

Planning and Configuring Managed Metadata



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Overview



What is metadata?

- And managed metadata!

How metadata is used inside SharePoint

Configuring managed metadata



What Is Metadata?

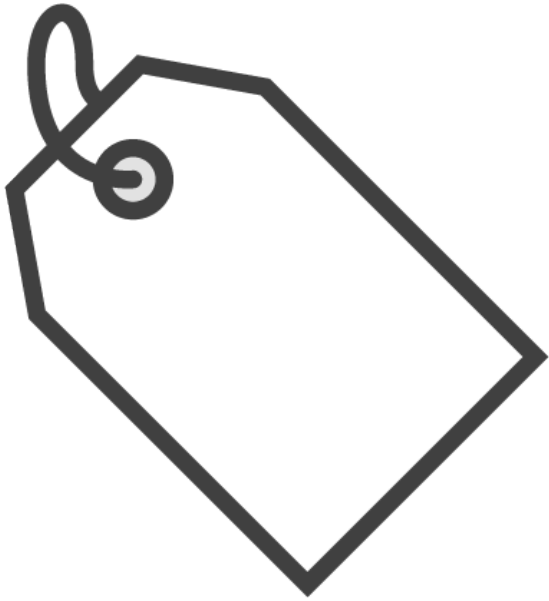


Metadata

Data that provides information about other data



Metadata Examples



Book

- Title, author, # of pages, genre, ISBN

Proposal

- Title, client, amount, account executive

Car

- Make, model, color, engine size, mileage

Managed Metadata

Metadata managed at a central location

Ensures consistency across the organization

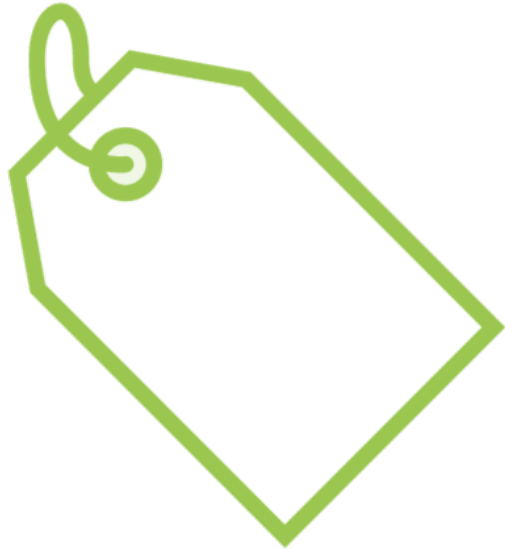
Helps enterprise search



How Metadata Is Used Inside SharePoint



Where Is Metadata Used?



Every SharePoint item can have metadata attached

- List items, documents, pages, pictures, etc!

Metadata is found inside columns

Managed metadata column

Gets information from the central managed metadata service

You can also configure managed terms at the site level

What about Managed Metadata?

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

New Column

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)
- ☐ Location
- ☐ Thumbnail
- ☐ External Data
- ☐ Task Outcome
- ☒ Managed Metadata



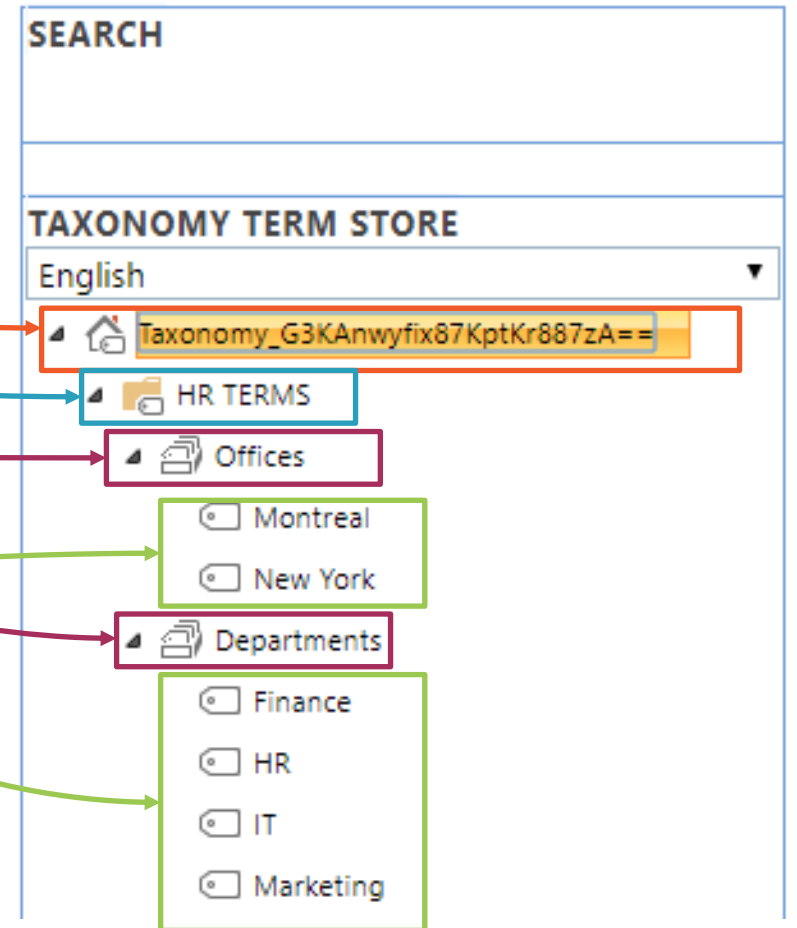
Managed Metadata Terms

Term Store

Term Group

Term Set

Term



Managed Metadata in SharePoint Online

Term Store is at the tenant level

Term Groups can be at tenant level or Site level



Terms can be entered
in multiple languages

You can also add
synonyms and
abbreviations for terms

HR

Available for Tagging

Select whether this term is available to be used by end users for tagging. When unselected this term will be visible but not enabled in tagging tools.



Language

Select a language of the labels for the term you would like to edit.

French ▼

Description

Descriptions will help users know when to use this term, and to disambiguate amongst similar terms.

Default Label

Enter one label as the default for this language.

RH

Other Labels

Enter synonyms and abbreviations for this term. (You can enter a word or phrase per line.)

Ressources Humaines

add new label



Demo



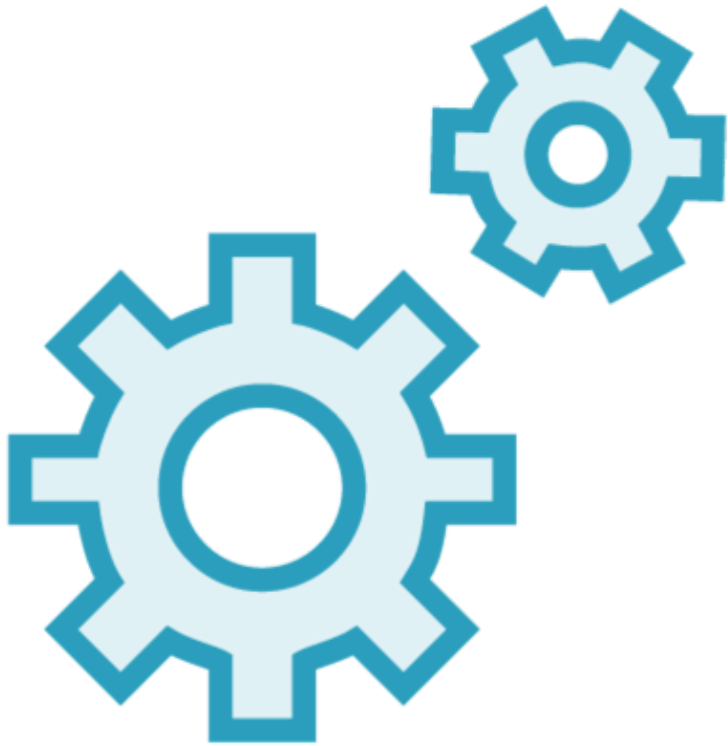
How Metadata is used inside SharePoint



Configuring Managed Metadata



Installing the Managed Metadata Service Application



No need to install anything in SharePoint Online!

- Comes setup with each SharePoint Online tenant

All language packs also come installed

Getting to the Term Store Management Tool

In the SharePoint Online Admin Center

- Classic features
 - Term store



Making Sure You Are an Admin

Global / SharePoint
Online admins are not
automatically added!

Some options might
be grayed out until
you do it

Term Store Administrators

You can enter user names, group names, or e-mail addresses. Separate them with semicolons. These users will be permitted to create new term set groups and assign users to the group manager role.

vlad@globomantics.org;
john.smith@globomantics.org;



Common Administrator Tasks

Creating term groups / term sets / terms

Assigning Role and Permissions to manage term groups



Term Store Permissions



Term Store Administrators

- Complete access to all term groups

Group Managers

- Contributor permissions to the term group

Term Set Stakeholders

- No actual permissions
- Informative / change management purposes only

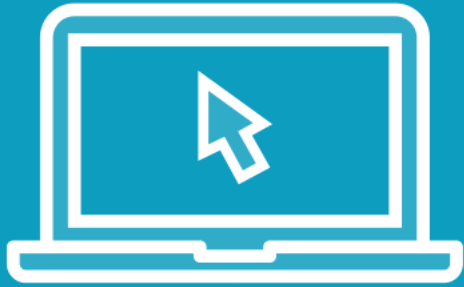
Multilingual

Add the required languages to “Working Languages” at Term Store level

All language packs come already installed



Demo



Configuring Managed Metadata



Conclusion



What is metadata?

- Data that provides information about other data

How metadata is used inside SharePoint

- Columns
- Managed metadata column

Configuring managed metadata

- Permissions
- Multilingual

