

Location-Based Auto-Tagging

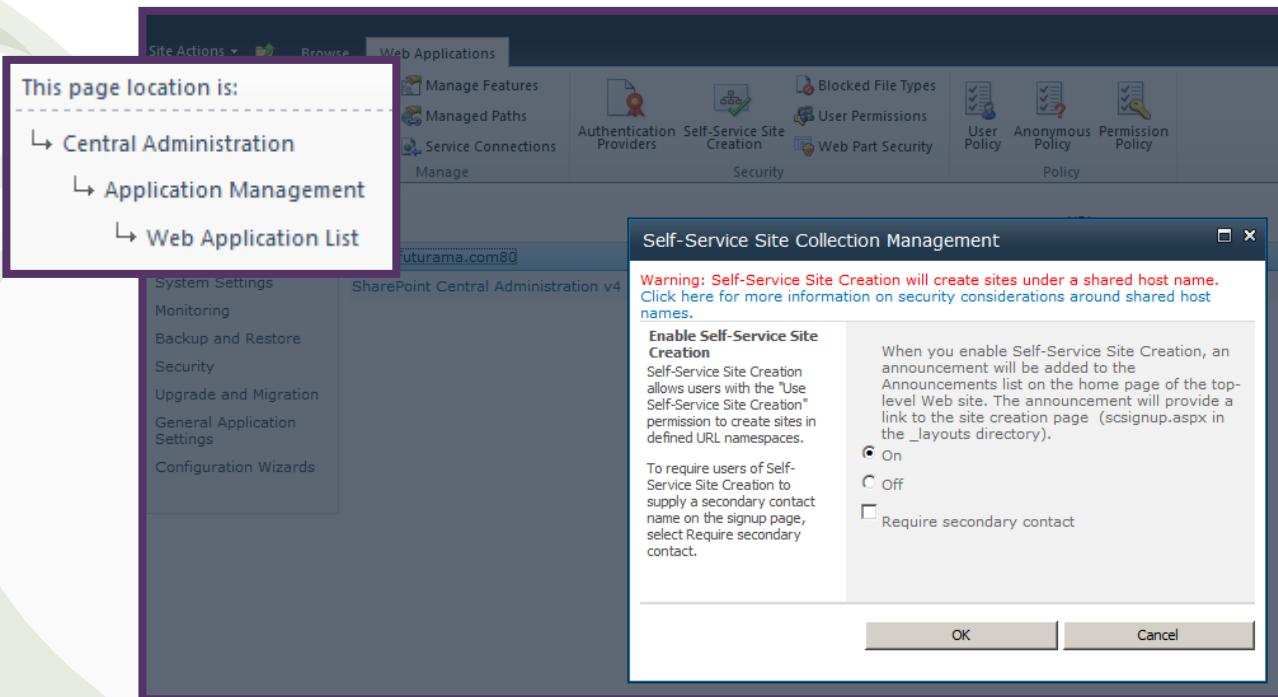
For SharePoint 2010

Manual v1.0



Before installation



- As we're about to install a SharePoint farm solution you need to have sufficient rights e.g. **SharePoint Farm Administrator**
- Select an existing SharePoint web application or create a new one and ensure that **Self-Service Site Creation** is enabled



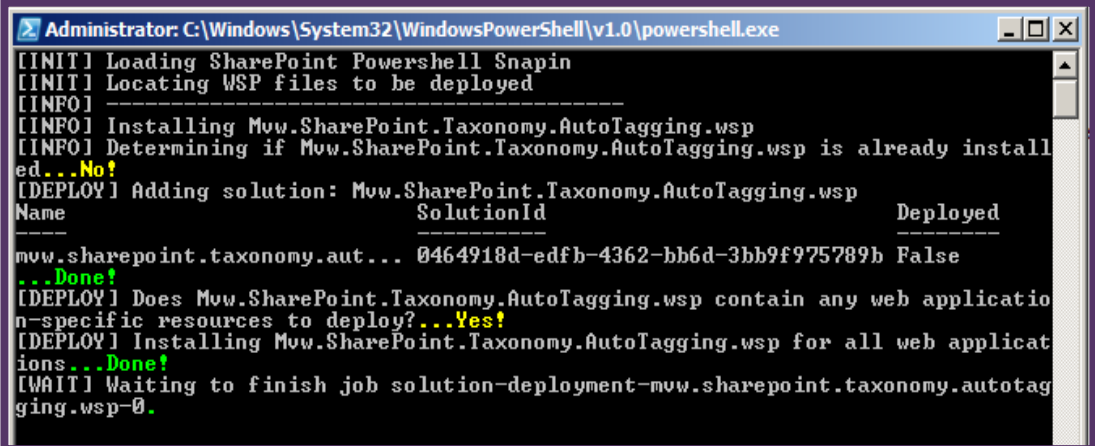
Goto:

Installation with PowerShell Script

- Copy both files to your SharePoint server into the same location

 install.ps1	01.10.2012 21:33	PS1 File	4 KB
 Mvw.SharePoint.Taxonomy.AutoTagging.wsp	08.10.2012 12:14	WSP File	43 KB

- Open **install.ps1** in an editor e.g. Notepad and replace **demo.futurama.com80** on line 67 with the name of your Web Application according to the web application list in the Central Administration
- Right-Click **install.ps1** and then **Run with PowerShell**



```
Administrator: C:\Windows\System32\WindowsPowerShell\v1.0\powershell.exe
[INIT] Loading SharePoint Powershell Snapin
[INIT] Locating WSP files to be deployed
[INFO] -----
[INFO] Installing Mvw.SharePoint.Taxonomy.AutoTagging.wsp
[INFO] Determining if Mvw.SharePoint.Taxonomy.AutoTagging.wsp is already installed...No!
[DEPLOY] Adding solution: Mvw.SharePoint.Taxonomy.AutoTagging.wsp
Name                               SolutionId                           Deployed
-----                               -
mvw.sharepoint.taxonomy.aut... 0464918d-edfb-4362-bb6d-3bb9f975789b False
...Done!
[DEPLOY] Does Mvw.SharePoint.Taxonomy.AutoTagging.wsp contain any web application-specific resources to deploy?...Yes!
[DEPLOY] Installing Mvw.SharePoint.Taxonomy.AutoTagging.wsp for all web applications...Done!
[WAIT] Waiting to finish job solution-deployment-mvw.sharepoint.taxonomy.autotagging.wsp-0.
```

Create the Central Workspaces List

- If installation was successful you can activate the **Managed Workspace Admin Infrastructure Feature**

The screenshot displays the SharePoint 'Features' page. The breadcrumb path is 'Metadata Inheritance > Site Settings > Features'. The page lists several features with 'Activate' buttons. The 'Managed Workspace Admin Infrastructure' feature is highlighted in yellow. A callout box on the right shows the breadcrumb path: 'This page location is: Metadata Inheritance > Site Settings > Site Features'.

Name	Description	Action
Content Organizer	Create metadata based rules that move content submitted to this site to the correct library or folder.	Activate
E-mail Integration with Content Organizer	Enable a site's content organizer to accept and organize email messages. This feature should be used only in a highly managed store, like a Records Center.	Activate
Group Work Lists	Provides Calendars with added functionality for team and resource scheduling.	Activate
Hold and eDiscovery	This feature is used to track external actions like litigations, investigations, or audits that require you to suspend the disposition of documents.	Activate
Managed Workspace Admin Infrastructure	Feature to provide the basic infrastructure components for the administration of Managed Workspaces e.g. event receivers, content types and custom actions.	Activate

- The only supported location for the Central Workspaces List is the **root web site** of the **root site collection** of the **current web application**

Verify the installation

- Site columns [site actions >> site settings >> site columns]

Managed Workspace Columns		
Administrator Email	Single line of text	Metadata Inheritance
Administrator Login	Person or Group	Metadata Inheritance
Language	Choice	Metadata Inheritance
Managed Path	Choice	Metadata Inheritance
Site Template	Choice	Metadata Inheritance

- Site content types [site actions >> site settings >> site content types]

Managed Workspace ContentTypes		
Managed Workspace	Item	Metadata Inheritance

- Site Lists [url: <http://yourwebapplication/Lists/Workspaces>]

The screenshot shows the 'List Tools' interface for the 'Workspaces' list. The navigation pane on the left includes 'Home', 'Libraries', 'Lists', and 'Workspaces' (selected). The main content area shows the list name 'Workspaces' and a message: 'There are no items to show in this view of the "Workspaces" list. To add a new item, click "New".' Below the message is an 'Add new item' button. The top navigation bar includes 'Site Actions', 'Browse', 'Items', and 'List'.

Prepare for first time use

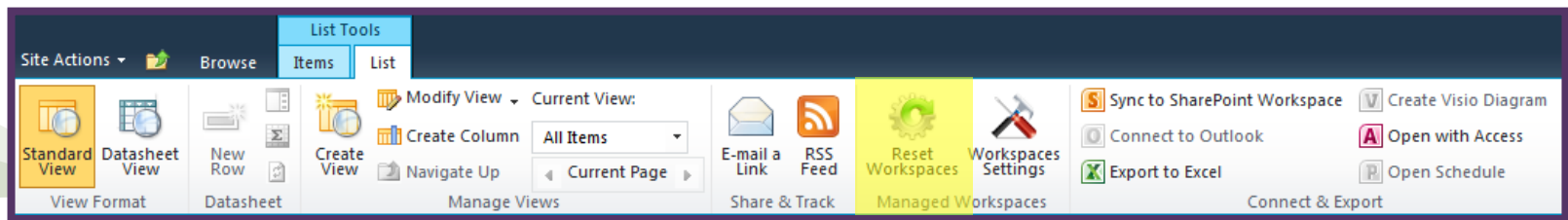
- The Location-based Auto-tagging Extension expects that you've created one or more SharePoint Taxonomy Columns with the purpose to inherit those in the same site where the Workspaces List is created in a group called **Inheritable Columns** [site actions >> site settings >> site columns]

Inheritable Columns		
Organization	Managed Metadata	Metadata Inheritance
Project Type	Managed Metadata	Metadata Inheritance

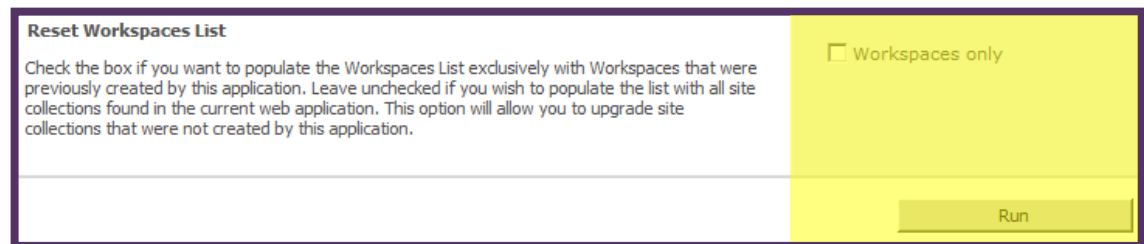
- There is no need to define a Default Value and the inheritance of Multiple Values is supported so you can check that box if you need this

First time use – Reset (1/2)

- Before you can start using the application you need to «reset» it by clicking the Reset-Button in the Workspaces List Ribbon

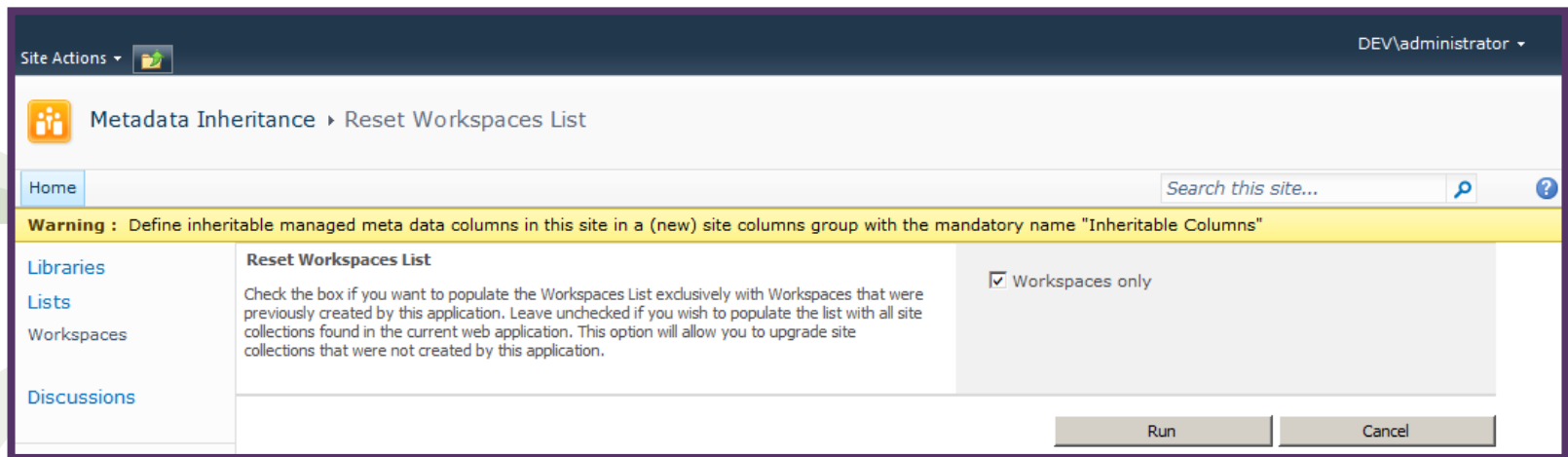


- This will add the previously created Taxonomy Columns
- Also make sure you check **Workspaces only** to avoid adding Site Collections that were not created by this application to our list
- Click **Run**



First time user – Reset (2/2)

- If something went wrong you may see an error, for example when no Taxonomy Columns were created



The screenshot shows a SharePoint interface with the following elements:

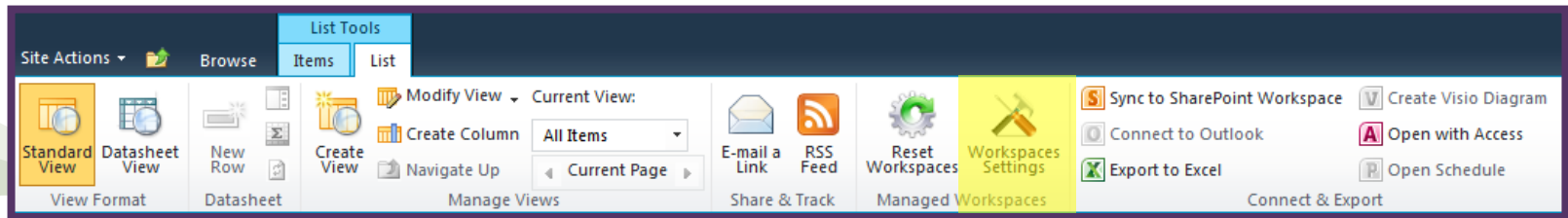
- Top bar: "Site Actions" and "DEV\administrator"
- Breadcrumb: "Metadata Inheritance > Reset Workspaces List"
- Navigation: "Home" and "Search this site..."
- Warning message: "Warning : Define inheritable managed meta data columns in this site in a (new) site columns group with the mandatory name 'Inheritable Columns'"
- Section: "Reset Workspaces List" with a checkbox for "Workspaces only" (checked).
- Text: "Check the box if you want to populate the Workspaces List exclusively with Workspaces that were previously created by this application. Leave unchecked if you wish to populate the list with all site collections found in the current web application. This option will allow you to upgrade site collections that were not created by this application."
- Buttons: "Run" and "Cancel"

- If everything went okay, you'll see a similar message as follows (more likely **0 entries were added ...**)

Information : 3 entries were added to the Workspaces List

First time use – Settings (1/2)

- Before you can start using the application you need to configure two settings to influence its behaviour



- Check **Update list items** if you want the application to update existing list items in (all sites in the) Site Collection(s) being updated when you change its settings in this list

Update list items Checking the box causes existing list items in this site and in all sites below it to be updated. Depending on the number of list items found this operation may require a significant amount of resources and run for a long time.	<input type="checkbox"/> Update list items
Delete Workspaces Check the box if the deletion of a Workspaces list element should invoke the deletion of the corresponding Managed Workspace	<input type="checkbox"/> Delete Workspaces
<input type="button" value="Save my settings"/>	

First time use – Settings (2/2)

- Check **Delete Workspaces** If a Workspace i.e. Site Collection should be deleted when you delete the corresponding List Entry

Update list items Checking the box causes existing list items in this site and in all sites below it to be updated. Depending on the number of list items found this operation may require a significant amount of resources and run for a long time.	<input type="checkbox"/> Update list items
Delete Workspaces Check the box if the deletion of a Workspaces list element should invoke the deletion of the corresponding Managed Workspace	<input type="checkbox"/> Delete Workspaces
<input type="button" value="Save my settings"/>	

Create a Workspace

- From the Workspaces List Ribbon select **New Item / Managed Workspace**

The image shows two overlapping screenshots from a SharePoint interface. The top-left screenshot shows the 'List Tools' ribbon with the 'New Item' button highlighted in yellow. Below it, a yellow tooltip reads: 'Managed Workspace Describes all necessary fields to automatically create workspaces.' The top-right screenshot shows the 'Workspaces - New Item' dialog box. It contains the following fields:

- Dokumententitel *
- Managed Path: sites (Managed path where the workspace will be created.)
- Administrator Login *: DEV\administrator ; (Workspace administrator login (DOMAIN\username).)
- Administrator Email
- Language: English [1033] (Workspace language code e.g. 1033.)
- Site Template: (Workspace template (e.g. STS#1).)
- Organization
- Project Type

At the bottom of the dialog box are 'Save' and 'Cancel' buttons.

- And fill out the form ...
- Notice the Taxonomy Field(s) at the bottom
The values you select here will be inherited

Summary of New Item Form fields

Field name	Usage
Title *	Will be used to set the title of the Root Site of the new Site Collection that will be created
Managed Path *	The Managed Path used to create the new Site Collection at
Administrator Login *	The network logon of the envisioned Site Collection Administrator in the form «DOMAIN\Logon»
Administrator E-Mail	E-Mail address of the new Site Collection Administrator
Language *	Base language of the Root Site in the Site Collection
Template *	Web template used to create the Root Site in the Site Collection in the form (Language) Display Name [SharePoint Short Code]
Taxonomy columns	Here you should all Taxonomy Columns that you've previously created as Site Columns in a Site Columns Group named «Inheritable Columns» and you select the value you want all Sites in the new Site Collection to inherit – The colums will still be created in the target Site Collection if no value is selected

Verify Workspace creation

- If the initial setup went okay your Workspaces list should look similar to the exemplary one shown below
- Notice that Metadata Navigation is activated automatically and Url's are clickable allowing you to open Workspaces immediately from the Workspaces List

The screenshot displays the SharePoint interface for a 'Workspaces' list. The top navigation bar includes 'Site Actions', 'Browse', and 'List Tools'. The 'List Tools' ribbon contains various options like 'Standard View', 'Datasheet View', 'New Row', 'Create View', 'Modify View', 'Current View', 'All Items', 'Current Page', 'E-mail a Link', 'RSS Feed', 'Reset Workspaces', 'Workspaces Settings', 'Sync to SharePoint Workspace', 'Connect to Outlook', 'Export to Excel', 'Connect & Export', 'Customize List', and 'List Settings'. The main content area shows a table of workspaces with the following data:

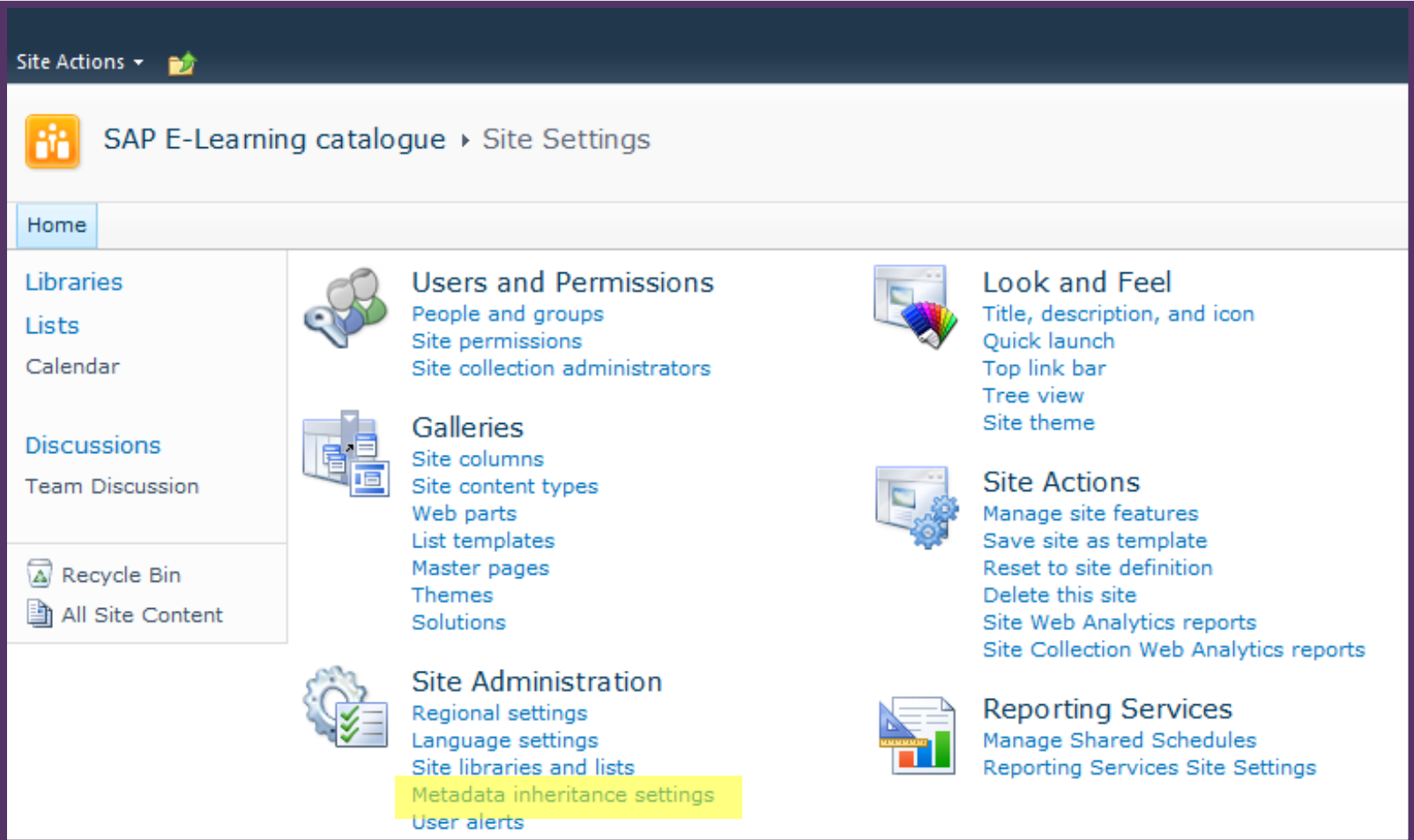
Dokumententitel	Url	Administrator Login	Site Template	Latest error
SAP E-Learning catalogue <small>NEW</small>	http://demo.futurama.com/sites/00eca348-3b81-48a0-af7f-8ea91bb30f28	DEV\administrator	(English) Team Site [STS#0]	
Specifications for YM2013 Mountainbikes <small>NEW</small>	http://demo.futurama.com/sites/3db82912-365f-4253-9f67-0a646505fd48	DEV\administrator	(English) Team Site [AC...]	
SharePoint global roll-out <small>NEW</small>	http://demo.futurama.com/sites/b21f551f-a7f0-490b-935f-ad8144971e4f	DEV\administrator	(English) Team Site [STS#0]	

Below the table, there is a 'Key Filters' section with 'Apply' and 'Clear' buttons, and two input fields for 'Project Type' and 'Organization'. A '+ Add new item' link is also visible.

In case an error occurred during Workspace creation you should see a message here

Verify Workspace created

- Open a Workspace and go to Site Settings as shown below





The screenshot displays the 'Site Settings' page for the 'SAP E-Learning catalogue' workspace. The page is organized into several sections:

- Site Actions:** A dropdown menu is visible in the top left corner.
- Navigation:** A 'Home' button is located at the top left of the main content area.
- Left Sidebar:** Contains links for 'Libraries', 'Lists', 'Calendar', 'Discussions', 'Team Discussion', 'Recycle Bin', and 'All Site Content'.
- Main Content Area:** Divided into four columns of settings:
 - Users and Permissions:** Includes 'People and groups', 'Site permissions', and 'Site collection administrators'.
 - Galleries:** Includes 'Site columns', 'Site content types', 'Web parts', 'List templates', 'Master pages', 'Themes', and 'Solutions'.
 - Look and Feel:** Includes 'Title, description, and icon', 'Quick launch', 'Top link bar', 'Tree view', and 'Site theme'.
 - Site Actions:** Includes 'Manage site features', 'Save site as template', 'Reset to site definition', 'Delete this site', 'Site Web Analytics reports', and 'Site Collection Web Analytics reports'.
 - Reporting Services:** Includes 'Manage Shared Schedules' and 'Reporting Services Site Settings'.
 - Site Administration:** Includes 'Regional settings', 'Language settings', 'Site libraries and lists', 'Metadata inheritance settings' (highlighted in yellow), and 'User alerts'.

Changing (Sub) Site Inheritance (1/2)

- Clicking the link highlighted in the previous screenshot should load the following settings page

Override inherited metadata settings Use the taxonomy fields on the right to change tags that will be set automatically (and break inheritance)	<input type="text" value="Internal Projekt"/> 
	<input type="text" value="HR;"/> 
Inherit meta data Checking the box will cause the current sub site to try and inherit its parent site's metadata again. This works for any web site that is not a root web site in a site collection. Use the Workspaces List to re-connect a root web site with an entry in the Workspaces List instead.	<input checked="" type="checkbox"/> Inherit
Update list items Checking the box causes existing list items in this site and in all sites below it to be updated. Depending on the number of list items found this operation may require a significant amount of resources and run for a long time.	<input type="checkbox"/> Update list items
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

- See the next page for a description of each of these settings

Changing (Sub) Site Inheritance (2/2)

Field name	Usage
Override inherited metadata settings	Here you can select new values for inherited metadata columns – doing so will automatically break inheritance and as such the current (Sub) Site and all of its ancestors will no longer inherit from the parent of the current (Sub) Site but instead will now be updated with the new metadata
Inherit meta data	Uncheck to break inheritance or check to re-establish inheritance meaning that the (Sub) Site will try and inherit from its parent again or if there is not parent (because the current Site is the Root Site in the Site Collection) it will wait for the next update made through the Workspaces List
Update list items	Use this setting to control whether you want list items in this site and all sites below it to be updated when metadata is changed

Updates are always recursively i.e. when a Site below another Site has disabled inheritance the update process for that specific site and all sites below that specific site will stop however for all other sites it will still continue

More information

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