". The address bar shows the URL "http://sp2010hal/Pages/". The page features a ribbon with tabs for "Site Actions", "Browse", and "Page". The "Page" tab is active, showing options like "Edit Page", "Edit Properties", "E-mail a Link", "Alert Me", "Approve", "Reject", "Workflows", "Edit Mobile Page", "Make Homepage", and "Title Bar Properties".

The main content area is divided into three sections:

- Pictures:** A list of image galleries including "GameOfLifeImages".
- Documents:** A list of document libraries including "DocLibWithEMM", "NewDocWithKeywords", and "Pages".
- HomeSubSite:** A list of subsites including "KP Test", "Press Releases", and "TestPublishing".

The central "Tag Cloud" section displays the following content:

- Tag Cloud:** A large tag "Cape Town" is prominent, with smaller tags "Cape Town", "shared", "Reference", "Sales", "Newlands", and "keywordtest2" below it.
- RSS Viewer:** A list of RSS feeds including "cawood's blog - geek literature", "Paul Quarrington", "Office Ribbon Hero", "Hyper-V Import Again Fails", "Microsoft's Free SyncToy", and "History of SharePoint ECM Through Shirts".

The status bar at the bottom indicates "Local intranet | Protected Mode: Off" and "100%".



Metadata Navigation

- Navigation hierarchy
- Key Filters

Key Filters

South Africa

All Tags

Home

Libraries

Site Pages

Shared Documents

Lists

Calendar

Tasks

Discussions

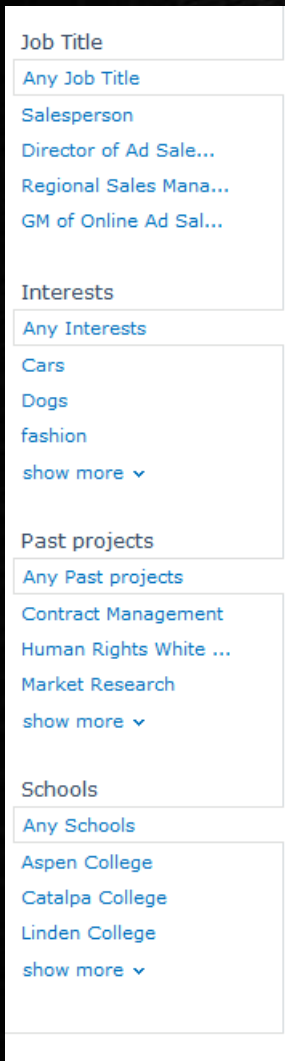
Team Discussion

Shared Documents

- South Africa
 - Cape Town
 - Johannesburg



Leveraging the Managed Metadata Service for better People Search



- Out of box:
 - Responsibilities, Interest, Skills, Schools, are all taxonomy properties
 - Automatic refinement on relevant pivots
- Extensibility
 - Adding a new taxonomy property to the profile store



End-User Demo

- Tag a document with a managed keyword
- Tag a document with a managed term (Suggest as you type)
- Tag Cloud web part
- Metadata-driven navigation (filtering)

EMM Developer

- Term - Class: Term. If the `IsAvailableForTagging` property is true, the term is available for tagging.
- Term Set – Class: TermSet
- Managed Keyword – Class:Term. A Term becomes a keyword when the `IsKeyword` property is true.
- Term Store – Class:TermStore
- Microsoft.SharePoint.Taxonomy

Questions?

Kurt Rolland
Covenant Technology Partners
krolland@mailctp.com

Microsoft®

Your potential. Our passion.™

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SharePoint 2010

