

Using Enterprise Content Types and Taxonomies in MOSS 2007

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Session Objectives and Takeaways

- Learn about Enterprise content types and Enterprise Metadata features
 - Think about the different scenarios
 - Consider what you may want to do regarding structured and unstructured content
 - How to model enterprise content using Content Types
- High level introduction to taxonomy principles

“This session will cover OOB metadata and content types in MOSS 2007, and how it can be used to provide more consistent metadata and taxonomies across multiple SharePoint sites in the enterprise.”

Agenda

- Challenges
- Introduction to:
 - Taxonomy
 - Metadata
 - Content type
- Deployment across farms and site collections
 - Publishing
 - Consuming
- What's coming in SP2010?
- Q&A

Organization Content Challenges

- Managing Content
 - Identification / cleansing
 - Categorization
 - Classification
- Finding Content
 - Navigation
 - Search

- Targeting Content
 - Audience
 - Personalization
 - Security trimming
- Subscription
 - RSS Feed
 - Email
 - Alerts

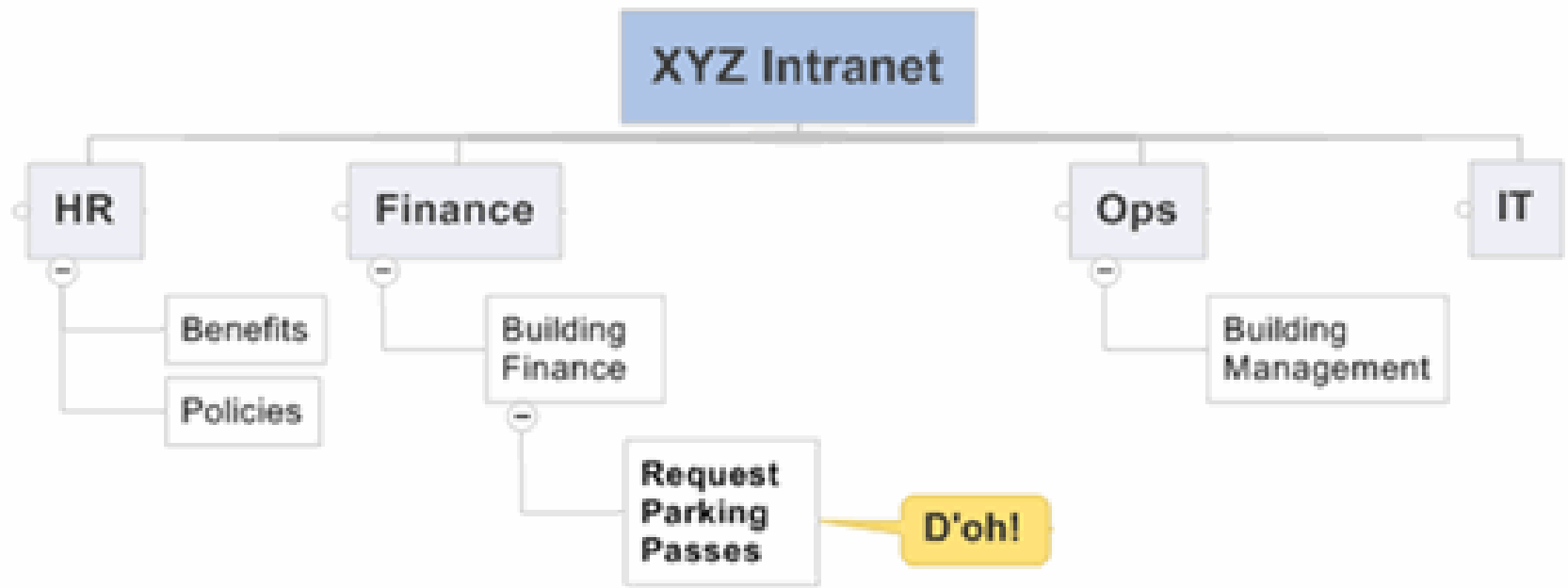
What is taxonomy?

- Definition
 - Classified collection of **terms**
- Purpose
 - Connect user to content
- Structures
 - Descriptive Taxonomy (search, synonyms, metadata)
 - Vertical Taxonomy (Folder/sub-folder)
 - Navigational Taxonomy (sites)
 - Matrix Taxonomy (roll-up)

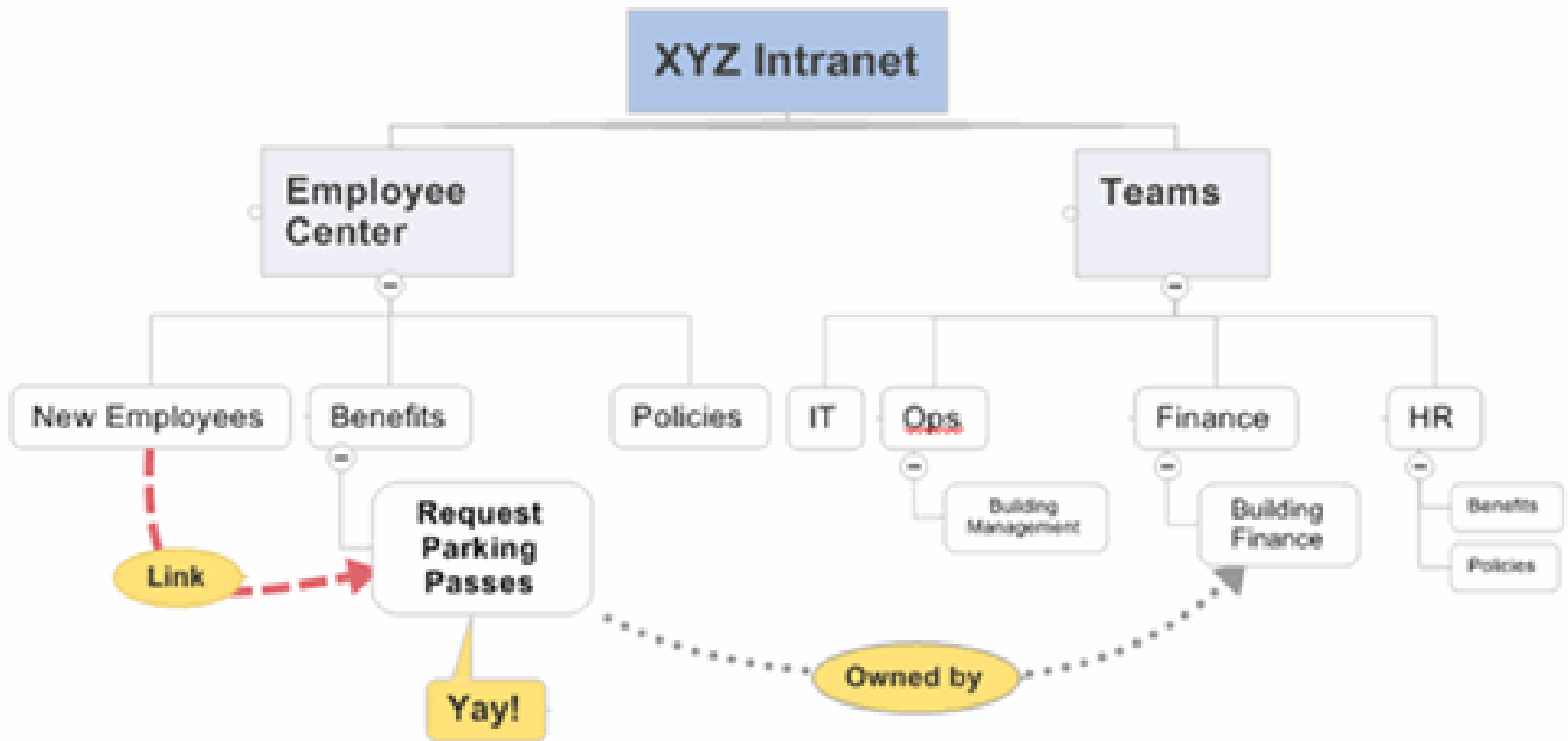
Where do I start?

- Identify stakeholders
 - Content owners
 - End user groups
- Examine current content structure
- Examine the different scenarios
 - Publishing
 - Navigation
 - Storage
- Categorize and classify the content
- Define a content governance plan

Scenario – New employee looking for parking pass



Solution – Employee Center



MOSS 2007 Taxonomy Features

- Metadata & Content types
- Navigation (site / sub-site)
- Content storage (Doc lib, List, Form Lib, Page)
- Search & Indexing
- Audience Targeting

Metadata (Column)

- Definition
 - Attribute that defines a piece of content
 - Equivalent to a data field in database entity
 - Metadata has a specific data type
- Benefits
 - Content tagging
 - Filtering / Grouping
 - Searching
 - Reusable
- Scope Level
 - Site Collection
 - Web
 - List / Document Library

Field CAML

```
<Field  
  ID="{2C1A36A1-582B-4089-9689-3FDB3C32F0BC}"  
  Name="spgsInvoiceNumber"  
  DisplayName="Invoice#"  
  Type="Text"  
  Group="SPGS Financial Columns">  
</Field>
```

DEMO

Using Browser to create metadata

Using the browser to create metadata

- Pros
 - No code
 - Very easy to prototype and test
 - XML can be extracted to create a feature
- Cons
 - Not easily deployable at the enterprise level
 - Some properties are not available
- Tips to create metadata
 - Use naming convention: xxxMyMetadata
 - No space when creating the metadata (internal *name*)
 - Update *Display Name* after metadata is created

OOB Site Columns

- Scoped a site collection level
- Can be used in any list, library or page layout
- Changes to the site column can be pushed down to the list or library using it

Site Column	Type	Source
Base Columns		
Append-Only Comments	Multiple lines of text	Dev
Categories	Single line of text	Dev
End Date	Date and Time	Dev
Language	Choice	Dev
Start Date	Date and Time	Dev
URL	Hyperlink or Picture	Dev
Workflow Name	Single line of text	Dev
Core Contact and Calendar Columns		
Address	Multiple lines of text	Dev
Anniversary	Date and Time	Dev
Assistant's Name	Single line of text	Dev
Assistant's Phone	Single line of text	Dev
Birthday	Date and Time	Dev
Business Phone	Single line of text	Dev
Business Phone 2	Single line of text	Dev
Callback Number	Single line of text	Dev
Car Phone	Single line of text	Dev
Children's Names	Single line of text	Dev
City	Single line of text	Dev

Content Types

- Definition
 - Reusable collection of settings you want to apply to a certain category of content
- Benefits
 - Content types enable you to manage the **metadata and behaviors** of a document, item, or folder type in a centralized, reusable way.
 - Hierarchy / Inheritance
 - Multiple content types per library
- Scope Level
 - Can be created at Site Collection or Web level
 - Can be consumed at the List / Document Library / Page Layout level

OOB Site Content Types

Site Content Type	Parent	Source
Business Intelligence		
Dashboard Page	Document	Dev
Indicator using data in Excel workbook	Common Indicator Columns	Dev
Indicator using data in SharePoint list	Common Indicator Columns	Dev
Indicator using data in SQL Server 2005 Analysis Services	Common Indicator Columns	Dev
Indicator using manually entered information	Common Indicator Columns	Dev
Report	Document	Dev
Document Content Types		
Basic Page	Document	Dev
Document	Item	Dev
Dublin Core Columns	Document	Dev
Form	Document	Dev
Link to a Document	Document	Dev
Master Page	Document	Dev
Picture	Document	Dev
Web Part Page	Basic Page	Dev
Folder Content Types		
Discussion	Folder	Dev
Folder	Item	Dev
List Content Types		
Announcement	Item	Dev
Contact	Item	Dev

Content type can include ...

- Metadata
- Template (doc)
- Custom forms
- Event Handler
- Workflow
- Information Management Policy

Dev > Site Settings > Site Content Type Gallery > Site Content Type

Site Content Type: Invoice

Site Content Type Information

Name: Invoice
Description:
Parent: Financial Document
Group: SPGS Financial Document Types

Settings

- ▣ Name, description, and group
- ▣ Advanced settings
- ▣ Workflow settings
- ▣ Delete this site content type
- ▣ Document Information Panel settings
- ▣ Information management policy settings
- ▣ Manage document conversion for this content type

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Amount	Currency	Optional	Financial Document
Invoice#	Single line of text	Optional	
Client Name	Single line of text	Optional	

Content Type CAML

```
<ContentType
  ID="0x01010012841A8869DB425cB829C3875EC558CE02"
  Name="Invoice"
  Version="0"
  Hidden="FALSE"
  ReadOnly="TRUE"
  Sealed="FALSE"
  Group="SPGS Financial Document Types">
  <DocumentTemplate TargetName="Invoice.dotx" />
  <FieldRefs>
    <FieldRef
      ID="{2C1A36A1-582B-4089-9689-3FDB3C32F0BC}"
      Name="spgsInvoiceNumber" DisplayName="Invoice#"/>
    <FieldRef
      ID="{E9FC44C2-9036-490d-9D7C-599A9366779F}"
      Name="spgsClientName" DisplayName="Client Name" />
  </FieldRefs>
</ContentType>
```

DEMO

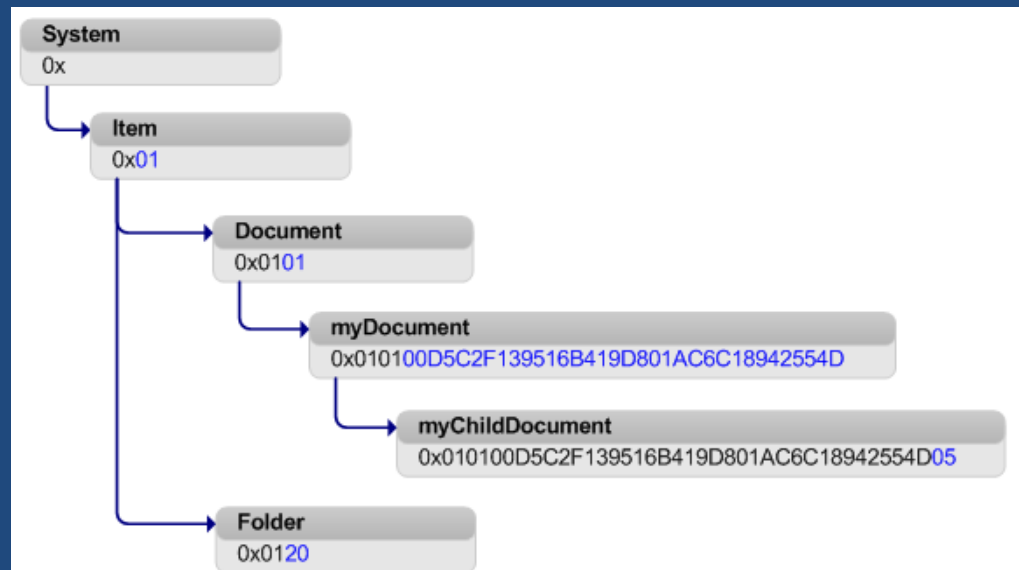
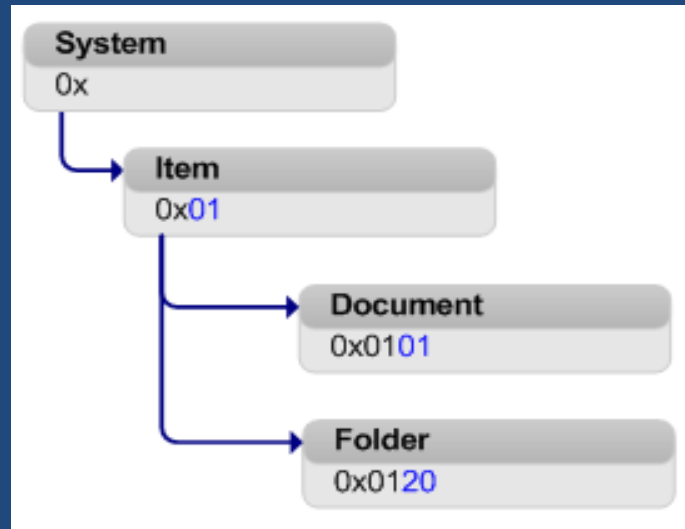
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- Cons
 - Not easily deployable at the enterprise level
 - Some properties are not available
- Tips to create content type
 - Use proper naming convention: new “Invoice”

OOB Content Types Hierarchy

System	0x
Item	0x01
Document	0x0101
XMLDocument	0x010101
Picture	0x010102
UntypedDocument	0x010104
MasterPage	0x010105
WikiDocument	0x010108
BasicPage	0x010109
WebPartPage	0x01010901
LinkToDocument	0x01010A
DublinCoreName	0x01010B
Event	0x0102
Issue	0x0103
Announcement	0x0104
Link	0x0105
Contact	0x0106
Message	0x0107
Task	0x0108
WorkflowTask	0x010801
AdminTask	0x010802
WorkflowHistory	0x0109
BlogPost	0x0110
BlogComment	0x0111
FarEastContact	0x0116
Folder	0x0120
RootOfList	0x012001
Discussion	0x012002
<hr/>	
_Hidden Group	
Document Content Types Group	
List Content Types Group	
Folder Content Types Group	



Content Type Hierarchy / Inheritance

OOB	Base Finance Content Type	Child Financial Content Type	Metadata
Document 0x0101			Name Title
	Financial Document 0x0101 0012841A88 69DB425cB829C387 5EC558CE		Name Title Amount
		Purchase Order 0x01010012841A8869DB4 25cB829C3875EC558CE 01	Name Title Amount PO# Department
		Invoice 0x01010012841A8869DB4 25cB829C3875EC558CE 02	Name Title Amount Invoice# Client

Financial Document Library

Content Types

This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:

Content Type	Visible on New Button	Default Content Type
Financial Document	✓	✓
Invoice	✓	
Purchase Order	✓	

- [Add from existing site content types](#)
- [Change new button order and default content type](#)

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type	Used in
Amount	Currency	Financial Document, Invoice, Purchase Order
Client Name	Single line of text	Invoice
Department	Choice	Purchase Order
Invoice#	Single line of text	Invoice
PO#	Single line of text	Purchase Order
Title	Single line of text	Financial Document, Invoice, Purchase Order
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

DEMO

Package metadata and content type
as feature

Packaging Site Column and Content Type

- Feature Deployment
 - Declarative (CAML)
 - API (Feature Receiver Assembly)
 - Hybrid
- Pros
 - Reusable across site collections and farms
 - More options (hidden, read, sealed)
 - Better governance
- Cons
 - Require development

Take-Away

- Use metadata and content types to identify, categorize and classify your content
- Deploy metadata and content types as features
- Bind content types to libraries, list or page layout

Reminder:

MOSS 2007 Taxonomy Features

- Metadata & Content types
- Navigation (site / sub-site)
- Content storage (Doc lib, List, Form Lib, Page)
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What's New in SharePoint 2010

- **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
- **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)

Shared Service Application



Central Administration → Manage Service Applications

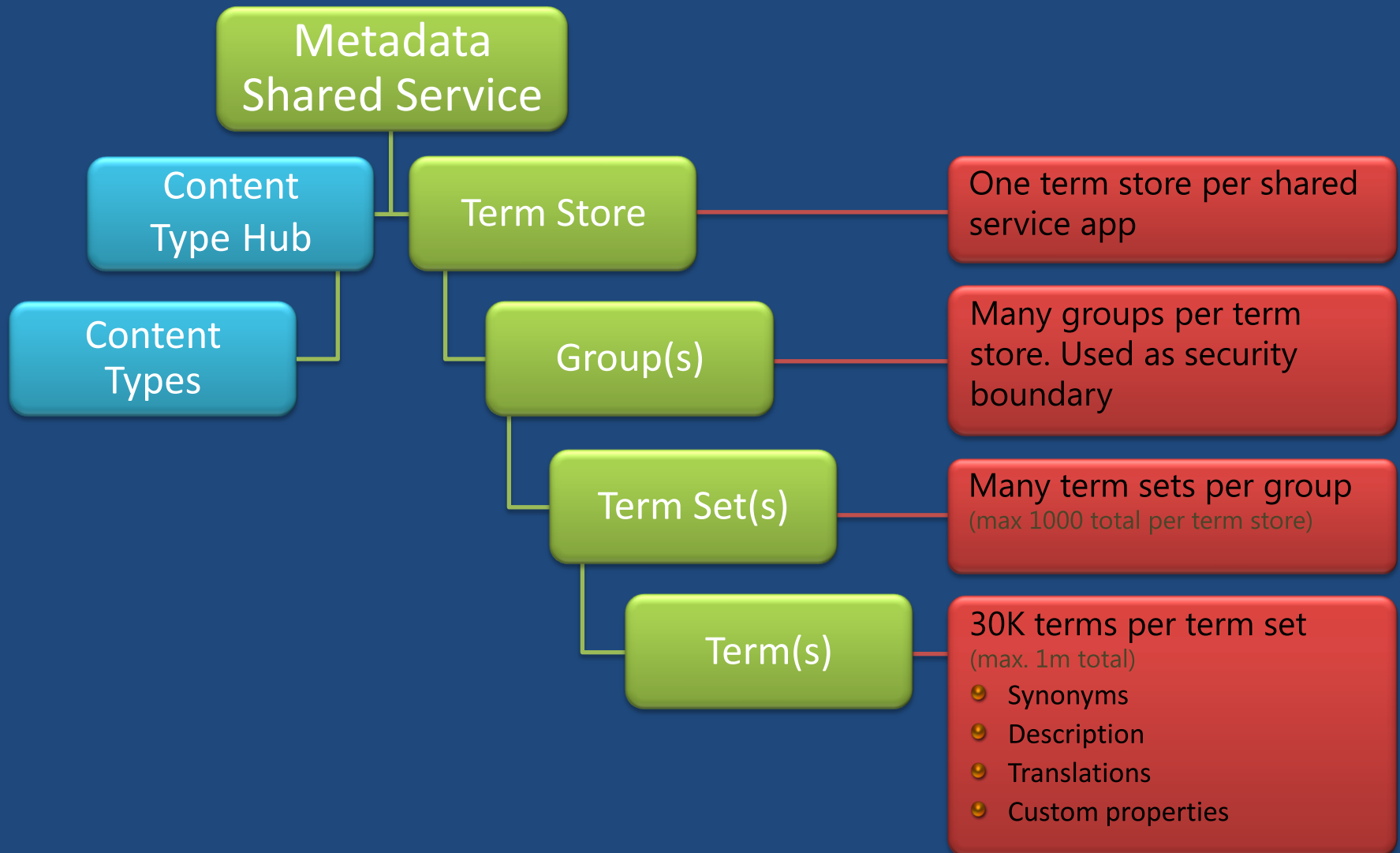


- “Service”
 - DB/DB connection
 - Content type hub
 - Many shared apps/web app
 - Service can be local or remote



- “Publishing” (sharing)
- “Connection”
 - Default Locations
 - Consume from the Hub?

SharePoint 2010



Q&A

Please provide feed back!!!!

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