Managed Metadata in Plain English

Understand, Manage, & Use

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About me!

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Agenda

• Understand
  • What is Metadata?
  • What makes it “Managed”?
  • Taxonomy vs. Folksonomy

• Manage
  • Term Store Management

• Use
  • Managed Metadata Columns
  • Enterprise Keywords & Social Tagging
  • Managed Metadata Navigation
  • Using Managed Metadata with the Content Search Web Part (CSWP)
Understand
What is Metadata?

• “Data about data”
• The attributes of an object

This Ball is:
• Color: Orange
• Sport: Basketball
• Stripe: Black

This Ball is:
• Color: Yellow
• Sport: Tennis
• Stripe: White
What is Metadata?

• Use list/library columns, site columns, or as Managed Metadata to store metadata

• SharePoint automatically logs some metadata by default when documents or items are added. This includes:
  – Created/Modified Date
  – Created/Modified By
  – Content Type etc.
What is Metadata?

- Columns are the most common way of using metadata in SharePoint.
- Can be created at the list/library or site level.
- When you create a column you select the type you need and then configure the specific properties.

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)
- Task Outcome
- External Data
- Managed Metadata
What makes it “Managed”

• Core functionality allows you to manage metadata centrally.
  – Better organization (use of Term Sets)
  – More control (designate who has access to manage it)
  – Consistency
  – Enhanced Discoverability & Usability (especially beneficial with the new search features in SharePoint 2013)
  – Managed Metadata Service & a Content Type Hub can be used to manage metadata & content types across multiple site collections.
Taxonomy vs. Folksonomy

• **Taxonomy** – A formal, structured, hierarchical classification system.
  – Think of how most companies structure their offices, departments, & employees.

• **Folksonomy** – A free flowing & informal way of classifying items. In SharePoint folksonomy is often born from collaboration.
  – Outside of SharePoint a good example of this would be hashtags & trending topics on Twitter
  – SharePoint also has a tag cloud

• **Managed Metadata** allows us to use both of these options when designing metadata structures.
Manage
Term Store Management

• Management options exist on the Global or Site Collection levels

• Typical Hierarchy:
  – Group
    • Term Set
      – Term

• OOTB Groups
  – People - Build taxonomy for User Profiles including My Site details
  – Search Dictionaries (Used to manage included/excluded companies & query spelling corrections)

• OOTB Term Sets
  – Hashtags - Manage hashtags that are being used on My Sites and in the Newsfeed app (example of Folksonomy)
  – Keywords – Manage keywords that are being used in Enterprise Keyword columns (example of Folksonomy)
  – Orphaned Terms – Storage for terms that have been deleted but where a source term for terms reused in other locations.
Term Store Management

• Term Set – group of related terms.
  – Local or Global
  – Set Owner, Contact, Stakeholders
  – Submission Policy (opens up for folksonomy)
  – Intended Use
    • Available for tagging
    • Term Set for Site Navigation
  – Custom Sort
    • Alphabetical or Custom Sort Order
  – Custom Properties
    • Additional data about term set

Demo: Adding a Group & Term Set
Term Store Management

• Terms – specific word or phrase that you can associate with an item or document.
  – Available for Tagging
  – Language
  – Description
  – Default Label
  – Other labels (synonyms)
  – Membership
  – Custom Properties

Demo: Adding Terms to a Term Set
Term Store Management

• Terms can be copied, *reused, pinned*, merged, deprecated, moved, and deleted.

• Reused terms can be placed in another term set and be modified from either location.

• Pinned terms can be placed in another term set but can only be modified from where they originate. Think of pinned terms as being read only.
Use
Managed Metadata Column

- Allows users to connect to specific term sets and then apply those terms to items or documents.
- Connect to existing term set or create a new local term set.
- Quick Edit can now be used to assign terms to content.
- Use the term set’s submission policy to allow users to enter their own terms.
Enterprise Keywords

- Example of Folksonomy!
- Users tag items/documents with words/phrases of their choosing.
- SharePoint will suggest existing keywords or managed terms as users type into the field.
- Turned on in List/Library Settings under **Enterprise Metadata and Keywords Settings**
- Can be managed in the Term Store.

### Enterprise Metadata and Keywords Settings

- **Add Enterprise Keywords**
  - An enterprise keywords column allows users to enter one or more text values that will be shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse.
  - Adding an Enterprise Keywords column also provides synchronization between existing legacy keyword fields and the managed metadata infrastructure. (Document tags will be copied into the Enterprise Keywords on upload.)

- **Enterprise Keywords**
  - Add an Enterprise Keywords column to this list and enable Keyword synchronization

- **Metadata Publishing**
  - Values added to Managed Metadata and Enterprise Keywords columns can be shared as social tags on My Sites to appear in newsfeeds, profile pages, tag clouds, and tag profile pages.

- **Save metadata on this list as social tags**
  - Add values in Managed Metadata and Enterprise Keywords fields to My Site profiles as social tags.

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**Demo: Enterprise Keywords**
Social Tagging

- Users can use `#term` when posting in their My Sites or on site Newsfeeds.
- Users can also follow tags and see updates around that tag on their My Site.
- Tags that are widely used will “trend.”
- These tags can be managed in the term store.

Demo: Social Tagging
Managed Metadata Navigation

• Great for public sites – more SEO friendly.
• Site Settings > Navigation
  – Both Global & Current Navigation can be switched to Managed Navigation
  – Choose an existing term set or create a new one
  – Use the Navigation & Term-Driven Pages tabs in the Term Store to customize where the navigation goes.
    • Simple Link or Header – Any subsite, page, or library
    • Term Driven Page with Friendly URL – Point to a specific page on your site and give it a friendlier URL
Managed Navigation & Product Catalog

- Term Set automatically builds term-driven pages from Product Category list
- As category is used in the Product list it will rollup to term-driven category page.
Managed Metadata & the CSWP

- Managed Metadata can make configuring a Content Search Web Part query simple
- Restrict by specific tags
- Restrict by Managed Metadata navigation terms

Example – Rolling up images
Final Word...

• Just one…. PLAN!
Helpful Links

- Configure Managed Metadata Service in 2013

- Create and manage terms in a term set

- Product Catalog Advanced Tutorial