

Global Knowledge & Information Management Services

### Creating a Managed Metadata Column in SharePoint Online



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Designing an effective business taxonomy involves facilitating a series of workshops, focus groups, content analyses, and one-on-one interviews. According to Zach Wahl, CEO of Enterprise Knowledge, the result of this approach is "a truly usable design that reflects the needs of your users and your organization." The outcomes include a set of metadata fields and their corresponding taxonomies. But remember, implementing and maintaining the taxonomy is as important as designing it.

SharePoint is widely used in the private and government sectors for managing content in intranets, document libraries, and other solutions that benefit greatly from tagging content with metadata. SharePoint offers a wide variety of column types to implement metadata fields and their corresponding taxonomies. However, the managed metadata column is one of the most effective means for implementing business taxonomies in SharePoint. Microsoft defines a managed metadata column as a column type that "can be added to lists, libraries, or content types to enable site users to select values from a specific term set of managed terms and apply these values to their content."

### When to Use a Managed Metadata Column

Enterprise Knowledge recommends using a managed metadata column when the metadata field that you are about to create involves either a significantly long list of values, a hierarchical list of values, synonyms for certain values, or all of the above. The managed metadata column offers specific features that help to manage the values in each of the following scenarios.

### **Auto-Suggestion**

When you have a long list of values, this feature becomes very handy for users, as it offers value suggestions or predictions before the user has even finished typing a value. The following illustration shows how the auto-suggestion feature works as the user is typing the Budget and Procurement value for the Business Area metadata field.

u	ę.,
Budget and Procurement	
in Management Services	
Bureau of IT Services	
in Management Services	

### **Tree Control View**

If you have a hierarchical list of values - in other words, a list that involves categories and subcategories - the tree control view allows users to browse through the categories more easily. The following illustration shows a sample tree control view for the Business Area metadata field with the Management Services node expanded for the user to select the Budget and Procurement value.

Select : Business Ar	ea	
Ø		
Business Area     Communications     Criterprise Initiatives     Internal Audit     Legal Services     Sudget and Procu     Busget and Procu     Busget of I Service	rement	×
Select >>	Budget and Procurement	<u>~</u>
Facilities     Select >>	Budget and Procurement	

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### **Synonyms**

Lastly, the synonyms feature is very useful when some of the values in the taxonomy have synonyms or acronyms that users could select as alternative words to tag content. In the screenshot below, PBM and Pharmacy Benefit Manager are synonyms of the value Pharmacy. As the user is typing, this feature displays both values and synonyms to help the user make their selection for the Benefit metadata field.

### Benefit

Pharmacy	
in Health Insurance	
• PBM	
<ul> <li>Pharmacy Benefit Manager</li> </ul>	

### How to Implement a Managed Metadata

### Column

If you have identified that a managed metadata column is a good fit for your SharePoint project, here is how you can implement it. To create a managed metadata in SharePoint, you need to take the following two steps:

### Step 1: Create a Managed Metadata Column

A managed metadata column is a special column that is linked to a specific term set. Like any other column, it can be can be created from the Site Settings page and can be added to a list or library. To create a new Managed Metadata site column, go to the Site Actions menu, click Site Settings, click Site columns, and then click Create. The screenshot below shows how to select the option to create a managed metadata column when you are creating a site column.

### Site Columns > Create Column

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

Business Area	
The type of information in this column is:	
○ Single line of text	
O Multiple lines of text	
O Choice (menu to choose from)	
O Number (1, 1.0, 100)	
○ Currency (\$, ¥, €)	
O Date and Time	
<ul> <li>Lookup (information already on this site)</li> </ul>	
○ Yes/No (check box)	
O Person or Group	
O Hyperlink or Picture	
Calculated (calculation based on other columns)	
◯ Task Outcome	
O Full HTML content with formatting and constraints for publishi	ng
Image with formatting and constraints for publishing	
O Hyperlink with formatting and constraints for publishing	
○ Summary Links data	
O Rich media data for publishing	
Managed Metadata	

### Step 2: Create a Term Set and Link it to the Managed Metadata Column

A term set is a list o terms that may have a hierarchical structure and it is managed in the Term Store through a tree control view. For security reasons, not everyone has access to the Term Store. To access the Term Store, you need to be either a Farm Administrator, a Term Store Administrator, a Group Manager, or a Contributor for term sets. You can create a term set manually by adding values one at a time or by importing a term set from a spreadsheet based on a .csv template that is available at the Term Store. Importing a term set makes it easier when you have a long list of values for the term set you are about to create. In the example below, a term set called Business Area has been created. Additional terms can be added, if needed, by clicking on the "Create Term" option.

	Business Area	
TAXONOMY TERM STORE	Term Set Name Type a new name for this term set as you want it to appear	Business Area
Taxonomy_V+/vrDV+HWcv6gaEDNpecg	in the hierarchy.	business racu
<ul> <li>10 10 10 10 10 10 10 10 10 10 10 10 10 1</li></ul>	Description Type descriptive text to help users understand the intended use of this term set.	Business Areas
Business Area     Communic     Ceate Term     Cinternal A	e primary user or group of this term set.	i:0#.f membership

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Once you finish creating the term set, you can go back to the managed metadata column and select the term set you just created, which will link the set of values to that specific column. In the example below, the Business Area term set has been selected to be associated with the Business Area managed metadata column.

● Use a managed term set: Find term sets that include the following terms. Use a managed term set: Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values. After finding the term set that conta the list of values to display options i this column, click on a term to selec the first level of the hierarchy to shc in the column. All levels below the term you select will be seen when 🔺 📻 ETF Audience Benefit Business Area Communications Enterprise Initiatives Internal Audit Customize your term set:

### **Critical Decisions When Using a Managed**

### Metadata Column

Term Set Settings

As you continue configuring your newly created managed metadata column and term set, you will be faced with multiple decisions. Particularly important is the submission policy and the values that will be available for tagging because they will support and significantly improve your taxonomy governance and evolution.

### **Submission Policy**

To implement some kind of governance for the taxonomy, you need determine how you want to manage the values for the term set. You can choose to have a closed submission policy or an open submission policy. A closed term set means that to add new terms, users must have appropriate permissions (e.g. Group Manager or Contributor for term sets). This allows for

more control and organized evolution of your taxonomy. An open term set means that any user can add new terms to the column that is mapped to the term set, which may introduce the risk of growing the taxonomy uncontrollably, depending on the purpose of the metadata field. EK recommends using a closed term set, and allow users to make suggestions through a different path (e.g. a feedback log or a taxonomy council). The illustration below shows how to select the type of submission policy for a particular the Term Set.

Use a managed term set

Term Set Settings Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values. After finding the term set that contain the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.

🔺 💏 ETF	
Audience	
Benefit	
Business Area	
<ul> <li>Communications</li> </ul>	
Enterprise Initiatives	
<ul> <li>Internal Audit</li> </ul>	

### Values Available for Tagging

In the Term Store, you can select which terms you want available for tagging. In other words, you may want to allow users to tag content only with the second-level values as opposed to both the first and second levels of the taxonomy. Or you may want to allow them to tag content with any values within taxonomy, in which case you will leave the box checked for all the values. This depends on the purpose of the column and the type of values. For example, you may have a term set called Country, in which the values are organized first by continent (first-level) and then by country (second-level). If you want users to select only countries

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when tagging content, you can uncheck the "available for tagging" box for the first-level continent values. The illustration below shows the checkbox to make the term Enterprise Initiatives available for tagging within a Term Set called Business Area.



In short, SharePoint's managed metadata columns and the term store tool offer a lot of options and flexibility for taxonomists to implement and manage their designs, and for organizations to implement and evolve their business taxonomies more efficiently. It is important to keep in mind that not all metadata fields are good candidates for managed metadata columns. You may want to consider other options, such as a choice column, before deciding on a managed metadata column. For more information and detailed steps on how to create managed metadata columns, refer to the following Microsoft articles: "Introduction to Managed <u>Metadata</u>" (http://bit.ly/2cZpEEY) and "<u>Create a Managed</u> <u>Metadata column</u>". (http://bit.ly/2cLTs4H)

If you need help with designing a business taxonomy for your organization or implementing it in SharePoint, contact info@enterprise-knowledge.com Our taxonomists and SharePoint experts will work with you on a successful solution.

**Enterprise Knowledge** (EK) is a services firm that integrates Knowledge Management, Information Management, Information Technology, and Agile Approaches to deliver comprehensive solutions. Our mission is to form true partnerships with our clients, listening and collaborating to create tailored, practical, and results-oriented solutions that enable them to thrive and adapt to changing needs.

Our core services include strategy, design, and development of Knowledge and Information Management systems, with proven approaches for Taxonomy Design, Project Strategy and Road Mapping, Brand and Content Strategy, Change Management and Communication, and Agile Transformation and Facilitation. At the heart of these services, we always focus on working alongside our clients to understand their needs, ensuring we can provide practical and achievable solutions on an iterative, ongoing basis.

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