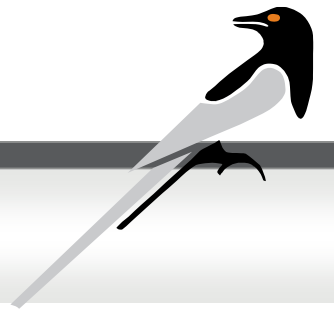


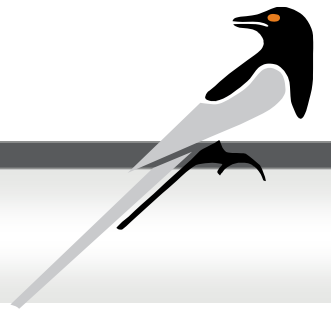
SharePoint Saturday

Ottawa, ON, Canada

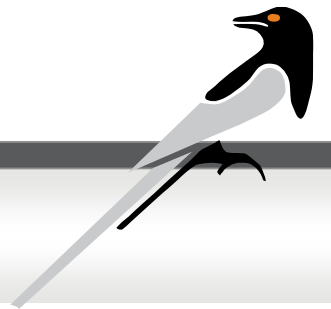
December 01, 2012



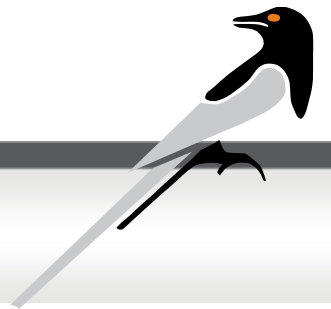
Leverage Metadata and the
Term Store to drive Search,
Governance and Compliance
in SharePoint On-premise
and in the Cloud



- VP ConceptSearching Canada
 - Sales, Partnerships
 - Term Store Management a.k.a. Taxonomy Management
 - Auto Classification for SharePoint 2010, 2013 and Office 365
- AIIM Senior Global SharePoint ECM Trainer
- Education (B. Comm. Management, BSc.)
- MCTS- SharePoint 2010
- ARMA – Records e-certificate



- Founded in 2002 - 10th anniversary
- Originally a search company from UK
- Turned Search upside-down by leveraging Search for “Classification”
- ‘Managed Partner’ under Global ISV Program for Taxonomy Management
- In TAP program – Our software is already deployed and tested for SharePoint 2013 and Office 365
- Offices in UK, USA, Canada, Australia



conceptSearching

Clients

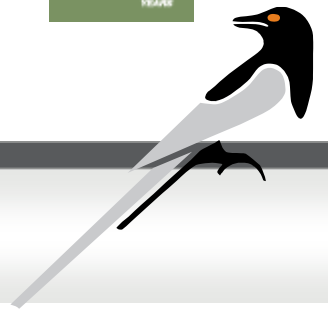
UNIVERSITY of CALIFORNIA
Office of the President



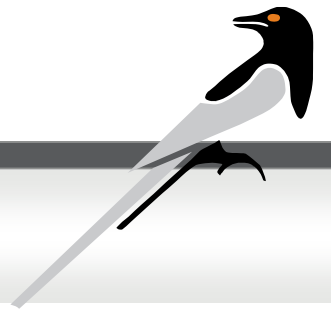
BIRD & BIRD



booz&co.



- Introduction / Background
- Metadata in SharePoint 2010/2013 = Term Store
- Information Governance and Compliance
- Taxonomy Management & Search
- Demo
- Solution Scenarios
 - Intelligent Migration
 - Information Management
 - Enterprise Classification & Improving Search

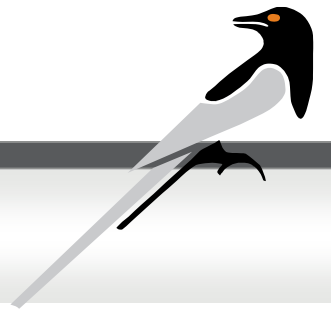
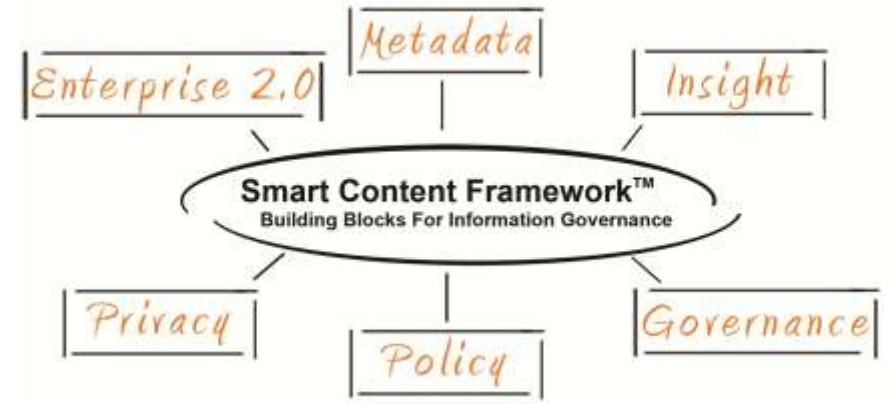


- **The Challenges**

- 80% of enterprise data is unstructured (*IDC*)
- 60% of documents are obsolete (*e.Law*)
- 50% of documents are duplicates (*equivio*)

- **The Benefits**

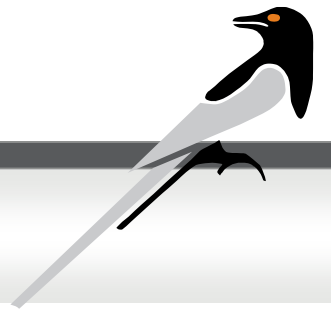
- Elimination of costs and errors associated with end user tagging
- Identification and protection of secure content assets from unauthorized access and in accordance with compliance procedures
- Normalization of content across functional and geographic boundaries
- Integration with the enterprise search
- Ability to apply policy consistently across diverse repositories



What do I need Insight for enterprise search?

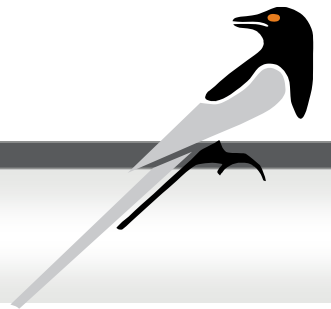
“By itself the search function has limited value. The real value of search and information access technologies is in the ongoing efforts needed to establish effective taxonomies, to index and classify content of all kinds, in order to provide meaningful results.”

- *Tom Eid, Technology and Research VP at Gartner*



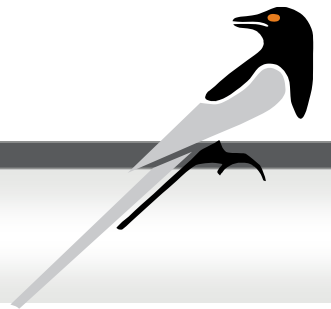
- **What is Information Governance?**

- Managing the information lifecycle of structured and unstructured information to improve business performance and address:
 - Regulatory requirements
 - Organizational risk
 - Privacy/Security
 - Compliance

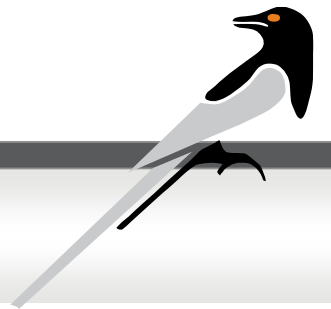


- Why do you care?

- Without effective governance, most technology focused metadata projects will fail (*Forrester Research*)
- The 2011 digital universe will surpass 1.8 zettabytes (1.8 trillion gigabytes) growing by a factor of 9 in just five years
 - Unstructured data and metadata are increasing at an average annual growth rate of 62%
 - Corporations will be responsible for the security, privacy, reliability, and compliance of 80% of that information (*IDC 2011 Digital Universe Study*)



- Classification uses Metadata
- Search uses Metadata
- Content Organizer uses Metadata
- Information Management uses Metadata
- Records uses Metadata
- Navigation uses Metadata
- Integration uses Metadata



PROPERTIES

Corporate Communications

Available for Tagging
Select whether this term is available to be used by end users for tagging. When unselected this term will be visible but not enabled in tagging tools. ☒

Language
Select a language of the labels for the term you would like to edit.

Description
Descriptions will help users know when to use this term, and to disambiguate amongst similar terms.

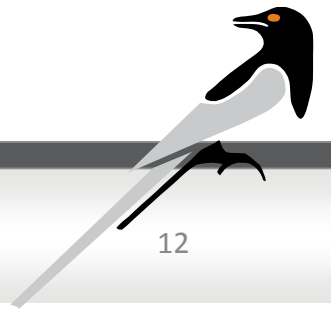
Default Label
Enter one label as the default for this language.

Other Labels
Enter synonyms and abbreviations for this term. (You can enter a word or phrase per line.)

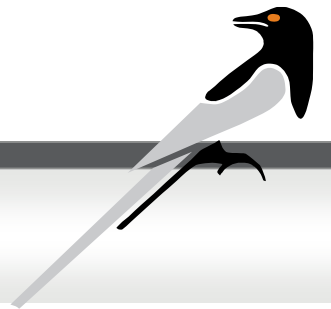
Corp Comm
Corp Communications
Internal Communications
Communications
add new label

Default Label

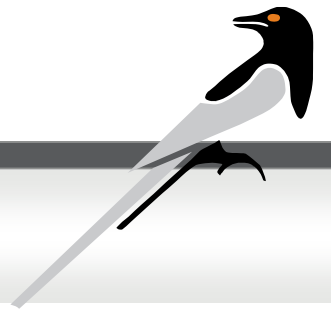
**Other Labels or
Synonyms**



- Take some education (AllIM Taxonomy and Metadata Course)
- Be complete – descriptions/scope notes for all Terms
- Like10.ca – SPManagedMetadataImportTool
 - Multiple languages
 - Multiple synonyms
- Use a Taxonomy Management Tool to support the Term Store and Search

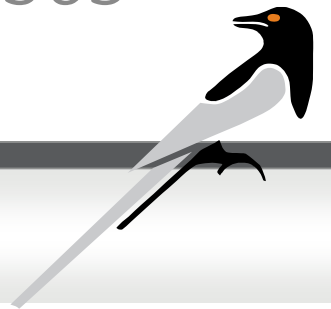


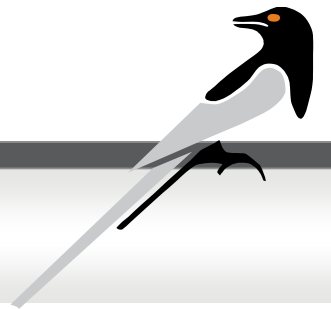
- Solution1: Intelligent Migration
 - Concept Classifier
 - Taxonomy Workflow
- Solution 2: Information Management
 - Classify information, Content Type Updating, Populate Metadata, Route
- Solution 3: Enterprise Classification
 - eDiscovery/ATIP
 - Improve Search – Add metadata to Term Store andMS Search takes care of the rest



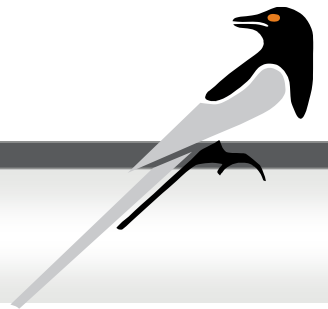
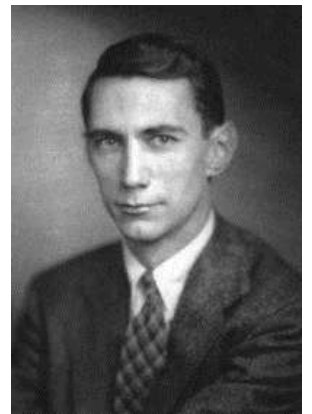
Technology Platform

Index Manager, Taxonomy Manager, Taxonomy Workflow and
ConceptClassifier for SharePoint 2007, 2010, 2013, Office 365

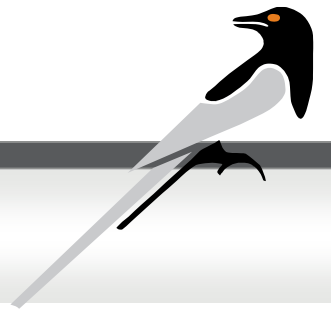




- Automatic Query Expansion
 - Term Store = Steak
 - Search Query = “New York Strip Loin”
- Relevance ranking based on the Probabilistic Model
 - (Bayesian Inference - Thomas Bayes)
- Concept identification based on Shannon’s Information Theory
 - Claude Elwood Shannon = Father of ‘Information Theory’
- Dynamic summarization
- Cross platform compatibility via web services
- All Application Programming Interfaces (APIs) based on XML



- Transparent access to system internals including the statistical profile of terms
- True relevance ranking of compound (i.e. multi-word) items
- Simple GUI for building and maintaining taxonomies
- Automatic concept identification, content tagging, auto-classification, taxonomy management
- Only statistical vendor that can extract conceptual metadata



conceptSearching
RETRIEVAL JUST GOT SMARTER

Index Manager v4.8.5.7

Manage

Settings

Utilities

[Manage Indexes](#)
[New Content Source](#)

Content Sources

↓

DeleteRe-CollectRe-IndexRe-ClassifyPauseResume

	Page URL	Status	Documents	
	http://www.gsa.gov	9	2,412	
	http://www.treasury.gov	400	1,401	
	http://server56178	400	305	

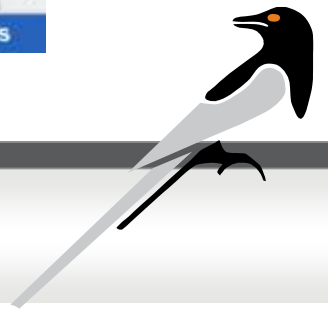
Index Manager

Taxonomy Manager

User Manager

Workflow Manager

Stats



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RETRIEVAL JUST GOT SMARTER

Taxonomy Manager v4.8.5.7

IPSV

Clues Suggest Search Browse Working Set Info Settings Help

IPSV

- Business and industry (0 of 4389)
- Economics and finance (0 of 304)
- Education and skills (0 of 13)
- Employment, jobs and careers (2 of 13)
- Environment (70 of 325)
 - Built environment (1 of 1)
 - Energy and fuel (6 of 76)**
 - Environmental protection (31 of 31)
 - Farming (1 of 3)
 - Fisheries and aquaculture (0 of 0)
 - Forest Products (0 of 0)
 - Horticulture (0 of 0)
 - Land and premises (0 of 63)
 - Mineral resources (2 of 2)
 - Plants, animals and wildlife (0 of 0)
 - Waste management (1 of 3)
 - Water resources (0 of 36)
- Government, politics and public services (0 of 0)
- Health, well-being and care (0 of 0)
- Housing (2 of 134)
- Information and Communication Technology (0 of 0)
- International affairs and defence (0 of 0)
- Leisure and culture (0 of 78)
- Life in the community (0 of 0)

Energy and fuel

Showing clues for class

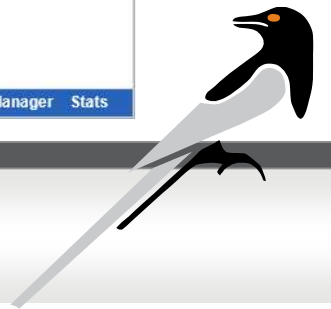
[Suggest clues for class](#)

[Suggest Clues](#) [Search](#) [Delete](#)

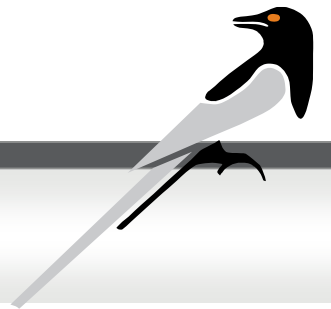
Type	Clue	Score	Mandatory	
Standard		50	<input type="checkbox"/>	Insert
<input type="checkbox"/> Standard	Energy and fuel languages	50	<input type="checkbox"/>	Edit Delete
<input type="checkbox"/> Case-Sensitive	fossil fuels languages	20	<input type="checkbox"/>	Edit Delete
<input type="checkbox"/> Metadata	nuclear energy languages	20	<input type="checkbox"/>	Edit Delete
<input type="checkbox"/> Phonetic	renewable energy languages	20	<input type="checkbox"/>	Edit Delete
<input type="checkbox"/> RegEx	electricity languages	10	<input type="checkbox"/>	Edit Delete
<input type="checkbox"/> Required Class	gas languages	10	<input type="checkbox"/>	Edit Delete
<input type="checkbox"/> Class Boost				
<input type="checkbox"/> Language				

[Bulk Edit](#)

Index Manager Taxonomy Manager User Manager Workflow Manager Stats



- OOB Actions
 - File Share to File Share
 - File Share to SharePoint
- Any custom Workflow Plugin
- .NET Code
- Take object and classification data and “DO Something”



concept**Searching**
RETRIEVAL JUST GOT SMARTER

Workflow Manager v4.8.5.7

Manage Workflows
[Workflow Config](#)
[Migration Config](#)
[SharePoint Hubs](#)
[Workflow Log](#)
[Workflow Plugins](#)

Workflow Manager

[Add New Workflow](#)

http://server56178	show
Global for SharePoint	show

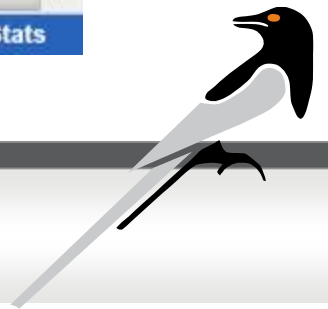
Index Manager

Taxonomy Manager

User Manager

Workflow Manager

Stats



conceptSearching
RETRIEVAL JUST GOT SMARTER

Workflow Manager v4.8.5.7

[Manage Workflows](#)
[Workflow Config](#)
[Migration Config](#)
[SharePoint Hubs](#)
[Workflow Log](#)
[Workflow Plugins](#)

http://server56178

hide

Don Newest Legal Hold Move	delete disable
Legal Hold Don	delete disable
PII MOve	delete disable
RMS Demo	delete disable
ITAR Move	delete disable
FOUO Move	delete disable

[Add Workflow to this Source](#)

Global for SharePoint

show

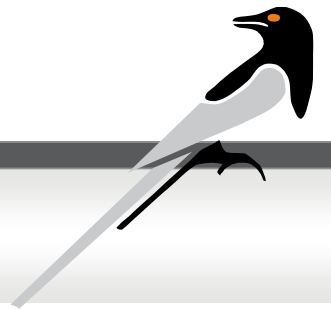
Index Manager

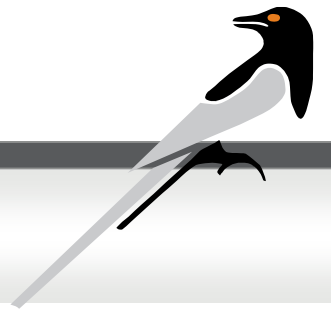
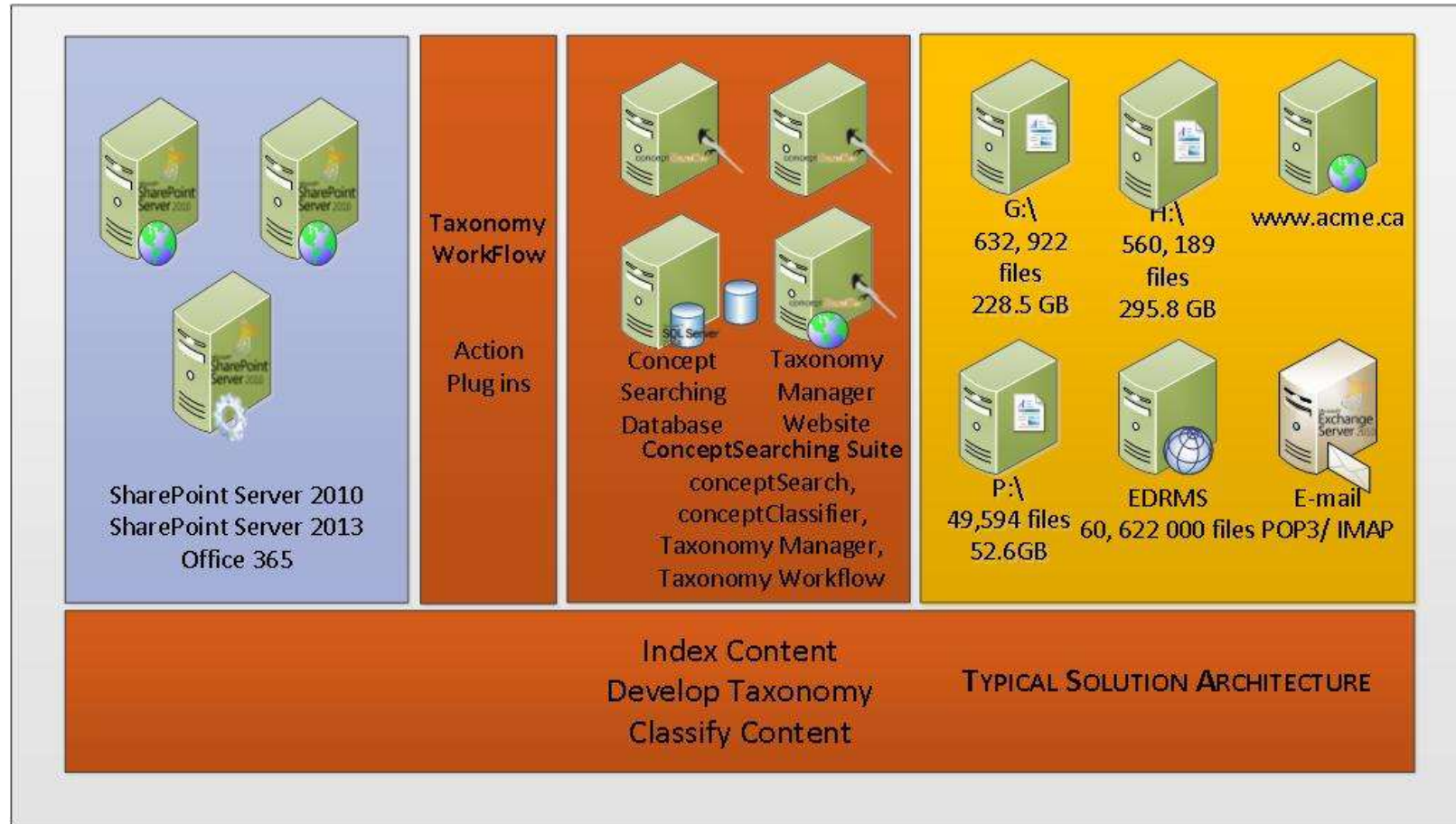
Taxonomy Manager

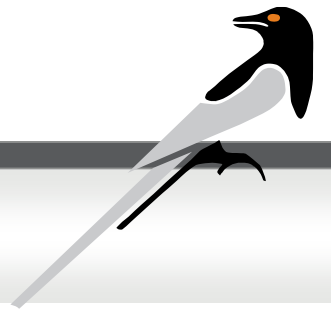
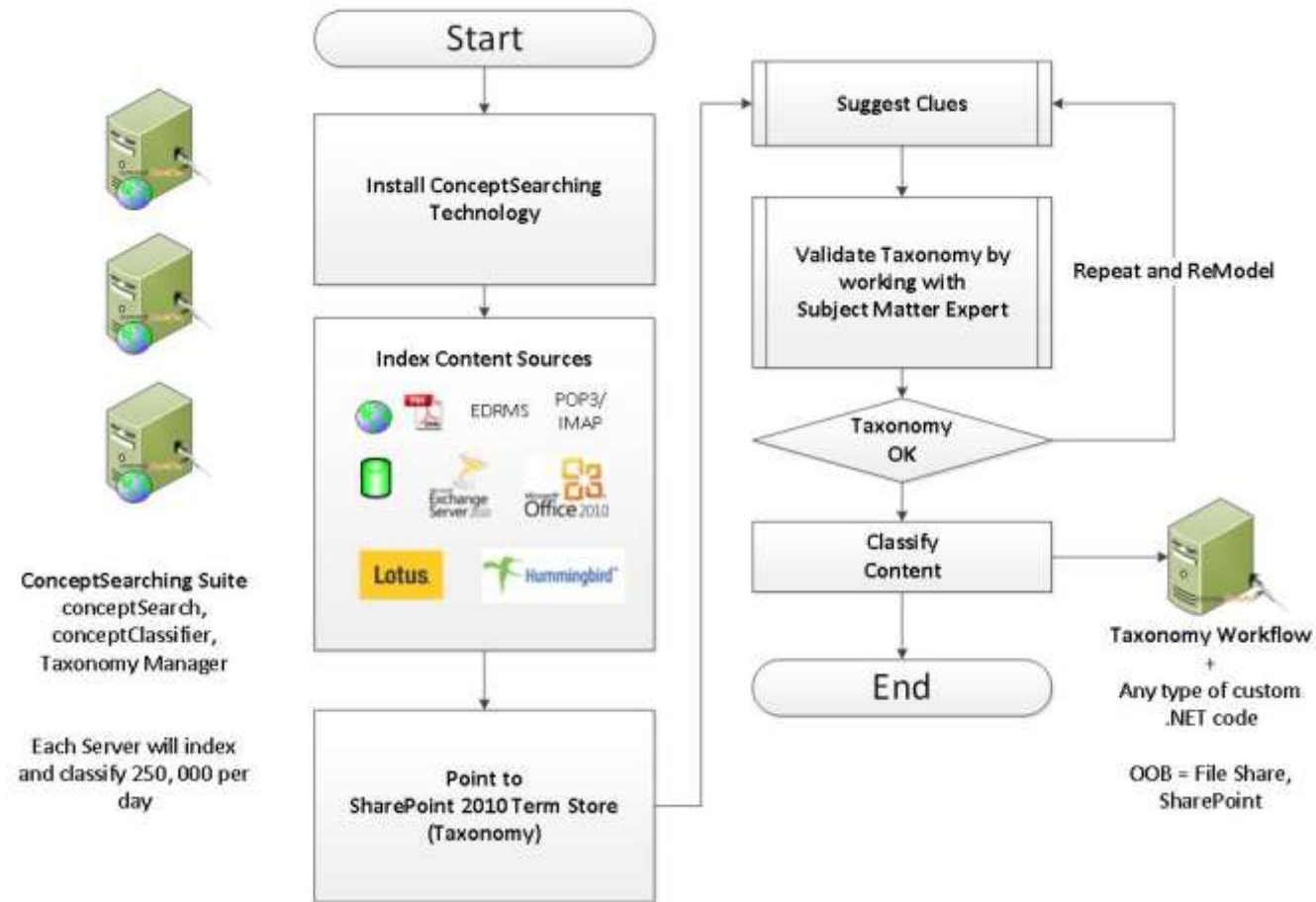
User Manager

Workflow Manager

Stats



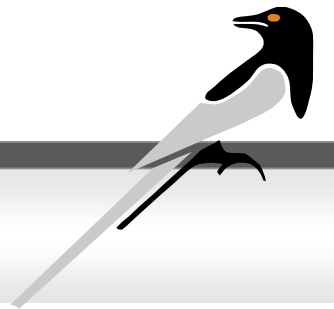




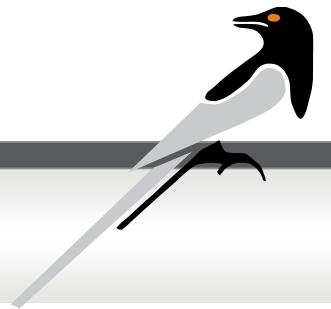
Demo + Freestyle

Upload some documents

Upload, classify, workflow - 3 minutes

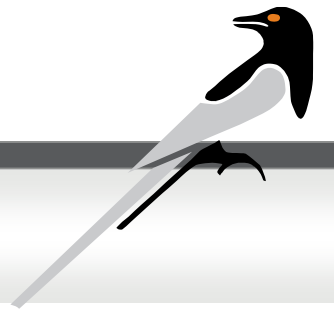


1. Some documents classified and moved
 - FOUO
 - PII
 - ITAR
 - RMS
2. All documents tagged with metadata
3. Records Identified – Content Type changed to “Record” and routed to RMS



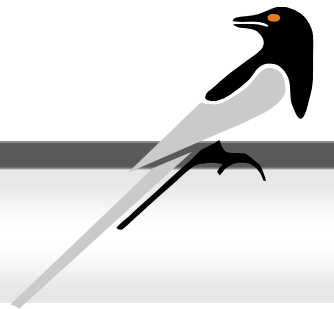
Solution Takeaways

Intelligent Migration, Information Management and Enterprise
Classification & Improving Search



How to get 10,000,000 files properly into SharePoint?

Solution #1: Intelligent Migration

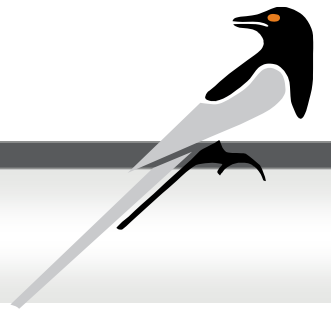


Old Way

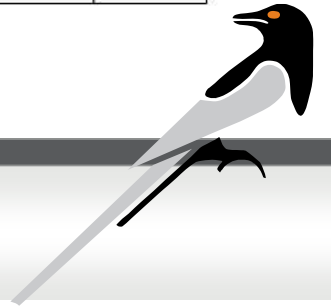
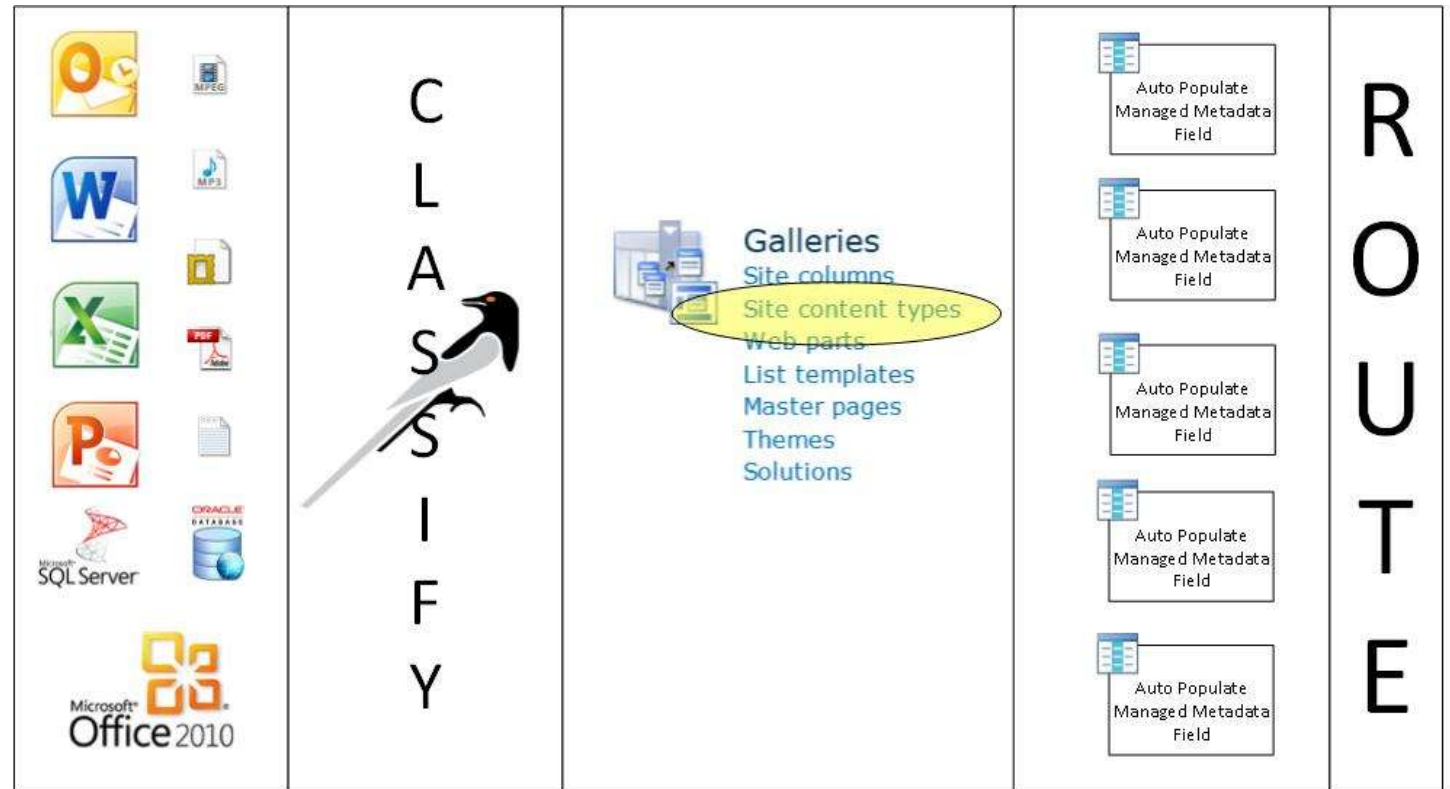
- Buy software
- Point at sources
- Import 'File' metadata
- Manually edit metadata (setup templates, terms, content types other metadata enrichment)
- Load into SharePoint

Concept Searching Style

- Buy software
- Point at sources
- Manage SharePoint 2010 Term Store
- Build rules
- Wait for the magic

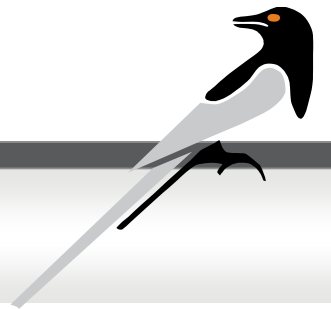


1. Index Sources of Information
2. Manage Term Store /Taxonomy
3. Create Rules
4. Classify
5. Set Content Type
6. Auto Classify Metadata
7. Route

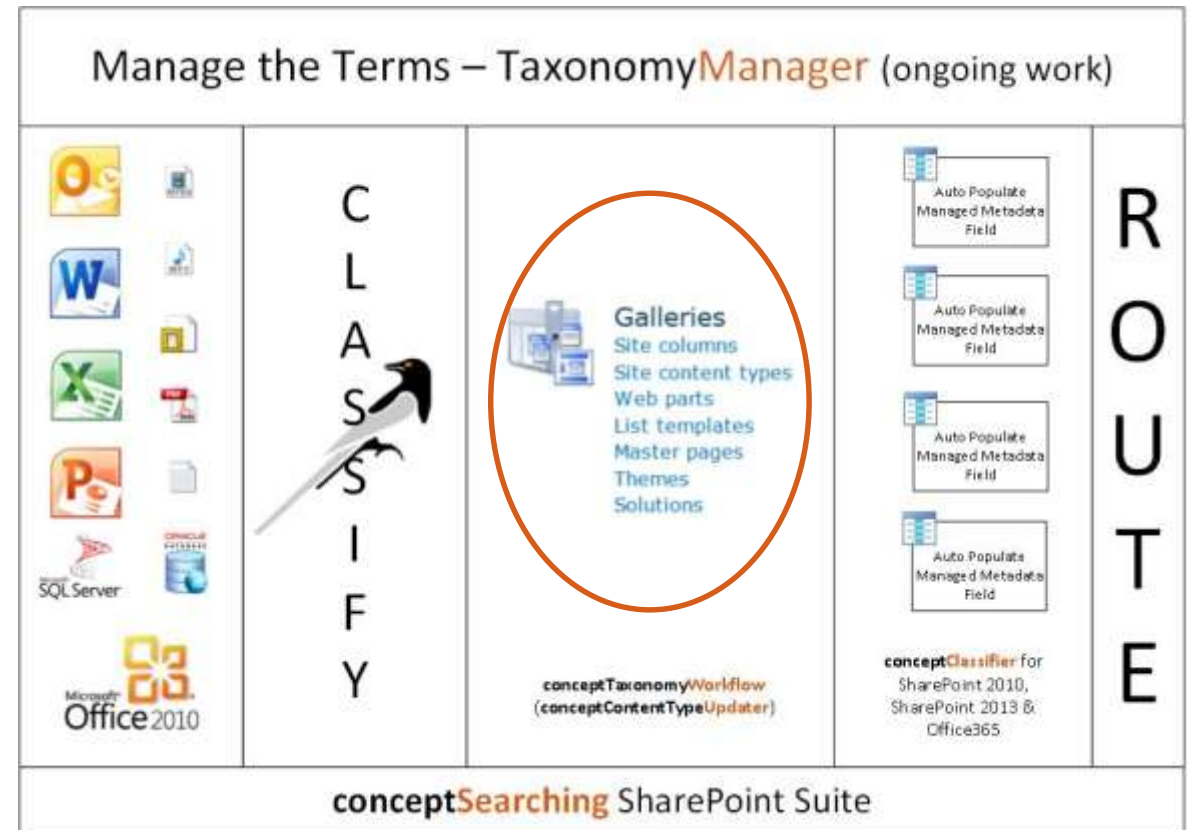


How to implement Information Management

Solution #2: Information Management

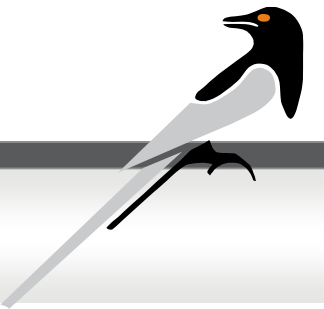


- Content Type Updater function within Taxonomy Workflow

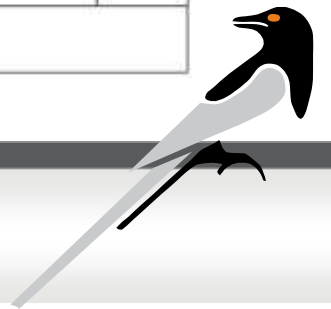
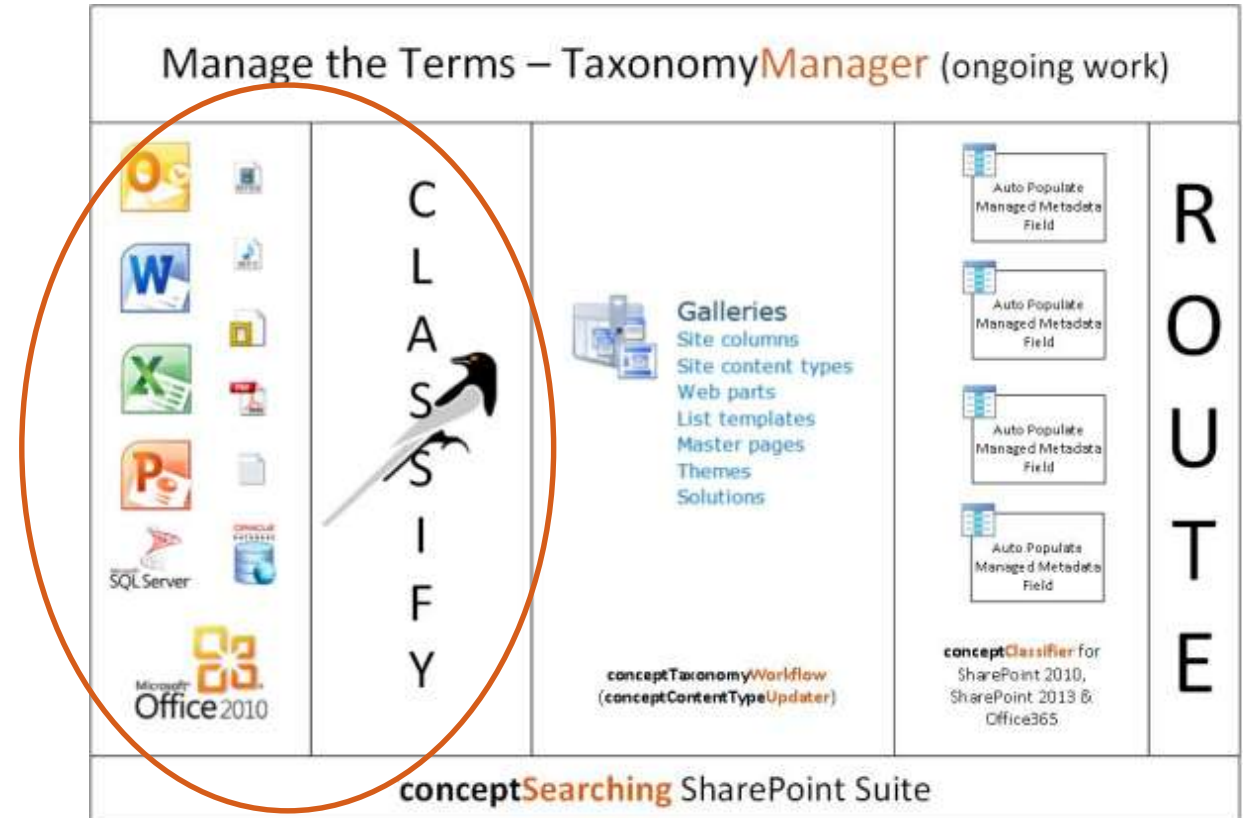


How do I leverage my Term Store to perform enterprise classification and Improve Search?

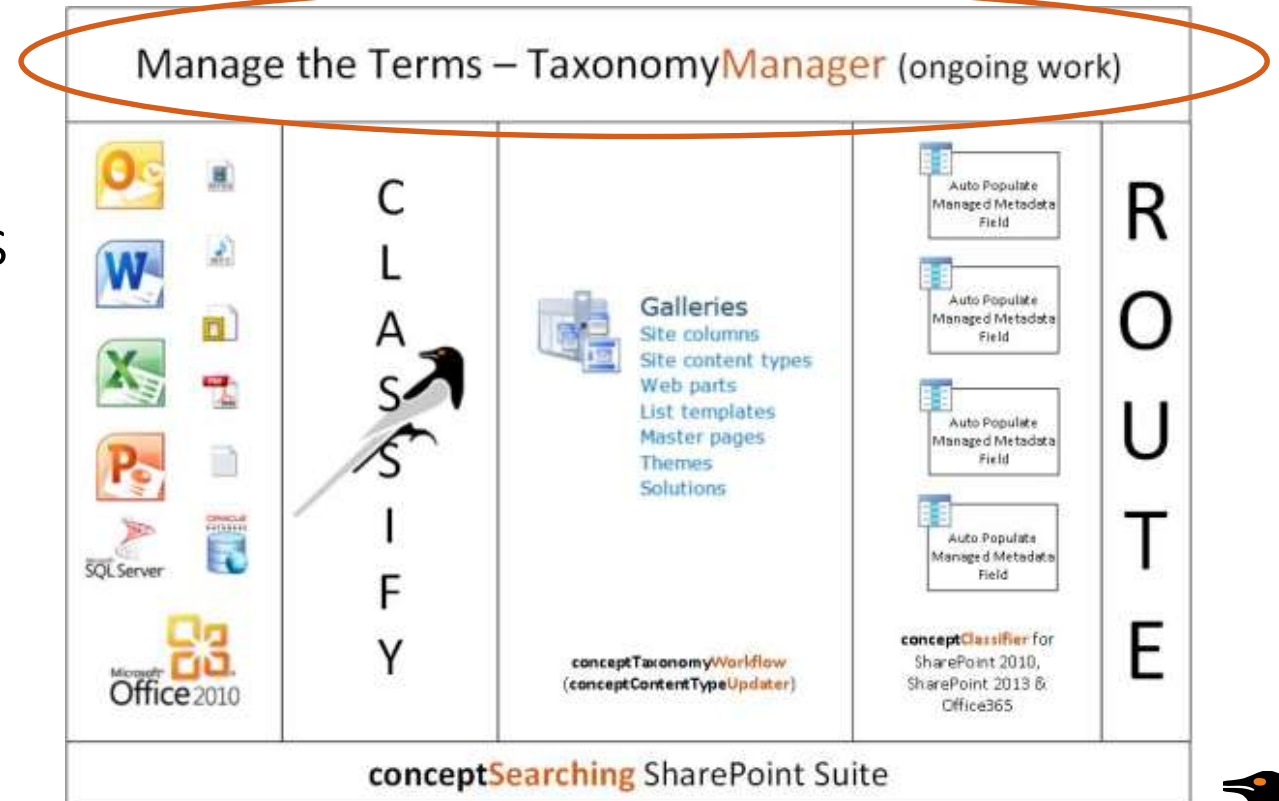
Solution #3: Enterprise Classification for eDiscovery and Improving Search



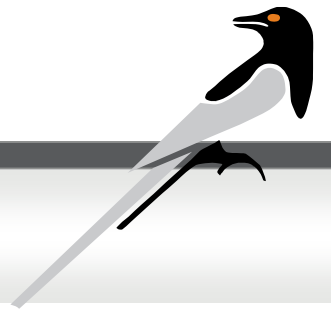
- Index Multiple sources
- Structured and Un-structured
- Constantly being Indexed and classified
- Can change the classification
- Just hit the 'Easy Button' or the Bird



- Taxonomy Manager
- Clues inserted within the Custom Properties within Terms
- MS Search/ FAST takes care of the rest
- The index now contains preferred terms from Term Store and associated clues



- Come by the Booth for your free CloudShare Key Chains compliments of www.cloudshare.com
- First person send me an email to schedule a **demo** of our software will get a fully working **Proof of Concept** for **one** month, within CloudShare and 5 days of SharePoint 2010 consulting at **no charge**, within that month.



Thank-you.

David Wu

davidw@conceptsearching.com

@conceptsearch

613-558-6677

