

# SharePoint 2010 Enterprise Content Management for IT Pros

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Macaw

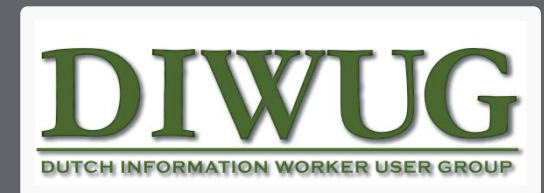
# About Mirjam



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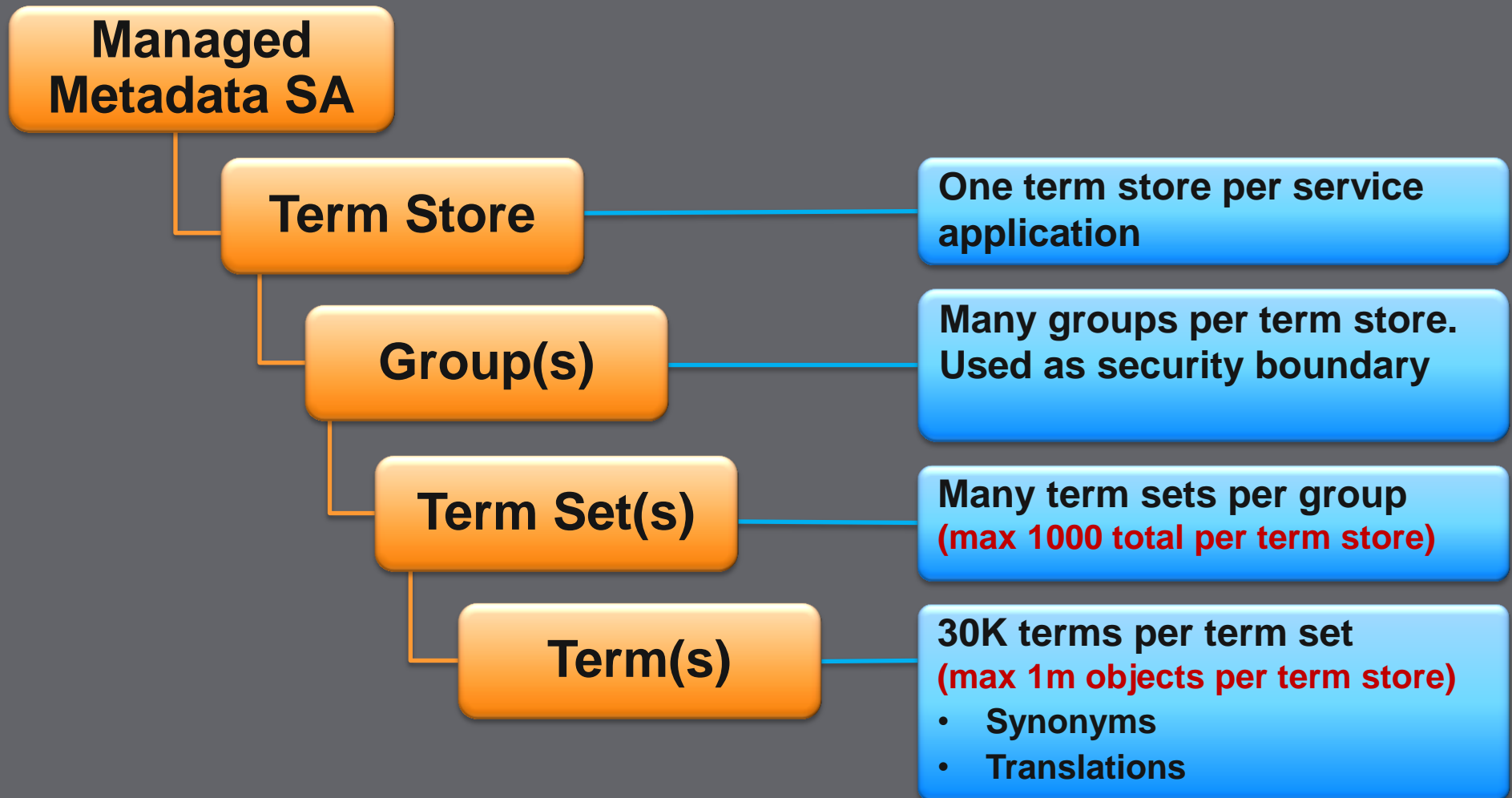


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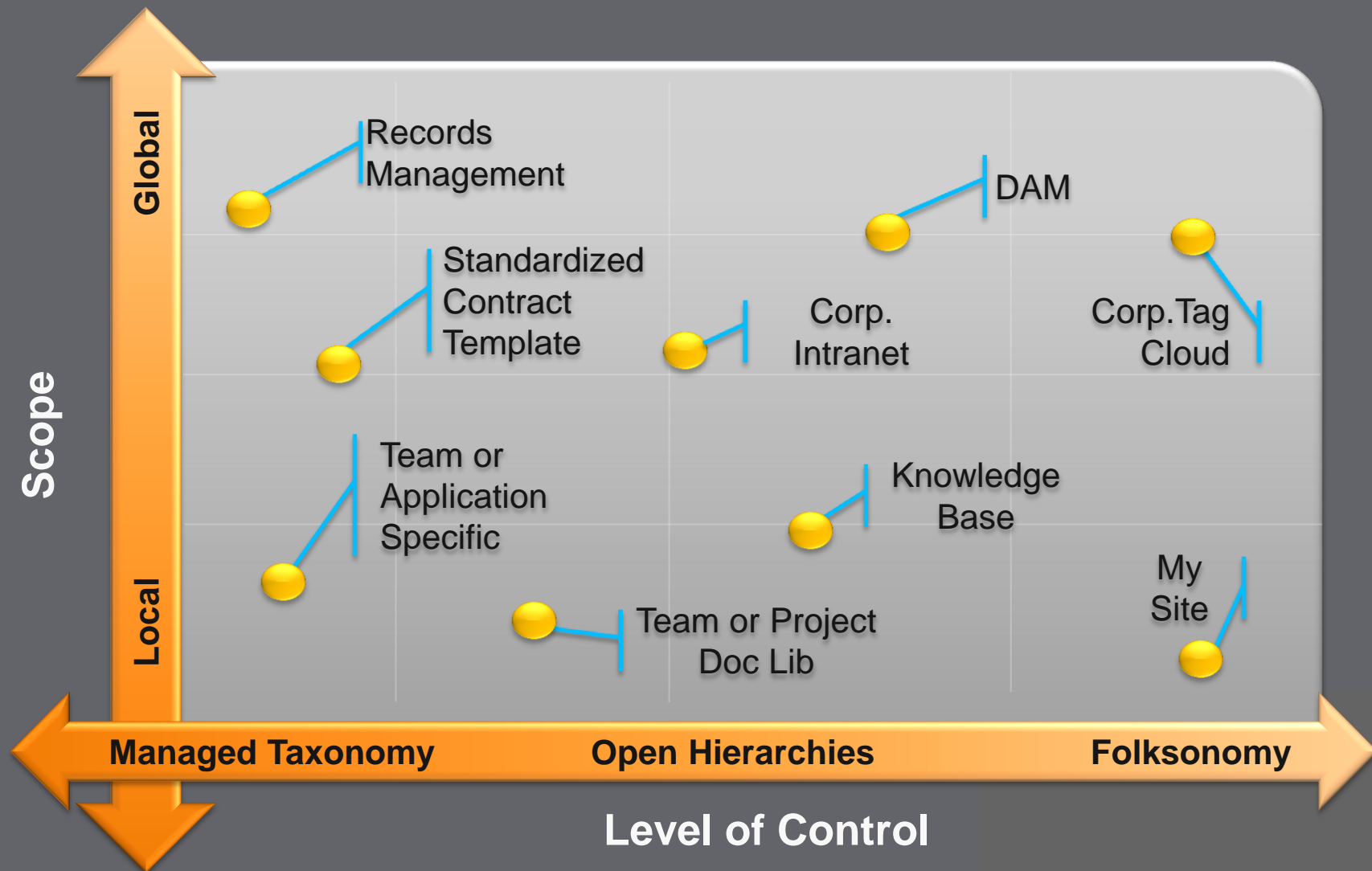
# Agenda

- Managed Metadata Service Application
- Document Centers
- Document ID
- Document Sets
- Metadata Navigation
- List Throttling
- Content Type Syndication
- Content Organizer

# Managed Metadata Service Application



# Term Scope and Control



# Managed Metadata timer job

- Central Administration
  - Monitoring
    - Review job definitions
      - Taxonomy Update Scheduler Job
        - » Per Web Application
        - » Hourly

# Demo

## Managed Metadata Service Application

# Tips #1

- Make using terms from the term store easy and intuitive for end users
- Give users the right amount of control on the right term sets
- If adding documents into SharePoint or adding metadata to documents isn't intuitive, users will go back to using network shares
- While offline you cannot save list items that have required managed metadata fields



# Document Centers

- Average size: 500 – 500.000 docs
- Managed by one or a few subject owners
- Active documents that are being authored and consumed
- Structured navigation needed to help users find what they are looking for
- Correct use of metadata important for findability



# Document ID's

- Unique within a site collection
- Custom prefix
- Not on by default
- Not for list items, docs only
- Kept during operations, except for copy
- Assigns “static url”
- Adds to Document & Document Set Content Types



# Document ID settings

- Site Actions
  - Site Settings
    - Site Collection Features
      - Activate Document ID Service feature
    - Document ID Settings
      - Set Document ID Prefix
      - Reset Document ID Prefix
      - Select Search Scope



# Document ID timer jobs

- Central Administration
  - Monitoring
    - Review job definitions
      - Document ID Enable/Disable job
        - » Per Web Application
        - » Daily
      - Document ID Assignment job
        - » Per Web Application
        - » Daily



# Document Sets



- New object to manage work products made up of multiple documents
  - Think Folder++
- Key Scenarios
  - Tight collection of documents
    - A sales proposal that includes documents (proposal), spreadsheets (quotation), and presentations
  - Compound documents
    - An HR manual that is an assembled roll-up of separate documents

# Document Sets



- Document Set Features
  - Shared Metadata
  - Customized welcome page
  - Default documents added
  - Version capture
  - Workflows
  - Send to records center

# Document Set settings



- Site Actions
  - Site Settings
    - Site Collection Features
      - Activate Document Sets feature
    - Site Content Types
      - Any Document Set Content Type
        - » Document Set Settings

# Document Set timer jobs



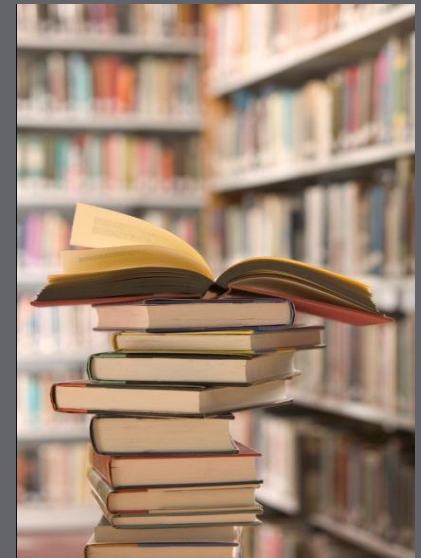
- Central Administration
  - Monitoring
    - Review job definitions
      - Document Set Fields Synchronization job
        - » Per Web Application
        - » Every 15 Minutes



# Metadata Navigation

- **Navigation Hierarchies**

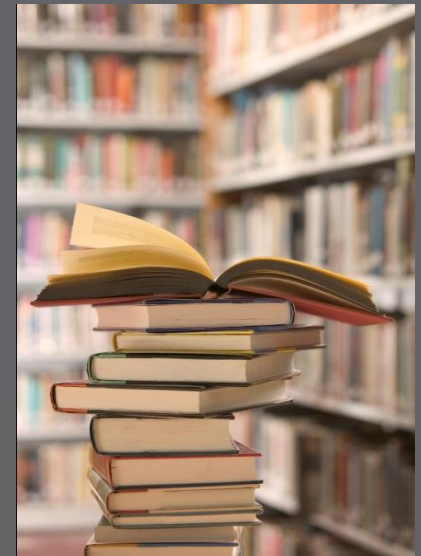
- Filter on a metadata hierarchy like folders, content types, choice fields, or managed metadata term sets
- Container contents will be filtered on selected item from the hierarchy
- Only one filter at a time



# Metadata Navigation

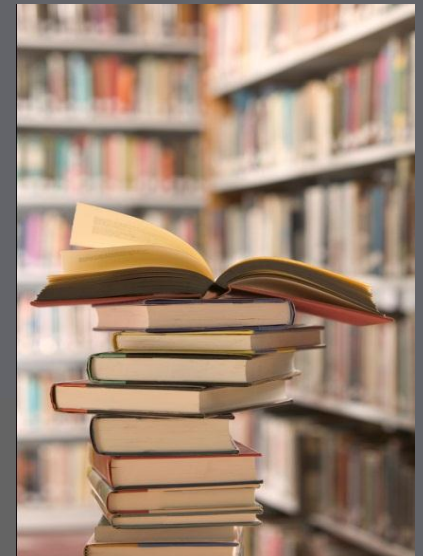
- **Key Filters**

- Can filter on a broad range of field types
- Any number of key filters can be applied in combination with a selected navigation hierarchy
- “All Tags” queries any managed metadata column
- From the root folder items from any folder will be returned



# Metadata Navigation configuration

- Library Settings
  - Metadata Navigation Settings



# List throttling

- Sets limits on how severely users can put the beat down on your servers
- Limits the amount of rows that can be retrieved for a list or library at any one time

# List throttling

- **Examples of when list throttling will kick in:**
  - Viewing data in a list or library
  - Sorting a large list on a non-indexed column
  - Deleting a web with large flat lists
  - When developing solutions while using for instance `SPList.Items` (depending on settings)
  - When using LINQ to query large lists

# List throttling - options

In Web Application general settings:

- List View Threshold –maximum number of items that can be retrieved in one request. Default: 5,000. Smallest: 2,000.
- Object Model Override –to enable retrieving items through the object model, up to the List view threshold for auditors and administrators
- List View Threshold for Auditors and Administrators –only relevant when Object Model Override is yes and only via the object model
- List View Lookup Threshold – only relevant for lookups
- Daily Time Window for Large Queries –block of time during the day when list throttling limits are not enforced

# List throttling - exceptions

- **Scenario 1:**
  - Box administrator on the SharePoint web server
  - At least Read rights to the list data
- **Scenario 2:**
  - Using object model SPList class
  - `SPList.EnableThrottling = False`

# List throttling configuration

- Central Administration
  - Application Management
    - Manage Web Applications
      - General Settings
        - » Resource Throttling



# Demo

Document Centers

Document ID

Document Sets

Metadata Navigation

List Throttling

# Tips #2

- Make sure your document center is managed
- Plan for document retention
- Decide on standard Document ID provider vs. a custom one
- Use managed metadata navigation and list throttling to keep large libraries manageable

# Tips #3

- Don't use the same prefix for Document IDs in more than one site collection
- Don't increase the throttle limit significantly
- Don't allow people to browse your environment as a local admin on the server
- Don't retrieve more items than necessary when developing SharePoint solutions

# Content Type Syndication

- Synchronizes content types across site collections
- Configure the content type hub as a dedicated site collection
- Set managed metadata service proxy to consume content types from content type store
- Turn on publishing for content types in hub
- Run timer jobs to make content types available in other sites

# Content Type Syndication settings

- Site Actions
  - Site Settings
    - Site Collection Features
      - Activate Content Type Syndication Hub

# Content Type Syndication configuration

- **Central Administration**
  - Application Management
    - **Manage Service Applications**
      - Properties of Managed Metadata SA
        - » **Content Type Hub url**
      - Properties of Managed Metadata SA Proxy
        - » **Consumes Content Types from the Content Type Gallery**

# Content Type Syndication settings

- Site Actions
  - Site Settings
    - Site Content Types
      - Any Content Type
        - » Manage publishing for this content type
          - » Publish/RePublish

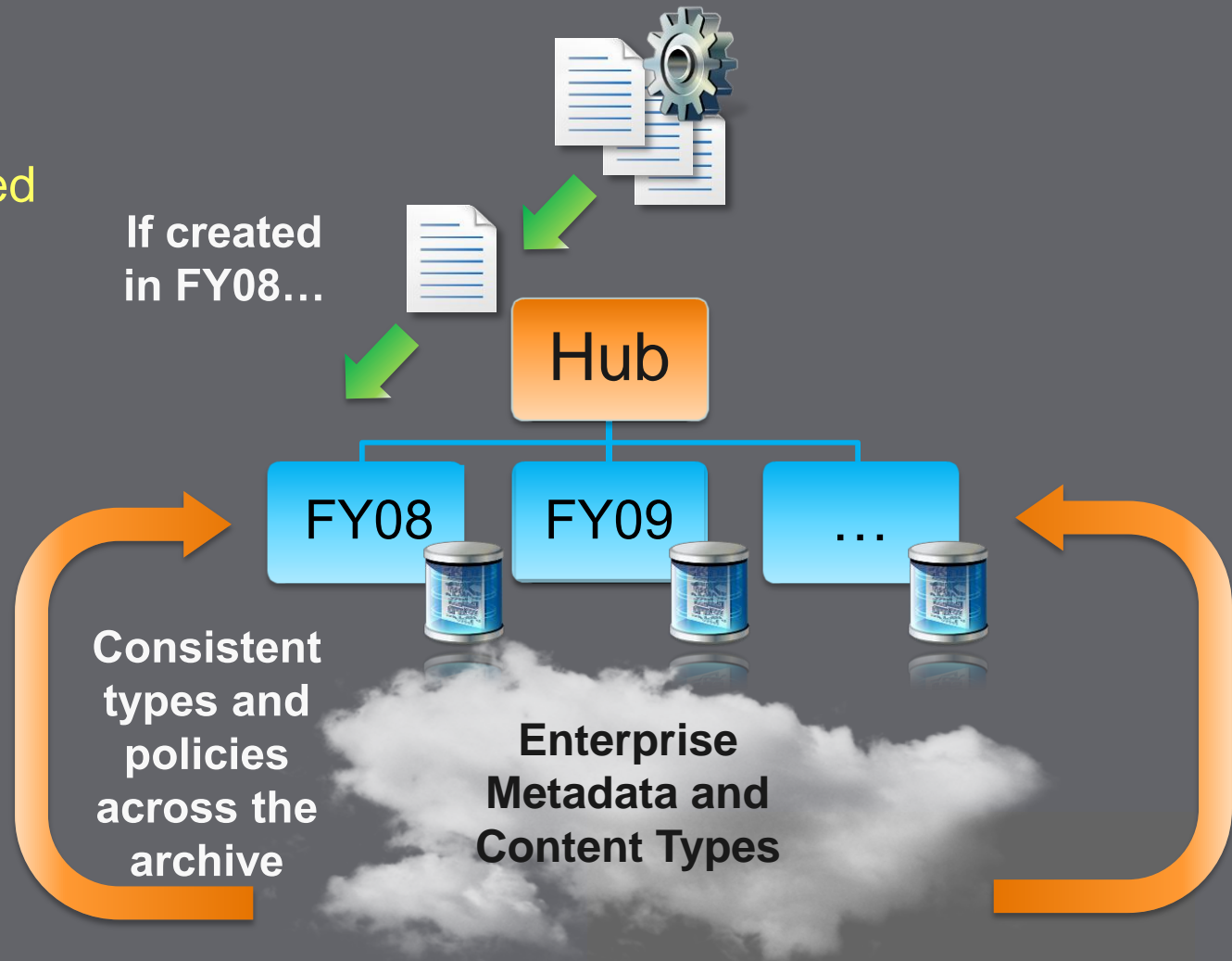
# Content Type Syndication timer jobs

- Central Administration
  - Monitoring
    - Review job definitions
      - Content Type Hub job
        - » Every 15 Minutes
      - Content Type Subscriber job
        - » Per Web Application
        - » Every Hour



# Massive distributed archives

- Scale is achieved with a distributed architecture
- Content organizer can route content to correct site collection in the archive
- Content type syndication enables central management of distributed archive
- FAST search is used to retrieve content



# Content Organizer

- Automatically routes documents to different libraries and folders
- Can be used to automatically create new folders after a certain # documents have been added
- No user intervention required
- Does not work for lists, just libraries
- DropOff folder created when “Content Organizer” site feature is enabled



# Content Organizer Settings

- Redirect Users to the Drop Off Library
- Sending to another site enables documents to be redirected to other sites, or site collections
- Folder Partitioning to automatically distribute documents across folders
- Duplicate Submissions to add new versions, or add unique characters to the filename
- Preserving context to keep audit logs and properties

# Content Organizer Rules

- Rules primarily based on content types
- Conditions can be added based on document properties
- Target Location can either be a library in the current site, or a different site or site collection
- Target location sites need to:
  - Have the content organizer feature activated
  - Be registered in Central Administration
  - Have the document's content type available

# Content Organizer settings

- Site Actions
  - Site Settings
    - Site Features
      - Activate Content Organizer

# Content Organizer settings

- Site Actions
  - Site Settings
    - Content Organizer Settings
      - Allow rules to specify another site as a target location
      - Create subfolder after a target location has too many items
      - Use SharePoint versioning OR Append unique characters to the end of duplicate filenames

# Content Organizer settings

- Site Actions
  - Site Settings
    - Site Organizer Rules
      - Status and Priority
      - Content Type
      - Conditions
      - Target Location

# Content Type Syndication timer jobs

- Central Administration
  - Monitoring
    - Review job definitions
      - Content Organizer Processing job
        - » Per Web Application
        - » Every 15 Minutes



# Demo

Content Type Syndication  
Content Organizer

# Tips #4

- Have a separate site collection to serve as a managed content type hub
- Create more than one records center if your company has a lot of data
- Use FAST search to enable users to find documents from the archives

# Your Feedback is Important

Please fill out a session evaluation form.

Thank you!