Welcome

SharePoint
Term Store & Taxonomy
Design

Harold Brenneman
Lighthouse Microsoft Technology Group

© Lighthouse Computer Services, All rights reserved
Harold Brenneman

Consulting Manager

- MBA, focusing on the management of technology and innovation, and over 15 years of experience implementing SharePoint and Content Management Solutions, including:
  - Enterprise Content Management
  - Digital Asset / Media Management
  - Web Content Management
  - Records Management
  - Regulatory Compliance Management
  - Knowledge Management Repositories
  - Data Warehouses and BI Applications

- Experience designing taxonomies and implementing managed metadata in SP 2010 & 2013 and Office 365.
Lighthouse Computer Services

- **Full spectrum of services** include assessments, designs, deployments and management
- **Complementary practices** allow us to architect integrated IT solutions
- **Expert pre & post sales services** staff with over 200 industry certifications
- **Expert Project Management Skills**

http://linkedin.com/company/lighthouse-computer-services
http://twitter.com/lighthousecs
Term Store & Taxonomy Design

- Objectives
- SharePoint & Term Store Strategy
- Taxonomy Development Best Practices
- Maintenance & Governance
- Adoption
Poll

- Where is your organization in its enterprise taxonomy adoption?
  - Adopted enterprise wide metadata standards
  - Using managed metadata in specific applications
  - Configured some metadata in isolated lists and libraries
  - What is a taxonomy and managed metadata?
Common Challenges

- How can I make information easier to find?
  - How do I push relevant content to users and make it easier for them to search and find the information they need?

- How can I make my applications more intuitive?
  - How do I make it easier for users to navigate to the information and applications they need?

- How can I make my processes more efficient?
  - What content is related to a process and when should a workflow be triggered?

- What can I do to keep up with ongoing business / regulatory changes?
  - How do I make sure Corporate Records are identified and managed properly?
The Classification Paradox

- Classification drives search responsiveness
  - Promotes user adoption
- Classification enables automation
  - Increases productivity
  - Reduces risk and costs

-VS-

- Creating and applying an enterprise taxonomy is difficult
  - Classification can impact productivity immediately
- Benefits realized over time
  - Users find workarounds and “opt-out”
Objectives

- Make planning & developing a taxonomy easier
- Minimize the impact of on-going classification efforts
- Prevent workarounds that undermine long term benefits
- Deliver immediate benefits to drive adoption
“...begin with the end in mind.”
- Stephen R. Covey
Your SharePoint Roadmap should inform your Term Store Strategy

- What solutions currently exist and what is planned?
- What apps will leverage the Term Store?
- What users or groups will use and manage the apps?
Technical Design

- **Architecture**
  - On Office 365 / SharePoint Online, the Term Store is a shared tenant service and must be designed to support current and future uses.
  - On-Premises, how you want to share and reuse taxonomies may impact Farm architecture, Web Applications and Site Collections design.

- **Search**
  - Plan the use of Search Center and results refiners.

- **Document / Records Management**
  - Use managed metadata with Content Type Hub and Document Center to apply retention policies and route documents.
Information Architecture

The art and science of organizing and labeling content to support findability and usability.

- **Site Navigation**
  - Use managed metadata navigation to separate user experience from site structure

- **Content Types and Site Columns**
  - Use enterprise Term Store group for taxonomies that will be leveraged by multiple applications and managed centrally
  - Create separate groups for each application or organization that will manage the content and metadata

- **Social**
  - Use the Term Store to manage #tags
Challenge:

- Organization decided to leverage the cloud for collaboration and intranet
- Included Records Management for collaboration sites
- Each department can have multiple collaboration sites as well as publish content to their intranet site
### SharePoint O365 Term Store Design for Portal and Collaboration Sites

<table>
<thead>
<tr>
<th>Group</th>
<th>Owners</th>
<th>Term Sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise</td>
<td>John, Harold</td>
<td>• Organization</td>
</tr>
<tr>
<td>(Shared Taxonomies)</td>
<td></td>
<td>○ Regions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ Divisions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ Departments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ Locations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ Languages</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Finance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Human Resources</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Information Technology</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Learning and Development</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Legal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Marketing</td>
</tr>
<tr>
<td>Intranet</td>
<td>Mary, Harold</td>
<td>• Document Categories</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Portal Features</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Navigation</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Bill, Harold</td>
<td>• Document Types</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Record Classes</td>
</tr>
</tbody>
</table>

**Key Point:** You do not have to add a large amount of time to your SharePoint strategy and design, but don’t let your Term Store approach be an afterthought.
How do you think your organization would benefit the most from implementing enterprise taxonomies and content classification standards?

- Being able to find the right information when you need it
- Enabling workflows and making business processes more efficient
- Implementing metadata based security or Records Management and reducing risk
- Developing a common business language and promoting collaboration
- Microsoft SharePoint Adoption Guide
A taxonomy is a formal classification system. A taxonomy groups the words, labels, and terms that describe something, and then arranges the groups into a hierarchy.

- The goal of creating a taxonomy is to help people find information to help them do their jobs, not just describe documents.

A folksonomy is an informal classification system.

- It evolves gradually as web site users collaborate on words, labels, and terms on a site.

SharePoint allows Taxonomies and Folksonomies to co-exist through the Term Store.

- Folksonomies can be controlled by monitoring user-submitted keywords, promoting them to your taxonomy, or deleting problematic keywords.
The Taxonomy should reflect three key pieces of information:

- Business Processes, People and Teams
- Information Hierarchy
- Thesaurus / Synonyms
Develop a Taxonomy in 6 “Easy” Steps

1. Identify the main business objective the taxonomy will support and limit scope
2. Perform an information audit to identify what exists and determine how it aligns to relevant business topics
3. Draft a high-level taxonomy structure
4. Develop a proof-of-concept taxonomy
5. Bring together stakeholders and build consensus
6. Add detail to the taxonomy
1. Identify the Business Objective

- Determine the knowledge area and process the taxonomy will support and set limits on the scope.

- Questions to ask:
  - What business process or information problems need to be solved? (Use Cases)
  - Who will contribute to the taxonomy?
  - Who will use it?

- **Key Point:** Keep it simple and **limit the scope** as much as possible.
2. Perform an Information Audit

- Identify and analyze source repositories to understand the type of content and metadata that exists, how information is generated and used, and its lifecycle.

- Questions to ask:
  - How does existing content align to relevant business topics?
  - How is the information generated?
  - What business processes use the information?
  - What Records Management and Discovery requirements apply?

- **Key Point:** Do not begin at the wrong end of the content lifecycle - focus on the source, content creation, and business processes.
3. Draft a High-Level Taxonomy Structure

- Organize around major domains like markets, geographies, businesses and major audiences that are driven by the overall corporate strategy
  - Break-up taxonomies into term sets and reuse portions based on use cases
  - Don’t develop taxonomy for unimportant or low-level parts of the business

- **Key Point: Keep it simple** - Provide a framework for the taxonomy and keep the maintenance process in mind
4. Develop a proof-of-concept taxonomy

- Involve working members from across the organization who are closest to the business processes and who can accurately represent the end-users.

- Learn from Existing Sources:
  - Folder structures, web pages
  - Business glossaries and existing metadata tags
  - Determine if a 3rd party taxonomy would provide value

- **Key Point:** Make sure the taxonomy is user-oriented – focus on the users' needs and not just what currently exists in a repository
5. Build consensus

- Clearly demonstrate how the success of the taxonomy will provide value.

- Iterate between the high-level architecture and the POC.
  - Examine logical relationships within the taxonomy and make sure all items at the same level are on parity.
  - Determine if terms are descriptive enough to be both meaningful and unique.
  - Establish required fields and rules for defaults.
  - Keep a history of decisions made about changes to the overall taxonomy design.

- **Key Point:** Stakeholder involvement is crucial to ensure ongoing support and investment.
5. Build consensus

- Excel prototype pulls together steps 2-4 and helps stakeholders evaluate taxonomy
6. Add detail to the taxonomy

- Add other labels or synonyms for language usage and cultural differences
- Determine how to address cross-references in Term Store
- **Key Point: Know when to quit** - Taxonomies created to a low level of detail can be more expensive to maintain compared to the value they deliver.
6. Add detail to the taxonomy

- **Copy Term** - good shortcut when creating a taxonomy if two term sets are similar, but should rarely be used
- **Reuse Term** - use for shared portions of a taxonomy where two groups or processes overlap
- **Pin Term with children** - use to combine or display portions of a taxonomy within another taxonomy when one group or process governs the taxonomy
"If you don't know where you are going, you'll end up someplace else."
- Yogi Berra
Poll

What is your biggest concern regarding implementing an enterprise taxonomy?

- User adoption & poor classification of content
- Complexity of supporting Records Management classifications
- Effort to monitor & enforce governance policies
- Effort to maintain an enterprise taxonomy
Establish a Maintenance Process

- Business users will need to work together with IT and Knowledge Management/BA counterparts to oversee both the ongoing validity of the taxonomy and to measure its success.

- Process owners for content management, information tagging and records management must also participate in establishing these processes.
- **Business SMEs**
  - Review sample documents to determine if they have been correctly classified
  - Identify gaps between the business and taxonomy

- **Knowledge Manager / Business Analysts**
  - Monitor and Tune Taxonomy - Update Terms and Term Sets
  - Organize user entered keywords (Folksonomy) into Term Sets
  - Report successes and shortcomings

- **SharePoint Administrator**
  - Tune Search
  - Manage Term Store groups and contributors
Establish Governance Policies

- Term Store Policies
  - Creating and Deleting Term Sets
  - Adding, Renaming, Merging and Deleting Terms
  - Adding or Removing Group Contributors
  - Adding or Removing Group Managers

- Usage Policies
  - Local vs Global Term Sets
  - Closed vs Open Term Sets

  **Tip:** Encourage users to use managed metadata instead of Choice columns, especially if Open, when creating lists.
Approach

- Term Set management can be centralized or decentralized and access to specific term sets assigned to groups
- Recommend monthly or quarterly meeting of Knowledge Manager/BAs and SharePoint Administrator
  - Review Enterprise Keywords and custom managed metadata
  - Discuss User feedback
  - Search tuning
  - Schedule follow up meetings with Business SMEs, as needed
"Hold everybody accountable? Ridiculous!"
- W. Edward Deming
- **Keep It Simple** – require user input on only 1 or 2 vital tags

- **Smart Defaults** - take the time to figure out the most likely selection based on user, process, and/or context

- **Use Enterprise Keywords** - let maintenance process promote to taxonomy
Enhance Search Results

- Refiners
- Suggestions
- Best Bets and Visual Best Bets
- Result Blocks
- Promoted Results
Eliminate Fight for “Prime Real Estate”

Put search at the center of your design

- Content by Search
- Content roll-up apps
- Scoped searches
- Personalized content
- Faceted navigation
Provide Immediate Benefits

- Use managed metadata to help users navigate lists and libraries.
- Create report like views using grouping, sorting and filtering to help users find key information.
How do we make developing a taxonomy easier?
- “Simplify. Start Small. Stay Focused.” – Try not to “boil the ocean”
- Identify key topics to use to start tagging vital information using a big bucket approach
- Limit depth and complexity of the Taxonomy

How do we minimize the impact of on-going classification efforts?
- Limit the number of required tags
- Logical and contextual defaults where possible
How do we prevent workarounds?
- Review search terms and keywords usage and update taxonomies to keep them relevant.
- Put Search at the center of your design

How do we deliver immediate benefits and drive adoption?
- Use metadata driven navigation
- Create quick report-like views
Additional Resources

- Introduction to Managed Metadata:

- Overview of managed metadata in SharePoint 2013

- Plan terms and term sets in SharePoint 2013

- Plan to share term sets and content types in SharePoint Server 2013

- Free General Business Taxonomy for SharePoint 2010 –
Questions?

You can also contact me at:

hbrenneman@lighthousecs.com
About Lighthouse
About our Microsoft Practice

- A leading systems integration firm now part of Lighthouse Computer Services
- Expertise in Application Development including SharePoint, .NET, and SQL Server
- Expertise in SharePoint with 100’s of implementations
  - Internet, Intranet, and Extranet experience
  - On Premises and Office 365 / SharePoint Online
- Creative Design services
  - Technology Informed Visual Design
- Full Life Cycle Development approach
- Professional Consultants with over 10 years experience on average
- Services only, no Software sales

Producing tangible results through disciplined execution
Certified Expertise at Every Phase

MANAGE
- Knowledge Transfer/Documentation
- Performance Testing
- Optimization and Remediation
- Technical Support

ASSESS
- Health Review
- Assessment
- Customer Needs Analysis
- Business and Functional Requirements
- IT Audit

DEPLOY
- Technology Procurement
- Technology Implementation and Integration
- Configuration
- Project Management

DESIGN
- Solution Design and Configuration
- Solution Justification
- Solution Strategy and Roadmap
- Implementation Plan

© Lighthouse Computer Services, All rights reserved
Microsoft Practice Services

### Strategy & Implementation
Deploy Microsoft SharePoint and build custom .NET / SQL applications for Intranet, Internet, and Extranet solutions.

### Content & Integration
Integration and Migration services for many ECM solutions including Microsoft SharePoint, OpenText, Filenet, and EMC Documentum.

### Creative Services
We make systems Beautiful; We make systems Usable; We make systems for People.

<table>
<thead>
<tr>
<th>Assessment &amp; Roadmap</th>
<th>Requirements Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirements &amp; Design</td>
<td>Content Auditing</td>
</tr>
<tr>
<td>Installation / Configuration</td>
<td>Integration &amp; Process Design</td>
</tr>
<tr>
<td>Tailored Customization</td>
<td>Migration Strategies</td>
</tr>
<tr>
<td>Training / Knowledge Transfer</td>
<td>Development/Systems Integration</td>
</tr>
<tr>
<td>Rollout Support</td>
<td>System Architecture</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Experience Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Persona Based User Interfaces</td>
</tr>
<tr>
<td>Information Architecture</td>
</tr>
<tr>
<td>Visual Design &amp; Storyboards</td>
</tr>
<tr>
<td>Front End Development</td>
</tr>
<tr>
<td>Usability Testing</td>
</tr>
</tbody>
</table>
What Makes our Microsoft Practice Different

- **Technical Depth**
  Enterprise Content Management, Documentum, OpenText, Microsoft, IBM

- **Long-term Microsoft Partnership**
  Over 10 years as a Gold Certified Partner and managed National Systems Integrator

- **Hundreds of Successful Solutions in Many Industries**
  Higher Education, Life Sciences, Healthcare, Financial Services, Public Sector

- **Refined Solution Strategies & Methodologies**

- **Thought Leadership, Seasoned Consultants**

- **80% of Our Business is Repeat Business**
Solution Areas

- **Information Worker Solutions**
  - Web & Portal Publishing
  - Document & Records Management
  - Collaboration and Electronic Forms

- **Custom Developed Solutions**
  - Web Development
  - Desktop / Smart Client Development
  - Tablet / Smart Phone Development – Web & Hybrid

- **Business Process Management and Integration Solutions**
  - Orchestration and Transformation
  - Middleware and Web Services

- **Data Management Solutions**
  - Business Intelligence & Reporting Solutions
We make systems beautiful

© Lighthouse Computer Services, All rights reserved
We make systems usable
Ways We Seek to Provide Value

Empower employees
- Faster, better decision-making
- Find critical business information quickly and easily
- Connect people to each other and the information they need when they need it

Increase productivity
- Faster, better search
- Easier, effortless collaboration
- Familiar, intuitive Web-based interface

Improve efficiency
- Reduce time-consuming business functions
- Automate approvals and workflows
- Simplify access to information, applications and systems

Deliver rapid access to dynamic business information
- Ensure information accuracy
- Enforce standard procedures
- Share best practices
- Do more with less

Build stronger, closer relationships
- Provide convenient, secure access to relevant business information
- Enable high value online communication
- Promote loyalty and improve level of interaction

Improve customer satisfaction
- Enable access to timely, accurate customer information
- Reduce customer wait times, improve service quality
Proven Results

Productivity Improved 33%

A leading equipment manufacturer streamlined the publishing and distribution of technical manuals to its clients, who report that completing repairs now takes on average 33% less time using the new materials and procedures.

Response Time in Hours, Not Weeks

After putting in place a news publishing solution (including interdepartmental workflow) for its corporate portal, a financial services company was able to reduce its average publishing time from weeks to hours.

FDA Citations Reduced to Zero

With a document control solution, helped one pharmaceutical client save time and money by reducing their average FDA 483 citations from dozens to none.

A Bottom Line to Boast About

By consolidating hundreds of call center support sites and creating an integrated information center that includes workflow, one company has saved $400,000 annually since the system rolled out.

Nine Months of Publishing Costs Saved

Helped one large bank save nine months’ worth of publishing costs by moving to an electronic disclosures system.

Submission Time Reduced 30%

Worked with one leading life sciences company to re-engineer and automate a clinical trial management process, reducing overall submission time by 30%.

How can we help your business?