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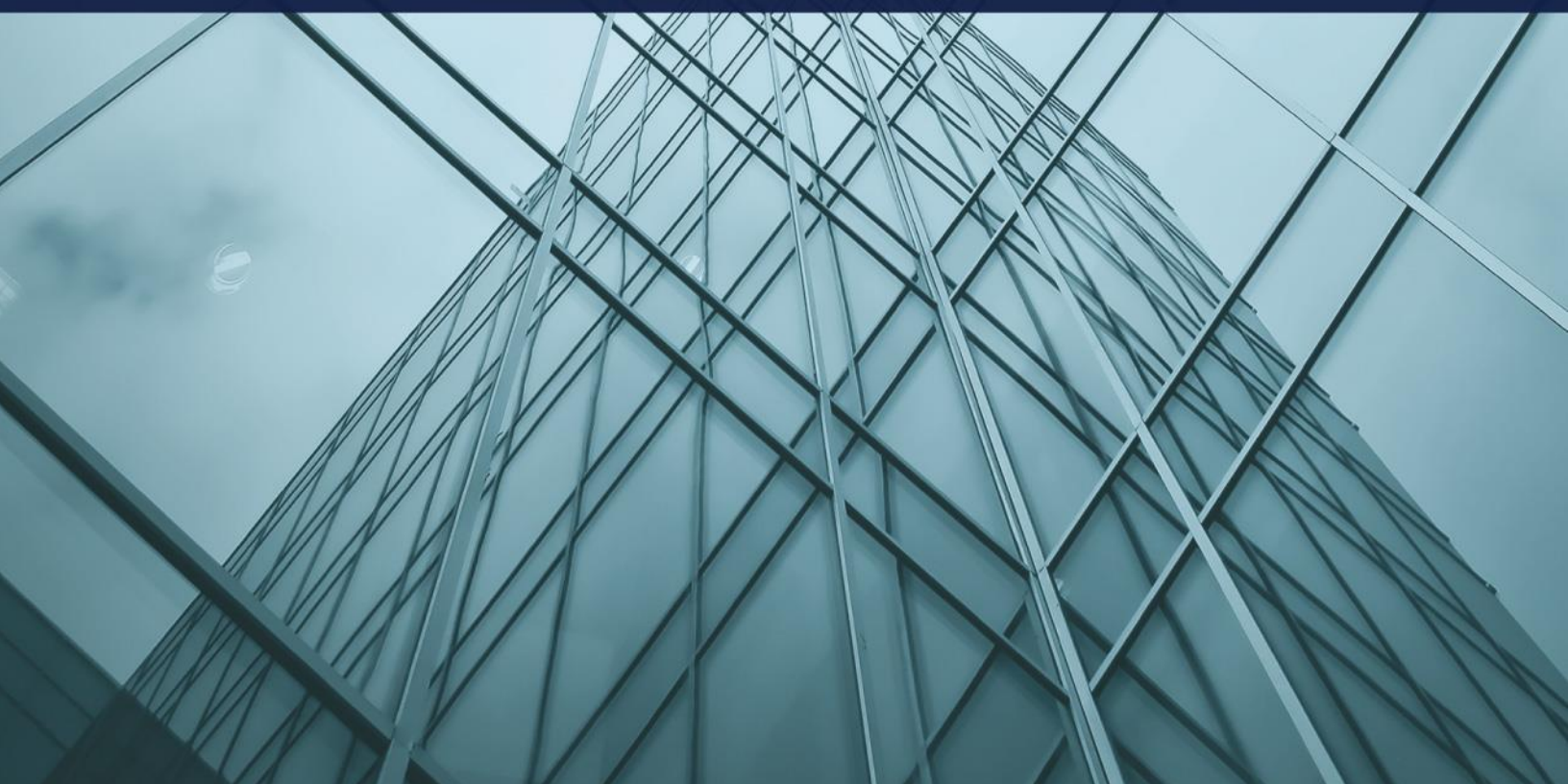
Taxonomy for SharePoint

Contains information about ShareSquared's approach, tools and techniques for implementing taxonomies in SharePoint

August 2016



Why do I need a Taxonomy in SharePoint?

The secret behind SharePoint search, automating business processes, and content governance is the underlying Taxonomy. Many organizations have issues related to finding and managing the lifecycle of content. Search, content and records management, workflow, and even views of content, are reliant on the underlying Content Types and Term Sets; together these comprise the Taxonomy in SharePoint.

A Content Type is a container for holding fields of metadata that are associated with the actual content. A Term Set is a list of allowable values that can be put into the fields of a Content Type. For example, an invoice in SharePoint could be associated with an Invoice Content Type and contain values such as the Department the invoice belongs to; the list of Departments should be driven/controlled by a Term Set. Another field or column of the Invoice Content Type could contain the Amount of the invoice, which might dictate the approval workflow that the invoice must go through to be approved.

Similar to Database Normalization, the goal is to minimize redundant Content Types, Columns, metadata, etc. As the number of Content Types and Columns increases, there is an impact on the user experience (having to choose between Content Types, enter more data, etc.), search/indexing (more fields to crawl/catalogue), and overall system complexity.

Developing a Taxonomy is a time-consuming endeavor, and often represents new territory for business users, and even SharePoint Administrators and Architects. We have been doing this work for over 12 years as part of the 100's of SharePoint solutions we have delivered. Our Prebuilt Taxonomies for SharePoint leverage our deep experience to help customers quickly enhance their SharePoint Intranets, Collaboration Portals, Content and Records Management, and other solutions.

Taxonomy Services and Products:

ShareSquared offers a full range of Taxonomy related services, including:

- Content Type Design and Implementation
- Term Set Development
- Search Source/Scope Design and Implementation
- Governance Plan Development and Implementation
- Content Auto-Classification
- Site Hierarchy Planning and Implementation
- Content Re/organization and Optimization

In addition, we developed Prebuilt Taxonomies that act as a solution accelerator for SharePoint-based Intranets and Enterprise Content and Records Management solutions. Customers can employ our expertly designed taxonomies to improve the findability, content lifecycle management, and process automation for state of the art SharePoint-based applications. The 70 Content Types that are included in our Prebuilt Taxonomy package were carefully crafted and leverage our decade-plus experience in designing and implementing myriad SharePoint solutions for innumerable customers in various industries.

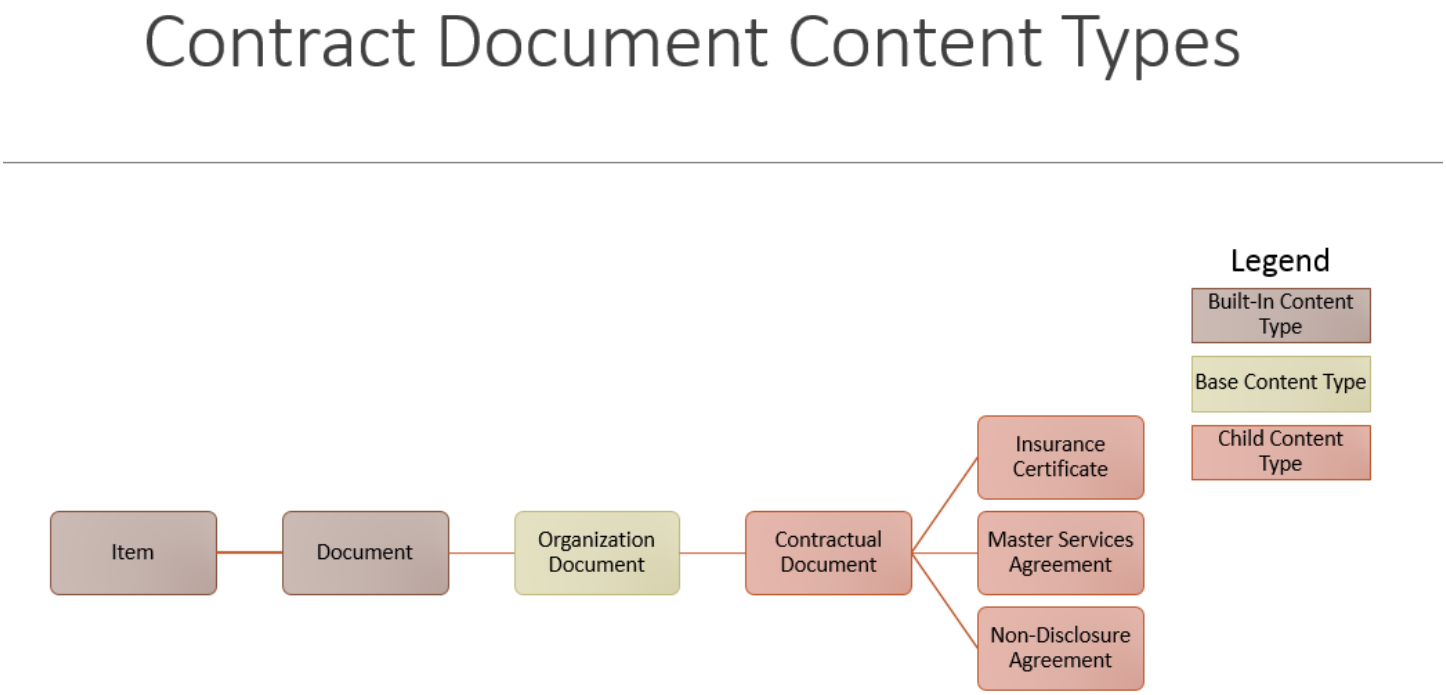
We designed our Taxonomies to optimize manageability (e.g. small/easy change at the right level impacts all children appropriately) and scalability (e.g. the minimal number of Content Types to effectively do the job). The package has been used by numerous commercial and local government customers, from small special districts to the largest county in the US.

Also included is a Governance Plan Template to use as a jumping off point for developing a robust Governance Plan and execution of governance for SharePoint. And lastly, we offer pre-built Term Sets for various industries, organization types and uses. Snapshots of the Content Type design and a sampling of Content Types that are included in the package are detailed below, as well as a sample TOC for the Governance Plan Template and sample taxonomies.

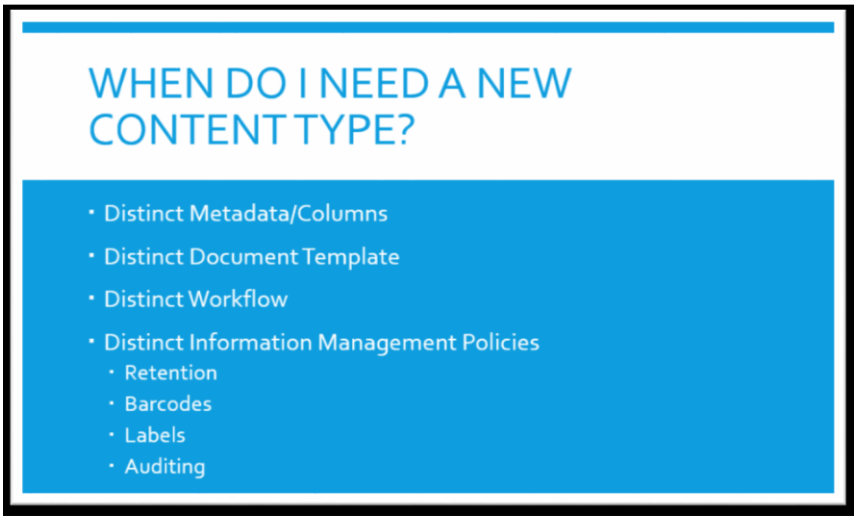
Our Prebuilt Taxonomy Package Includes:

- Consulting and Best Practices for:
  - Using Content Types
  - Taxonomy Development
  - Site and Content Organization
  - Search
- 70 commonly used Content Types licensed on a per-farm basis
  - Minor customization (e.g. to resolve naming collisions with pre-existing Content Types)
  - Installation, configuration and validation
  - Additional customization as needed on an hourly basis
- Governance Plan Template
- Pre-built Term Sets for various industries, organization types and uses (additional costs may apply)

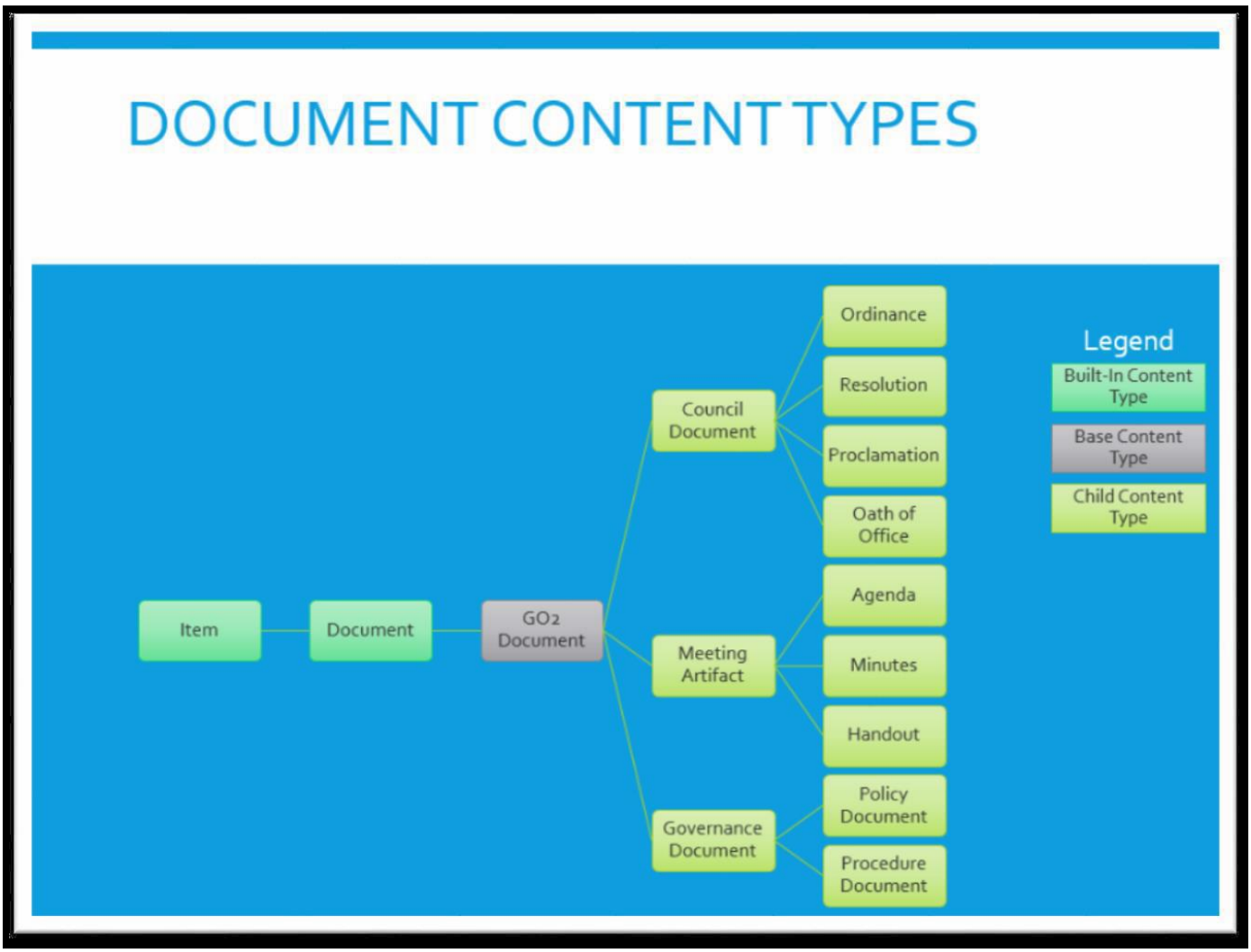
Prebuilt Taxonomy Sample:



Best Practices Sample:



Content Type Design Sample:

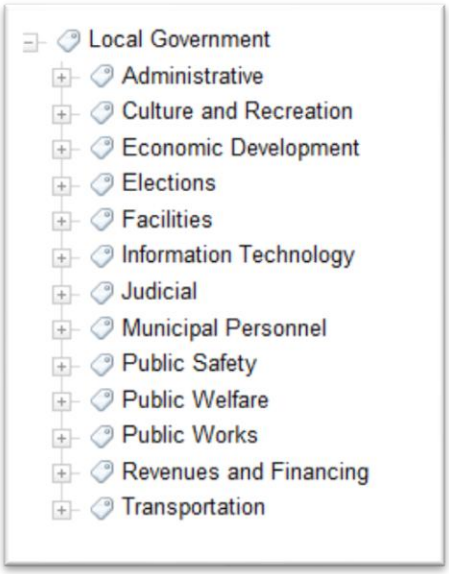


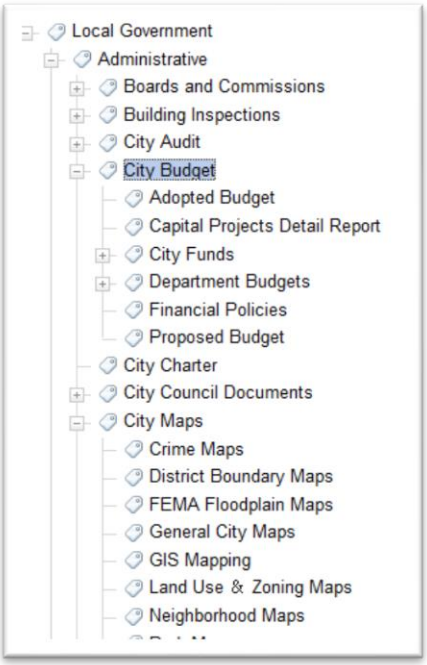
List of Sample Content Types:

Council Document	Request for Quote	Work Order
Ordinance	Addendum	Facility Document
Resolution	Contractual Document	Engineering Document
Proclamation	Master Services Agreement	Drawing
Oath of Office	Non-Disclosure Agreement	Financial Document
Meeting Artifact	Insurance Certificate	Business Process Document
Agenda	Accounting Document	Process Map
Minutes	Invoice	Work Instruction
Handouts	Purchase Order	Training Document
Governance Document	Correspondence	Manual
Policy Document	Request for Change	Syllabus
Procedure Document	Request for Information	Generic Report
Procurement Document	Project Document	Incident Report
Request for Proposal	Scope of Work	Legacy Form

Sample Term Sets for Various Industries, Organization Types and Uses:

Below is a sample Term Set for Local Government. All taxonomies are priced separately; please contact us for availability and pricing





Content Auto-Classification:

Lastly, using an automated content classification engine that analyzes documents and automatically applies the appropriate Content Type and terms from the term store to the columns of each Content Type can be employed to increase in findability without human error or effort.

Governance Plan Template TOC Snapshot

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