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## Module 11: Managing taxonomy

# Lab A: Configuring content type propagation

## Exercise 1: Creating content types for propagation

### ▶ Task 1: Create the Invoice content type

1. Sign in to **NYC-SP1** with the user name **Contoso\Administrator** and the password **Pa$$w0rd**.
2. On the **Start** screen, click **Internet Explorer**.
3. In the Internet Explorer address bar, type **sharepoint.contoso.com**, and then press Enter.
4. If you are prompted for credentials, sign in as **Contoso\Administrator** with the password **Pa$$w0rd**.
5. On the **Settings** menu, click **Site settings**.
6. On the **Site Settings** page, under **Web Designer Galleries**, click **Site columns**.
7. On the **Site Columns** page, click **Create**.
8. On the **Create Column** page, in the **Column name** text box, type **Supplier**.
9. Under **Group**, click **New group**, and then in the **Group name** text box, type **Contoso Columns**, and then click **OK**.
10. On the **Site Columns** page, click **Create**.
11. On the **Create Column** page, in the **Column name** text box, type **Contoso Due Date**.
12. Under **Name and Type**, click **Date and Time**.
13. Under **Group**, in the **Existing group** list, click **Contoso Columns**, and then click **OK**.
14. On the **Site Columns** page, click **Create**.
15. On the **Create Column** page, in the **Column name** box, type **Contoso Department**.
16. Under **Group**, in the **Existing group** list, click **Contoso Columns**, and then click **OK**.
17. On the **Site Columns** page, click **Create**.
18. On the **Create Column** page, in the **Column name** text box, type **Amount**.
19. Under **Name and Type**, click **Currency**.
20. Under **Group**, in the **Existing group** list, click **Contoso Columns**, and then click **OK**.
21. On the site breadcrumb trail, click **Site Settings**.
22. On the **Site Settings** page, under **Web Designer Galleries**, click **Site content types**.
23. On the **Site Content Types** page, click **Create**.
24. On the **New Site Content Type** page, in the **Name** box, type **Invoice**.
25. In the **Select parent content type from** list, click **Document Content Types**.
26. In the **Parent Content Type** list, click **Document**.
27. In the **Group** section, click **New group**, and then in the **Group name** text box, type **Contoso Content Types**, and then click **OK**.

28. On the **Site Content Type** page, under **Columns**, click **Add from existing site columns**.
29. On the **Add Columns** page, in the **Select columns from** list, click **Contoso Columns**.
30. In the **Available columns** list, select **Contoso Department**, **Amount**, **Contoso Due Date**, and **Supplier**, click **Add**, and then click **OK**.

> **Note:** To select multiple items, press Ctrl and then click each item.

### ▶ Task 2: Create the Contract content type

1. On the **Settings** menu, click **Site settings**.
2. On the **Site Settings** page, under **Web Designer Galleries**, click **Site columns**.
3. On the **Site Columns** page, click **Create**.
4. On the **Create Column** page, in the **Column name** text box, type **Client**.
5. Under **Group**, in the **Existing group** list, click **Contoso Columns**, and then click **OK**.
6. On the **Site Columns** page, click **Create**.
7. On the **Create Column** page, in the **Column name** text box, type **Final Effective Date**.
8. Under **Name and Type**, click **Date and Time**.
9. Under **Group**, in the **Existing group** list, click **Contoso Columns**, and then click **OK**.
10. On the **Site Columns** page, click **Create**.
11. On the **Create Column** page, in the **Column name** text box, type **Owner**.
12. Under **Name and Type**, click **Person or Group**.
13. Under **Group**, in the **Existing group** list, click **Contoso Columns**, and then click **OK**.
14. On the site breadcrumb trail, click **Site Settings**.
15. On the **Site Settings** page, under **Web Designer Galleries**, click **Site content types**.
16. On the **Site Content Types** page, click **Create**.
17. On the **New Site Content Type** page, in the **Name** text box, type **Contract**.
18. In the **Select parent content type from** list, click **Document Content Types**.
19. In the **Parent Content Type** list, click **Document**.
20. In the **Group** section, in the **Existing group** list, click **Contoso Content Types**, and then click **OK**.
21. On the **Site Content Type** page, under **Columns**, click **Add from existing site columns**.
22. On the **Add Columns** page, in the **Select columns from** list, click **Contoso Columns**.
23. In the **Available columns** list box, select **Client**, **Owner**, **Final Effective Date**, click **Add**, and then click **OK**.
24. Close Internet Explorer.

**Results**: After completing this exercise, you should have created several site columns and two content types.

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## Exercise 2: Publishing content types across site collections

### ▶ Task 1: Publish the content types

1. On the **Start** screen, click **Internet Explorer**.
2. In the Internet Explorer address bar, type **sharepoint.contoso.com**, and then press Enter.
3. If you are prompted for credentials, sign in as **Contoso\Administrator** with the password **Pa$$w0rd**.
4. On the **Settings** menu, click **Site settings**.
5. On the **Site Settings** page, under **Site Collection Administration**, click **Site collection features**.
6. On the **Site Collection Features** page, in the **Content Type Syndication Hub** row, click **Activate**.
7. In the Internet Explorer, click the refresh button and verify that the **Content Type Syndication Hub** feature now has a status of **Active**.

> **Note**: If the **Content Type Syndication Hub** site collection feature is already activated, you can skip Step 6 and 7.

8. On the **Settings** menu, click **Site settings**.
9. On the **Site Settings** page, under **Web Designer Galleries**, click **Site content types**.
10. On the **Site Content Types** page, under **Contoso Content Types**, click **Contract**.
11. Under **Settings**, click **Manage publishing for this content type**.
12. On the **Content Type Publishing: Contract** page, make sure **Publish** is selected, and then click **OK**.
13. On the **Site Content Type** page, on the site breadcrumb trail, click **Site Content Types**.
14. On the **Site Content Types** page, under **Contoso Content Types**, click **Invoice**.
15. Under **Settings**, click **Manage publishing for this content type**.
16. On the **Content Type Publishing: Invoice** page, make sure **Publish** is selected, and then click **OK**.
17. Close Internet Explorer.
18. On the **Start** screen, type **SharePoint 2016 Central Administration**, and then press Enter.
19. On the Quick Launch navigation menu, click **Monitoring**.
20. On the **Monitoring** page, under **Timer Jobs**, click **Review job definitions**.
21. On the **Job Definitions** page, click **Content Type Subscriber** of the web application **SharePoint - sharepoint.contoso.com80**.
22. On the **Edit Timer Job** page, click **Run Now**.
23. In the Internet Explorer address bar, type **http://sharepoint.contoso.com/projects/P1**, and then press Enter.
24. If you are prompted for credentials, sign in as **Contoso\Administrator** with the password **Pa$$w0rd**.
25. On the **Settings** menu, click **Site settings**.
26. On the **Site Settings** page, under **Web Designer Galleries**, click **Site content types**.

27. On the **Site Content Types** page, verify that the list of content types includes a group named **Contoso Content Types**.
28. Verify that the **Contoso Content Types** group includes content types named **Contract** and **Invoice**.
29. Close Internet Explorer.

### ▶ Task 2: Prepare for the next lab

- When you complete the lab, keep all the virtual machines running. The virtual machines in their current state are required for the next lab.

**Results**: After completing this exercise, you should have published content types across site collection boundaries.

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# Lab B: Configuring and using managed metadata term sets

## Exercise 1: Configuring the managed metadata service

### ▶ Task 1: Assign term store administrators

1. Sign in to **NYC-SP1** with the user name **Contoso\Administrator** and the password **Pa$$w0rd**.
2. On the **Start** screen, type **SharePoint 2016 Central Administration**, and then press Enter.
3. In the SharePoint 2016 Central Administration site, under the **Application Management** section, click **Manage service applications**.
4. On the list of service applications, select the **Contoso Managed Metadata Service** row (you should select the **Managed Metadata Service** row, and not the **Managed Metadata Service Connection** row), and then on the ribbon, click **Manage**.
5. On the **Term Store Management Tool** page, in the **Term Store Administrators** text box, after the existing entry, type **Contoso\Tamera**.
6. Click **Check Names**, and then click **Save**.

**Results**: After completing this exercise, you should have assigned term store administrators.

## Exercise 2: Creating term sets and terms

### ▶ Task 1: Create the Department term set

1. On the **Term Store Management Tool** page, in the left navigation pane, right-click **Contoso Managed Metadata Service**, and then click **New Group**.
2. Type **Organization**, and then press Enter.
3. Right-click **Organization** group, and then click **New Term Set**.
4. Type **Department**, and then press Enter.
5. Right-click **Department** term set, and then click **Create Term**.
6. Type **Marketing**, and then press Enter.
7. Type **Finance**, and then press Enter.
8. Type **IT**, and then press Enter.
9. Type **Sales**, and then press Enter.

### ▶ Task 2: Create the Supplier term set

1. Right-click **Organization** group, and then click **New Term Set**.
2. Type **Supplier**, and then press Enter.
3. Right-click **Supplier** term set, and then click **Create Term**.
4. Type **Litware, Inc.**, and then press Enter.
5. Type **Proseware, Inc.**, and then press Enter.

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6. Type **Northwind Traders**, and then press Enter.
7. Type **Trey Research**, and then press Enter.
8. Type **Wide World Importers**, and then press Enter.
9. Close **Internet Explorer**.

**Results**: After completing this exercise, you should have created term set groups, term sets, and terms.

## Exercise 3: Consuming term sets

### ▶ Task 1: Create the Supplier (MMS) site column

1. On the **Start** screen, click **Internet Explorer**.
2. In the Internet Explorer address bar, type **http://sharepoint.contoso.com**, and then press Enter.
3. If you are prompted for credentials, sign in with the user name **Contoso\Administrator** and the password **Pa$$w0rd**.
4. On the **Settings** menu, click **Site settings**.
5. On the **Site Settings** page, under **Web Designer Galleries**, click **Site columns**.
6. On the **Site Columns** page, click **Create**.
7. On the **Create Column** page, in the **Column name** text box, type **Supplier (MMS)**.
8. Under **Name and Type**, click **Managed Metadata**.
9. Under **Group**, in the **Existing group** list, click **Contoso Columns**.
10. Under **Term Set Settings**, expand **Contoso Managed Metadata Service**, expand **Organization**, click **Supplier**, and then click **OK**.

### ▶ Task 2: Create the Contoso Department (MMS) site column

1. On the **Site Columns** page, click **Create**.
2. On the **Create Column** page, in the **Column name** text box, type **Contoso Department (MMS)**.
3. Under **Name and Type**, click **Managed Metadata**.
4. Under **Group**, in the **Existing group** list, click **Contoso Columns**.
5. Under **Term Set Settings**, expand **Contoso Managed Metadata Service**, expand **Organization**, click **Department**, and then click **OK**.

### ▶ Task 3: Edit and republish the Invoice content type

1. On the **Site Columns** page, on the site breadcrumb trail, click **Site Settings**.
2. On the **Site Settings** page, under **Web Designer Galleries**, click **Site content types**.
3. On the **Site Content Types** page, under **Contoso Content Types**, click **Invoice**.
4. On the **Site Content Type** page, in the **Columns** list, click **Supplier**.
5. On the **Change Content Type Column** page, click **Remove**.
6. In the **Message from webpage** dialog box, click **OK**.
7. On the **Site Content Type** page, in the **Columns** list, click **Contoso Department**.

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8. On the **Change Content Type Column** page, click **Remove**.
9. In the **Message from webpage** dialog box, click **OK**.
10. On the **Site Content Type** page, under the list of columns, click **Add from existing site columns**.
11. On the **Add Columns** page, in the **Select columns from** list, click **Contoso Columns**.
12. In the **Available columns** list box, click **Contoso Department (MMS)** and **Supplier (MMS)**, and then click **Add**.
13. In the **Message from webpage** dialog box, click **OK**.
14. On the **Add Columns** page, click **OK**.
15. On the **Site Content Type** page, click **Manage publishing for this content type**.
16. On the **Content Type Publishing: Invoice** page, make sure **Republish** is selected, and then click **OK**.
17. Close **Internet Explorer**.
18. On the **Start** screen, type **SharePoint 2016 Central Administration**, and then press Enter.
19. On the Quick Launch navigation menu, click **Monitoring**.
20. On the **Monitoring** page, under **Timer Jobs**, click **Review job definitions**.
21. On the **Job Definitions** page, click **Content Type Subscriber** of the web application **SharePoint - sharepoint.contoso.com80**.
22. On the **Job Definitions** page, click **Content Type Subscriber**.
23. On the **Edit Timer Job** page, click **Run Now**.

### ▶ Task 4: Verify that the republished content type and managed metadata columns behave as expected

1. In the Internet Explorer address bar, type **http://sharepoint.contoso.com/projects/P1**, and then press Enter.
2. If you are prompted for credentials, sign in with the user name **Contoso\Administrator** and the password **Pa$$w0rd**.
3. On the Quick Launch navigation menu, click **Documents**.
4. On the ribbon, on the **LIBRARY** tab, click **Library Settings**.
5. On the **Settings** page, under **General Settings**, click **Advanced settings**.
6. On the **Advanced Settings** page, under **Allow management of content types**, click **Yes**, and then click **OK**.
7. On the **Settings** page, under **Content Types**, click **Add from existing site content types**.
8. On the **Add Content Types** page, in the **Select site content types from** list, click **Contoso Content Types**.
9. In the **Available Site Content Types** list box, click **Invoice**, click **Add**, and then click **OK**.
10. On the site breadcrumb trail, click **Documents**.
11. On the **Documents** library page, click **Upload**.
12. In the **Add a document** dialog box, click **Browse**.
13. Browse to the **E:\Labfiles\Mod11** folder, select the **Invoice.docx** file, and then click **Open**.
14. In the **Add a document** dialog box, click **OK**.

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15. In the **Add a document** dialog box, in the **Content Type** list, click **Invoice**.
16. In the **Title** text box, type **Stationery Invoice**.
17. In the **Amount** text box, type **89.50**.
18. In the **Contoso Due Date** text box, type **2/8/2016**.
19. Next to the **Contoso Department (MMS)** box, click the **tag** icon.
20. In the **Select: Contoso Department (MMS)** dialog box, click **Finance**, click **Select**, and then click **OK**.
21. Next to the **Supplier (MMS)** box, click the **tag** icon.
22. In the **Select: Supplier (MMS)** dialog box, click **Litware, Inc.**, click **Select**, and then click **OK**.
23. In the **Add a document** dialog box, click **Save**.
24. Close all open windows.

**Results**: After completing this exercise, you should have managed metadata term sets in site columns and content types.

### ▶ Task 5: Prepare for the next module

1. On the host computer, start **Hyper-V Manager**.
2. In the **Virtual Machines** list, right-click **20339-1A-NYC-SP1-E**, and then click **Revert**.
3. In the **Revert Virtual Machine** dialog box, click **Revert**.
4. Repeat steps 2 and 3 for **20339-1A-NYC-DB1-E** and **20339-1A-NYC-DC1-E**.

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