SharePoint 2010 Managed Metadata Services

DEV109

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About the Speakers

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Agenda

▶ Terminology and SharePoint IA

▶ Managed Metadata Overview

▶ Term Stores

▶ Content Type Syndication

▶ Recommendations

Some Terminology

▶ Information Architecture

  ▪ the categorization of information into a coherent structure, preferably one that the most people can understand quickly, if not inherently

▶ Taxonomy

  ▪ is the practice and science of classification

▶ Metadata

  ▪ Data about data

The IA Practice "Discipline"

▶ Extremely Immature

▶ More often than not counter productive

▶ Usually doesn't take into account products

▶ What works for a "Web Site" or "Intranet"

  ▪ Isn't suitable for collaboration or social scenarios

▶ Often hoodwinks a project from the get go

▶ Internal views of an organisation

 ▪ are poorly suited to users or customers

The reality

Putability

▶ Definition:

- The quality of putting content in the correct location with the correct metadata.
- The degree to which we put quality information into our information management system.

▶ Truths:

- What goes in, must come out: garbage in, garbage out
- Our users will resist taking the time to put quality information into the system
- Findability is directly impacted by our putability practices

Flexibility
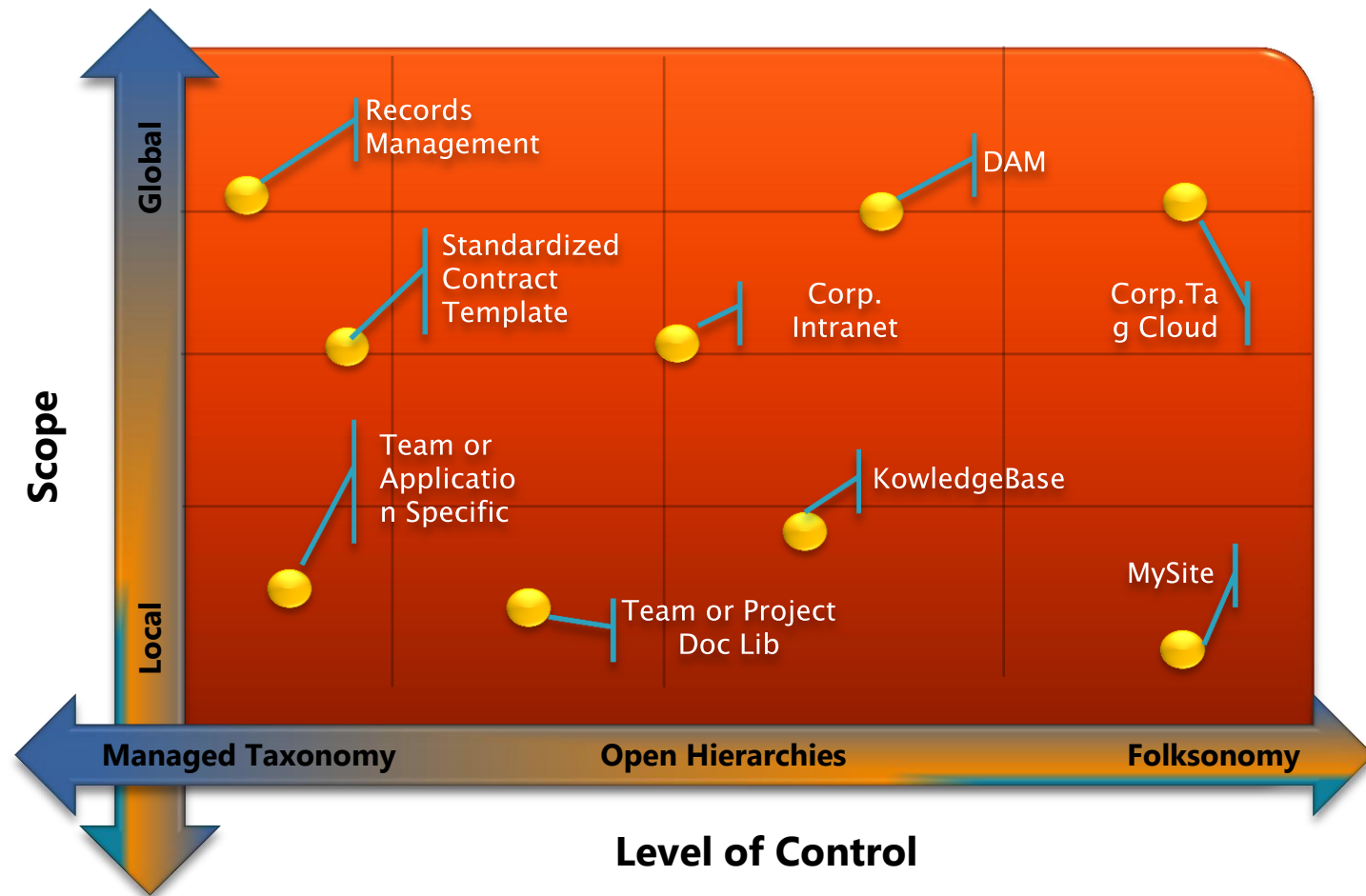
Findability

▶ Definition:
- The quality of being locatable or navigable
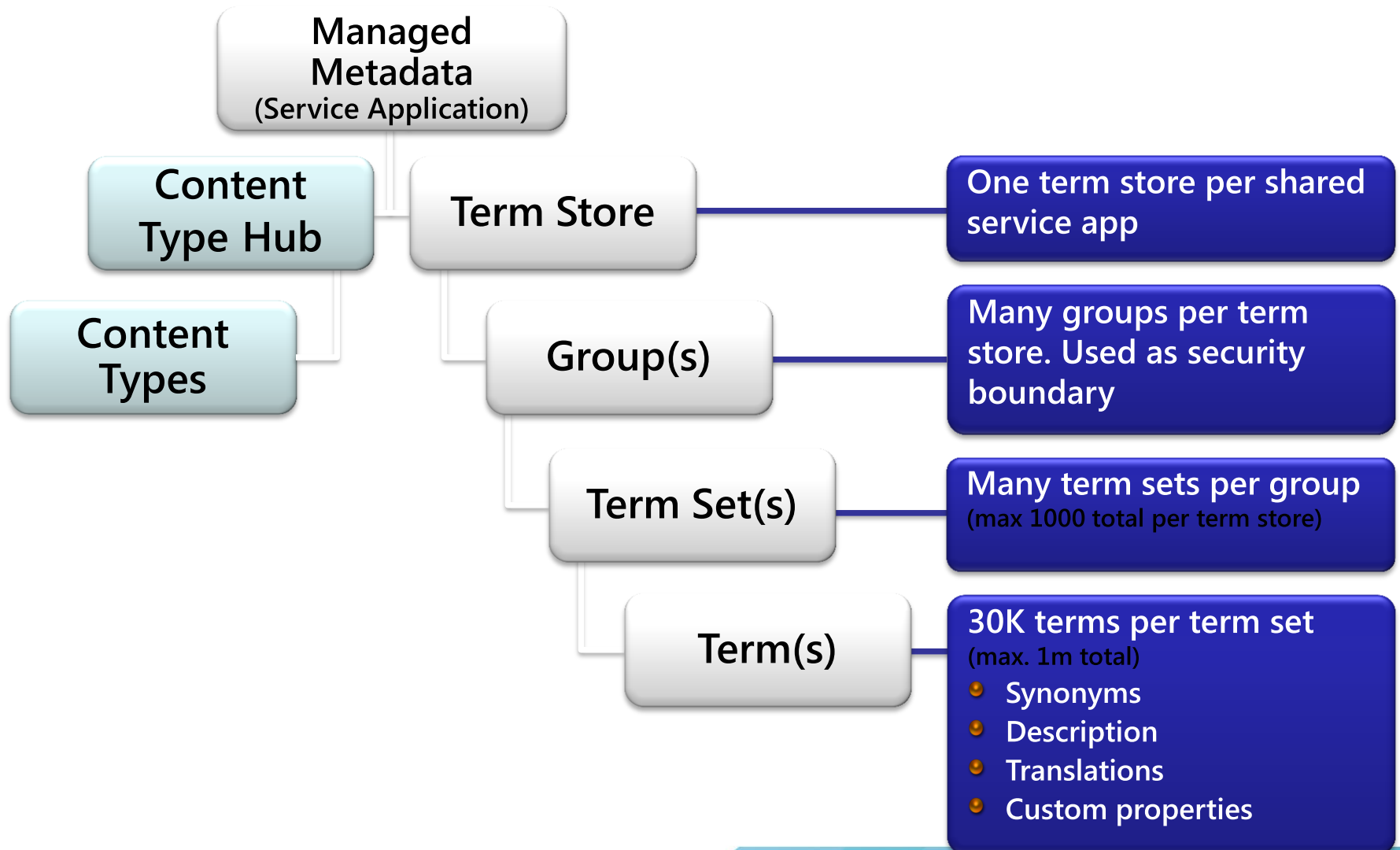- The degree to which objects are easy to discover or locate

▶ Truths:
- You can't use what you can't find
- Information that can't be found is worthless
- Our customers can't purchase what they can't find
- Information that is hard to find is hardly used
- Authority, trust and findability are interwoven
- Key to success when working with information is findability

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MANAGED METADATA SERVICES

Managed Metadata Overview

Managed Metadata (Service Application)

Content Type Hub

Content Types

Term Store — One term store per shared service app

Group(s) — Many groups per term store. Used as security boundary

Term Set(s) — Many term sets per group (max 1000 total per term store)

Term(s) — 30K terms per term set (max. 1m total)
- Synonyms
- Description
- Translations
- Custom properties

Core Configuration

▶ Services on Server

   ▪ Start the Managed Metadata Web Service

▶ Manage Service Applications

   ▪ Create new Managed Metadata Service SA

      – And Proxy

   ▪ Configure SA & Proxy Settings

TERMS STORES

Term Store

Definition
- Database in which managed metadata is stored

Usage/Limits
- Term Groups container
- Language settings, ACLs
- One per Service Application

Example
- Security Isolation
- Scalability

Term Set Group

Definition	• A collection of Term Sets
Usage/Limits	• Many groups per Term Store • Security Boundary
Example	• Finance • Marketing

Term Set

| Definition | • A collection of terms |

| Usage/Limits | • One instance of source term
• 30,000 terms per term set
• 1,000 term sets per term store |

| Example | • Column must contain term from specific term set
• Locations |

Terms (now we're talking!)

Definition	• A keyword or phrase that can be associated with items in SharePoint
Usage/Limits	• Merge, delete, deprecate, translate, move • Synonyms, Descriptions, Translations • One million objects per term store
Example	• Managed Metadata Column

Entering Metadata

Three ways to enter metadata

▶ Web Browser

▶ Office Client Applications

▶ Custom (3rd party) Applications

Managing Metadata

▶ Columns can store local, adhoc data, or

▶ Columns can be tied to term store

▶ Term set can be open or closed

▶ Keywords can be entered manually or imported from CSV file

CONTENT TYPE SYNDICATION

Why Publish Content Types?

▶ Consistency

▶ Identity

▶ Location

▶ Lifecycle Management

What Get's Published?

▶ Content Type object

▶ Metadata

▶ Document Set

▶ Document Template

▶ Information Management Policies

▶ Workflow associations

▶ Workflows *not* published

Content Type Publishing

▶ Enterprise Content Types

▶ Content Type Hub
  - Used by Managed Metadata Service Application
  - Requires Site Collection
  - Consider dedicated Web Application

▶ Content Types "published" from hub
  - Pulled by consuming Site Collections

Managing Published Content Types

- From the hub
  - Publish
  - Unpublish
  - Republish
  - Roll-up errors from consuming site collections
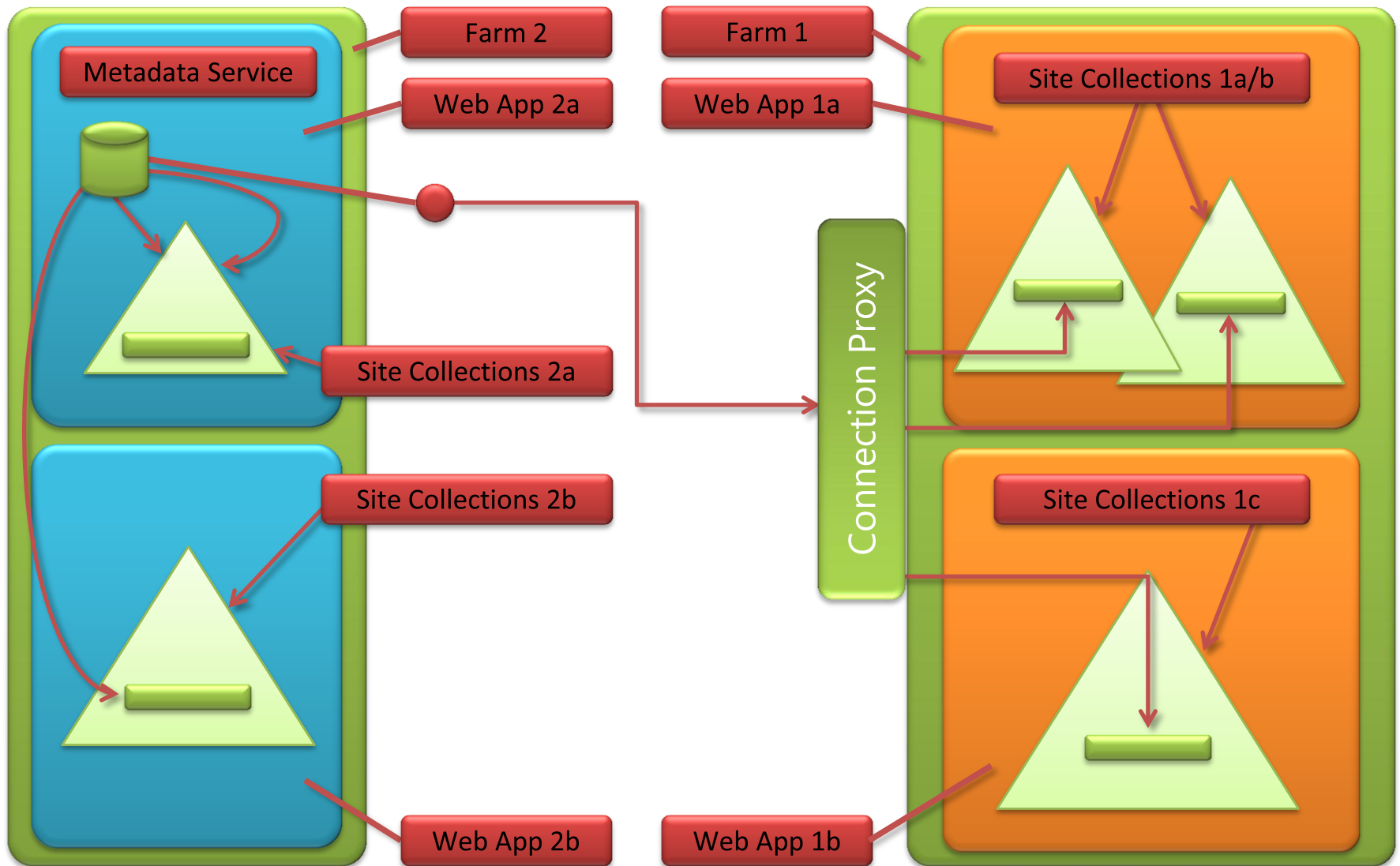
- On the consumer side
  - Extend a published content type
  - Derive from a published content type
  - View import errors
  - Refresh all content types consumed from the Hub

Demo

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CONTENT TYPE SYNDICATION

Inter-Farm Scenario

Farm 2

Metadata Service

Web App 2a

Site Collections 2a

Site Collections 2b

Web App 2b

Connection Proxy

Farm 1

Web App 1a

Site Collections 1a/b

Site Collections 1c

Web App 1b

Considerations

▶ Align Content Types with Term Stores

▶ Use Multiple Hubs for Additional Layers

▶ Use Discriminatory Terms

▶ Plan for Scalability

Thank you for attending!