Metadata og taksonomier i SharePoint 2010

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Purpose

- Learn about the new Managed Metadata and Term Stores
- Understand the architecture and infrastructure of the new system
- See the new functionality in action – also from Office clients
- Introduction to more advanced document management options

About

- Worked with Microsoft Technology for nearly two decades
- Implemented solutions on all version of the SharePoint Technologies since the early version of SPS2001 and STS
- Active participant in the Microsoft Office "12" and "14" BETA programs
- Lead architect on several major SharePoint projects over the years

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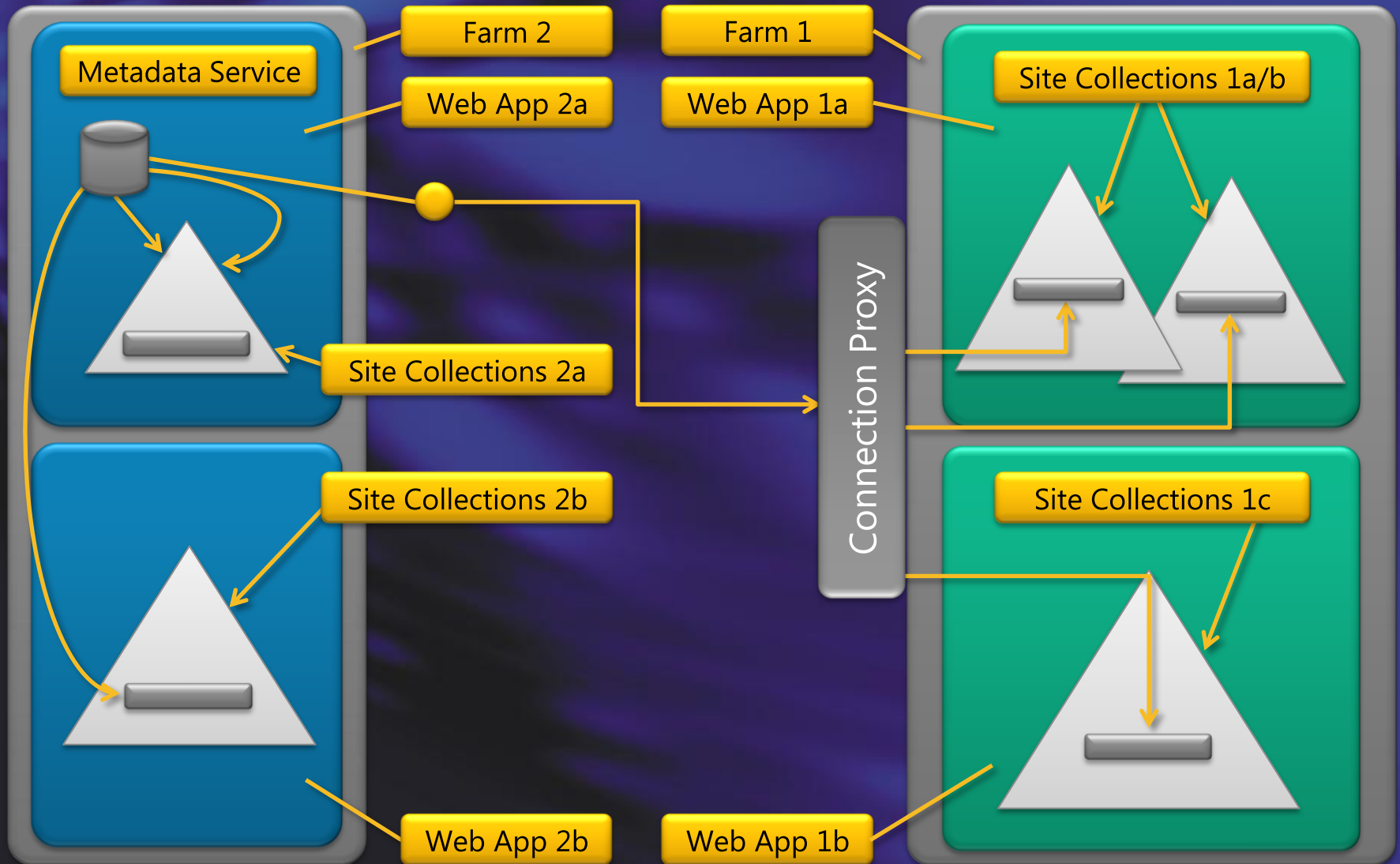
Managed Metadata basics

Defining the new terms

- **Hub** - A site collection designated as a "source" from which we share content types through out the enterprise
- **Content Type Syndication** - Publishing, sharing, pushing one or more content types across site collection, Web App., and farm boundaries
- **Taxonomy** - Hierarchy, synonyms, descriptions, and translations
- **Folksonomy** - Informal flat list of adhoc values
- **Term Store** - DB that contains one or more taxonomies available as a "Shared Service"
- **Term** - Node in the taxonomy with a unique ID and many text labels
- **Tagging** - Applying metadata to an item (authoritative or social)
- **Keywords** - "Not just a text string"

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Content Type Syndication

Content Type Publishing

Introducing the hub
Creating a new Content Type
Publish
Reports and logs
Force the Timer Job
Show consuming Site Collection
Read only Content Type

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Applying Metadata (or tagging)

- Rich Web Browser experience
  - Direct editing of properties
  - Set through policies or processes
  - Inherited from parent "objects" (e.g. the Document Set)

- The experience in the browser is now fully replicated in the Office Clients
  - Information panel
  - New "file" menu

- Custom application
  - Developed using the SharePoint Metadata OM
  - WhitePaper is out
  - Documentation on MSDN

Applying Metadata

Simple Metadata editing
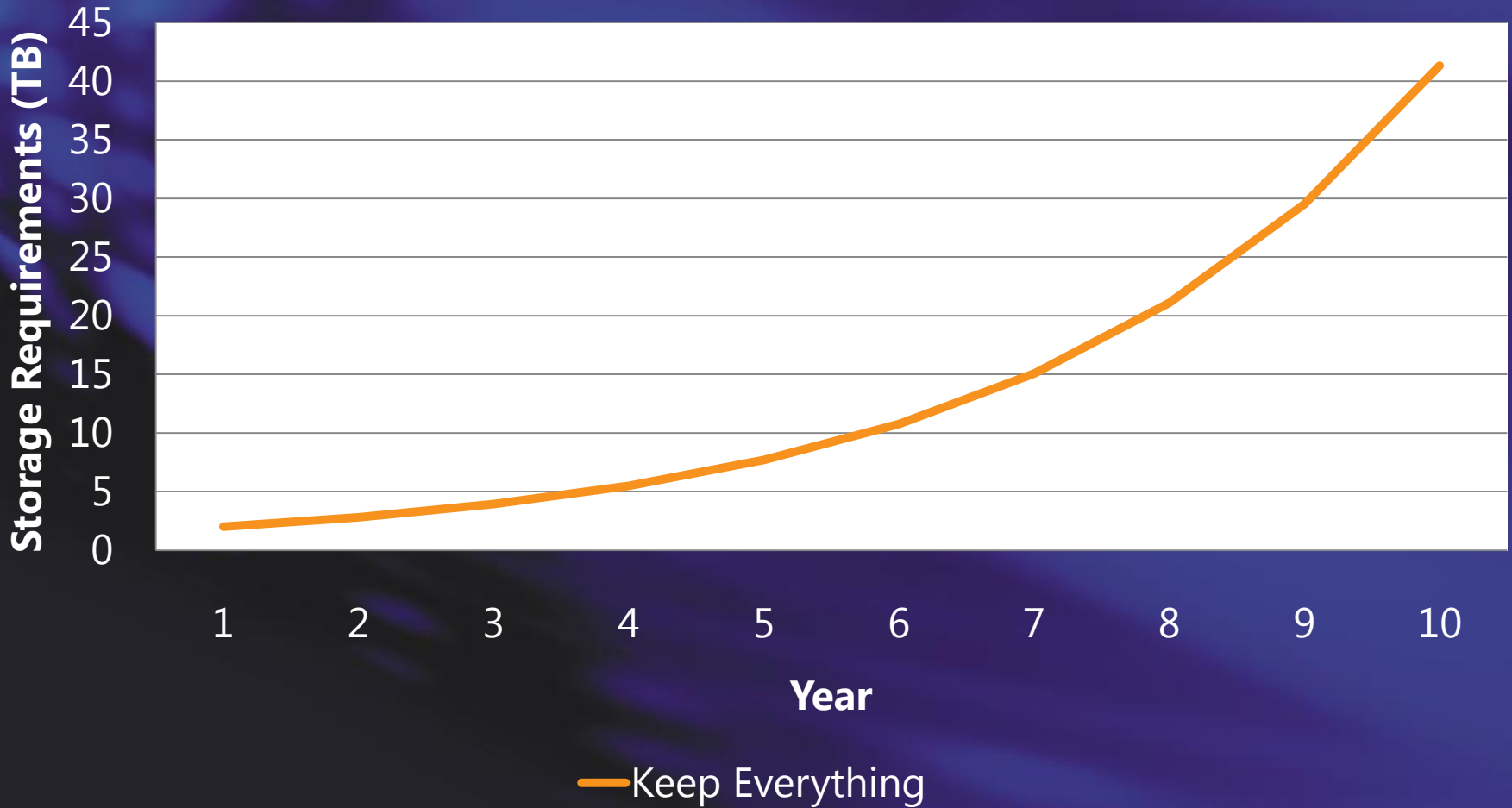- Through the browser
- Using Word

Metadata Navigation Settings
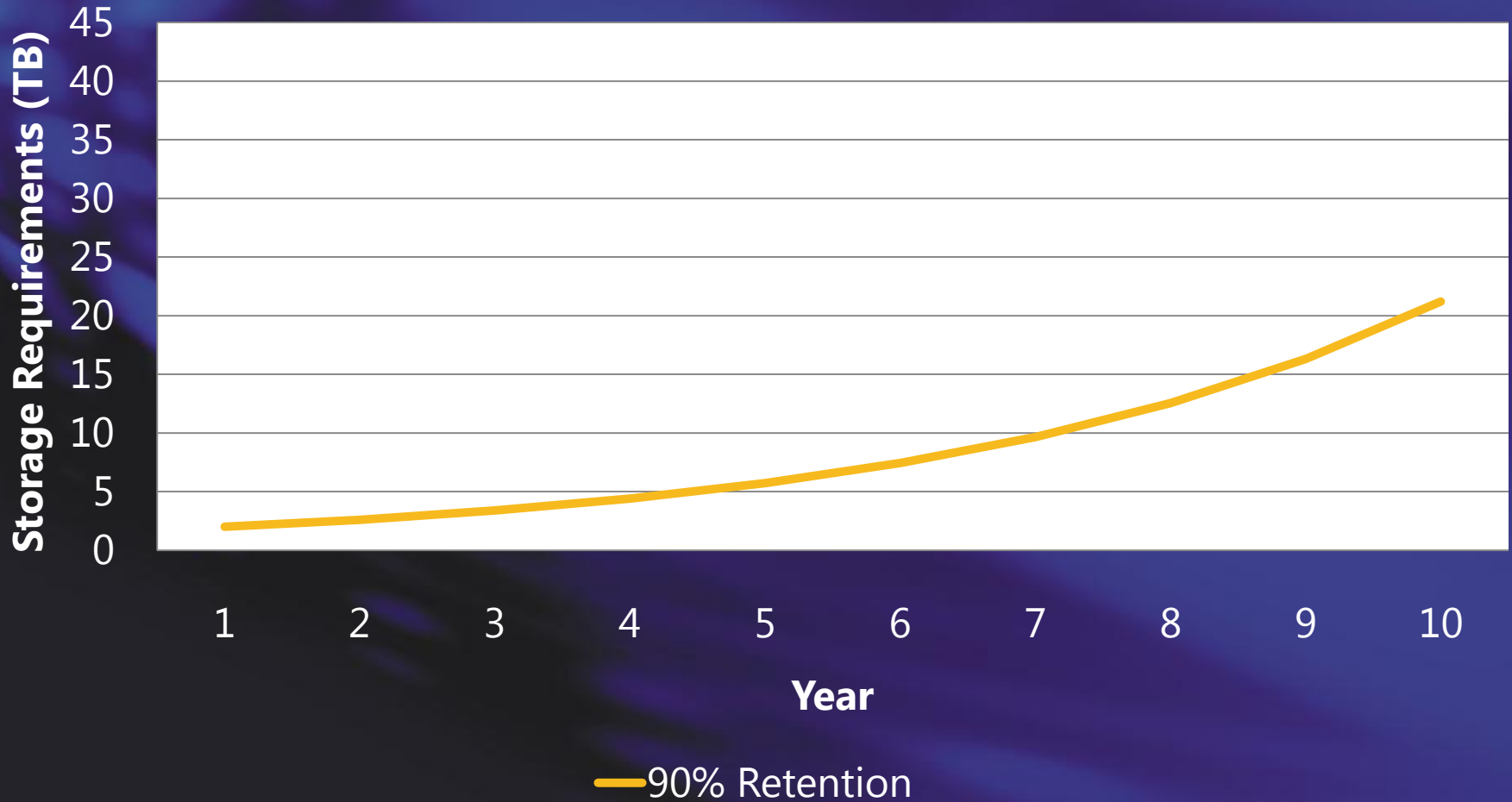Ratings

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Advanced document management

- All documents can now be auto-tagged with an ID
  - Unique accross the Site Collection and with prefix the Farm
  - Used and accessed through a forwarder

- Declaring of records can be enforced on multiple levels

- Information management policies
  - Option to use containers (folders) for retention policies
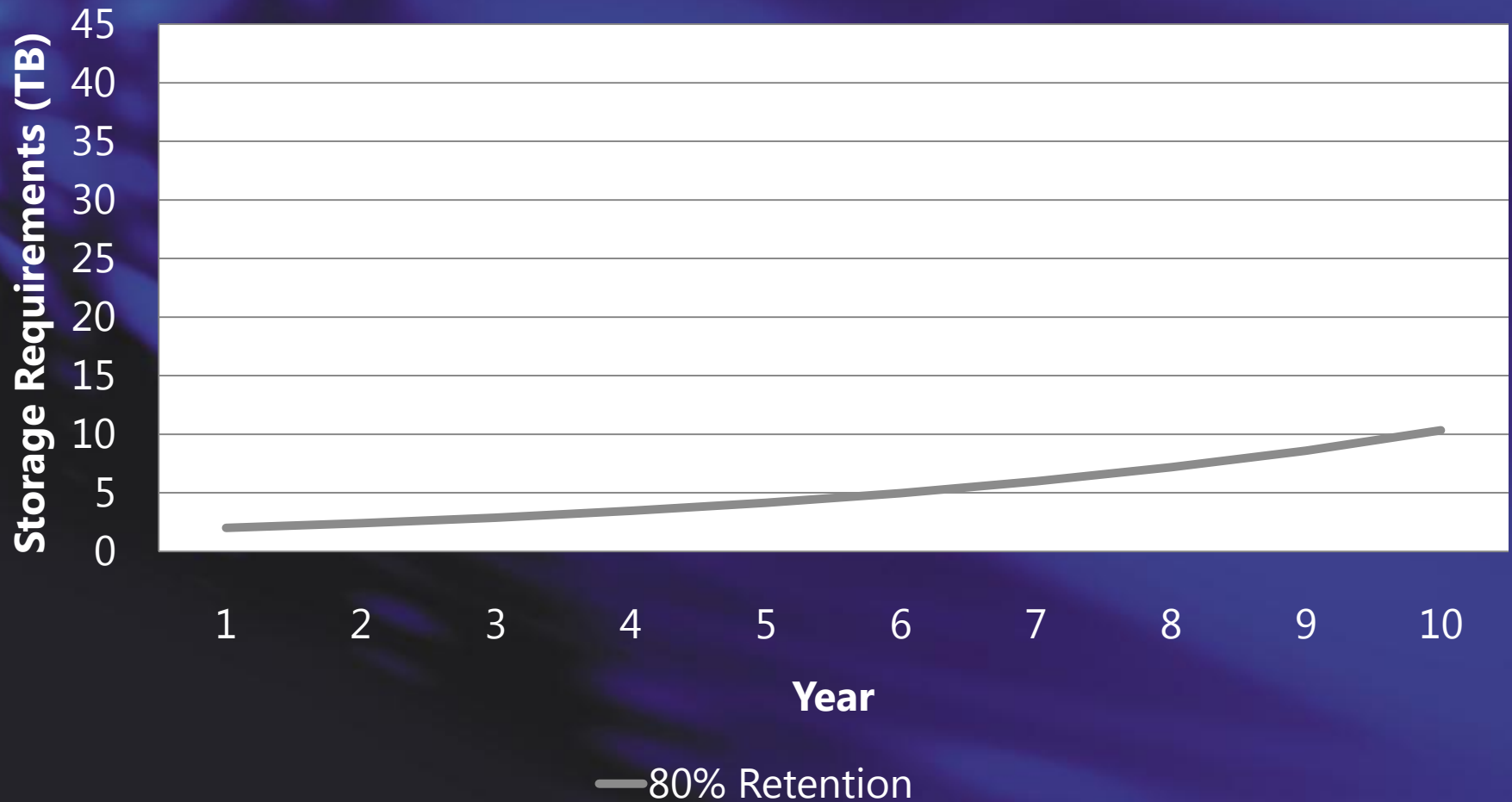 - Recuring check for usage
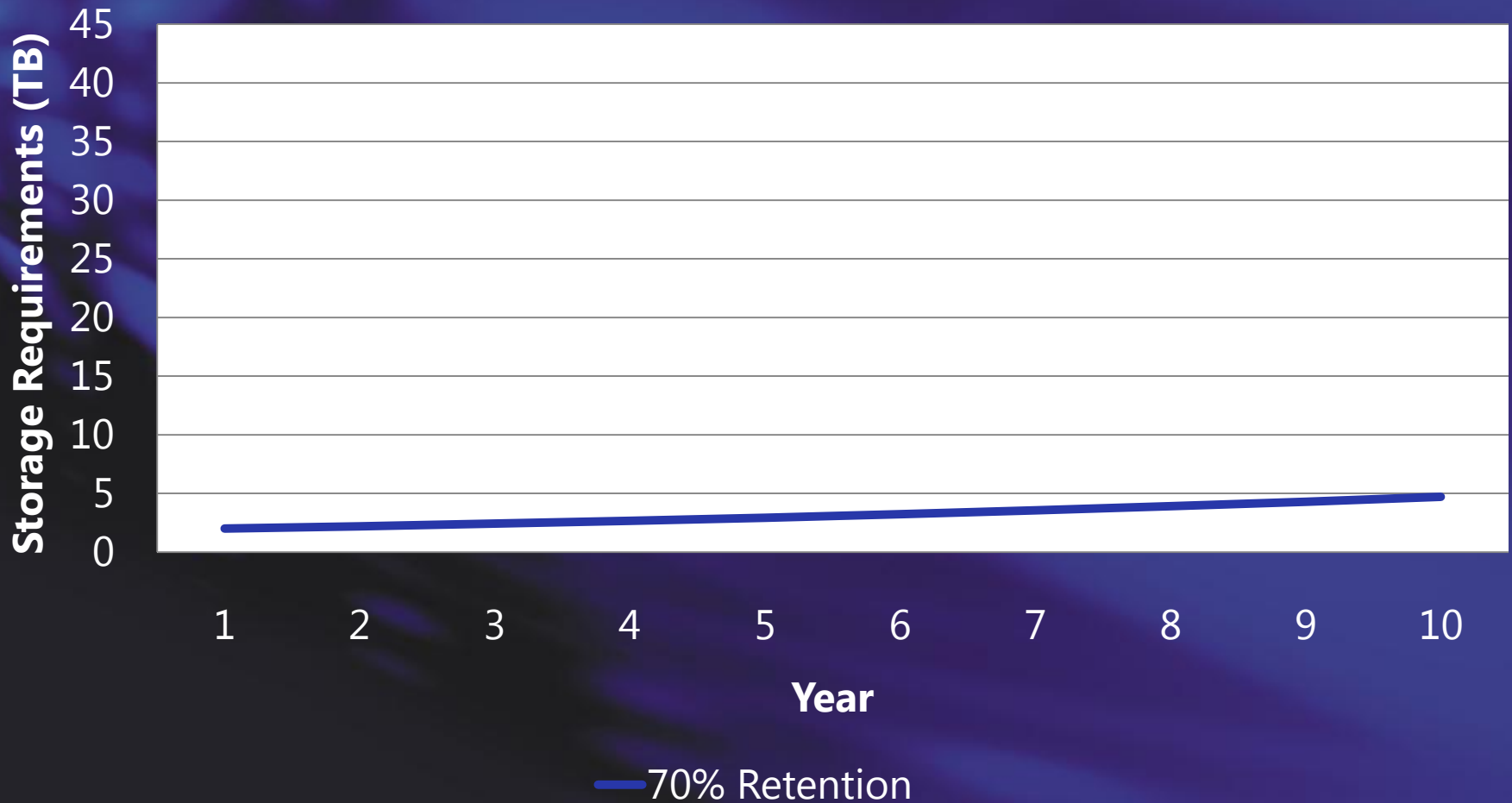 - Finally removing unused content

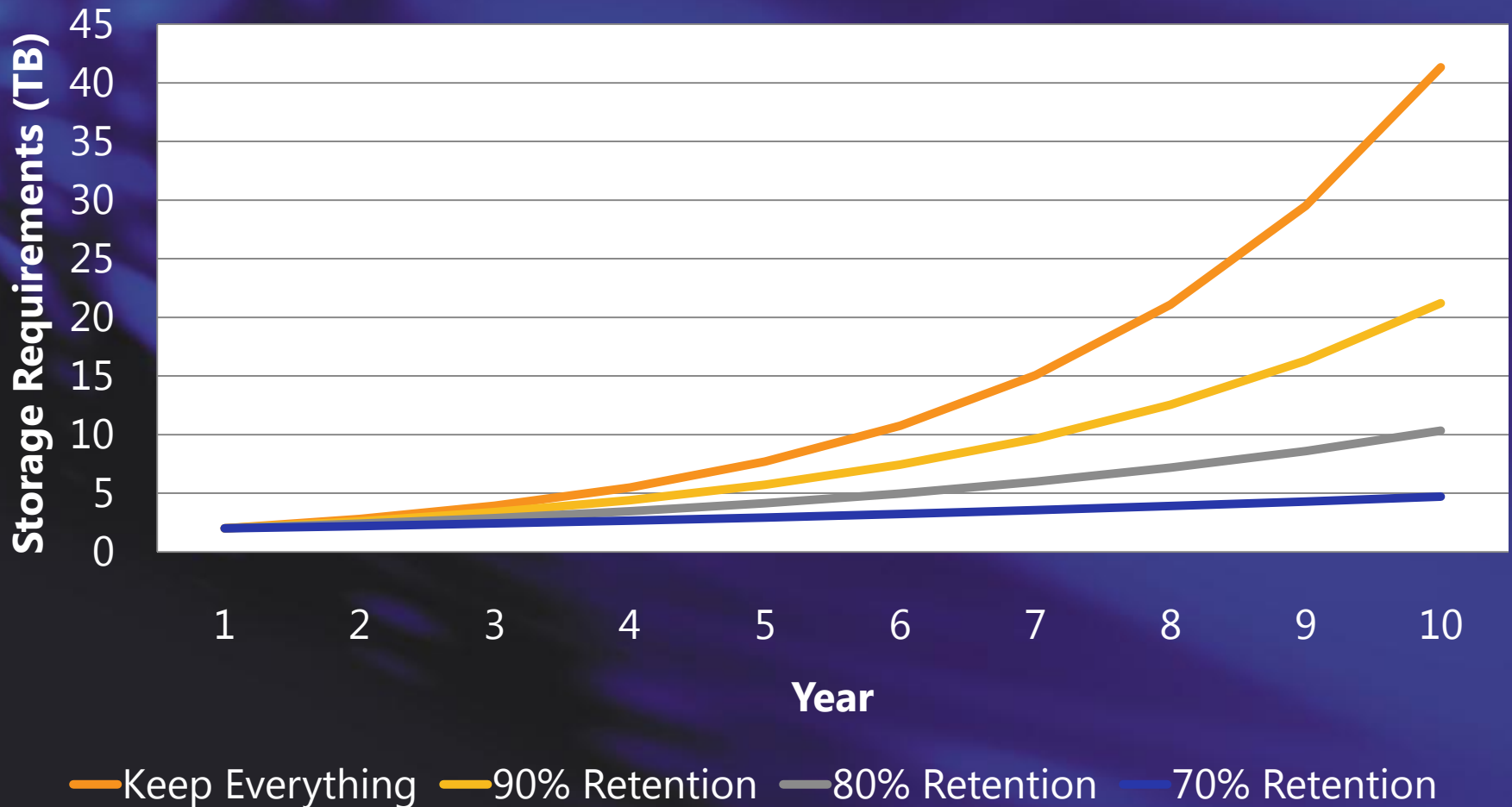# Manage the Unmanaged

Manage the Unmanaged

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Storage Requirements (TB) vs Year

— Keep Everything — 90% Retention — 80% Retention — 70% Retention

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Advanced Document Management

Document Id
Document Sets
Record Declaration – auto and manual

Information management policy settings on Libraries
- Introducing retention

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Managed Metadata Column Type

Managed Metadata

- Single or multi-value field
- Binds to a term set of any term store (Share Application Service)
- Many managed metadata column on a list, library, or content type
- "Like a super choice field"
- Inclusive/exclusive filtering
- MUI enabled
- Most recently used

Managed Keywords

- Now part of the base doc content type
- One per content type
- Validates against all terms in all term sets
- Always for "folksonomies"
- "Like a super text field"
- Auto-complete
- Preferred term
- Tree picker control

Managed Metadata Column Type

Creating new Managed Metadata
Adding terms
Synonyms and MUI
Promoting to Enterprise Term Store

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Term Store Management Tool

Term Sets

- Create and manage different hierarchies that share terms
- Same term can have different parents in different term sets
- Each term set can have unique sort order
- Allow/disallow end user updates

Security Groups

- Control how can edit/delete/create using SharePoint groups and users

Term Management

- Copy
- Reuse
- Description
- Merge
- Import
- Deprecate
- Delete
- Not available
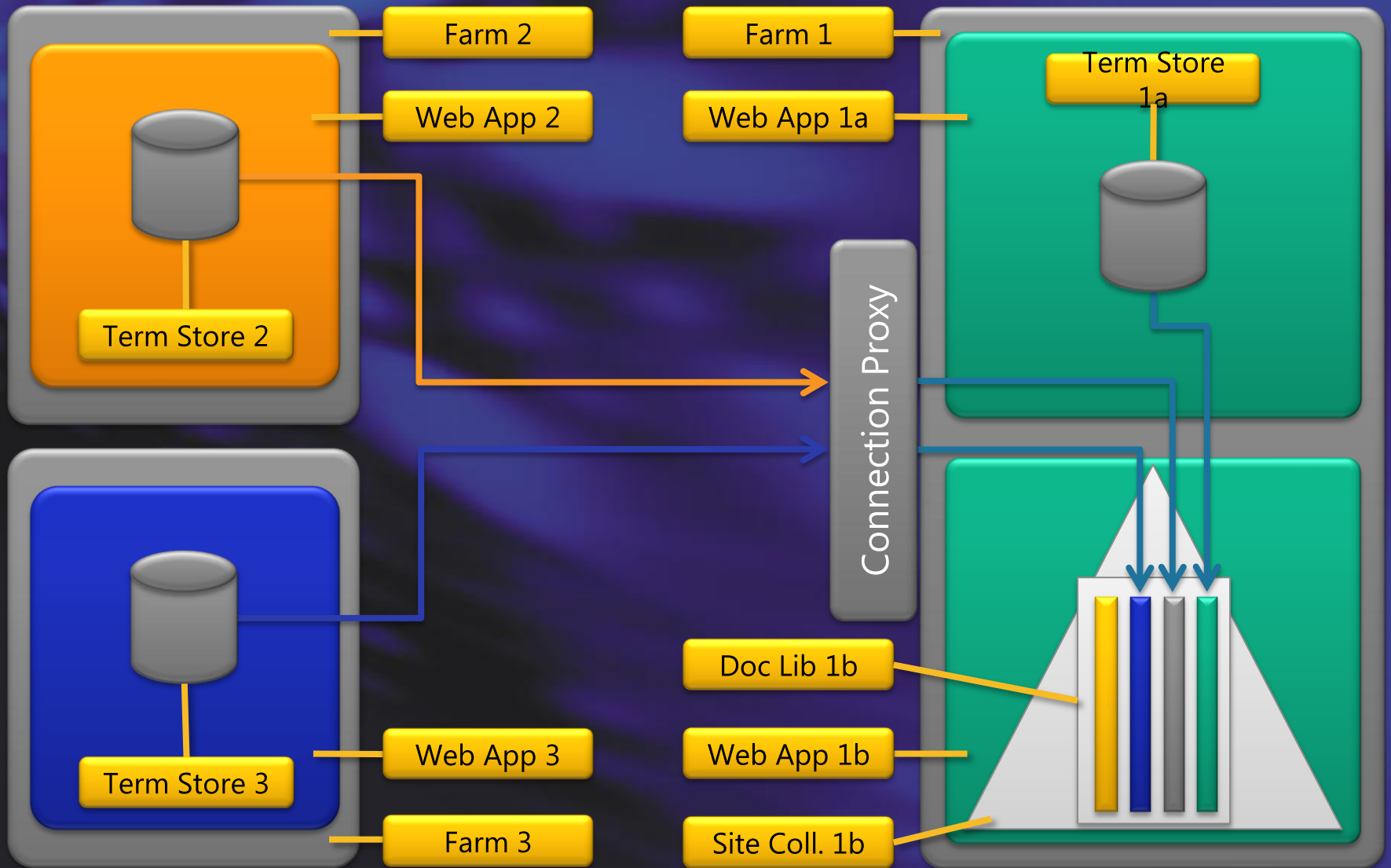- Full multi lingual
- Extensible custom properties

Term Store Management Tool

Advanced use of Term Management
- Copy
- Reuse
- Merge
- Import
- Deprecate
- Delete
- Not available
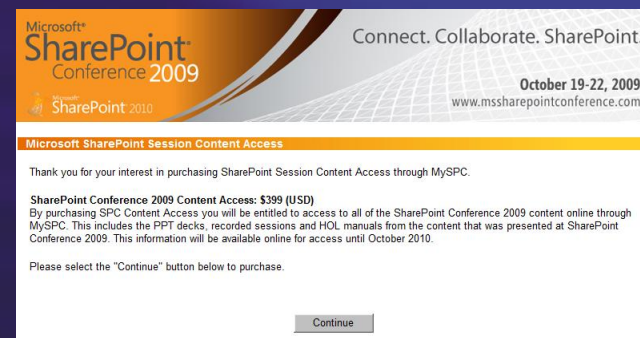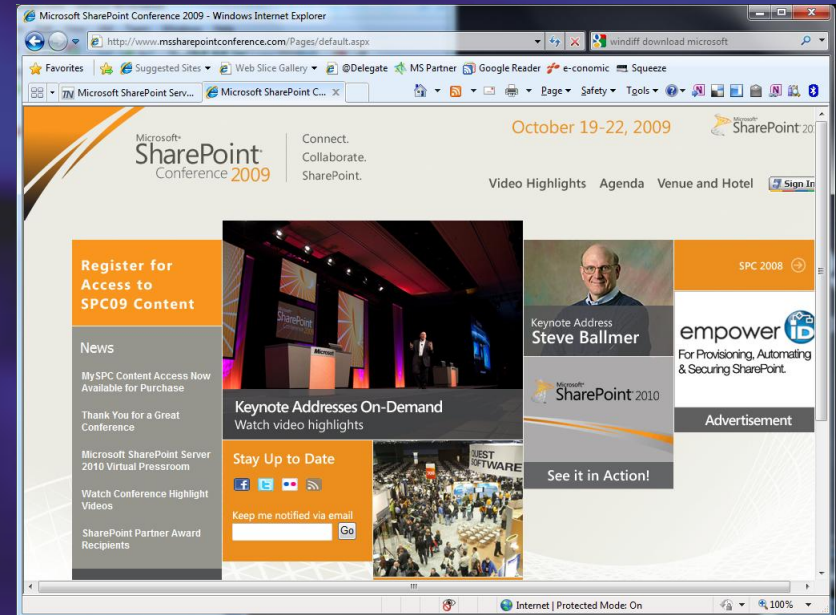
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Multi Farm in the Enterprise

Shared Service Application

Configuring multiple Service Application

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To learn more:
Access the SharePoint 2009 Conference content

- Much of the content build on information found at SPC
- All sessions are recorded and can be viewed on demand
- Buy access for $399 (USD)

- Added bonus: also access to SPC2008 content

Q&A – please fill in evaluations!

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