

# Enterprise Content Management



# Agenda

- Managed Metadata
- Enterprise Content Types
- Document Sets
- Records Management
- eDiscovery
- Programming with Managed Metadata



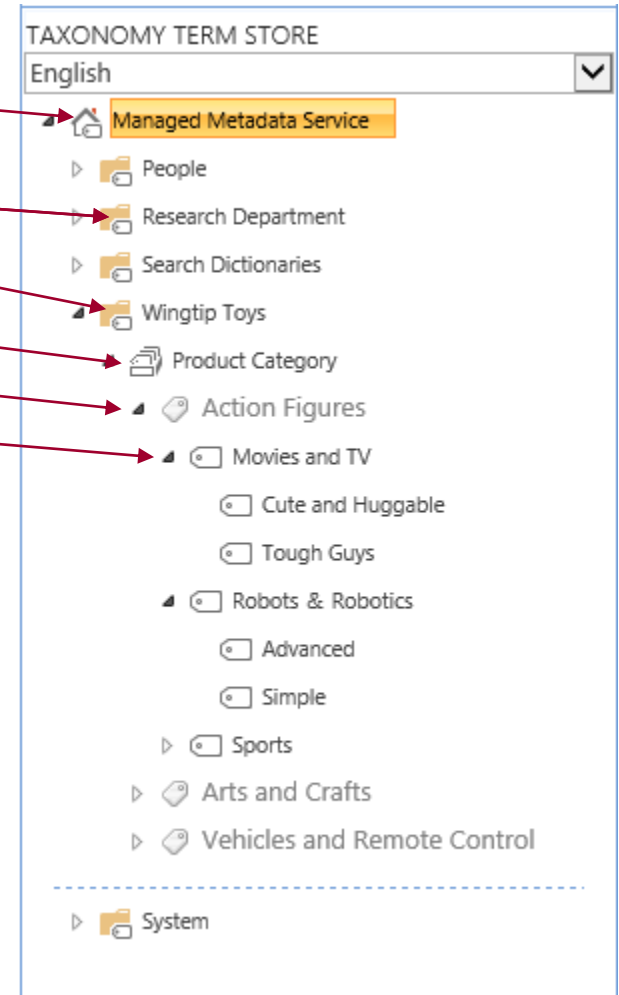
# Managed Metadata Service

- Term Store Management
  - Default Keyword Store
  - Shared Enterprise Term Store
  - User Profile Service Term Store
- Enterprise Content Types
  - Syndication of Content Types
  - Content Type Publishing (Push Down)



# Understanding Terms and Term Sets

- Term Store
  - Term Group
    - Term Set
      - Term
        - Term



# Managed Metadata Improvements

- Metadata leveraged in various ways throughout SharePoint 2013
- New pages introduced so not everyone has to use Term Store Manager to modify taxonomies
  - Permissions for groups
    - SharePoint 2010 allowed read
    - SharePoint 2013 supports read/write
- Numerous features based on taxonomy targeting WCM scenarios
- Ability to flag a term set's "intended use"
- Taxonomy API exposed via CSOM



# Metadata Manager

- Provides UI for managing term sets and terms
  - Import of term sets and terms
  - Manage custom properties
  - Translations & synonyms
- Manage term set / term languages
- Submission policy (open / closed)
  - Open means users can submit terms to the term store (when adding / editing items)
  - Regardless of the policy, users can always submit keywords



# Creating a Taxonomy

- Steps to creating a taxonomy
  - Create a new group
  - Create a new term set
  - Create top-level terms
  - Create hierarchy of child terms







**DEMO**

## **Working with Managed Metadata**



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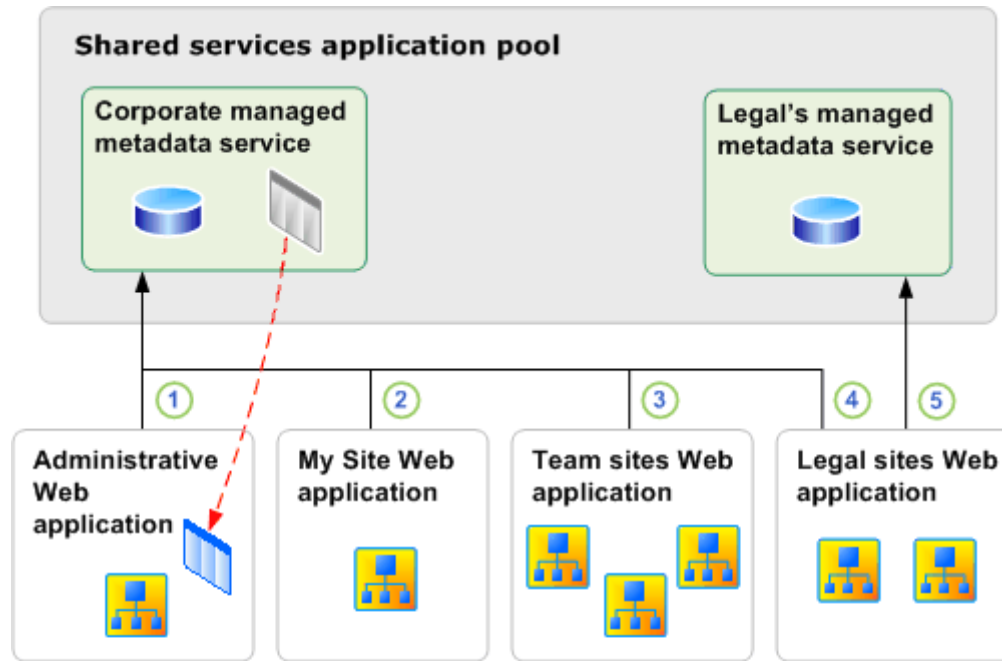


# Enterprise Content Types

- Central Store of Content Types
- Published to Subscribed Site Collections
- Republished when Source is Updated
- In Subscriber Site
  - Cannot Edit Source Content Type
  - Create New Content Types that Inherit



# Enterprise Content Types



## Key

-  Term store
-  Site collection
-  Content type gallery
-  Content type hub





**DEMO**

# Enterprise Content Type Publishing



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# Document Sets

- SharePoint Server 2007 treated documents as atomic & not linked to other documents
- SharePoint Server 2010 introduced document sets, or a collection of documents, spreadsheets, presentations, etc. that make up a single work product
- Metadata exists on individual items and the set as a whole



# Document Sets

- Each document set has:
  - List of available content types allowed within it
  - Default content automatically added to the set
- Can create shared columns (defined in document set's content type) that are pushed down across all content in set
- Welcome page acts as the homepage
  - Customizable Web Part Page displaying the document set's properties



# Document Sets – Templates, Versioning

- Document Templates:
  - Admins can provide users document templates for creating new items for the work product
  - Templates created with Visual Studio
- Document Set Versioning:
  - Set owners can capture the state of the set at different points in the lifecycle
  - Ability to see point-in-time history of the set
  - Set owners can restore to a previous version of the set
- Workflows
  - Special OOTB activities for working with document sets







**DEMO**

# Document Sets

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# In Place Records Management

- SharePoint Server 2007 introduced records management functionality tied to Records Center site template
- SharePoint Server 2010 moved this to a Feature for use in any site template:  
In Place Records Management
- Define who can & can't declare records



# Content Organizer

- Site owners configure rules for new content
- Content authors create content, let the organizer move it to the desired location
- Automatically create subfolders in libraries for lots of content (ie: Press Releases 2008/2009)
- Enabled with site collection scoped Feature
- Managed from each site's Site Settings page





# Unique Document ID Service

- New site collection Feature: Document ID Service
- Adds unique ID for all documents throughout the site collection
- Documents can be retrieved regardless of the current or future location based on their unique ID
- Activating the feature adds 3 columns to the Document and Document Set content types
  - Changes pushed down to all derived content types
  - IDs assigned to existing items as a delayed process
- Adds a Web Part to help find by ID vs. URL:  
Find By Document ID



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# eDiscovery

- eDiscovery is the process of finding content relevant to a specific topic
  - For example: legal action / litigation
- Companies also employ internally
  - Ensure they are in compliance
  - Ensure the appropriate policies are in place
  - Ensure they understand their IT & content sources



# Add, Manage & Export Discovery Sets

SharePoint Newsfeed SkyDrive Sites CONTOSO\administrator

Home

Search This Site...

## New: Discovery Set

Discovery Set Name \*

Sources [\(Add & Manage Sources\)](#)

Name	Source Type	In-Place Hold Status	Items	Size
There are no sources in this discovery set. To add sources, click "(Add & Manage Sources)".				

Filter

Start Date: End Date:

Author/Sender:  
Enter names or email addresses...

Domain (Exchange only):

[Search syntax and tips](#)

Apply Filter

In-Place Hold

Certain sources such as SharePoint and Exchange can be preserved in place. This will protect content in its original location so if it is modified or deleted it will be retained in a secure location. If a source does not support in-place hold, you can export the content and place it in a secure location to protect it.

☐ Enable In-Place Hold ☒ Disable In-Place Hold

Preview Results Save Cancel

## Add & Manage Sources

Mailboxes

Specify Exchange mailboxes using names or email addresses.

[Add an additional mailbox](#)

Locations

Enter URLs to specify SharePoint sites & file shares that are indexed by Search. SharePoint site sources will include all sub sites. File share sources will include all folders underneath the specified folder.

[Add an additional location](#)

OK Cancel

Home

Search This Site...

## Exports

[+ new item](#)

All Items ... Find an item

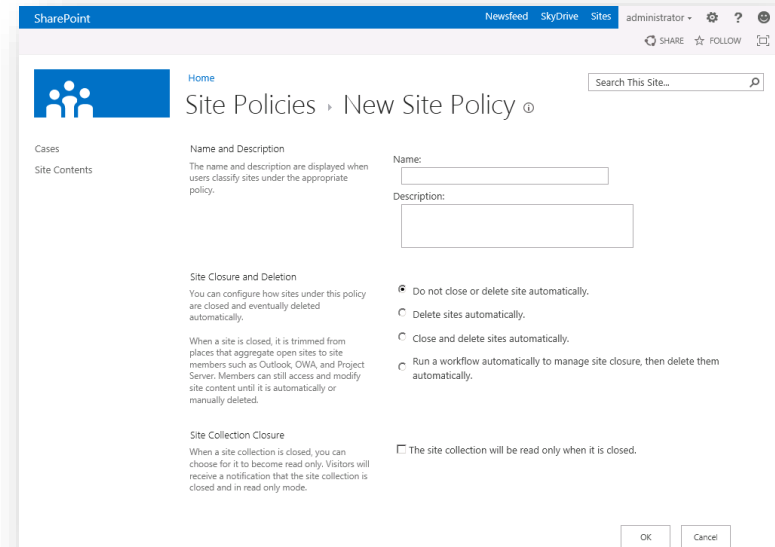
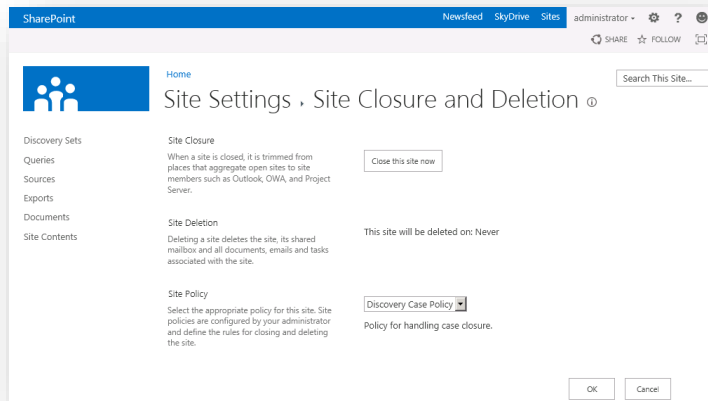
✓	Name	Status	Items	Size (MB)	Modified	Modified By
There are no items to show in this view of the "Exports" list.						





# Site Based Compliance & Preservation

- Compliance officers create policies, which define:
  - The retention policy for the entire site and the Site Mailbox, if one is associated with the site
  - What causes a project to be closed
  - When a project should expire



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# Managed Metadata CSOM

- SharePoint 2013 CSOM has support for taxonomy
- Add references to:
  - `Microsoft.SharePoint.Client.dll`
  - `Microsoft.SharePoint.Client.Runtime.dll`
  - `Microsoft.SharePoint.Client.Taxonomy.dll`



# Using the Local Termset Groups

```
static TermGroup GetSiteCollectionTermGroup(ClientContext clientContext, Site siteCollection)
{
    TaxonomySession taxonomySession = TaxonomySession.GetTaxonomySession(clientContext);
    taxonomySession.UpdateCache();

    clientContext.Load(taxonomySession, ts => ts.TermStores);
    clientContext.ExecuteQuery();

    TermStore termStore = taxonomySession.TermStores.FirstOrDefault<TermStore>();
    Guid localTermStoreID = termStore.Id;
    TermGroup termGroup = termStore.GetSiteCollectionGroup(siteCollection, true);
    clientContext.Load(termGroup);
    clientContext.Load(termGroup.TermSets);
    clientContext.ExecuteQuery();
    return termGroup;
}
```



# Creating a Termset

```
static TermSet CreateTermset(ClientContext clientContext, TermGroup termGroup, string termSetName) {  
    // delete termset if it already exists  
    foreach (TermSet termset in termGroup.TermSets) {  
        if (termset.Name.Equals(termSetName)) {  
            termset.DeleteObject();  
            termGroup.TermStore.CommitAll();  
            clientContext.ExecuteQuery();  
        }  
    }  
  
    Guid termSetId = Guid.NewGuid();  
    TermSet newTermSet = termGroup.CreateTermSet(termSetName, termSetId, 1033);  
    newTermSet.IsOpenForTermCreation = true;  
    termGroup.TermStore.CommitAll();  
    clientContext.Load(newTermSet);  
    clientContext.ExecuteQuery();  
  
    return newTermSet;  
}
```



# Creating Terms

```
static void CreateTerms(ClientContext clientContext, TermSet termSet) {  
    Term termEurope = termSet.CreateTerm("Europe", 1033, Guid.NewGuid());  
    termEurope.CreateTerm("United Kingdom", 1033, Guid.NewGuid());  
    termEurope.CreateTerm("France", 1033, Guid.NewGuid());  
    termEurope.CreateTerm("Spain", 1033, Guid.NewGuid());  
    termEurope.CreateTerm("Germany", 1033, Guid.NewGuid());  
  
    Term termNorthAmerica = termSet.CreateTerm("North America", 1033, Guid.NewGuid());  
    termNorthAmerica.CreateTerm("Canada", 1033, Guid.NewGuid());  
    termNorthAmerica.CreateTerm("United States", 1033, Guid.NewGuid());  
    termNorthAmerica.CreateTerm("Mexico", 1033, Guid.NewGuid());  
  
    clientContext.ExecuteQuery();  
    termSet.TermStore.CommitAll();  
}
```





# Summary

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