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**Kenneth Lo, PMP**

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# DOCS WITHOUT FOLDERS

ORGANIZING DOCUMENTS WITH  
CONTENT TYPES & METADATA

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11 NOVEMBER 2011, HONG KONG



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# SCOPE

- Level 200
- Technical Managers
- Record Managers
- Power Users



# BIOS

- Kenneth Lo, PMP
- Principal Consultant
- SharePoint | Mobile | Social Media
- @klopmp



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# OBJECTIVES



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# AGENDA

- Taxonomy
- Metadata
- Views
- Demo
- Smart Practices



# TAXONOMY

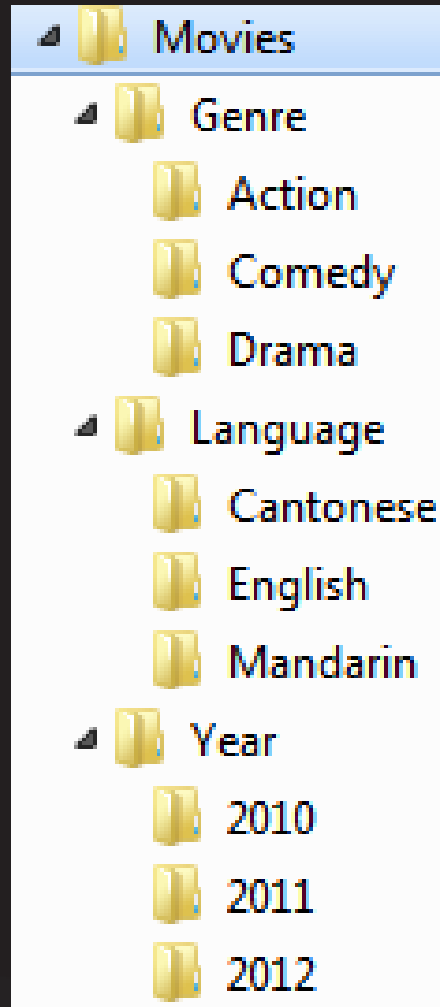


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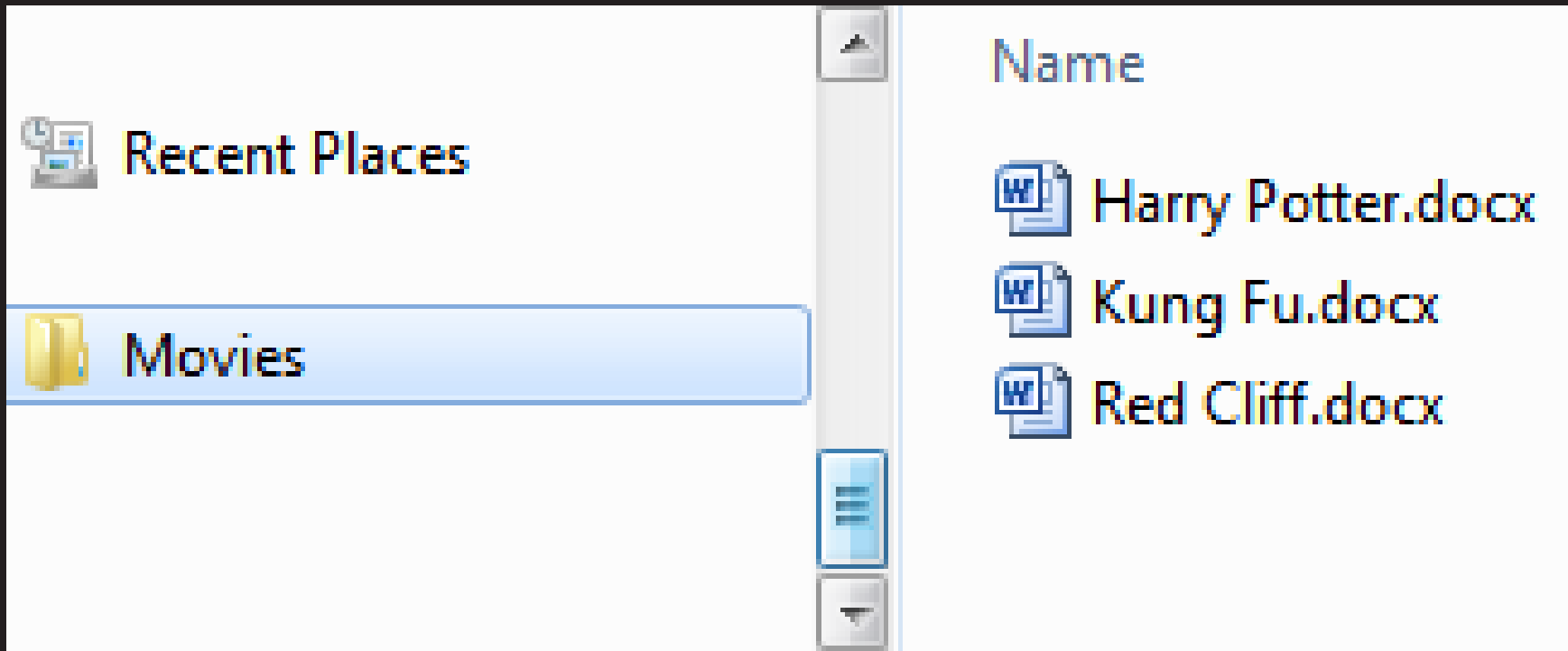


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# TAXONOMY



# TAXONOMY



# TAXONOMY

- Multiple Categories
- Duplicate Files
- Complex Naming
- Usability



# METADATA



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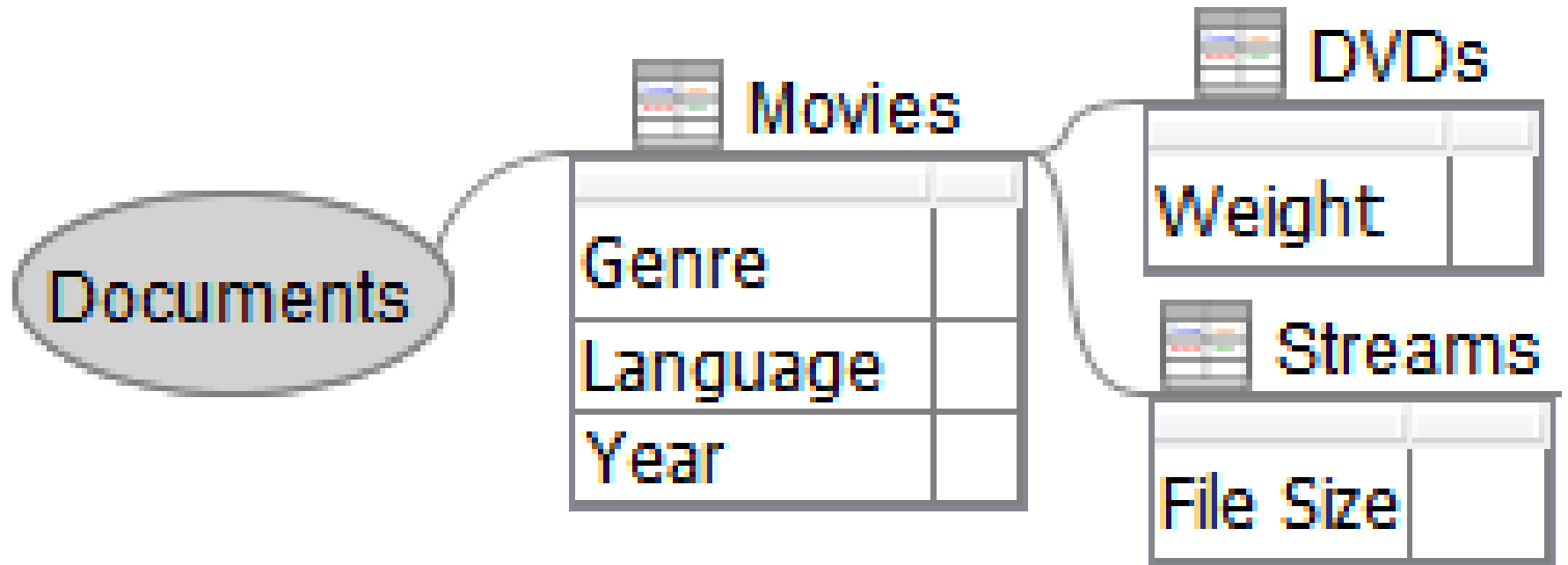
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# METADATA

- Context
- Refine
- Search



# METADATA



# METADATA

1. Add Site Columns
2. Add Content Type
3. Add to Document Library



# METADATA

- Content Types
  - Centralize
  - Reuse
  - Inherit



# METADATA

- Site Columns
  - Building Blocks
  - Data Types
  - Validations



# METADATA

<b>Content Type</b>	Movies ▼
Name *	Ip Man 3 .docx
Title	
Movie Genre	Action ▼
Movie Language	Cantonese ▼
Movie Year	2012 ▼



# METADATA

Properties ▾	
Size	18.5KB
Pages	1
Words	2
Total Editing Time	1 Minute
Title	Add a title
Comments	Add comments
Template	Normal.dotm
Status	Add text
Categories	Add a category
Subject	Specify the subject
Hyperlink Base	Add text
Company	Specify the company
Movie Language	Show Details
Movie Genre	Show Details
Movie Year	2012



# METADATA

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time



# METADATA

- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Full HTML content with formatting and constraints for publishing
- Image with formatting and constraints for publishing
- Hyperlink with formatting and constraints for publishing
- Summary Links data
- Rich media data for publishing
- Managed Metadata



# METADATA

Description:

Require that this column contains information:

Yes  No

Enforce unique values:

Yes  No

Maximum number of characters:

Default value:

Text  Calculated Value



# METADATA

- Advanced Topics
  - Managed Metadata
  - Navigation

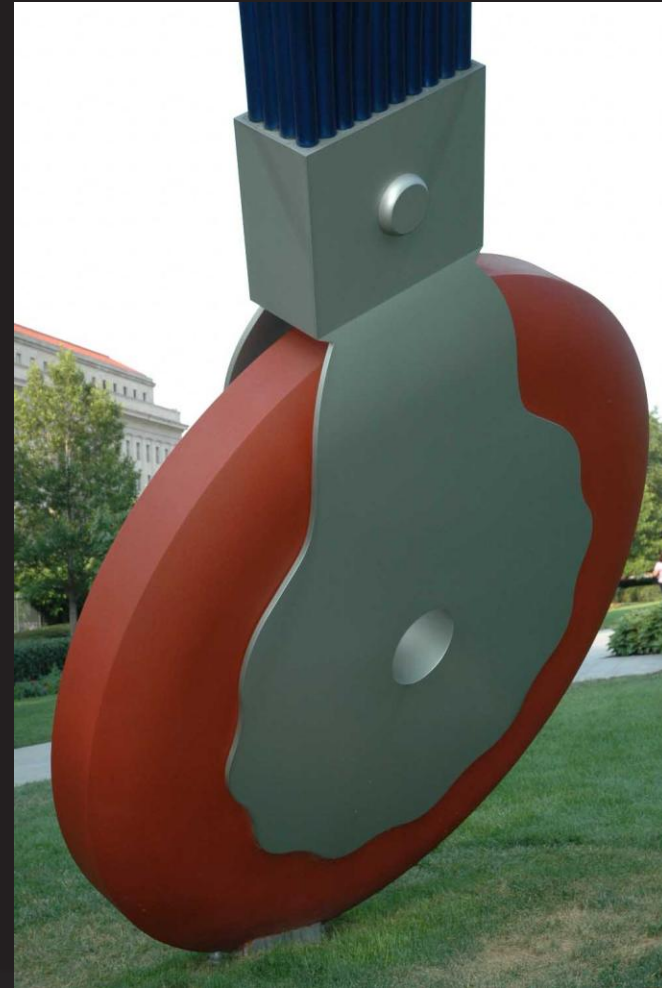


# METADATA

- Cross the Boundaries
  - Farms
  - Web Applications
  - Site Collections



# VIEWS



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# VIEWS

- Virtual Folders
- Replace Folder Hierarchy
- Modify within Seconds







# VIEWS

 Type	Name↑
	Harry Potter Finale  NEW
	Harry Potter  NEW
	Ip Man 3  NEW
	Kung Fu  NEW
	Red Cliff 2  NEW
	Red Cliff  NEW

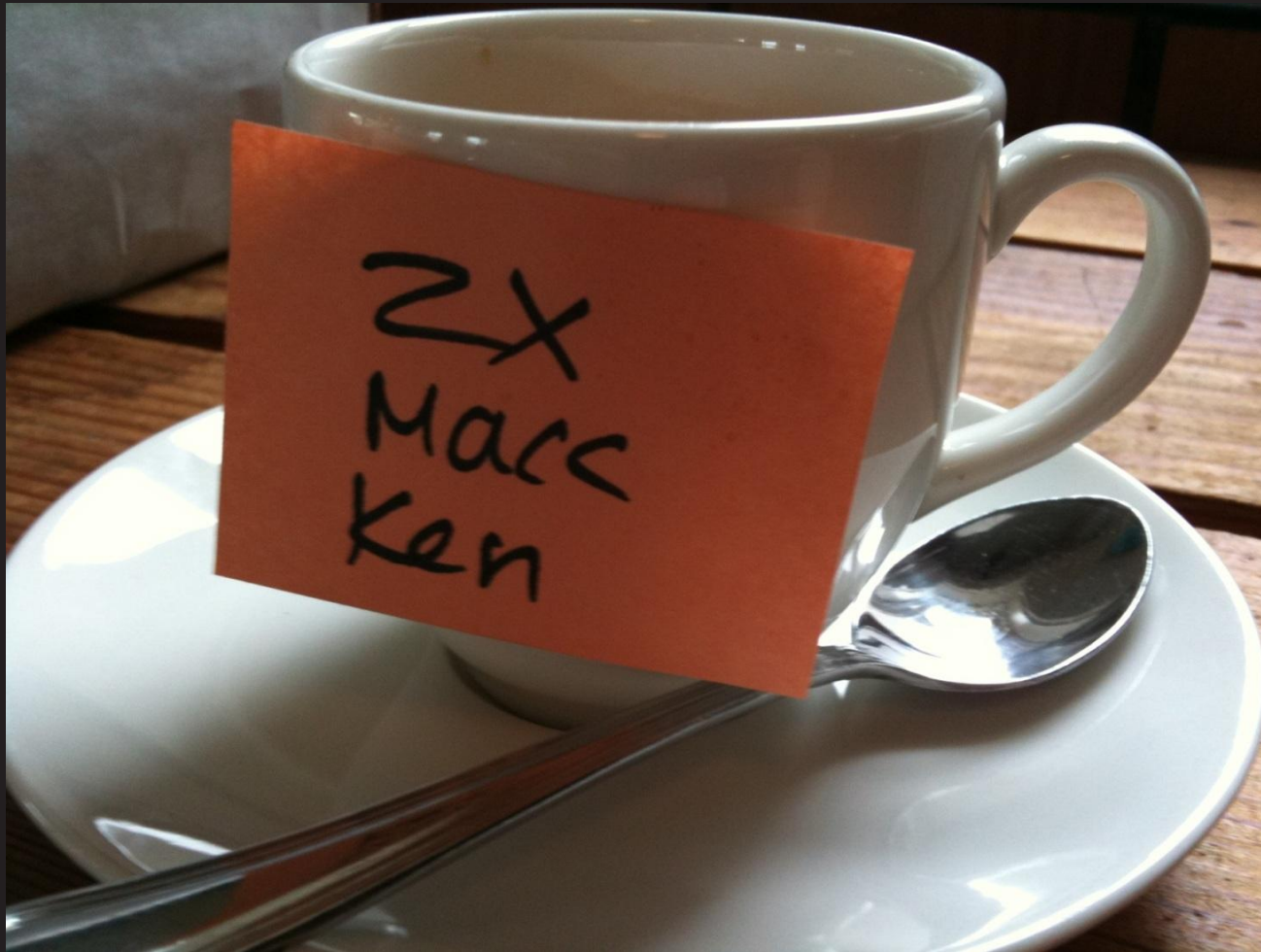


# VIEWS

<input type="checkbox"/>	Type	Name
	<b>Movie Language : Cantonese (2)</b>	
		Ip Man 3  NEW
		Kung Fu  NEW
	<b>Movie Language : Mandarin (2)</b>	
		Red Cliff 2  NEW
		Red Cliff  NEW



# DEMO



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# SMART PRACTICES



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# SMART PRACTICES

- Plan with SharePoint Worksheets
- Agree Enterprise-Wide
- Mandate Metadata Selectively
- Customize Views
- Paginate



# RESOURCES

## Kenneth Lo's Bookmarks

<http://delicious.com/kennethlo/sharepoint>

## Kenneth Lo's Presentations

<http://klopmp.com/downloads>

## SharePoint 2010 Taxonomy Worksheets

<http://technet.microsoft.com/en-us/library/cc262451.aspx>

## MSDN: Managed Metadata

<http://technet.microsoft.com/en-us/library/ee424402.aspx>



Q & A

KLOPMP

Need Expert Advice?

Kenneth Lo, PMP

<http://klopmp.com>

<http://klopmp.com/linkedin>

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