

# An Exciting Project by the DVPP to Leverage SharePoint On-line for Document Management

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# Introductions

- ▶ Catherine Gagne, CAO, Division of Vice-President and Provost
- ▶ Dong Xia Wang, Information Management Analyst (SharePoint)
- ▶ Daniella Mallinick, Director, Academic Programs, Planning & Quality Assurance

# Project Objectives

- ▶ To improve business processes
- ▶ To support collaboration across the team
- ▶ To manage documents more efficiently
- ▶ To preserve University records

# System Features

- ▶ Managed metadata
- ▶ Subsite templates (e.g. team site, project site, wiki)
- ▶ Document libraries and lists
- ▶ Document center
- ▶ Records center
- ▶ Content types (e.g. document sets)
- ▶ Search

# Managed Metadata

- **Key Concepts:**
  - ▶ Managed Metadata
  - ▶ Managed Metadata Service
  - ▶ Taxonomy
  - ▶ Term Store, term groups, term sets (global and local), terms

# Benefit of Managed Metadata

- Consistent use of metadata throughout the organization
- Improved content discoverability
- Can group and filter the items by the hierarchy of the term sets, and narrow the results down to find the information needed (libraries, and searches)
- Makes it easier to maintain and adapt your metadata as business needs evolve

# Managed Metadata Columns vs Choice Columns/Lookup Columns

- Managed metadata columns:
  - ▶ Easy to work with hierarchical structure
  - ▶ Easy to handle long list
  - ▶ Term sets can be reused, pinned and merged
  - ▶ Users can create a cross reference for old terms or synonyms
  - ▶ Any changes in a value are pushed down everywhere the tag is used
  - ▶ Term set can be maintained by users that have contribution rights from business area
  - ▶ Automatically suggests terms as the user types based on input
  - ▶ Automatically promoted to search refiners
- Choice columns/lookup columns
  - ▶ Don't have the above benefits that managed metadata column has
  - ▶ Any changes made to the choice list to be done by an administrator

# Planning a Taxonomy

- Elicit the requirements from stakeholders and identify their business needs with regards to document management.
- Identify the information the stakeholders are looking for and the terms describing that information.
- Get the terms from stakeholders or get the stakeholders agree on the terms to be used
- Plan the hierarchical structure of the term set
- Decide if the term set is global or local
- Create the term set in the term store



# Some Use Cases of Managed Metadata

- Divisions
- Units
- Programs
- Type of Change
- Committee Dates

# Use Case of Managed Metadata – Committee Dates

- Multiple committees such as AP&P, Planning and Budget, Agenda Committee, Executive Committee, etc.
- Each committee has multiple meeting dates during a year
- Not possible to use date type site column: Cannot handle multiple dates, cannot used for “N/A” and “TBD”
- Using managed metadata for committee dates:
  - ▶ Will only need one site column to tag all committee dates
  - ▶ The dates are pre-entered in the term store and available for tagging
  - ▶ Can avoid human errors; the staff don’t need to remember exact dates
  - ▶ Term set grows by years, may serve as a history of committee dates for different years; past dates can be taken off from managed metadata list easily.

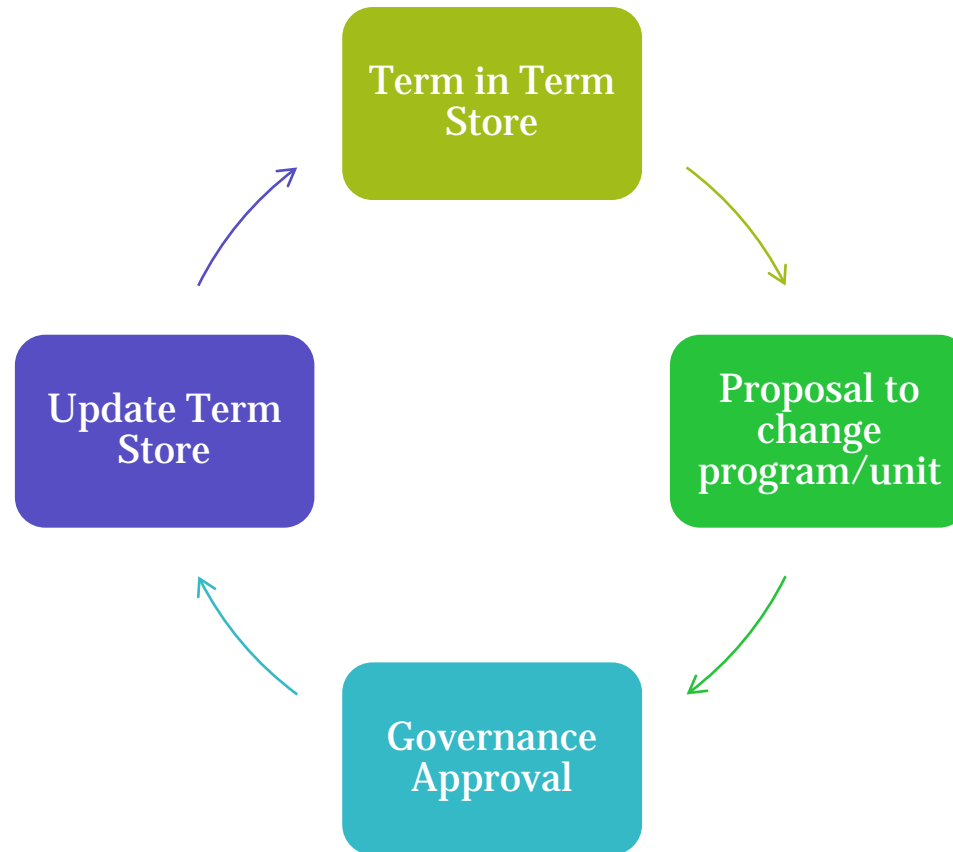
# Managed Metadata Results

- Simplified reports – easy to find, collate, sort, and present data to match reporting needs
- Auto-populated templates – set these up once and your documents will automatically display the pre-established metadata specific to the project/process you are working on
- Search – finding what you are looking for is significantly improved, saving time and effort

# Metadata Governance

- With business evolving:
  - ▶ Terms change over time
  - ▶ New terms emerge
  - ▶ Terms no longer needed
  - ▶ For example:
    - New programs
    - Name change for a program
    - Cancelled programs.
- Manage terms in term store

# Aligning Business Processes and Metadata Governance



# Takeaways

- Take advantage of a centrally supported SharePoint implementation
- Local investment required: project management approach and dedicated expert
- Training programs for long term maintenance

# Takeaways

- PLAN!
- PLAN!
- PLAN!

# Takeaways



**Value-  
added  
metadata**

