Microsoft SharePoint 2013

Managed Metadata Service
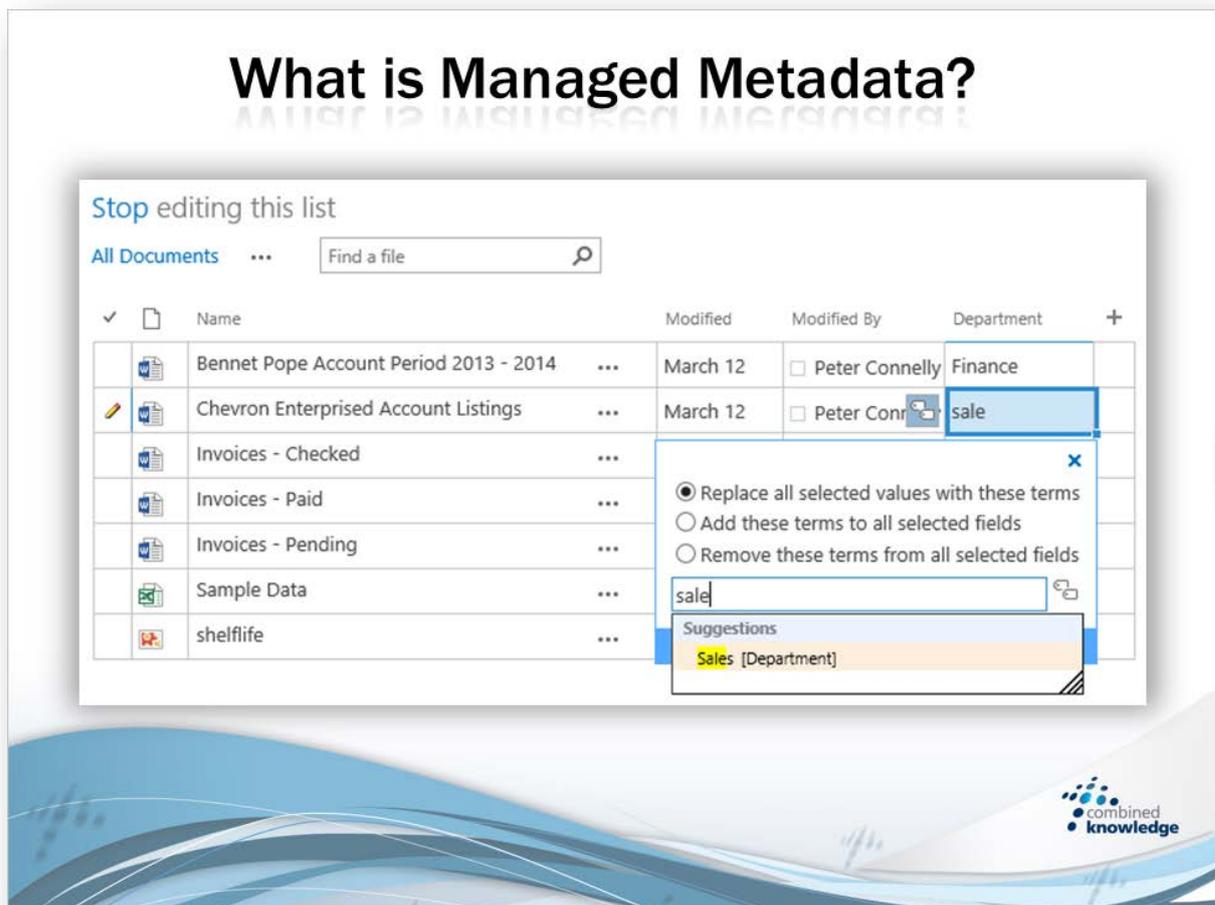
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Relevant to SharePoint 2010 and 2013 (including Office 365) Standard and Enterprise Editions

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What is Managed Metadata?

Managed metadata was introduced to SharePoint in 2010 and is available in SharePoint 2013. It provides a centrally managed and organised collection of terms that are used in your business. These terms can then be tagged onto files, items and pages in lists and libraries to assist with organising and searching for content.

How can your business benefit from such a service? Often, many end users that are editing properties of files, pages and items in SharePoint are often not sure of what to put in a field. If they were to leave it blank or make up a value, this could cause issues with consistency and accuracy. Incorrect declaration of properties can also negatively impact searches. When other users are consistently using known keywords to tag essential documents, deviating from this can lead to the absence of content in a search.

Other business processes may rely on the accuracy of properties added to a file, page or item. For example some more advanced workflow may make logical choices based on the data added to these fields. Without this data being present or relevant, the workflow may fail.

Before Managed Metadata

Before the Managed Metadata service was introduced, users in previous versions of SharePoint came up with inventive ways of implementing term management systems. Some site owners set up lists and used list lookup columns to allow users to tag properties from the list onto their content. Other users used choice columns however, the more choices there were, the less user friendly it was. Sometimes if these columns are successful, they may be created as site columns that can be used across an entire site collection (if declared at the site collection level). The issues with all of these options is that none of them are available across all of a business's SharePoint sites are limited at the site collection level. Users could recreate these options in other site collections but risk terms becoming inconsistent as changes will not be replicated to their copies.
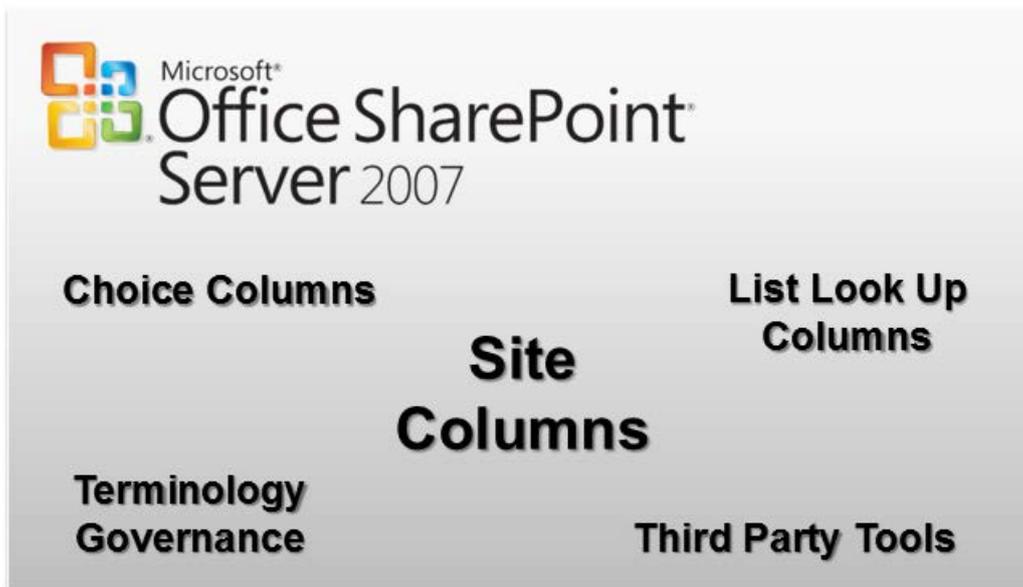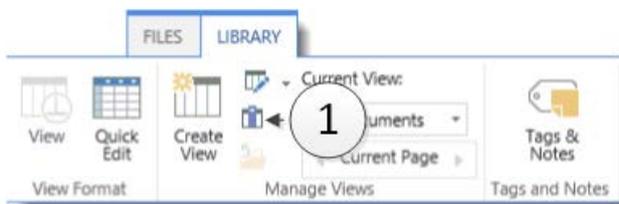
Using Managed Metadata

For users who are new to the concept of managed metadata may be wondering where it can be used in SharePoint and once it has been added, how to use it. The following section will be covering these areas including tips and descriptions to help you as both a site owner and an end user.

Where can I use Managed Metadata?

As a site owner in SharePoint you have the ability to add columns to a list or a library to allow additional properties to be tagged onto content. In SharePoint 2013 team sites, users in the Member group are given the Edit permission level. This means that they can add, edit and delete apps as well as content. If this permission level has not been adjusted by your business, you may be able to add a column to a list or library as a member. The **Create Column** button appears in the **List** or **Library** tab as shown in step 1 below:

When adding a columns to a list or library it is the managed metadata column type that you will need to select in order to tie it to your businesses managed metadata service.

2. Enter a name for the column

3. Select the managed metadata column type

Tip

The document information panel for Office 2007 does not support managed metadata fields

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

(4)

Require that this column contains information:

(5) ○ Yes ◉ No

Enforce unique values:

○ Yes ◉ No (6)

(7) ☑ Add to all content types

Multiple Value field

Specify whether the column will allow more than one value

Note: allowing multiple values will prevent sorting in list views.

☐ Allow multiple values (8)

Display format

The value selected from the term set can be displayed either as a single value or with the full hierarchical path.

Example:
Single value - *City*
Full hierarchical path -
Location, Continent, Country/Region, City

Display Value:
◉ Display term label in the field
○ Display the entire path to the term in the field (9)

4. Enter a description to help your users understand the context of the field

5. Choose whether it is mandatory to add a value to this field

6. Once a keyword is selected, it cannot be used again for another item sharing this column

7. By default, this column will be added to all content types with this option selected

8. Allows multiple keywords to be selected and applied at once.

9. The default option will display only the keyword that was chosen e.g. *Blue* or the full path of the keyword e.g. *Shoes, Suede, Blue*

Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values.

After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.

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

10

▷ ⌂ TBD MMS

11
○ Customize your term set:
A custom term set will be available ~~other~~ users in the site collection, however its terms will not be offered as suggestions in Enterprise Keywords columns.
Description

10. Either search for term sets containing specific terms or use the hierarchy below to select a group or term set to use

11. Optionally you can choose to customize the term set at the column level which allows additional terms to be added

Allow Fill-in

Select whether users will be permitted to add values to the term set. (Only open term sets will allow 'Fill-in')

Allow 'Fill-in' choices:
○ Yes ◉ No 12

12. If a term set is open, allowing users to enter their own values, select allow 'fill-in' choices to enable this feature for this column

Default Value

Enter the default value for the column

13

Default value:

13. Optionally choose an existing keyword as a default value

14 OK Cancel

14. Click **OK** to apply

How do I use managed metadata?

Once you have added a managed metadata column to a list or library, you are then able to use it to tag terms onto items or files. To do this, a user with contribute level access or higher can use **Edit Properties** option. This is accessible from the item menu or ribbon for a selected item or file.
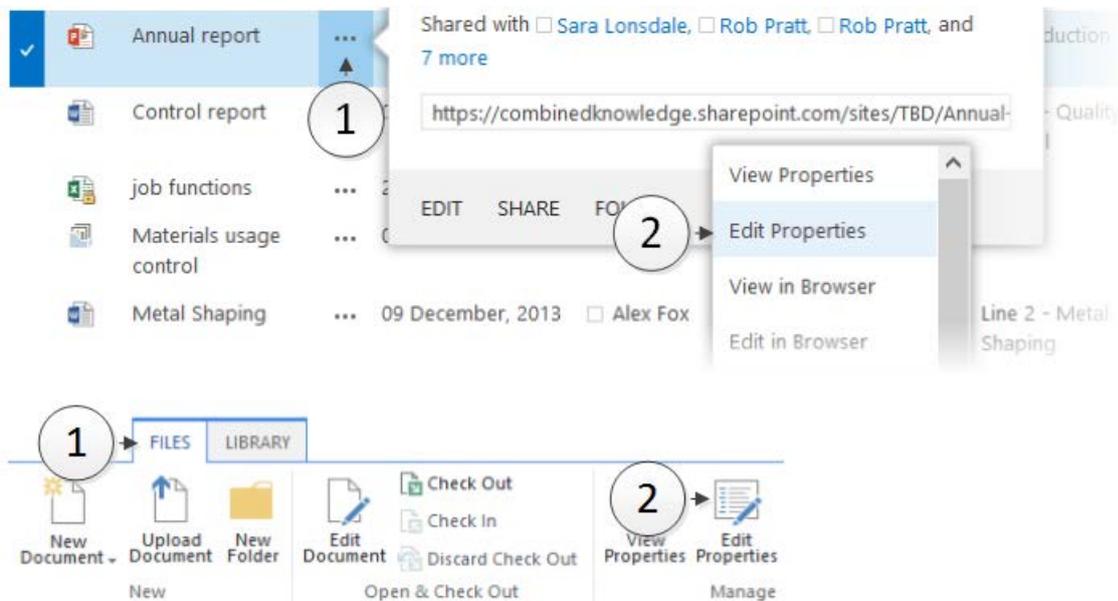
On the edit properties page a managed metadata field can be identified from its double tag symbol . The field can be used in two ways from this form. Simply start to type the term you wish to use in the field and suggestions starting with the same letters will be displayed.
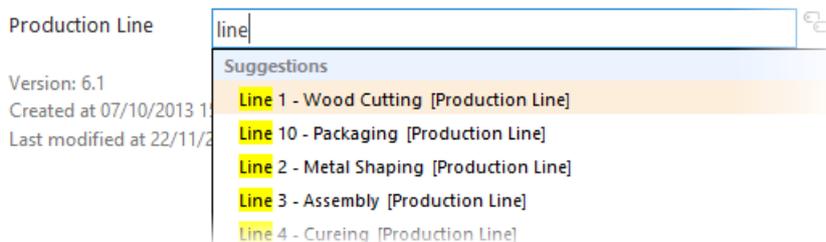
Another way to add a term for users that are unfamiliar with the choice of terms your company may have is to use the double tag to the right of the field. This will display the columns selected hierarchy of terms, allowing you to drill down into the hierarchy and select relevant terms. If the column is configured to allow it you may select multiple terms.

Select : Production Line

New items are added under the currently selected item. Add New Item

▲ 🗐 **Production Line**

⬆

◎ All Production Lines

◎ Line 1 - Wood Cutting

◎ Line 10 - Packaging

◎ Line 2 - Metal Shaping

◎ Line 3 - Assembly

◎ Line 4 - Cureing

◎ Line 5 - Base Paint Coating

◎ Line 6 - Primary Paint Colours

◎ Line 7 - Primany Double Coating

◎ Line 8 - Detail Painting

⬇

Select >>	line

OK   Cancel

SharePoint 2013 and Quick Edit

In SharePoint 2010, users that had the Office 2010 client gained the benefit of using **Datasheet View**. This allowed users to edit metadata in lists and libraries in a familiar spreadsheet style format. Essentially this saved users a lot of time allowing them to edit metadata on mass rather than having to edit properties item by item. Datasheet view did not support the managed metadata column, so users still needed to use edit properties to complete the item or files metadata.

In SharePoint 2013, datasheet view evolved into **Quick Edit**. An on-mass editor, similar to datasheet view that did not rely on functionality provided by an Office client. Quick edit also allowed users to edit managed metadata on-mass with 3 additional options.

Quick Edit mode can be accessed by either clicking on the Edit option directly on certain lists or libraries. The option is consistently available in the ribbon under the Library or List tab.
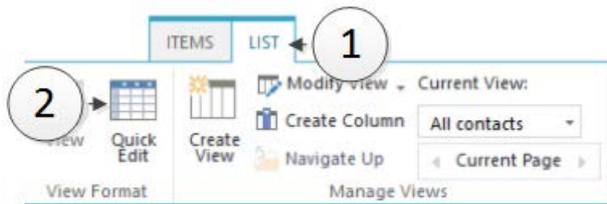
Accessing quick edit from a list or library

Accessing quick edit from the ribbon

Interacting with a managed metadata field while in quick edit will provide you will the opportunity to:

- Option 1 – Replace all selected values with these terms
- Option 2 – Add these selected terms to all fields
- Option 3 – Remove these terms from all selected fields

In SharePoint 2013 it is easier for end users to interact with managed metadata fields.

Metadata Navigation

Lists and libraries also have an option called **Metadata Navigation**. Similar to using filters on columns in a list or library, metadata navigation provides users with an additional selection of filter options based on columns in the current list or library. This setting can be accessed from the List or Library tab in the ribbon and then by selecting List or Library Settings. This option is available to users with Edit access or higher. From the settings menu, click on **Metadata navigation settings** to be presented with the following options:
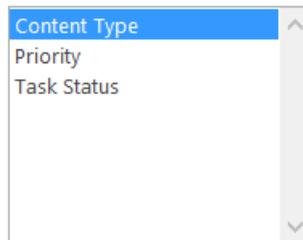

Configure Navigation Hierarchies

Select from the list of available fields to use them as navigation hierarchies for this list. Selected fields will appear under this list in the Site Hierarchy tree view. You can expand these fields and select one of their values to filter your current view to show only items matching that value.

Fields that are available for use as navigation hierarchies include columns on this list that are one of the following types:
- Content Type
- Single-value Choice Field
- Managed Metadata Field
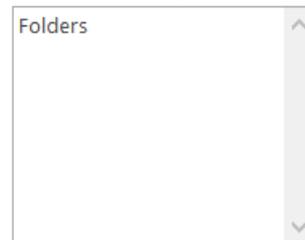
Available Hierarchy Fields:
- Content Type
- Priority
- Task Status

Selected Hierarchy Fields:
- Folders

Add >

< Remove

Description:
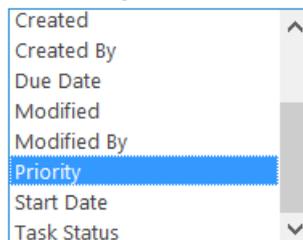Content Type Id - No Description

Configure Key Filters

Select from the list of available fields to use them as key filters for this list. Selected fields will appear underneath the Site Hierarchy tree when viewing items in this list. You can use these fields to filter your current view to show only items matching that value.

Fields that are available for use as navigation hierarchies include columns on this list that are one of the following types:
- Content Type
- Choice Field
- Managed Metadata Field
- Person or Group Field
- Date and Time Field
- Number Field

Available Key Filter Fields:
- Created
- Created By
- Due Date
- Modified
- Modified By
- Priority
- Start Date
- Task Status

Selected Key Filter Fields:

Add >

< Remove
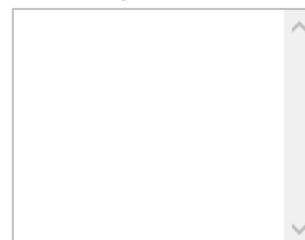
Description:
Choice - No Description

Hierarchies will allow you to choose one or more columns to be added to the quick launch for this list or library to organise your content.

Key filters allow you to run small queries against the information stored in a column to filter the content on the page.


When combining these navigational features with managed metadata columns, it can provide users with an enhanced solution for organising keywords.

Working with the Managed Metadata Service

This section will cover where to access the option to view the managed metadata service or if you have sufficient access, manage terms. For some businesses, you may have the have the managed metadata service set up in Central Administration by a SharePoint administrator however there may not be any keywords. For this scenario this paper will discuss how to make a start with your keywords including tips for using Excel and also delegating the keyword creation role onto a team. We will begin by discussing where to access the term store and how to manage terms.

How can I access the Managed Metadata term stores?

Firstly, the term store can be accessed from any site by a user who has the Full Control permission level. These users can click on the settings cog ⚙ to access the **Site settings** menu. Under the *Site Administration* heading you will find the option to access **Term store management**. Farm Administrators can also access the term store from Central Administration.
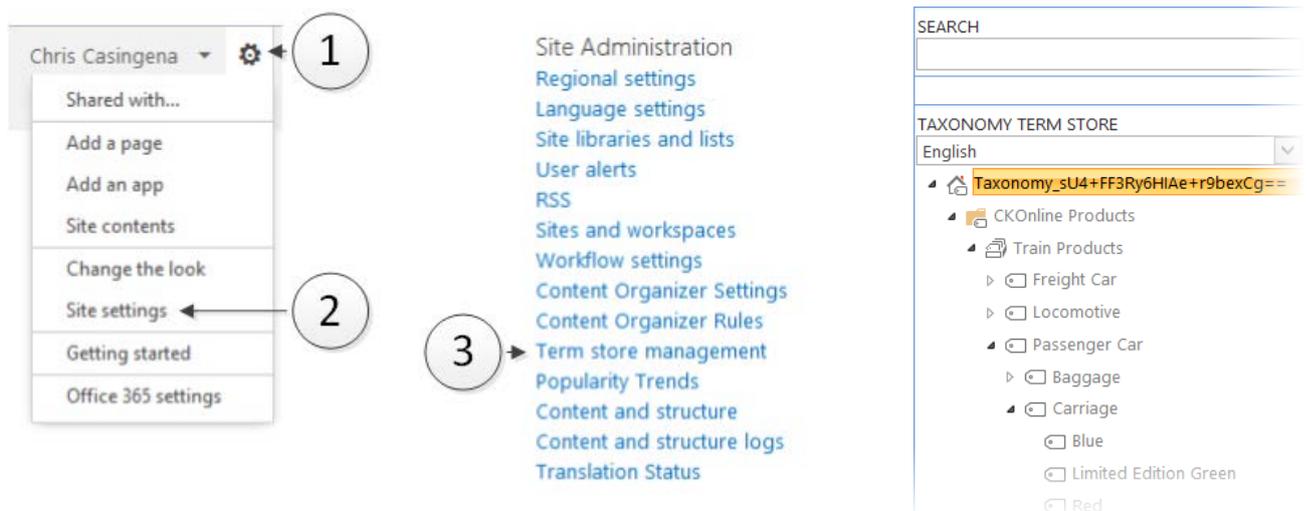
Tools for creating and managing term sets

Now that we are in the term store it is important to gain an understanding of what is here. Firstly a lot of the information in a term store is normally unavailable for editing unless a term set is open (anyone is allowed to manage the terms) or a user has been extended a level of ownership over one or more term sets. The second thing to be aware off is there is a lot of new terminology that is used in a term store.

Terminology

Here is a reference guide to commonly used terminology.

- Term Store – a database of managed terms or managed keywords
- Group – a container for multiple term sets
- Term Set – a group of related terms
- Term – a word or phrase associated with a SharePoint item
    - Managed term – a term defined by a secured user (taxonomy)
    - Managed keyword – a word or phrase that can be created by any user in SharePoint (folksonomy)

- Taxonomy – structured, audited and controlled use of terms
- Folksonomy – unstructured words or phrases that can be created by anyone for example skills and interests fields in a profile (or MySite)

Ownership

In Central Administration, SharePoint farm administrators have the option to elect users as **Managed Metadata Service (MMS) Administrators**. These users have full control over the entire term store (accessible from any of the locations mentioned earlier).

Individual **Term Sets** can also have **owners**. Owners of a term set can only manage their term set (or any others that they are an owner of). Term sets can also have **contacts**. This is a useful option if a term set is closed. Closed term sets do not allow SharePoint users to moderate terms in that term store. An open term set will allow SharePoint users to moderate terms in that term store. If a term set is closed and there is a defined term set contact, he or she will receive notifications from SharePoint users containing suggestions on terms that would like you to add or corrections that should be made. Users can make these requests when adding terms to content in a list or library. Finally term stores can also have **stakeholders**. These are a selection of users that should be notified (manually) if any major changes are being planned to the term set.

Granting ownership at the farm level can only be achieved by a farm administrator who has access to amend the service and apply ownership. For terms stores, users with the rights to provide access can do so by clicking on the relevant term set in the term store. User groups (AD and SharePoint Security Groups) can be applied if needed. This can be used to get around the one item limit.

Limitations

A term store can hold up to a million terms. Each individual term set can hold up to 30,000 terms. This means that you should not need to worry about hitting these restrictions straight away.

Working with Terms

Of you have access to one or more areas of the term store you are likely to encounter the following options when working with existing terms or creating new ones:
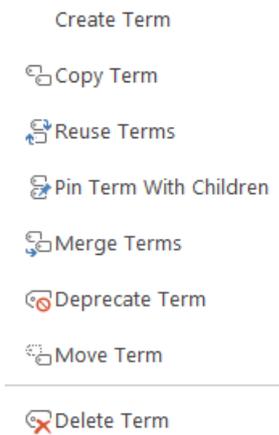
- **Create Term** - Creates a new term
- **Copy Term** - Creates a new term called 'Copy of [Name of term]' in the current term set
- **Copy Term With Children** - Takes a term and its tiers and creates a copy in the current term set (only the parent tem has the 'Copy of' prefix.
- **Pin Term With Children** – Makes copied terms with children read only
- **Reuse Term** - Allows you to choose a term and then locate another term to add to its next tier down
- **Merge Term** - Applies all synonyms and translations to the target term
- **Deprecate Term** - Restricts a term from being used until it is enabled
- **Move Term** - Moves a term to any location in any group
- **Delete Term** - Deletes a term

Working with Term Sets

There are additional options when managing a term set. The options available for managing a term set are described below:
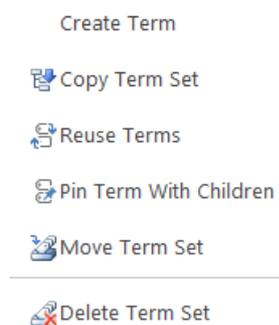
- **Create Term** - Creates a new term in the selected term set
- **Copy Term Set** - Creates a new term set called 'Copy of [Name of term] set' in the current group. Terms in the original term set are simply reused in the copy
- **Reuse Terms** - From your current term set you can then pick terms from another term store to add to the current term set
- **Pin Term With Children** – Makes copied terms with children read only
- **Move Term Set** - Select a group to move this term set too
- **Delete Term Set** - Deletes a Term Set

Updating existing terms

If you choose to update any existing terms in a term set, references to the term that you have updated do not automatically update. For example, you tag a file with the term *IT*. You change this term to *Information Technology* within the relevant term set. Any new files that you tag after the change will use *Information Technology*. Any legacy files that used the term *IT* before the change will remain as *IT*. When you edit the properties for the file it will inform you that *IT* no longer exists and you will then need to manually select the term *Information Technology*. Remember, you can use quick edit (mentioned earlier) to speed up the update process.

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Using Synonyms

Often some terms might vary across the business but evidently might mean the same thing. In the term store, once you have selected a term you have the option to use the **Other Labels** field to allow you to add synonyms or abbreviations for your term e.g. *Help Desk, IT Support, Call Centre*.
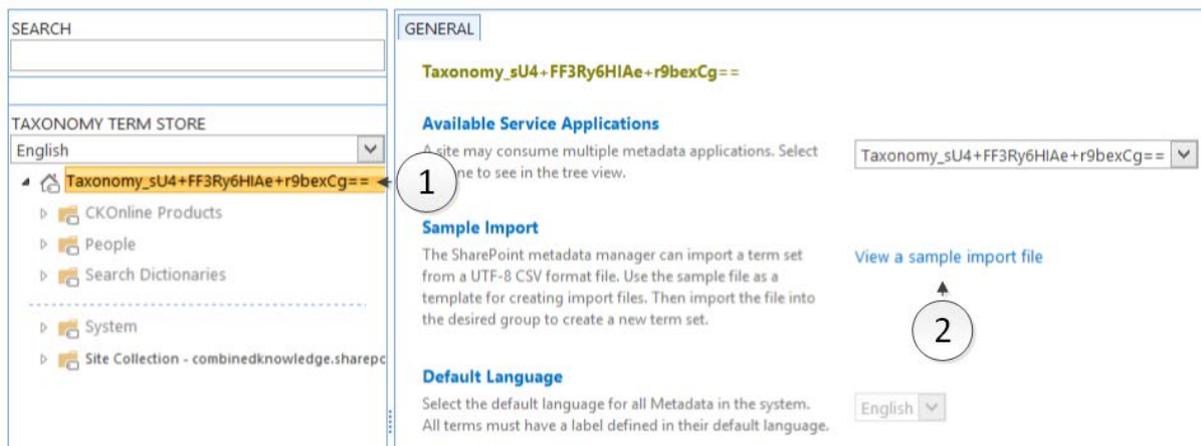
Multi-Language Terms

If you have additional language packs installed in your SharePoint environment, for individual terms you can change the language. Then you can specify the name for this term in another language. This can help create a universal term store that is no longer language specific. User's language preferences or site preferences will dictate which language of the term store is used.

What if our company has not started its Term Stores?

It can be a large task to set up a term store which is why there are a few ways of handling the process.

Importing Term Sets from Excel

In the term store, (with your term store selected) you will be able to access a sample term set that has been designed in Excel. This CSV formatted spreadsheet can be a good starting point for designing a term set. This can be passed around as a file for many people to contribute to or audit as necessary. Next when creating a new term set in the term store you will see the option to import a term set. Simply select the CSV file to import your term hierarchy.


Open Term Sets

The end users will be frequently using your terms. It might be a good idea to allow these users to initially build the term set. For example, sales know better than anyone which terms their department uses. Simply create a new empty term set and with the term set selected, set the submission policy to **open**. This allows the sales team to contribute to the term set. Then add a Managed Metadata column with Allow 'Fill-In' Choices selected to the relevant lists and libraries

used by this department. Over a few months, sales will add and structure their terms in the term set. After a suitable amount of time, **close** the term set. No further contributions can be made and now the term set can be audited for duplicates, errors and inconsistencies. Finally elect an owner for this term set whose role it is to maintain this term set for their team. Now the sales team have a term set they are happy with and it's also controlled.

Further recommendations

At the SharePoint Evolutions Conference 2013 in London, I covered this white paper and more in a 1 hour session that is now available on YouTube. Find it at:
http://www.youtube.com/watch?v=obyLt3HnaEc
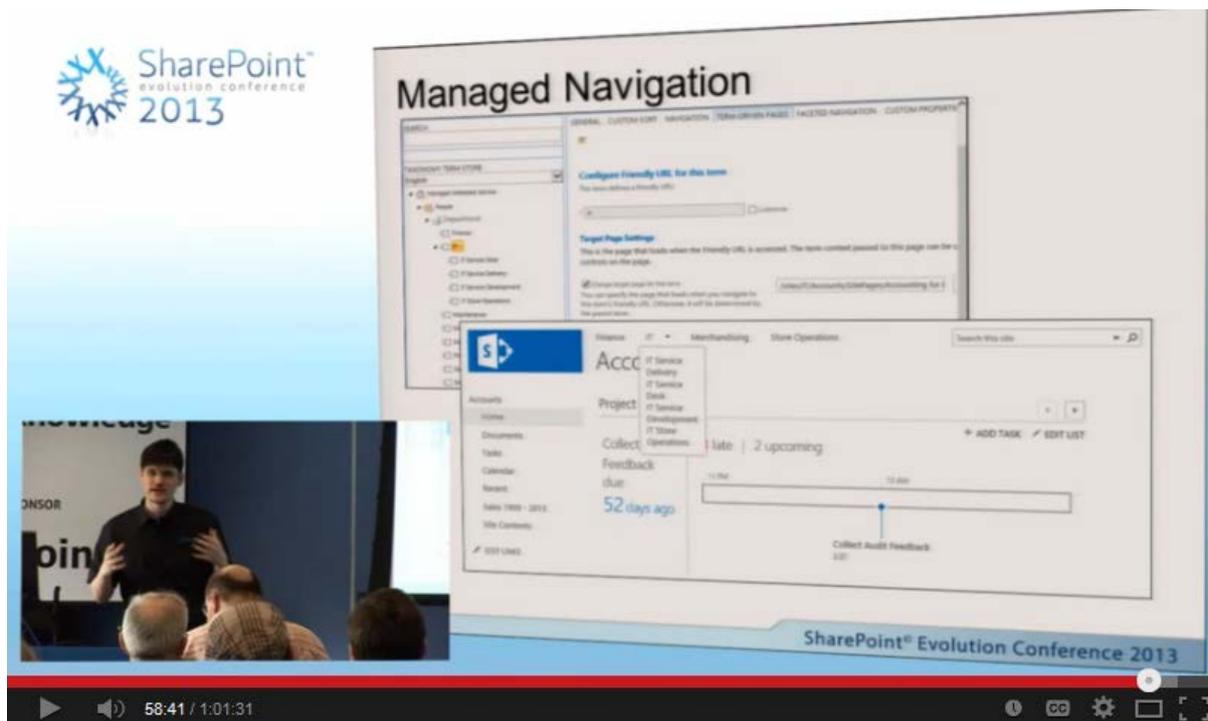
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