

The page features a decorative design with two blue circles of varying sizes, each composed of concentric circles in different shades of blue. Two thin blue lines intersect at the top left and extend diagonally across the page, framing the circles.

The Power of Classifying in SharePoint 2010

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Introduction

As a Microsoft SharePoint MVP and consultant, I have spoken with a number of SharePoint users and attended or spoken at numerous conferences. Having presented various sessions devoted to document management in SharePoint 2010, the one topic that always hits home with users is “organizing documents in SharePoint 2010.”

Why is it important to organize SharePoint content? The answer is simple, organized content is easier to manage, search and maintain. This makes SharePoint a more productive tool within an organization improving collaboration, document sharing and governance.

However, organizing content in SharePoint is no easy task. As any SharePoint administrator knows, it takes a well-organized information architecture and the power to classifying content to keep SharePoint organized.

This article details how and why content classification is an essential part of organizing documents in SharePoint 2010.

SharePoint Content Types

Usually documents are organized into libraries and folders, but in SharePoint 2010 there are additional capabilities, including Content Types and Managed Metadata. Both of these are excellent ways to improve the quality of Information Architecture in SharePoint 2010. Let’s begin by explaining how Content Types can help.

Content Types are one of the best ways to classify content in SharePoint. Different Content Types have different properties, different templates and different workflows. This allows you to build your own Content Type hierarchy, and so on.

Scenario One:

Imagine a company with a lot of project documents - contracts, specifications, feasibility studies, case studies, user manuals, etc. All of these types have their own attributes – each different from the other. For example, contracts have properties like signature date and person’s name, deadlines, etc; but user manuals have properties like software version number, related specifications, etc. There will also be properties in common, such as project id and name (See

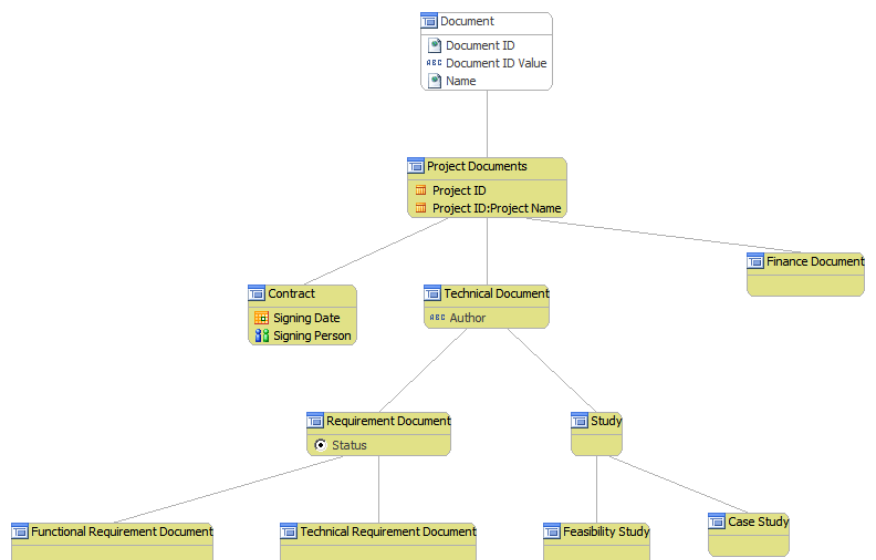


Figure 1 & Figure 2).

Figure 1

Using these Content Types on a SharePoint 2010 Document Library:

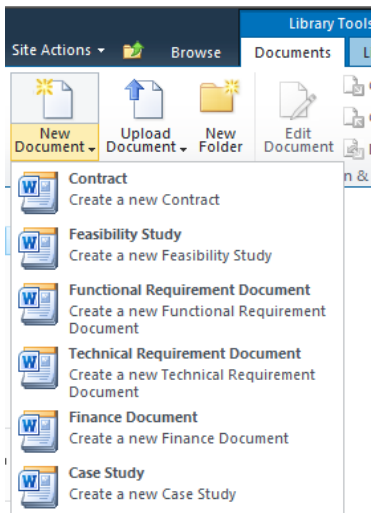


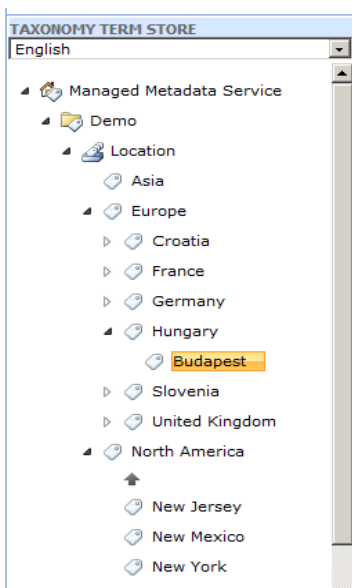
Figure 2

Managed Metadata

Besides Content Types, Metadata Management is one of the most impressive new capabilities in SharePoint 2010. Why is this so useful?

- It can be (and has to be) defined by the business – for the business. After the initial configuration, there's no admin or developer needed for adding or modifying taxonomy keywords.
- Managed metadata is managed out of context, it's not affiliated to lists, libraries or sites.
- Managed metadata is dynamic, alive, and it can evolve with the business' lifecycle.

Scenario 2:



Let's say the same project company mentioned in Scenario 1 works for clients around the world and locations for each project need to be captured. Managed Metadata is the ideal tool for doing that. You can store the continents, countries, states and cities in a well-defined hierarchy and the taxonomy can be used across all your SharePoint sites (See [Figure 3](#) and [Figure 4](#)).

Figure 3

Project Name	Project ID	Project Location
Deploying SharePoint 2010 <small>NEW</small>	Proj-2010-01	Düsseldorf
Upgrading from MOSS2007 <small>NEW</small>	Proj-2010-02	Düsseldorf
Upgrading from SPS2003 <small>NEW</small>	Proj-2010-03	San Diego
Deploying SharePoint 2010 <small>NEW</small>	Proj-2010-04	Las Vegas
Upgrading from MOSS2007 <small>NEW</small>	Proj-2010-05	Ljubljana

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Figure 4

Improving Search with Content Types and Managed Metadata

Of course, all of these great features (Content Types and Managed Metadata) have a larger purpose - to make the content searchable and findable. The more content you have, the more important it is to have a good search infrastructure. There is no way to memorize locations for all your content even if you excel in memory games. SharePoint content is designed to have a dynamic lifecycle (e.g. workflows, content organizer rules, etc.) and users need to find the content regardless of its current state or location.

As Content Types define document properties, they can also help with building a good Search infrastructure. Search Scopes can be based on Content Types, and each Search Scope can have its own Search Result Page. You can also improve the Search experience with a customized User Interface for the various Content Types. For example, you can create a general Document Search page, but also a Contract Search or Technical Search page, all based on content types (see Figure 5).

The screenshot shows the SharePoint 2010 Enterprise Search interface. The search query is 'sharepoint' and it has returned 8 results. The results are displayed in a list with columns for Result Type, Site, Author, and the document title and URL. The Refinement Panel on the left shows filters for Result Type (Any Result Type, PowerPoint, Excel, Text, Word), Site (Any Site, developer2010), and Author (Any Author, System Account, Natalya, Ágnes Molnár, Molnár Ágnes, show more).

Result Type	Site	Author	Document Title and URL
PowerPoint	developer2010	System Account	nevsor.xlsx Visual Studio Development;#User Experiences (UX) ... Visual Studio Development;#SharePoint (WSS + MOSS) ... Visual Studio Development;#Software + Services (S+S) ... Authors: System Account, Molnar, Agnes Date: 9/28/2010 Size: 27KB http://developer2010/DocCenter/TrainingMaterials/nevsor.xlsx View In Browser
Excel	developer2010	System Account	VirtualLaunch2010.xlsx SharePoint Architect ... Software Engineer - Web/Mail Server Administrator ... SharePoint admin ... SharePoint Analyst ... SharePoint administrator ... sharepoint developer ... Authors: System Account, Ágnes Molnár Date: 9/28/2010 Size: 64KB http://developer2010/DocCenter/TrainingMaterials/VirtualLaunch2010.xlsx View In Browser
Text	developer2010	System Account	CHAPTER 17: UNDERSTANDING SHAREPOINT 2010 SEARCH FAST Search Server 2010 for SharePoint ... SharePoint 2007 gave us the capability to index various content sources already. In SharePoint 2010, those kind of content sources are ... Authors: System Account, Ágnes Molnár Date: 9/28/2010 Size: 1MB http://developer2010/DocCenter/TrainingMaterials/Chapter17.docx View In Browser
Word	developer2010	Natalya	Enterprise Document Management in SharePoint 2010 as You've Never Seen 52 - Best Practices for Organizing Documents in SharePoint 2010 ... SharePoint 2010 Capabilities for supporting Document Management ... Easiest to adopt with previous SharePoint experience ... Authors: System Account, Natalya Date: 9/28/2010 Size: 3MB http://developer2010/DocCenter/TrainingMaterials/BPC10-16_AgnesMolnar_EnterpriseDocMgmt.pptx View In Browser

Figure 5

Managed Metadata also provides a number of ways to further improve SharePoint Search. Well-tagged items will always be easier to find. The more information you have for items and documents, the more relevant search results you'll get in return.

Furthermore, you can filter search results with the Refinement Panel. While returning the result set, SharePoint 2010 builds a shallow refinement. This means the first 100 results are checked and their properties are extracted into the Refinement Panel. When you select one of the values, the result set will be filtered based on the document's property and value. In case of FAST Search Server for SharePoint 2010, the refinement is deep - meaning not only the first 100 results but all items in the result set are extracted.

By default, the Refinement Panel contains the most important out-of-the-box SharePoint properties (Author, site, file type, etc.), and metadata properties. The more Managed Metadata fields are used for tagging, the more powerful the Refinement Panel becomes.

As a result, SharePoint Search can be significantly improved if Content Types and Managed Metadata tagging are implemented and used actively (see [Figure 6](#)).

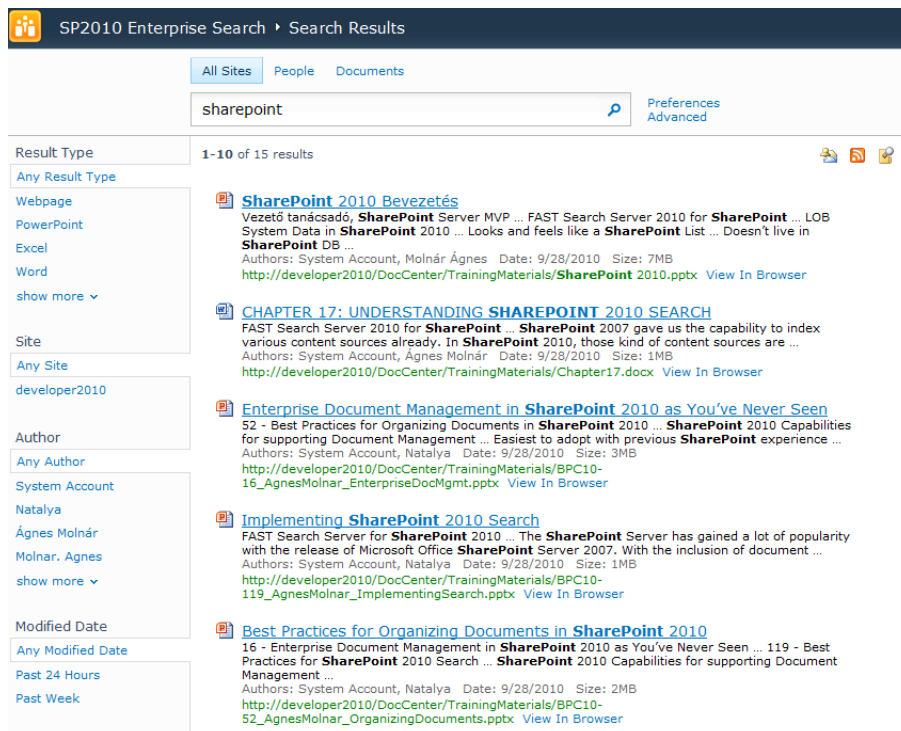


Figure 6

Bulk Classification

If your SharePoint environment is like most, you have thousands of unclassified documents with no Content Types and no metadata tags applied to them. This is due to SharePoint's organic growth within companies where business groups or teams began using it with little internal or IT planning. For many organizations:

- Documents and file were just uploaded or migrated from file systems or other document management system;
- Little to no content types or information architect design was done; and
- Upgrades from SharePoint 2007 or 2003 to SharePoint 2010 did not take advantage of new tagging and classification infrastructure provided by the Managed Metadata feature.

These examples are typical for many organizations. However, it is never too late to organize SharePoint and begin classifying content. Bulk Classification tools used in conjunction with SharePoint can help you realize the full benefits of SharePoint 2010 and build a strong Information Architecture with effective search.

Making Classification Easy

You can tag and associate Content Types to any document manually - one by one. This is not a real option when there are a large number of documents and files involved. Imagine having millions of documents using the default Content Type, 'Document,' that need to be moved to a new content

type and tagged. Doing this manually, one by one, is hardly an option? It would take weeks to classify each document manually.

One option for organizations is to develop scripts or code. This would require a developer and well defined (and validated) classification rules and processes. While this is possible, it is a more expensive and time consuming option.

A second and more likely option is to leverage a third-party bulk classification tool. [MetaVis Classifier](#) for SharePoint is an end-user friendly solution that is quick and easy to use and is cost effective. MetaVis Classifier is a bulk re-organization tool for SharePoint contents. It allows you to:

- Assign new metadata values and new content types;
- Move files to different folders, lists, sites or servers;
- Or do both at the same time.

Using MetaVis Classifier is easy. For example, say you want to upload, copy or move many documents to a SharePoint 2010 library in bulk. The only thing you have to do is locate the documents, right click and select the 'Copy To' option. With this operation you can choose where to copy the documents, assign appropriate metadata and you are done! (See [Figure 7](#) & [Figure 8](#))

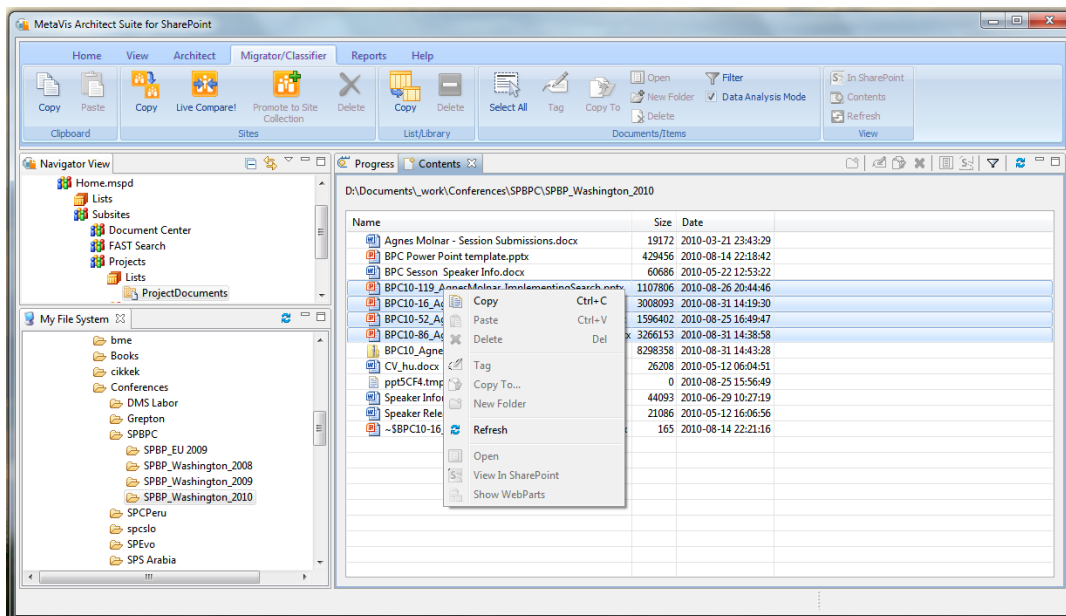


Figure 7

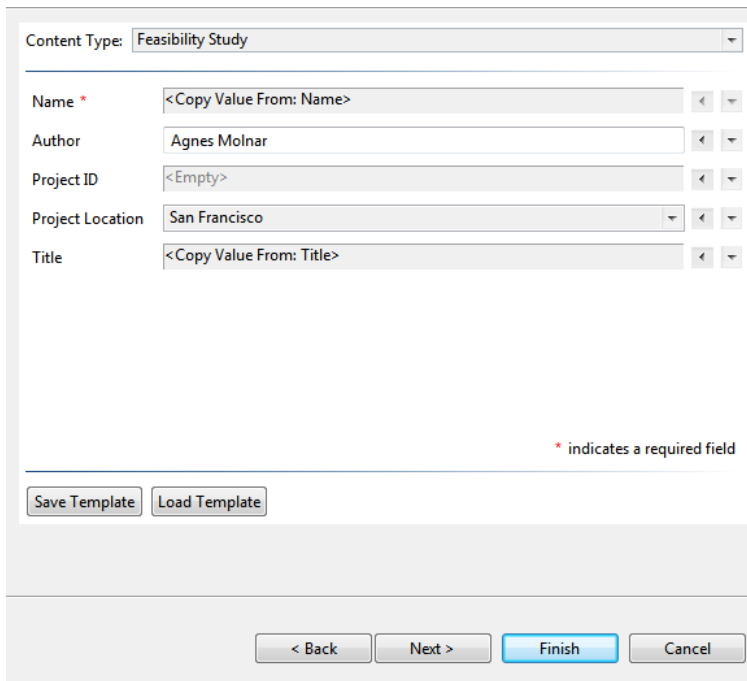


Figure 8

Pretty powerful, right? Just install MetaVis Classifier on your computer and connect to your SharePoint 2003, 2007 or 2010 sites. Moreover, you can import documents from the file system too, in this same simple way.

If you have already uploaded or moved the documents into the right location, you can tag them and/or change their Content Types in-place with MetaVis Classifier (see

Figure 9).

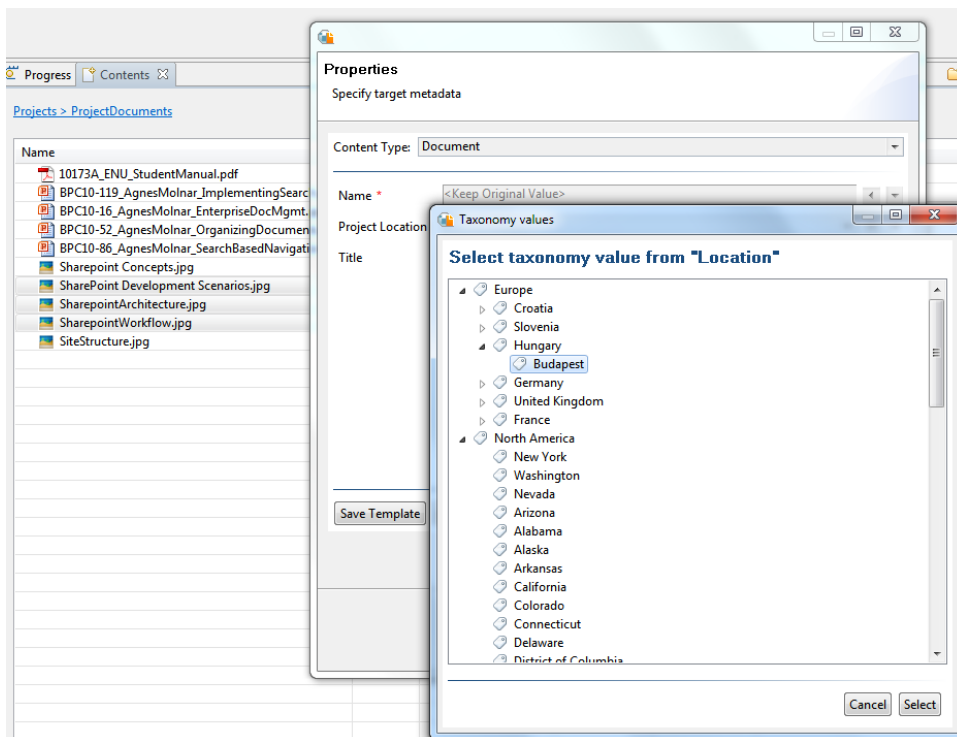


Figure 9

MetaVis Information Manager

What if you cannot or don't want to install a product on your own or a co-worker's computer? Or you want to extend the power of classification to SharePoint users? MetaVis Information Manager for SharePoint 2010 integrates into the SharePoint 2010 ribbon and includes much of the same functionality as the rich client but with a major difference - no client installation necessary. Your users can classify content in SharePoint 2010 from their browser (see [Figure 10](#)).

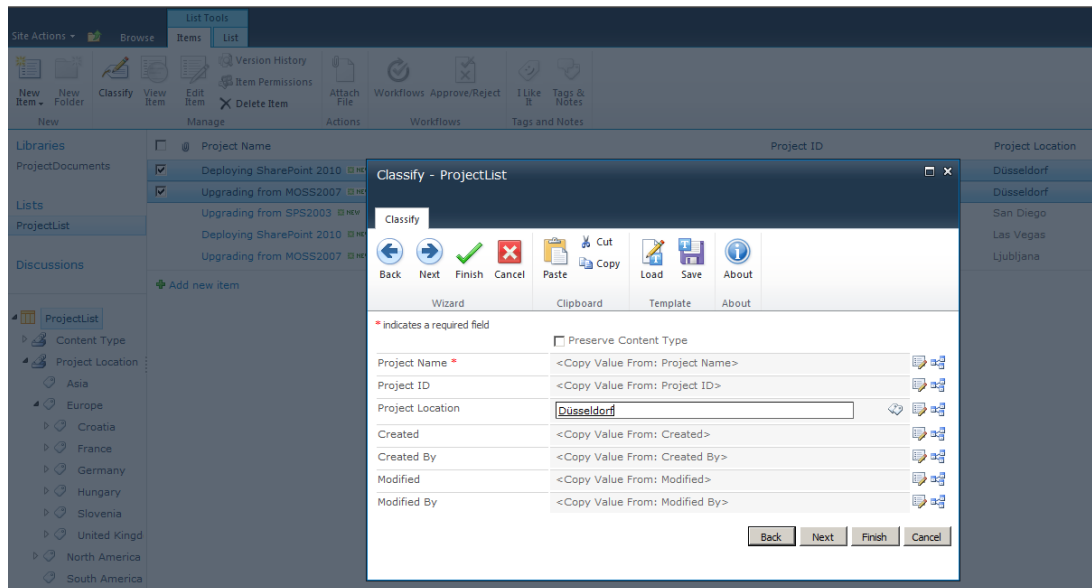


Figure 10

Why is this so powerful? For information workers to be successful, they need to find the right information at the right time and in the right place. Tagging and classification content makes this possible.

Having tagging and content typing capabilities as part of your document management system but not using them is huge opportunity lost. Without metadata and only using the default "Document" content type organizations end up with an information silo instead of a well-organized information architecture. As a result finding information becomes a major task.

With tools like MetaVis Classifier and MetaVis Information Manager, tagging and content typing are no longer a nightmare. Your end users can do classify in an efficient manner. The result is a SharePoint 2010 Information Architecture that is well organized, clean, discoverable and searchable.

About the Author:

Agnes Molnar is a Microsoft SharePoint MVP and has been working with Microsoft technologies and SharePoint since 2001. She serves as an independent SharePoint consultant and solutions architect having leaded numerous SharePoint implementations for Central European companies. Agnes specialized in SharePoint Architecture, Governance, Information and Knowledge Management, and Enterprise Search. Agnes frequently speaks at leading European and International conferences including The Best Practices Conferences in Washington DC and London; SharePoint Conferences in Peru and throughout Europe; SharePoint Saturdays, and more. She is also the co-author of the book '*Real World SharePoint 2010*' and contributing author of the book '*SharePoint Unleashed 2010*'.