How To Automatically Assign Managed Metadata In SharePoint

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Agenda

- What is managed metadata in SharePoint?
- What is the benefit of using managed metadata?
- How to manually assign managed metadata?
- Why automatically assign managed metadata?
- How does automatic content classification work?
- How to define content classification rules?
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- How to enable SharePoint lists and libraries for automatic metadata assignment?
- How to configure list-based auto tagging?
- How to assign managed metadata to external data with SharePoint?
- How to make use of SharePoint Web Parts for better findability?
What Is Managed Metadata In SharePoint?

- Metadata can be any kind of information - a location, a date, or e.g. a product catalog item number.
- With SharePoint you can centrally manage metadata in the Term Store.
- You can organize the metadata in a way that makes sense in your business, e.g. as term sets for product groups and products, by services, or by any organizational structure. That’s called a taxonomy. Mostly it’s tree-style.
- You can assign managed metadata to items and documents using a specific managed metadata column to make it easier to find what you want in SharePoint.
- **Important:** Terms are required in the Term Store for next steps. Please create manually or import from Excel or SKOS.
What’s the Benefit of Using Managed Metadata

- You can highly increase content discoverability in SharePoint using managed metadata.
- Managed metadata can drive navigation, discovery and search, content relation, and re-usability of content.
- Managed Metadata provides a common vocabulary for corporate language and can connect people to social networks.
- Use managed metadata to filter data lists and document libraries.
- Use managed metadata to refine search results with drill-downs.
- Search exactly for content that has specific metadata assigned.
- Use term sets for content navigation.
- Many 3rd party apps using managed metadata to increase SharePoint benefits.
- Most important: Using views in SharePoint is limited to 5,000 items. If you have more items in a list or library, managed metadata often is the only way to filter and navigate content.
How To Manually Assign Managed Metadata?

- You have to assign managed metadata manually while uploading documents to SharePoint or modifying data by default in SharePoint out-of-the-box.
- A search-as-you-type feature helps to find certain terms.
- You can also open the taxonomy and select certain terms from the assigned term set.
- Assigning metadata manually requires knowledge about the taxonomy and the content. It should be done by subject matter experts.
- It’s difficult to make sure that valid metadata is assigned. A required field attribute or workflows / notifications can help – but do not solve the issue.
- **Important**: Manual content classification is not an option after migration of large data sets, e.g. file shares, to SharePoint.
Why Automatically Assign Managed Metadata?

- Automatic metadata assignment makes sure that assigned metadata is valid. It gives absolutely reproducible results.
- No additional workload for end users. No subject matter knowledge required.
- Automatic metadata assignment can be done in real-time during upload or data change. It takes approximately one second to execute (depending on taxonomy).
- You can also bulk-tag existing libraries after migration or taxonomy changes.
- **Important:** Automatic content classification highly increases user acceptance.
How Does Automatic Content Classification Work In SharePoint?

- Synonyms and content classification rules can be added to terms in the SharePoint Term Store.
- Content classification rules are fired against the item attributes and document text content on each content change or bulk tag.
- Managed metadata terms are assigned if content classification rules fit.
- Document text content can be read using installed IFilters, e.g. for Word, PDF etc. (similar to Sharepoint search).
- Only terms below the pre-selected root node are processed.
- You can make use of system update mode to avoid new item versions, to lose user information / modified date or start workflows on data change.
- You can disable overwrite mode to keep already assigned metadata.
- You can include and exclude column into / from auto-tagging.
How To Define Content Classification Rules In The Layer2 Taxonomy Manager For SharePoint?

- The Layer2 Taxonomy Manager is a user interface and feature extensions to better manage taxonomy metadata and enterprise keywords within the SharePoint term store.
- Taxonomy export (SKOS), e.g. for backup.
- Deployment and migration, e.g. from QA to production system without losing assigned terms.
- Integration of external systems via SKOS.
- Management of categorization rules, logical expressions of terms or synonyms. RegEx can be used, if required.

**Important:** The Taxonomy Manager provides content classification rules, rule auto-generation and rule validation. But you can simply start with synonyms (no rules required).
How To Verify Content Classification Rules With The Layer2 Tag Suggester For SharePoint?

- The Layer2 Tag Suggester provides increased end-user productivity and precision while classifying SharePoint items and documents manually based on given taxonomies of managed metadata.
- An additional suggest list is displayed with appropriate tags or terms (keywords) based on assigned taxonomies.
- Taxonomy entry point (root node) is automatically chosen with respect to the current metadata column settings.
- List items are processed as well as documents.
- Properties are considered for tagging.
- The context (e.g. URL, list name) is considered for tagging.
- The document or file textual contents are considered, if IFilters are installed.
- High performance Microsoft .NET Framework based content classification rule engine with RegEx support.
- Fully integrated in default SharePoint tagging dialog. Out-of-the-box features (e.g. auto-complete) are kept working.
- **Important**: The Tag Suggester can be used to verify and improve categorization rules.
How to enable SharePoint Lists And Libraries For Automatic Metadata Assignment?

- The Layer2 Auto Tagger provides increased productivity and precision while assigning managed metadata to items and documents automatically.
- It is helpful for initial tagging, e.g. after content migration from any system to SharePoint, as well as for daily background operation.
- Real-time tagging during document upload or change.
- Bulk-tagging per library after migration or taxonomy changes.
- Taxonomy entry point is automatically chosen with respect to the current column settings. List items are processed as well as documents. Properties and context of list items and documents are considered for tagging. The document or file textual contents are considered, if IFilters are available.
- High performance Microsoft .NET Framework based content classification engine.
- Fully integrated in default SharePoint tagging. Manually assigned tags can be kept untouched.
- Flexible background operation settings: Real-Time / Full / Incremental crawl.

Think about:
Auto-classify your new content after migration to SharePoint
How To Configure List-based Auto Tagging?

- Goto List / Library Settings. Enter “Automatically Assign Metadata”
- Select your options as described here.
- Activate Configuration.
- Upload a document – Metadata will be assigned automatically.
- Please also note the Bulk-Tagging option and the Auto Tagger Timer Job (Full / Incremental Crawl).
How To Assign Managed Metadata To External Data With SharePoint?

- You can use the Layer2 Business Data List Connector for SharePoint or the Layer2 Cloud Connector to connect and synchronize external data with SharePoint lists and libraries.
- You will have all native list features available, including managed metadata columns.
- Note that it’s not about bulk import. Changes are synchronized only.
- Managed metadata can be assigned manually, automatically in real-time, using bulk-tagging or timer jobs.
- Example 1: Add sales volume from CRM/ERP/SQL etc. to customer or project data managed in SharePoint and assign managed metadata automatically to keep the relationship to project or customer.
- Example 2: Add files from a file share to project data automatically, keep it synced and add metadata automatically to keep the relationship.
How To Make Use Of SharePoint Web Parts For Better Findability?

- The Layer2 Tag Directory Web Part provides an additional alphabetical A-Z index-style metadata navigation, that makes it very easy to find information for users, that don’t know, where the information is originally located in menu or storage structure.

- Alphabetically sorted directories are very common and well-known, e.g. from books.

- Display terms or tags, all or used only.

- The index is rendered automatically using managed metadata. Starting nodes could be given from existing taxonomies.

- Flexible design and linking: The web part comes with template-based output (XSLT).

- Additional information, such as description or number of tagged items can be displayed.

- The tag or term can be linked to the tag profile as well as to the classified content.

- **Important**: There are a lot more web parts included in the Layer2 KM Suite.
What Are You Waiting For? Start Evaluation Today!

- You can download an evaluation version of the Knowledge Management Suite for SharePoint 2010 and 2013 today at:

- See FAQs or contact sales@layer2.de for more information. Please note, that there are more SharePoint apps and web parts available on www.layer2solutions.com.
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