

# Managing the Information Overload with Managed Metadata

**Track: SharePoint 2010**

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# About Miguel Wood

- Over 10 years of SharePoint Experience (2001, 2003, 2007, 2010)
- Microsoft Certified Master (MCM), SharePoint 2010
- MCITP, SharePoint Server 2010
- MCPD, SharePoint Server 2010
- MCTS, Configuring and Development, WSS 3.0, MOSS 2007
- Microsoft Virtual Technical Solutions Professional (VTSP) Program
- Only non-Microsoft individual authorized to instruct SharePoint 2010 Ignite (pre-release training) for BOTH IT Pro and Developer tracks
- Fun Facts
  - Veteran U.S. Army Paratrooper
  - Lead Singer for Rock Band at LSU



# About Statêra

- In business 10 years
  - 2010 revenue ~\$40M
- Headquartered in Denver with offices in Phoenix, Seattle, Salt Lake City, and Dallas
- Commands over 17 Microsoft competencies
- Broad business-focused technology consulting organization of over 300 consultants

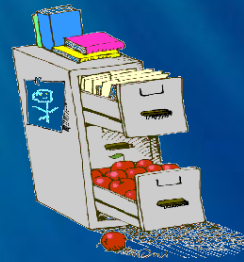
# Agenda

- The Information Overload Problem
- SharePoint 2010 Managed Metadata Service Application (MMSA)
- Taxonomy / Folksonomy
- The Overall Solution
- Q & A

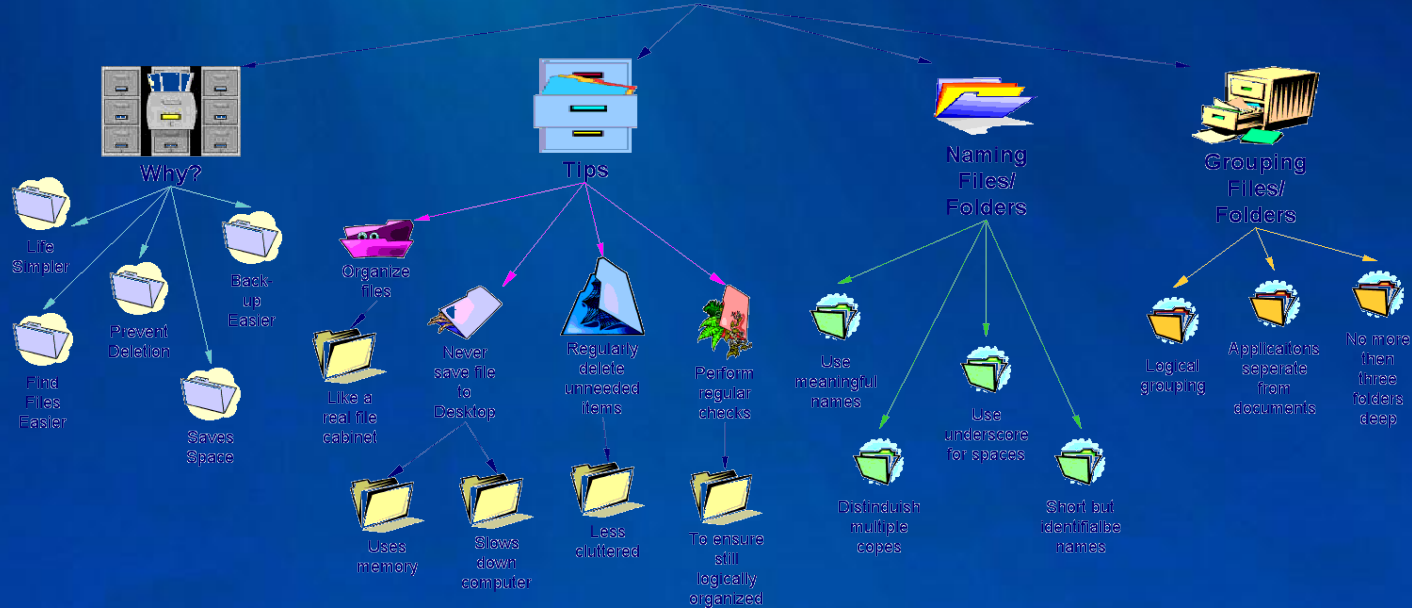
# TMI (Too Much Information)



# The File Share



## Organize Your Files



# Metadata

- Everyone has heard the definition of “data about data”
- It's a way of identifying information (content) to organize and classify in different and/or many ways

# Why Metadata

- First article on front page of USA Today Money section on May 18, 2011, “Distractions for workers add up”
  - “The average worker wastes 2.5 hours a week looking for documents missing in poorly organized electronic files.”

<http://tinyurl.com/ti2011-wood-sp1>



# SharePoint 2010

## “ENTERPRISE” Content Management

- First version with OOB functionality supporting enterprise management of metadata and content types
- Implemented in the new Service Application architecture via the Managed Metadata Service Application (MMSA)

# Managed Metadata Service Application

- Two, somewhat distinct components of functionality
  - Hub (Enterprise Content Types)
  - Term Store (Enterprise Metadata Term Storage)

# Fun with Words

- **Taxonomy** – Formal practice and science of classification (Greek roots meaning “arrangement” and “method”)
- **Folksonomy** – User-based classification, usually ad-hoc

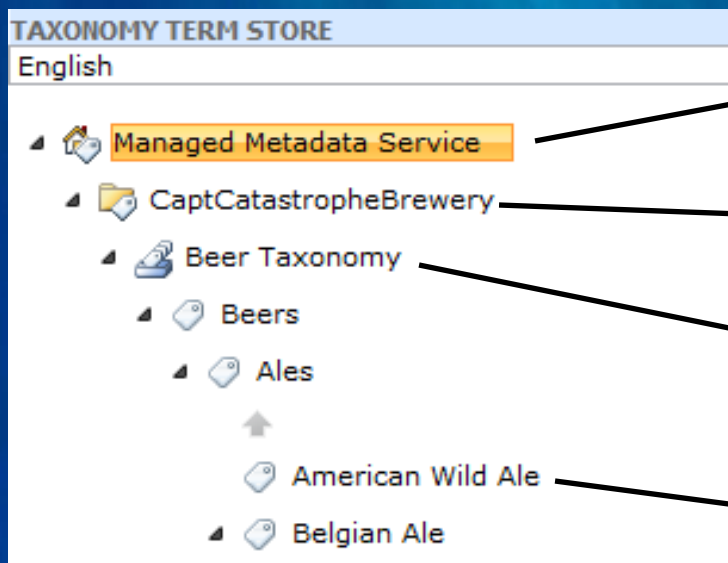
# SharePoint 2010 Terminology

- **Term Store** (Database for MMSA)
  - **Term Set Group** (Security Boundary)
    - **Term Set** (Group of tags)
      - **Term** (Tag)
- ALWAYS hierarchal in structure
- Allows for synonyms and translations

# Additional Definitions for MMSA, Only for Completeness

- **Content Type** – A reusable object (properties and behaviors) representing a type of information in SharePoint
- **Enterprise Content Type** – A content type used in multiple site collections (also web applications and farms)
- **Content Type Hub** – The site collection that is the source and central management location of the enterprise content types
- **Content Type Syndication** – The process of publishing the enterprise content types across multiple site collections

# Term Store Hierarchy



Term Store

Term Group

Term Set

Term

# Importing Terms

## Sample Import

The SharePoint metadata manager can import a term set from a JTF-8 CSV format file. Use the sample file as a template for creating import files. Then import the file into the desired group to create a new term set.

[View a sample import file](#)

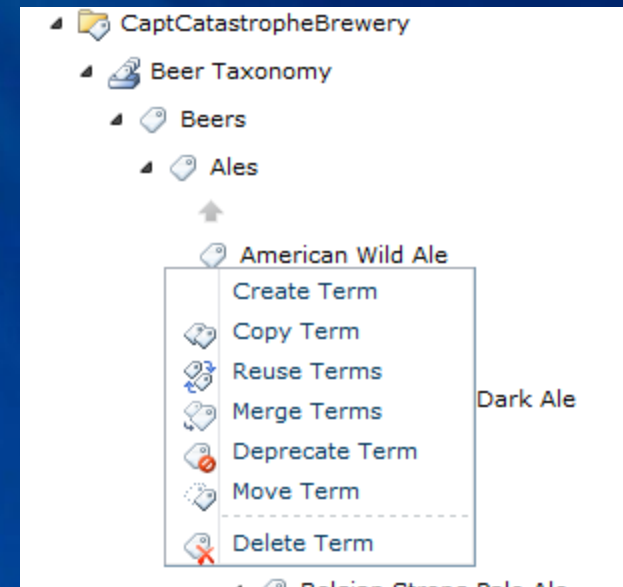
Sample CSV File Link

7 Levels of Terms  
Created in Excel

	A	B	C	D	E	F	G	H	I	J	K
1	Term Set	Term Set LCID	Available	Term Desc	Level 1 Te	Level 2 Te	Level 3 Term	Level 4 Term	Level 5 Te	Level 6 Te	
2	Beer Taxo	A Taxonomy of Beer	TRUE	Beers							
3			TRUE	Beers	Lagers						
4			TRUE	Beers	Lagers	German Lager					
5			TRUE	Beers	Lagers	German Lager	Rauchbier				
6			TRUE	Beers	Lagers	German Lager	Vienna Lager				
7			TRUE	Beers	Lagers	German Lager	Marzen				
8			TRUE	Beers	Lagers	German Lager	Schwarzbier				
9			TRUE	Beers	Lagers	German Lager	Keller Bier				
10			TRUE	Beers	Lagers	German Lager	Bock				
11			TRUE	Beers	Lagers	German Lager	Bock		Maibock/Helles		
12			TRUE	Beers	Lagers	German Lager	Bock		Doppelbock		
13			TRUE	Beers	Lagers	German Lager	Bock		Eisbock		
14			TRUE	Beers	Lagers	German Lager	Bock		Dunkler Bock		
15			TRUE	Beers	Lagers	German Lager	Dortmunder				

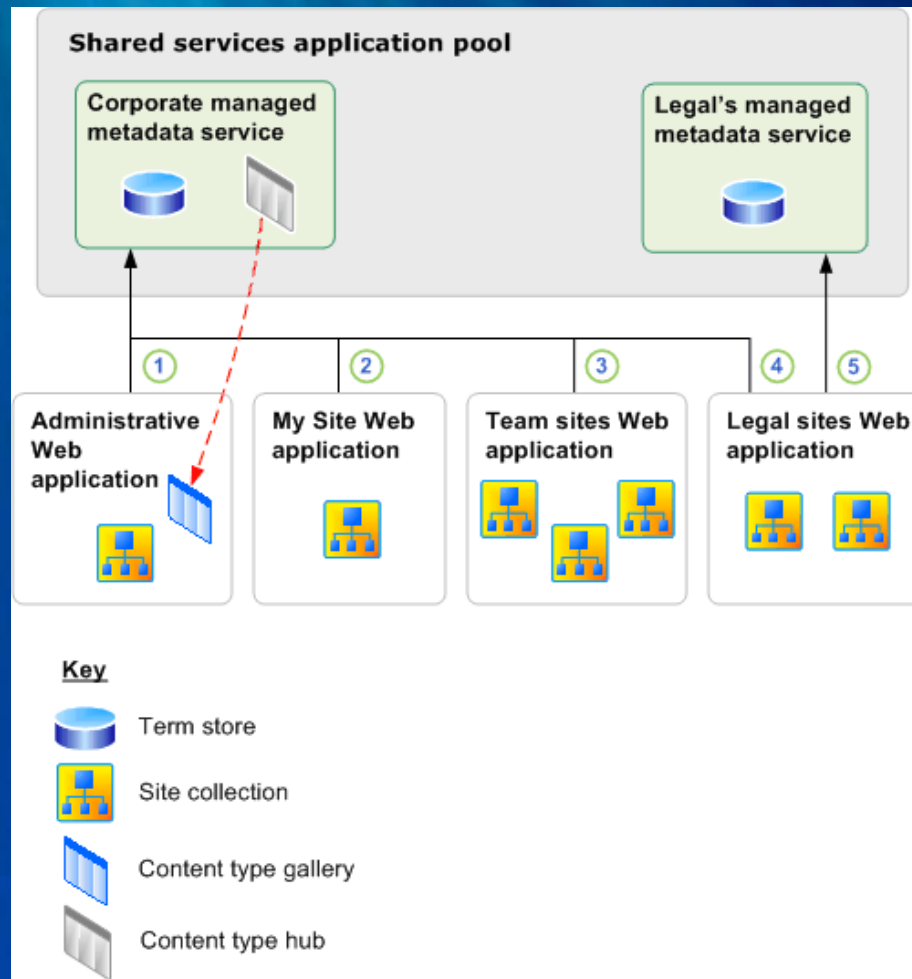
# Creating and Managing The Taxonomy

- Full Create/Delete
- Reuse of terms in different branches
- Merging of terms
- Creating Synonyms
- Deprecating Terms





# Multiple MMSAs



# Service Application Administration

The screenshot shows the 'Service Applications' section of a SharePoint administration interface. A red circle highlights the top toolbar containing the following icons and labels: New, Connect, Delete, Manage, Administrators, Properties, Publish, and Permissions. Below the toolbar, a table lists various service applications and their status.

Category	Service Application Name	Web Service Application	Status
Excel Services Application	Excel Services Application	Excel Services Application Web Service Application	Started
	Excel Services Application	Excel Services Application Web Service Application Proxy	Started
Managed Metadata Service	Managed Metadata Service	Managed Metadata Service	Started
	Managed Metadata Service	Managed Metadata Service Connection	Started
PerformancePoint Service Application	PerformancePoint Service Application	PerformancePoint Service Application	Started

# Managing the Term Store

The screenshot shows the SharePoint 2010 Central Administration interface for the Term Store Management Tool. The breadcrumb path is: Central Administration > Site Settings > Term Store Management Tool. The page title is "Managed Metadata Service".

**SEARCH**

**TAXONOMY TERM STORE**  
English

- Managed Metadata Service
- System

**PROPERTIES**

**Managed Metadata Service**

**Available Service Applications**  
A site may consume multiple metadata applications. Select the one to see in the tree view.  
Managed Metadata Service

**Sample Import**  
The SharePoint metadata manager can import a term set from a UTF-8 CSV format file. Use the sample file as a template for creating import files. Then import the file into the desired group to create a new term set.  
[View a sample import file](#)

**Term Store Administrators**  
You can enter user names, group names, or e-mail addresses. Separate them with semicolons. These users will be permitted to create new term set groups and assign users to the group manager role.  
tfclass\administrator;

**Default Language**  
Select the default language for all Metadata in the system. All terms must have a label defined in their default language.  
English

**Working Languages**  
Select the "translation of" languages for terms in the term store. This will allow a term to have language specific labels and translations.  
Add >> English

# Applying Metadata

## Web Browser

- Edit properties UI
- Location-based metadata
- Business process

## Office Client

- Document information panel
- Backstage
- InfoPath forms

## Custom Apps

- Object model

# Using Your Taxonomy

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)
- External Data
- Managed Metadata

Earlier versions of client programs might not support this type of column. Adding this column might block those programs from saving documents to this library.

New 'Managed Metadata' field type

# Selecting the Term Store or Term

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

- Managed Metadata Service
  - CaptCatastropheBrewery
    - Beer Taxonomy**
      - Beers
        - Ales
        - Lagers
    - Document Taxonomy

Pick the Term Store or Term

# Demo Time

- Adding Terms to Taxonomy
- Adding Managed Keywords to a library
- Tagging and Terms

# Where to Start

- Folksonomy is driven by Managed Keywords (in System folder of Term Store) or custom “open” term set group(s)/term set(s)
- Taxonomy is usually a business managed “closed” set, requiring administration privileges
- Good “rule of thumb” is to keep folksonomies open and taxonomies closed



# Summary

- The Information Overload Problem
- SharePoint 2010 Managed Metadata Service Application (MMSA)
- Taxonomy / Folksonomy
- The Overall Solution
- Q & A

# References and Resources

- TechNet (for IT Pros) Managed Metadata
  - <http://tinyurl.com/ti2011-wood-sp2>
- MSDN (for Developers) Managed Metadata
  - <http://tinyurl.com/ti2011-wood-sp3>
- Microsoft Enterprise Content Management (ECM) Team Blog
  - <http://blogs.msdn.com/b/ecm/>

The background of the slide is a deep blue underwater scene. Sunlight rays penetrate the water from the top, creating a shimmering, ethereal effect. The rays are most prominent in the upper left and center, fading towards the right. The overall mood is serene and professional.

# Thank you.