

SharePartXXL Taxonomy Extension for Microsoft SharePoint

Version 2.2.1.60

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Introduction to Taxonomy

SharePoint technology is increasingly being used by companies and organizations, especially to simplify browser based **collaboration** with Microsoft Office over the Internet. With the fast growing amount of collaboration data, the need for additional features to **quickly access information items and documents** has never been greater. If the user has to rely on searching alone, then all the effort in locating information is down to them, and they often do not know the contents of the possibly existing repositories. **Structuring the information in advance** as a mandatory part of the content creation process assists the user before they even start spending their time on search.

By far the most common and effective method of finding information is browsing one or more structured classification systems, e.g. **taxonomies**.

Why taxonomies?

Taxonomy is a system of definitions that are used to describe, categorize, recognize, organize and manage information, to show how they interrelate. Hierarchical relationships (e.g. 'parent-child') and associative relationships (e.g. 'see also') capture the essence of a subject area by being described by taxonomy.

Taxonomy enables documents or other items to be classified and organized according to a category structure. It therefore enables users to access this documents more easily and also guides them in exploring a document collection by laying out the conceptual structure of the subject area and enhancing knowledge discovery. **By far the most effective method of finding information is browsing a structured classification system.** Thus taxonomy makes it possible to describe

- the **structure of products and solutions a company offers,**
- **the company's organizational structure,**
- **typical process tasks or life situations** (e.g. my first day in the company, all documents about company's security policy)
- **time-based** cross-list cross-site information (e.g. all items that are new or changed in last month within one category)
- **geographical,** language or subsidiary-based information
- Information for defined **target groups** like sales, development, students etc.

Additionally related information is displayed, e.g.

- **responsible** sales and technical **contact** for a product,
- **related** product sheets, available service **documents,**
- **associated events,** training days or
- **connected tasks.**

Scattered documents among isolated sites

From the Knowledge Manager's point of view SharePoint data often is difficult to manage, especially when the **documents are scattered among different isolated pages or sites.** The SharePoint navigation is based on a *single* hierarchical folder structure, which only allows content items to be classified with a single term. This causes problems if content logically relates to more than a single term and terms at different levels within a hierarchy. Navigation is difficult, often impossible. Frequently required information is totally inaccessible both for users and services (e.g. machines). Metadata, e.g. from Office documents, are saved - but not managed. In some areas, e.g. within the Public Sector, adherence to the use of predefined taxonomies to classify content is a **mandatory compliance issue.**

The SharePartXXL Taxonomy Extension for Microsoft SharePoint enables users to have different category-based views to their cross-site items, independent from its location. These views can be by any topic, time based (e.g. all new items in a category created last week), by author or by any other criteria. All usual view-based features are provided, including subscription by RSS and e-mail alerts.

With that extension the information inside a SharePoint portal can be transformed to knowledge and the portal becomes a place to **share knowledge as well as content.**

Installation

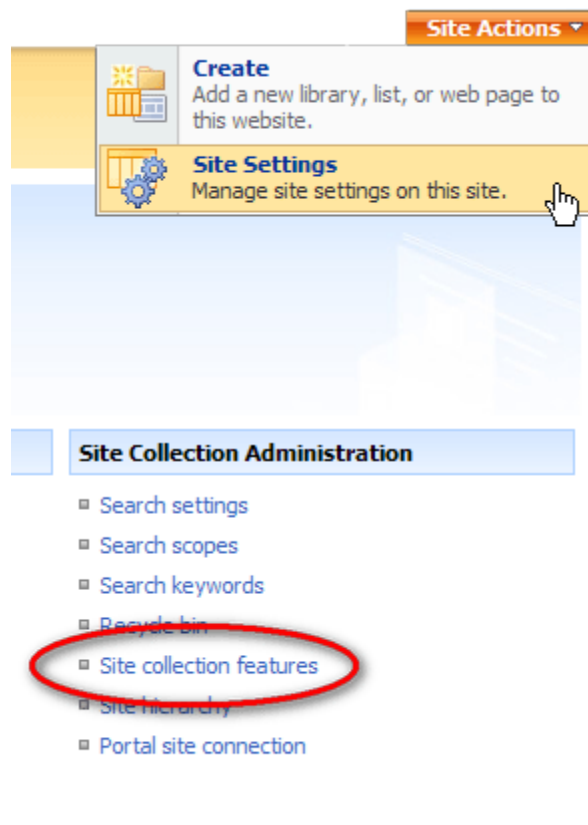
- Please check if you've installed service pack 2 for WSS/MOSS.
- Run "installSPXXLTE.bat" - this will use the stsadm command line tool to install and deploy the solution to all local SharePoint site collections

Remark: In Windows Server 2008 scenario you have to right click on the file and choose: "Run as administrator"

- Afterwards, please check the console output for a successful deployment of the Taxonomy Extension for Microsoft SharePoint. If it fails because the **Windows SharePoint Services Timer** Job is not running you can force deployment by calling:




```
"%CommonProgramFiles%\Microsoft Shared\web server extensions\12\BIN\stsadm.exe" -o  
execadmsvcjobs
```

- **In a server farm scenario you have to copy language resources on every included server you did not run the installTE.bat file. To do this please run:**
"%CommonProgramFiles%\Microsoft Shared\web server extensions\12\BIN\stsadm.exe" -o copyappbincontent
- To verify everything deployed correctly please go to
C:\Inetpub\wwwroot\wss\VirtualDirectories\<port of your application>\App_GlobalResources
and make sure you find the file: "SharePartXXLTaxonomy.resx" in here.
- Login as Site Collection Administrator to the Root Site, where you want to use the Extension
- Under "Site Actions" -> "Site Settings" -> "Site Collection Administration" -> "Site Collection Features" ...



- ... you have to activate the SharePointXXL Taxonomy Extension

Site Collection Features

Name	Status
 Office SharePoint Server Search Web Parts This feature uploads all web parts required for Search Center	<input type="button" value="Activate"/>
 SharePartXXL Newsletter Installs two WebParts and list templates for subscribing, unsubscribing and sending newsletter	<input type="button" value="Deactivate"/> Active
 SharePartXXL Taxonomy Extension The SharePartXXL Taxonomy Extension enables documents and list items to be organized cross-site as part of a connected content network and knowledge model	<input type="button" value="Deactivate"/> Active





To use Taxonomy Extension Advanced functionality

Login as a farm administrator. Go to Central Administration -> Operations -> Manage Farm Features and activate: SharePartXXL Taxonomy Extension Advanced.

Central Administration > Operations > Manage Farm Features

Manage Farm Features

This page allows you to manage SharePoint-wide features.

Name	Status
 Data Connection Library Adds Data Connection Library feature	<input type="button" value="Deactivate"/> Active
 Excel Services Farm Feature Adds farm-level Excel Services Features to the Windows SharePoint Services framework	<input type="button" value="Deactivate"/> Active
 Global Web Parts Installs additional web parts common to all types of sites.	<input type="button" value="Deactivate"/> Active
 SharePartXXL Taxonomy Extension Advanced The SharePartXXL Taxonomy Extension enables documents and list items to be organized cross site and cross site collection as part of a connected content network and knowledge model	<input type="button" value="Deactivate"/> Active

In Central Administration -> Application Management -> SharePoint Site Management you will find a new item: "Manage SharePartXXL Taxonomy Advanced".

Go to this site and choose a Master Site Collection. This is the site collection from which you manage your categories centrally.

After that check all site collections that should be managed from the Master Site Collection.

Central Administration

Home Operations Application Management Site Actions

SharePartXXL Taxonomy Extension Advanced - Central Administration

This page allows you to administrate your SharePartXXL Site collections

Master Site Collection
Site Collection that contains taxonomy administration and category sites

http://spxxl

Site Collections
Select the site collections to be involved for central administrated SharePartXXL Taxonomy Extension.
Remark: Make sure that the feature is deployed correctly to your site collections.

http://spxxl (Feature active)	<input checked="" type="checkbox"/> Managed by Master
http://spxxl/sites/SubSiteCollection1 (Feature active)	<input checked="" type="checkbox"/> Managed by Master
http://spxxl/sites/SubSiteCollection2	<input type="checkbox"/> Managed by Master

OK Cancel

Confirm your changes with "OK".

Categories created at master site collection will be duplicated to all site collections that are managed by master. The category sites with the meta data items lists will be created only at master site collection.

Activate Taxonomy Extension to full version

After ordering you will receive an email which you must reply to. In this email please give us the machine name of the web-frontend-server the Taxonomy Extension has been installed to.

Afterwards (please allow us up to 1 business day) you will receive an email that contains the license information. This is an XML based text that looks like this:

```
<license><licenseid>99</licenseid><licensee>Your company name</licensee> <servername>Your
server name</servername> <version>Basic</version> <issuer>name</issuer>
<signature>41CB1CFF2802503FB52E760A80...</signature> </license>
```

Please paste this information into the configuration options of the Web Part follow these steps:

1. Go to "Central Administration" Site -> Application Administration -> SharePoint Website Administration -> SharePartXXL Taxonomy – License Management

2. Paste the provided XML into the Textbox

SharePartXXL Taxonomy Extension - License Management

SharePartXXL Taxonomy License

Please paste your XML-formed SharePartXXL license key in the right text field.

License

```
<license><licenseid>64</licenseid><licensee>ACME</licensee>  
<servername>Farmserver01</servername>  
<version>Basic</version><issuer>Test User</issuer>  
<signature>F62FEFF4-FB91-48CC-B5E1-  
4C8F41C52AF4</signature> </license>
```

OK

Abbrechen

3. Click OK

4. If licensing is correct the "Trial Version" information in Web Part will disappear.

Updating Taxonomy Extension

To update the Taxonomy Extension please download the latest version by using the download link you already received. If you do not have this information available please register again.

Upgrade to Taxonomy Advanced Edition

To upgrade Taxonomy Extension to Taxonomy Extension Advanced please run "updateSPXXLTE.bat" file that comes with the solution.

Due to Microsoft SharePoint restrictions you may retract and redeploy the solution before you will find the new farm feature available.

So please go to Central Administration -> Operations -> Solution Management. Click on sharepartxml.taxonomy.wsp "Retract Solution". (Assigned categories won't be removed).

Central Administration

Central Administration

Home **Operations** Application Management

Central Administration > Operations > Solution Management > Solution Properties

Solution Properties

View All Site Content

Central Administration

- Operations
- Application Management

Shared Services Administration

- SharedServices1

Recycle Bin

Deploy Solution | **Retract Solution** | Back to Solutions

Retract Solution

Name:	sharepartxxl.taxonomy.wsp
Type:	Core Solution
Contains Web Application Resource:	Yes
Contains Global Assembly:	Yes
Contains Code Access Security Policy:	No
Deployment Server Type:	Front-end Web server
Deployment Status:	Deployed

Wait some time. After solution was retracted successfully it gets status: "Not Deployed". Now redeploy solution by clicking on sharepartxxl.taxonomy.wsp "Deploy Solution".

In a server farm scenario you have to copy language resources on every included server you did not run the updateSPXMLTE.bat file. To do this please run:

```
"%CommonProgramFiles%\Microsoft Shared\web server extensions\12\BIN\stsadm.exe" -o copyappbincontent
```

To verify everything deployed correctly please go to C:\Inetpub\wwwroot\wss\VirtualDirectories\<port of your application>\App_GlobalResources and make sure you find the updated file: "SharePartXXLTaxonomy.resx" in here.

First Steps

The first steps after installation of the SharePartXXL Taxonomy Extension are described in the Taxonomy Administration tab and are repeated and extended here for your convenience.

Activate feature on site collection

On every site collection in a web application where you like to use the Taxonomy Extension the Taxonomy Extension Feature has to be activated.

Go to Site Actions -> Site Settings -> Site Collection Features

Add categories to category list

Categories are managed in the "Categories" list. To add a new category you have to create a new category item in this list.

1. Select "Categories" list at the "Taxonomy Administration" site.



The screenshot shows the 'Taxonomy Administration' site interface. The navigation pane on the left includes 'View All Site Content', 'Lists', and 'Recycle Bin'. Under 'Lists', the 'Categories' item is highlighted with a mouse cursor. The main content area displays the 'Taxonomy Management Center' with a welcome message and two task buttons: 'Copy items template list' and 'Copy Items Template Web Parts', each with a 'Start' button.

2. Click on "New" -> "New Item".

3. Fill out at least the required "Title" attribute and confirm with "OK".

Sample GmbH > Taxonomy Administration > Categories > New Item

Categories: New Item

<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
* indicates a required field	
Title *	<input type="text" value="Public Relations"/>
Synonyms	<input type="text"/> Synonyms for this category, colon-separated
Description	<input type="text" value="PR Department"/> Description of this category
Assignable	<input checked="" type="checkbox"/> An item can be assigned to this category
Navigation	<input checked="" type="checkbox"/> Category is shown as site navigation
A-Z Index	<input checked="" type="checkbox"/> Category is shown in A-Z index view
Categorization Rules	<input type="text"/> Rules for assigning this category to an item (dependent on categorizer)
Categorization Threshold	<input type="text" value=""/> % Threshold for applying the rule (as percentage, default=80)
Sort Order	<input type="text" value="1"/> Sort order of this category in category tree and navigation
Parent Category	<input type="checkbox"/> Root <input checked="" type="checkbox"/> Organization <input type="checkbox"/> Products
Related Categories	<input type="text"/> <input type="button" value="Search"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Organization <input checked="" type="checkbox"/> <input type="checkbox"/> Products Categories that are related to this category
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

A new site "Categories" with a new navigation tab will be created on top-level by default. Beneath this site a new sub site with the name of the new category will be created, too.

4. Repeat step 2. and 3. You can create a hierarchical taxonomy by choosing a "Parent Category" in the corresponding category attribute.

Remark: After you have created a new category item you possibly have to wait a short time before you will see this category in "Parent Category" attribute.

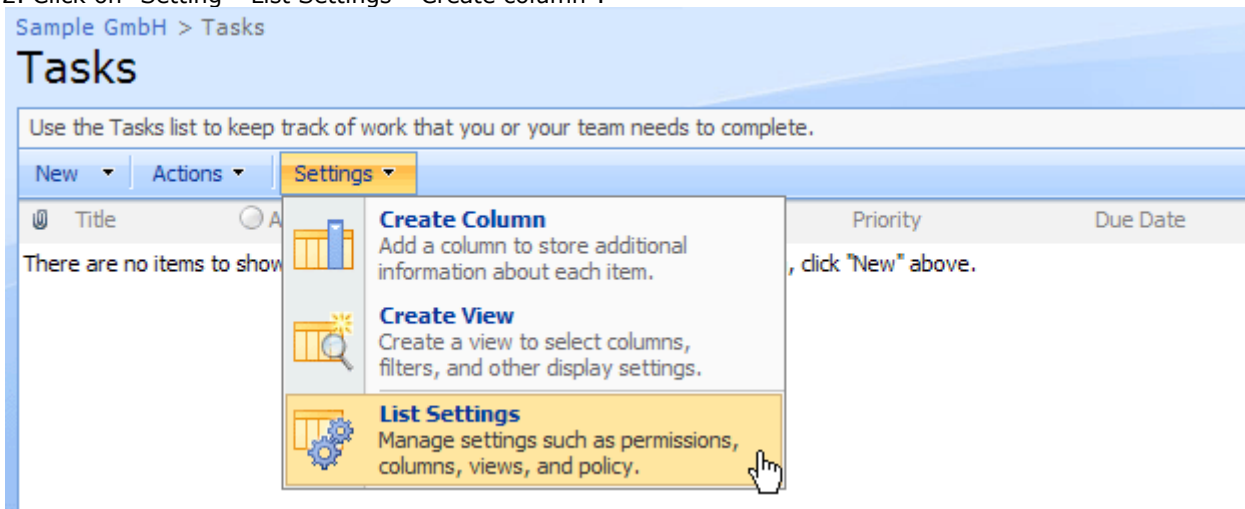
Add the category lookup column to your items list

In an existing or newly created list a category lookup column can be added.

In order to assign categories to your items, you have to add an additional column to your lists or libraries manually.

1. Select the list (or library) where you want to assign categories.

2. Click on "Setting" "List Settings" "Create column".



3. Choose a name for the new column (for example Category) and choose "Lookup to SPXXL Categories" type. Leave "Add to default view" checked, confirm with "OK".

[Sample GmbH](#) > [Tasks](#) > [Settings](#) > [Create Column](#)

Create Column: Tasks

Use this page to add a column to this list.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

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
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Lookup to SPXXL Categories

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes No

Root category Id

Enable category suggestion

Enable category search

Check parent categories, too

Add to default view

OK

Cancel

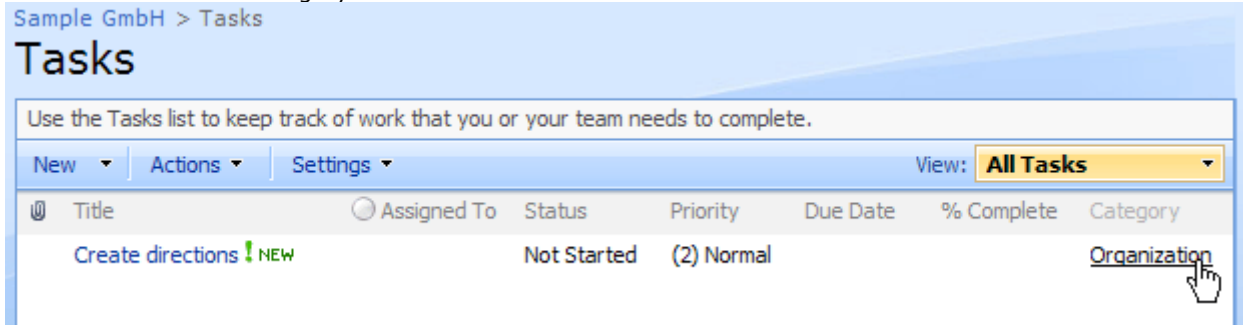
Now you are able to assign categories to that list.

Assign categories to items

In the list with the category lookup column the existing categories can be added to any items.

You can assign one or more categories to existing or new items in lists or libraries.

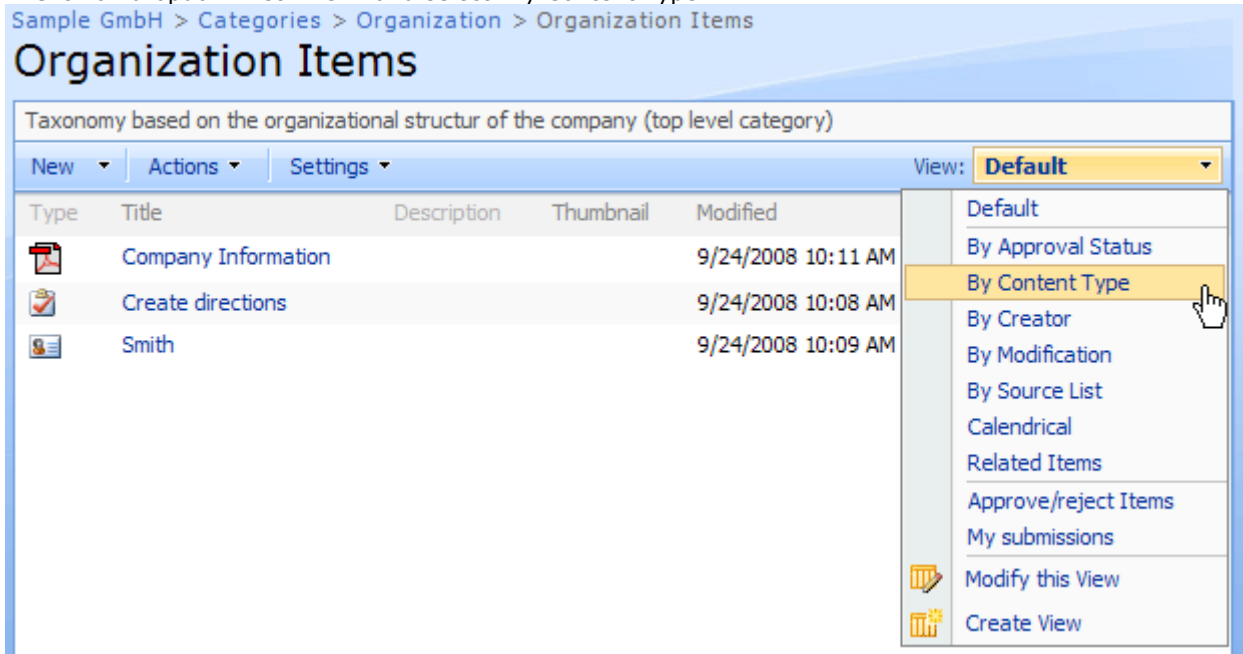
1. Click on the linked category name.



You will be linked to the category meta data items list located at the category site. This list contains meta data for every item assigned to this category - cross list and cross site.

Per default some helpful views come out-of-the-box with this solution. You can group the items by content type for example.

2. Click on dropdown list "View" and select "By Content Type"



If you click on the items title you will be linked directly to the original item.

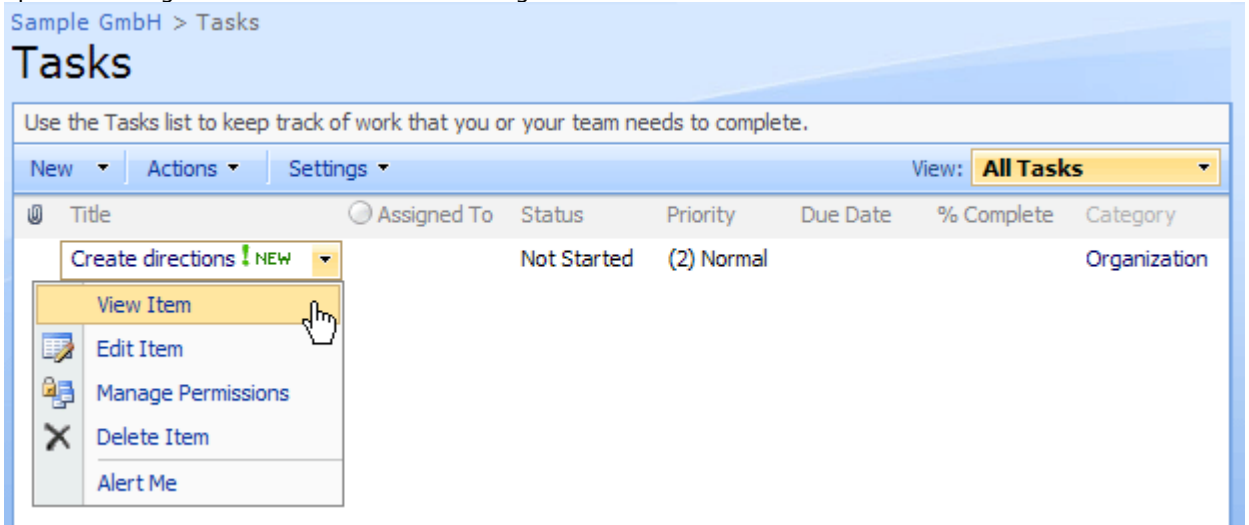
Use the related items links in an items detail view

Klick on an item opens the detail view. Related items can be clicked here.

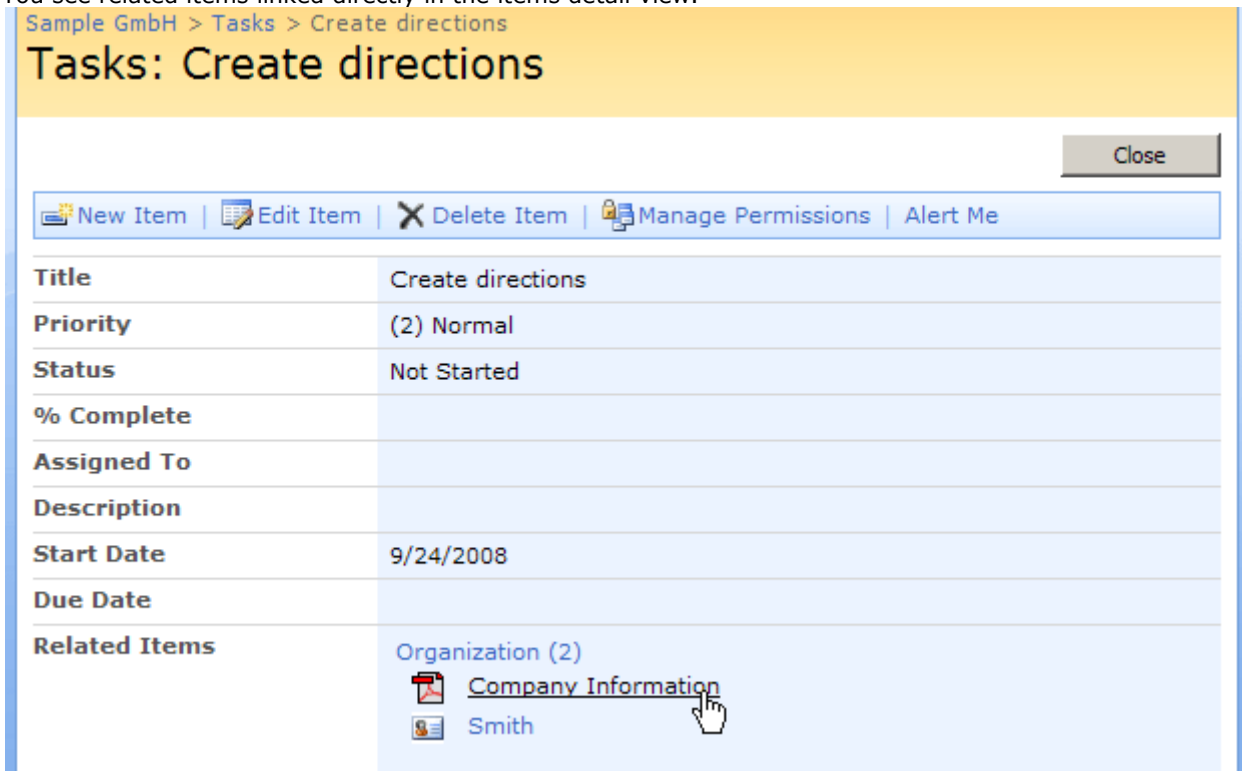
To view related items of the same category directly in the detail view of an item please

1. Select the categorized item list

- Open the categorized item in detail view using "View Item"

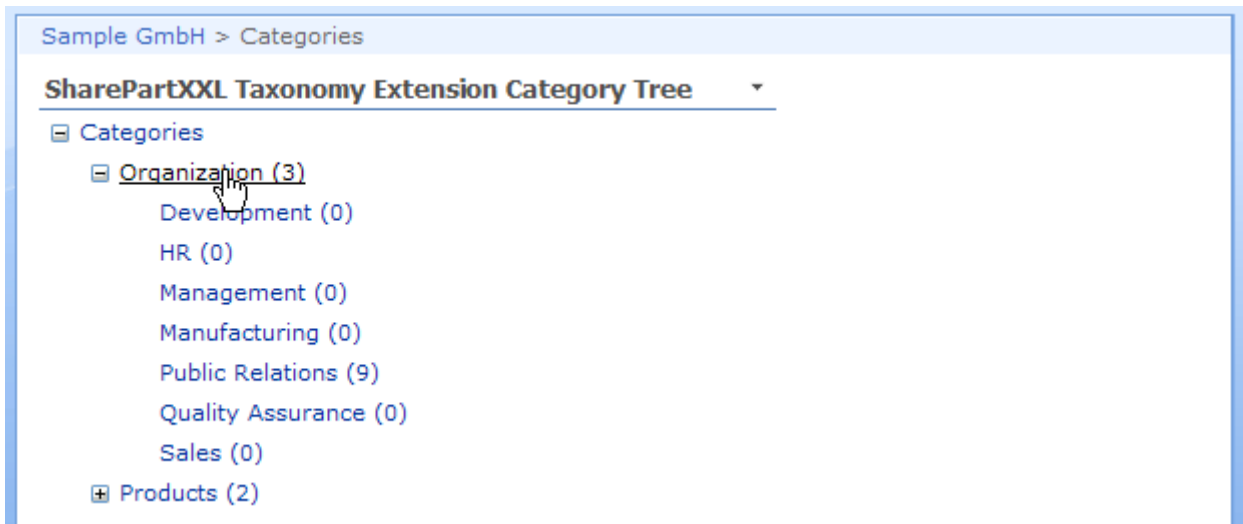


You see related items linked directly in the items detail view.



Use the category tree web part and the tag cloud web part to find all items of a given category

The category tree web part is placed on the categories site by default. To navigate to a given category please click on this category.



Remark:

You can use the web parts settings dialogue to set different modes and views.

Use the default SharePoint navigation to navigate the category tree

By default for every category a category site is created and shown in the default SharePoint navigation below the "categories" site. So you can use the default SharePoint navigation to show all items of a selected category.



Remark:

You can modify this feature later on in the configuration center.

Components

Taxonomy Administration Site

With activating the Taxonomy Extension site collection feature a new site: "Taxonomy Administration" will be created.

This site holds all information necessary to use the Taxonomy Extension and contains the configuration and management Web Part described in the next chapter.

Categories List

Your taxonomies are managed in the Categories list. With this list you can create, update or delete your categories. The tree structure is established by referencing a parent category.

The list comes with the following columns:

- Title: Category title
- Synonyms: Optional Synonyms that are considered for auto categorization and "Suggest" functionality (-> field type "SPXML Categories Lookup")
- Description: Optional description will be displayed at corresponding category site
- Assignable: An item can be assigned to this category
- Navigation: Category is shown as site navigation entry
- A-Z Index: Additional flag that is used for Categories list "A-Z Index" view
- Categorization Rules: Rule for auto categorization and "Suggest" functionality (-> field type "SPXML Categories Lookup"). For "Internal" categorizer that comes with the solution rule must be a regular expression
- Categorization Threshold: Only needed if you use a categorizer other than "Internal"
- Sort order: Used for sorting categories in the same hierarchy level in Category Tree Web Part
- Parent Category
- Related Categories: Hold relation information to display in "Category Information Web Part" for example

Calculated:

- Index: Calculated column for Categories list: "A-Z Index" view
- Displayed Title: Used in "Category Tree Web Part"
Tip: Change formula if you do not want to display count information
- Title with Path
- Count: Number of assigned categories
- Category Link: Depending on operation mode (-> Taxonomy Configuration Center Web Part) this links to corresponding category site or SharePoint search
- Child Categories: Can be used in Category Information Web Part
- Unique Title: Used in "Tagging" operation mode (-> Taxonomy Configuration Center Web Part)

These columns **except "Related Categories"** column are required by system so they cannot be deleted.

If you need additional information stored you can add additional columns anytime.

Categories and category sites

For every category item added to the Categories list a new category site is created automatically (in operation mode "Navigation" and "Metadata" only). These sites are created as sub sites of the Categories site.

The hierarchy of the site structure reflects the parent <-> child relation of your category items in the Categories list.

The category sites contain the meta data result lists (in operation mode "Metadata" only). In these lists the meta data items are located. A meta data item is a copy (of some columns) of the item that is assigned to the corresponding category. You are free to add your own views to each list. If you want to add or modify all category meta data result list you can do this in the -> Items Template list

Items Template list

On every category site a result list is located (in operation mode "Metadata" only). To modify all these lists at once the Items Template list is used. Changes in this list will affect all result lists.

If you add an additional column to this list an additional column will be added to all items lists at once.

New or modified views at the Items Template list are not copied in real time. You will have to start an additional task "Copy items template list" (-> Taxonomy Management Center Web Part)

Log list

Error or logging information are added to the Log list. You can define different log levels at Configuration Center Web Part.

Category Tree / A-Z Index Web Part

The Category Tree Web Part renders the Categories list as tree structure or A-Z index inside a web part. It is placed by default on the Categories root site. You can use this Web Part on any page you like. The category names are linked to the category-based metadata sites or search results (depending on operation mode). This information comes from the Categories list column "Category Link". Sub trees are loaded dynamically on demand.

By default all categories are shown ordered by the column "Sort Order" and "Displayed Title" of Categories list.

Web Site Content by Category

- [-] Categories
 - [-] Products (2)
 - [-] Taxonomy Extension (14)
 - Categorizer (6)
 - Concept (18)
 - Installation (7)
 - Known Problems (5)
 - Licensing (11)
 - Localization (2)
 - Programming and Customizing (8)
 - [-] Web Parts (0)
 - Category Information Web Part (1)
 - Category Tree Web Part (1)
 - Tag Cloud Web Part (2)
 - Taxonomy Configuration Web Part (5)
 - Taxonomy Management Web Part (3)
 - General (14)
 - Newsletter Web Part (1)
 - [-] Company (4)
 - Contact (2)
 - Press Information (9)

In configuration section of Web Part settings you find the following entries:

- Root Category ID: To display sub trees only you can change the default value "0". The new root ID to be set here is the ID of the corresponding category item in the Categories list
- Enable Category Site Mode: If checked and the Web Part is placed on a category site only child categories will be displayed
- Expanded by default: If checked the tree will be rendered expanded
- Display Mode: Possible values "TreeView", "TreeView_A-Z", "Flat_A-Z"

A-Z Index

|C|G|I|K|L|N|P|T|W|

-C-

Categorizer (6)
Category Information Web Part (1)
Category Tree Web Part (1)
Company (4)
Concept (18)
Contact (2)

-G-

General (14)

-I-

Installation (7)

-K-

Known Problems (5)

-L-

Licensing (11)
Localization (2)

-N-

Newsletter Web Part (1)

-P-

Press Information (9)
Products (2)
Programming and Customizing (8)

-T-

Tag Cloud Web Part (2)
Taxonomy Configuration Web Part (5)
Taxonomy Extension (14)
Taxonomy Management Web Part (3)

-W-

Web Parts (0)

You can customize the category's display title by modification of the calculated column "Displayed Title" in the Categories list. So you can include any other useful information that is available in the categories list, e.g. item count etc.

Tag Cloud Web Part

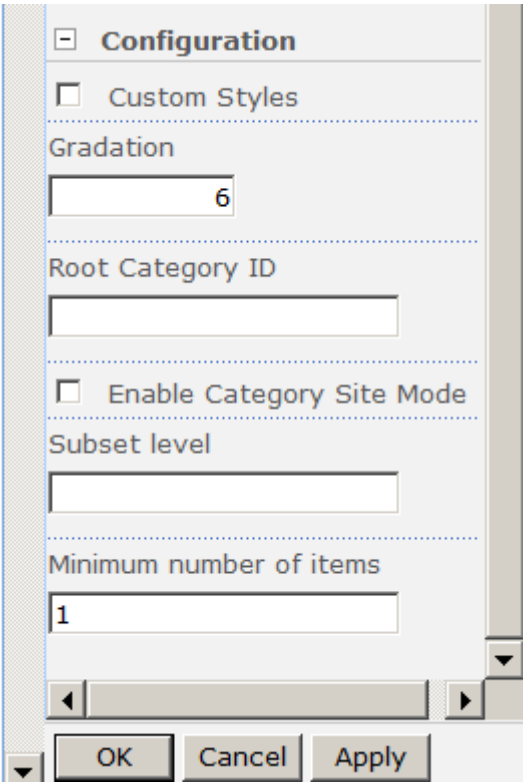
A **tag cloud** or **word cloud** (or **weighted list** in visual design) is a visual depiction of your generated tags, used typically to describe the content of your web. Tags are the names of your categories and are

listed alphabetically, and the importance of a tag is shown with font size and impact. The tags are hyperlinks that lead to the meta data items lists that is associated with the category.

So you can easily distinct between popular and less popular used categories on the current website while the exact number of associated items is shown when hovering over a tag.



You can add a Tag Cloud Web Part to any of your websites and customize the categories that will be shown: Just enter the "Modify Shared Web Part"-mode and go to Configuration section:



Gradation this will change the numbers of different levels that will be shown; only values between 2-10 will be applied.

Root Category ID If you want to show only a sub tree of your taxonomy then enter here the ID of the category from which on the sub tree starts. Please look up this ID at the Categories list by adding the field CategoryID to a view. If you leave this field empty all categories will be shown.

Category Site Mode if enabled and with the Tag Cloud placed on a category site, only the sub tree of the respective category of this site will be shown. This is exceptionally helpful when putting a Tag Cloud on the Meta Template Site as you don't have to adjust all copied Tag Clouds on each category site with the appropriate Root Category ID.

On non-category sites this feature won't change the Tag Cloud's behavior.

Subset level with Category Site Mode enabled you can decide which levels- related to the current category of the site the Tag Cloud resides on- of categories will be shown

'0' all children of the current category (sub tree without current category)

'1' all children of the current category's parent (sub tree of parent incl. current category)

'2' all children of the current category's grandparent (sub tree of grandparent incl. current category)

Minimum number of items only categories that are assigned at least this number of items will be shown within the Tag Cloud.

To configure this web part with custom styles

1. go to the section "Configuration" of the Web Parts edit view,
2. check "custom styles" and
3. enter the number of levels.

The solution uses a theme file for the style sheet. By default themes can be found in:

```
<%Program Files%>\Common Files\Microsoft Shared\web server  
extensions\12\TEMPLATE\THEMES\<MyTheme>
```

Please edit the file "theme.css" in this directory. For each of the n levels to be displayed on the tag cloud define a CSS-style with the naming convention "SPXXLTagCloudStyle_n"
e.g.

```
.SPXXLTagCloudStyle_1  
{
```

```

background:#f3f8ff
font-size:xx-small;
}
...
.SPXXLTagCloudStyle_n {
background:#ffa020
font-size:x-large;
}
for the levels 1 to n.

```

The Microsoft supported procedures for applying custom themes are to modify the theme files under the Themes directory and then run a IISreset on the web server.

If the site doesn't refresh properly just change its theme to another theme and change back to the new modified theme and it will refresh properly. There are also cases where a cache-refresh (by pressing CTRL, SHIFT and the IE's refresh-button) can be useful.

Category Information Web Part

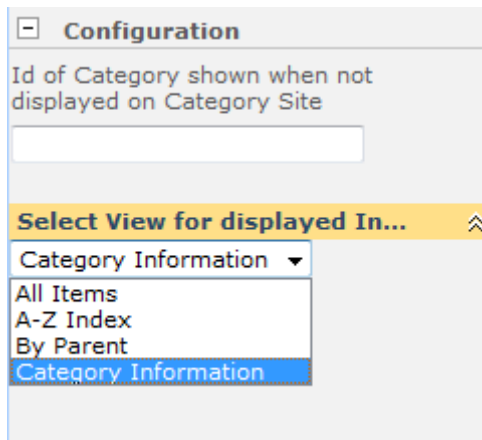
This Web Part displays detailed information of one category, similar to an item's detail view - but inside a Web Part. It can be used to quickly navigate to the parent category, to child categories or cross tree to related categories.

Category Information	
Title	Public Relations
Title mit Pfad	Organization > Public Relations
Beschreibung	This category should be given to all items and documents that are related to the Public Relations department.
Synonyme	Press Information, PR
Anzahl	8
Edit	
Modified	7/10/2008 3:15 PM
Modified By	System Account
Related Categories	Management Sales
Parent Category	Organization
Child Categories	

By default this Web Part is placed on all category based sites.

The Web Part can be configured in configuration section of the Web Part's edit mode.

It is possible to set the displayed fields by referring to a view of the Categories list. The current category can be set manually by ID or taken dynamically from the context of the category site, where the Web Part is placed.

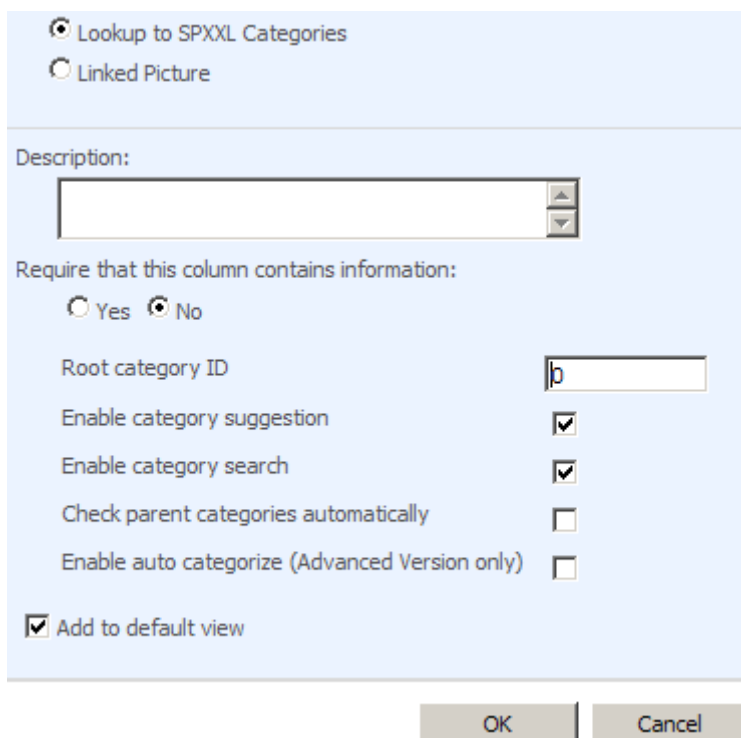


Field Type "SPXML Categories Lookup"

With the solution a new field type is installed. It is used to assign categories to your list or library items.

To do so add column type: "Lookup to SPXML Categories".

Additional parameters can be set:



- Root category ID: With default value "0" the whole category tree will be rendered. You can define another root category to render a sub tree only. The ID to be set here is the ID of the corresponding category item in the Categories list
- Enable category suggestion: If checked the functionality to suggest categories will be shown. The suggestion can be either "Last used categories" or the result a categorizer returns

- Enable category search: If checked category search functionality can be used. This is helpful if you have many categories defined. You can use the search functionality to reduce the set of displayed categories before assigning.
- Check parent categories automatically: This is a client site function. When a category is checked all its parent categories are also checked automatically
- Enable auto categorize (Advanced Version only): If checked the column becomes read only. Category assignment is done with the result of the used categorizer

When you open the list or library containing this column in edit form it will look like this:

The screenshot shows a web part titled "Category" with a light blue background. At the top left, the title "Category" is displayed. Below the title, there are two radio buttons: "Last used categories" (which is selected) and "Categorizer". To the right of these radio buttons is a "Suggest" button. Below the radio buttons is a search input field and a "Search" button. At the bottom of the web part, there are two expandable category lists: "Products (4)" with a checked checkbox and "Company (4)" with an unchecked checkbox.

For "Suggest" functionality you have two options:

- "Last used categories": All categories will be checked the current user has used in this list or library the last time. This makes it very fast and easy to assign similar categories to similar items of a list. If the user has never assigned categories to an item of this list, there will be no suggestions.
- Categorizer: Categories returned from the categorizer will be checked. In Configuration Center Web Part you set the categorizer that is used.

If you search for a category all categories containing the substring in its title will be returned. To view the whole tree enter "*".

Rule Validation Web Part

This WebPart is created automatically at Rule Validation site beneath Taxonomy Administration site. It helps you to create rules for category suggestion and auto categorization functionality.

Rule Validation	
Rule expression	<input type="text"/> Enter the expression you want to check here
Category	<input type="text" value="--direct input--"/> or choose an existing Category whose rule expression will be checked
List	<input checked="" type="checkbox"/> Site collection Finally choose the list whose items will all be checked for the validity of the expression
	<input type="button" value="Search"/> Check on which items within the selected list the rule expression applies to
Results	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> View the item details by doubleclicking an item

- Rule expression: If you are using the internal categorizer (default behavior) please insert a regular expression here
- Category: If you want to use the rule that is defined in a corresponding category item you can select a category instead of the rule expression
- List: Choose a list to which items you want to apply the selected expression (rule)
- Search: Click on this button to view all items that apply to the entered or selected expression (rule)

Konfiguration / Management

Configuration Center Web Part

Per default the Configuration Web Part is located at Taxonomy Administration site. You can change the following settings:

- Log level:
 - **Debug**
This is the highest log level. All available information is logged. Please set this level for debugging only.
 - **Info**
Additional information is logged.
 - **Warning**
Warnings are logged.
 - **Error**
This is the lowest and the default level, only errors are logged.
- Operation Mode:

- **Tagging:** Use this mode for tagging your items only. No category based sites and no meta data items lists will be created. Category links trigger the default WSS/SharePoint search procedure to show all items with given category. This is the most simple operation mode with nearly no overhead, like metadata, site navigation, result views etc.
Use this mode if want to keep things simple and in case you have lots of documents.
- **Navigation:** Use this mode if you want category based sites, but no meta data items list be created. Category links in this case go to the category sites. You can place additional information, e.g. Web Parts, on the category-based sites by your own.
- **Metadata** (default): Use this mode if you want the full functionality: Category based sites and meta data items lists are created. For every category assignment a meta data item will be created.
- Type of navigation:
this settings affect the "Category Link" content of the "Categories" list. Choose from one of the following options:
 - **List:** The link will refer directly to the meta data items list of the corresponding category
 - **Site:** The link will refer to the default.aspx of corresponding category site

Remark: "Category Link" is also used in Tree View Web Part and Tag Cloud Web Part.

- Type of categorizer:
 - **Internal:** This categorizer comes with the solution per default. It works with regular expression rules and returns true or false only
- Type of categorizer
 - **Internal:** This categorizer comes with the solution per default. It works with regular expression rules and returns true or false value only

Remark: If you are interested in other categorizer please contact SharePointXXL directly.

Management Center Web Part

The SharePointXXL Taxonomy Management Web Part is placed at Taxonomy Administration site and provides some often required tasks to manage the taxonomy solution:

- **Copy items template list:**
Modifications of the "Items Template" list views and versioning settings are not published automatically. This task will copy all views and versioning settings from the "Items Template" list to all lists on your category-based sites.
- **Copy Item Template Web Parts:**
Modifications of the "Items Template" site are not published automatically. This task will copy all Web Parts from the "Items Template" site to all category based sites. Remark: Every view in the Items Template list is treated separately.
- **Reset list views:**
This task will reset the views of the "Items Template" list and the "Categories" list to the installation default.
- **Update categories count:**

Category count is set in real time. If many assignments are done parallel the value may get wrong. In this case use this task to recalculate the count of assigned items for every category

- **Update category rights:**

This task will copy item level security settings of Categories list items to corresponding category site. Warning: Inheritance from parent Site will be disabled

- **Update category sites:**

This task will update all metadata items in items list of every category. Start this task if you have deleted a category site or you have changed operation mode

- **(Re-)categorize content:** (Advanced version only)

This task will categorize (again) all items and documents containing category fields with auto categorize feature enabled

- **Export categories:**

This task will export the current "Categories" list into XML file format. To receive the file press "Download" button.

- **Import categories:**

This task will import external categories from a XML file. Please make sure that the file has the required format. First select file and then press 'Upload' to start the task.

In Configuration settings of this WebPart you also find the following settings:

- License
- Use item level security

License

In license field you have to paste the XML license information you receive after you bought the solution. This will remove the category amount limitation.

Use item level security

In operation mode "Metadata" meta data of every item you assign a category to are copied to the meta data items result list. The access rights of the original item are copied also. That means only user that are allowed to see the original item are allowed to see the meta data item in the Items list.

This option is checked by default. If you do not need this functionality please deactivate item level security.

Import Categories via XML

If you want to import categories via XML format you need a file containing data like this:

```
<?xml version="1.0" encoding="utf-8"?>
<TaxonomyRoot CreateDate="2/10/2009" CreatedBy="SharepartXXL Taxonomy Extension">
  <Taxonomy ID="10" Name="Company" Synonyms="Company, Sharepart XXL" Description="this is our
Company" AZIndex="True" Navigation="True" Assignable="True" SortOrder="0">
  <Taxonomy ID="20" Name="Department" Synonyms="" Description="grouping the departments"
AZIndex="True" Navigation="True" Assignable="True" SortOrder="0">
  <Taxonomy ID="30" Name="Sales" Synonyms="Sales,marketing,PR" Description=""
AZIndex="True" Navigation="True" Assignable="True" SortOrder="0" />
  <Taxonomy ID="40" Name="Development" Synonyms="" Related="60;70" Description=""
AZIndex="True" Navigation="True" Assignable="True" SortOrder="0" />
  </Taxonomy>
</Taxonomy>
<Taxonomy ID="50" Name="Products" Synonyms="Product,Part,Solution" Description="these are our
```

```

products" AZIndex="True" Navigation="True" Assignable="True" SortOrder="0">
  <Taxonomy ID="60" Name="Newsletter" Related="40" Synonyms="" Description=""
AZIndex="True" Navigation="True" Assignable="True" SortOrder="0" />
  <Taxonomy ID="70" Name="Taxonomy Extension" Synonyms="" Description="" AZIndex="True"
Navigation="True" Assignable="True" SortOrder="0" />
</Taxonomy>
</TaxonomyRoot>

```

With the position of the node the hierarchy is defined. The attributes relate to the column names. So if you want to import additional information just add an attribute with the same name as the column you want to place the content to.

For defining relations you can define your own IDs and reference to them. As shown in the above sample element "Development".

If you import categories to a list that contains already categories it will affect them only if the root node(s) matches:

So for example you have two root categories ("Products" and "Services") with sub categories defined already and you import the sample XML, "Services" will stay unaffected.

On the other hand the existing sub categories of the "Products" node will be changed to the imported structure. The categories will usually be identified by its names and their position.

If you want to modify existing content via Export / Import mechanism the XML looks almost the same. But in the "Taxonomy-Root" element you find an additional attribute: "ListGUID". The exported IDs match to the internal IDs of the Categories list items. In this case you can modify the category names also.

Using Categorizer

The solution comes with the internal categorizer. This categorizer is based on regular expressions. It validates a regular expression (rule) given in Categories list, category item, attribute "Rule" against items and documents including files and attachments (if IFilter for the file type is available).

If no rule given:

If no rule is given (empty category attribute "rule") the following category attributes are automatically validated against the item or document:

- title
- synonyms

If rule is given

If a rule is given in the category attribute "rule" this rule is validated only. No other attributes are used. The rule has to be a valid regular expression. See FAQ about regex for more info, syntax etc.

Please note that other, more complex categorizers are available too, depending on license.

Using SharePoint Search

For every category item a unique title is created per default. It is a string combination containing the id and category title (for example: "4_Company").

After your website is (re-)indexed you will find assigned items with this name.

If you use Taxonomy Extension in operation mode "Tagging", category links in tag cloud and tree view Web Part will automatically trigger the WSS search with the corresponding category.

To use Office SharePoint Server Search go to "Taxonomy Configuration Center" on "Taxonomy Administration" site and change parameter "Search Url". The placeholder "[SPXXLCategory]" will be substituted with category's unique title.

By entering another URL with this placeholder it is possible to integrate search providers from other vendors, too.

Using SharePoint Content Query Web Part

To use the Content Query Web Part you have to create a site column (e.g. SPXXLCategory) of type "Lookup to SPXXL Categories".

This site column must be added to your lists and libraries whose items you want to categorize.

In the categories list add "Unique Title" to the default view to determine the value you will need for filtering. It is a unique combination of category ID and category title, e.g. "4_company".

Remark: "Unique Title" is only visible in Operation modes "Navigation" and "Metadata".

Fill out filter settings and use the Unique Title name as shown in screenshot below.

Content Query Web Part

Content Query Tool Part

Query [Help](#)

Source:

- Show items from all sites in this site collection
- Show items from the following site and all subsites:
 [Browse...](#)
- Show items from the following list:
 [Browse...](#)

List Type:

Show items from this list type:
Custom List

Content Type:

Show items of this content type group:
<All Content Types>

Show items of this content type:
<All Content Types>

Include child content types

Audience Targeting:

- Apply audience filtering
- Include items that are not targeted

Additional Filters:

Show items when:

- SPXXLCategory
- contains
- 4_Company

Using SPXXL category in DataSheet view or document information panel (DIP)

In datasheet view and document information panel the category lookup field is read only.

To modify its content anyway the Taxonomy Extension provides the following workaround:

- Add a new "Single line of text" or "Choice" column with the **name of your SPXXL category**

English > Tasks > Settings > Create Column

Create Column: Tasks

Use this page to add a column to this list.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

CategoryString

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)

- Verify that the column names fit together

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Priority	Choice	
Status	Choice	
% Complete	Number	
Assigned To	Person or Group	
Task Group	Person or Group	
Description	Multiple lines of text	
Start Date	Date and Time	
Due Date	Date and Time	
Category	SPXXL Categories Lookup	
CategoryString	Single line of text	
Created By	Person or Group	
Modified By	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Column ordering](#)
- [Indexed columns](#)

- Change to datasheet view and enter the category name you want to assign. Different categories are separated by ";" (without space)

the Tasks list to keep track of work that you or your team needs to complete.

View ▾ | Actions ▾ | Settings ▾

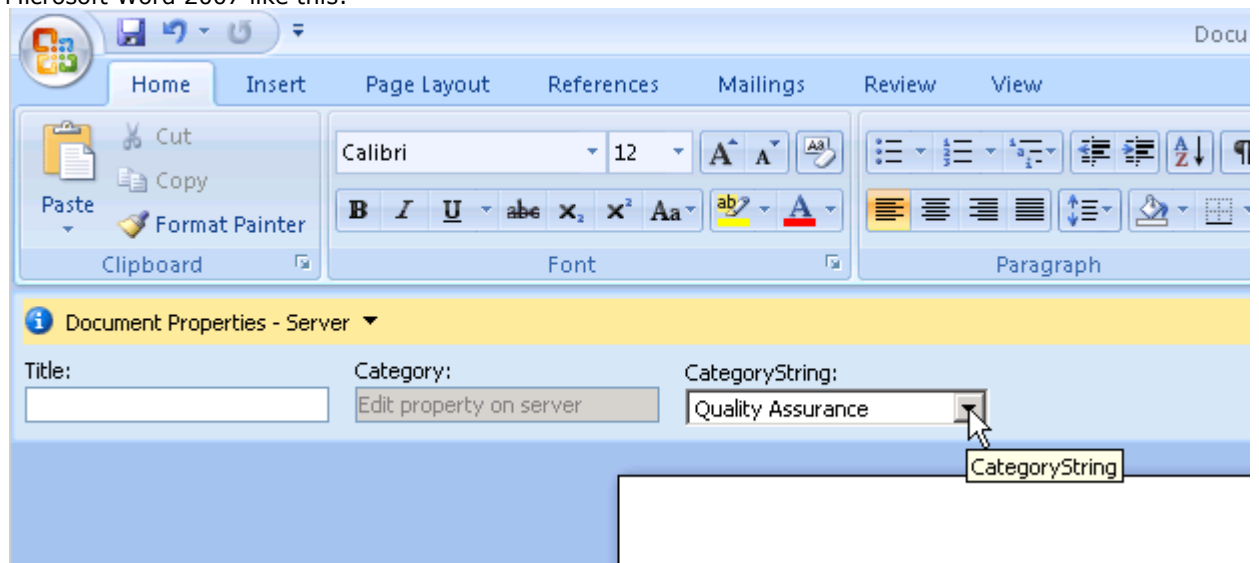
% Complete ▾	Category ▾	CategoryString ▾
	7: #Organization > Quality Assurance	Quality Assurance
		Organization;Quality Assurance

- When you move to another field, the category field will be updated automatically

the Tasks list to keep track of work that you or your team needs to complete.

% Complete	Category	CategoryString
	7:#Organization > Quality Assurance	Quality Assurance
	1:#Organization;#7:#Organization > Quality Assurance	Organization;Quality Assurance

- If you are using column type "Choice" the document information panel will be rendered in Microsoft Word 2007 like this:



Working with SharePointXXL Taxonomy Extension

Creating a suitable Taxonomy

Creating the taxonomy structure in the Categories list is hard work - but a well designed one will pay a big dividend for all users. You have to think about the following:

- The taxonomy should be simple and flat so that it can be navigated easily. If it becomes too deep and complex then users will end up lost.
- Typical taxonomies are **product groups**, product parts or modules, **service offers**, **organizational structure of company**, **geographical locations** (countries, subsidiaries) or **languages, task or process based** or **target group based** navigations. With SharePointXXL you can have several taxonomies at once.
- There is latitude for the taxonomy to grow, adapt and change over the lifetime of its use.
- Ensure that the audience of all users (both internal and external, experts and newbies) and what they want from the system is understood. In particular, the taxonomy should cover the topics of interest to its audience.
- Understand, that the dynamics of the taxonomy and the information it describes are completely different. The organisation's information content may change rapidly, but the

knowledge structure should be sophisticated enough to contain these alterations without much change itself.

- The taxonomy should conform to ISO or ANSI standards if available and contain scope and historical notes or other relevant metadata for each preferred term to explain its usage and how it came to be in the taxonomy. This can be done by enabling versioning in the category list.
- The taxonomy should have restrictions for general users adding or removing terms by using the SharePoint default access rights system.

Industry standard products and services taxonomies have been [pre-packaged by our taxonomy partners](#) for delivery, available in multiple languages, e.g. for:

- Agriculture and Forestry,
- Arts, Crafts and Hobbies,
- Automotive,
- Books,
- Music and Video,
- Building and Construction,
- Clocks and Watches,
- Communications,
- Computer & Information Technology,
- Consumer Electronics,
- Education and Training,
- Electrical and Electronics,
- Environmental,
- Fashion and Apparel,
- Fine Art, Antiques & Collectibles,
- Food and Beverage,
- Gifts and Jewelry,
- Home and Garden,
- Industrial Equipment & Supplies,
- Medicine,
- Metals,
- Minerals, Mining and Drilling,
- Office Equipment & Supplies,
- Packaging,
- Personal Care,
- Photography,
- Plastics and Rubber,
- Safety and Security,
- Science and Technology,
- Services,
- Sports and Recreation,
- Textiles and Leather,
- Toys and Games,

- Transportation

Setting up a media library

The SharePointXXL Taxonomy Extension for Microsoft SharePoint can help you a lot to build an easily browsable cross-site media or image library:

- In most cases you have to provide different source image libraries, e.g. for different groups of users (departments, external, internal), with different access rights. Some image libraries are possibly for internal use only. So the real site structure highly depends on your organization and processes.
- Using SharePointXXL Taxonomy Extension for Microsoft SharePoint you can assign multiple cross-site categories to each item of any list or library.
- So you can browse the images independent from its fixed location in sites by the additional category driven site navigations.
- Useful cross-site views are automatically created, e.g. new images, images by source list, by modification (time based), a calendar view, by creator etc.
- Thumbnail images are provided as in the source library by default.
- All source list attributes can be configured to be available in category driven list too, e.g. width, height, resolution, etc. - as available in source list.
- You can subscribe to category-based lists of cross-site items by RSS and email alerts, e.g. all media items of the category "Nature" - independent of its location and type. Possibly tasks or other items that are related to the media can also be tagged.

Setting category based alerting

The Taxonomy Extension provides cross-list cross-site category based lists of meta data items. Based on this lists the default WSS/MOSS alerting feature can be used to inform subscribers about changes.

These alerting features can be customized on SharePoint level or 3rd party solutions - e.g. **Alert Plus Web Part** - can be used to customize the category based alerting. Any solution should work with the Taxonomy Extension because the category based lists of metadata are default SharePoint lists.

SharePartXXL Taxonomy Extension Advanced

With Advanced version you can categorize your items cross site collection.

Because a lookup column can only display content of the same site collection this is done by different Categories lists. There is one list for each involved site collection.

Whenever you add or update a category item at your Master site collection this is duplicated to the Categories lists on all involved site collections.

Remark: In current version changes to the Categories list itself are not duplicated.

To use this functionality you first have to activate the farm feature "SharePartXXL Taxonomy Extension Advanced" at Central Administration site (-> Operations -> Global Configuration, Manage farm features).

Now you will find a new entry: "Manage SharePartXXL Taxonomy Advanced" in Central Administration -> Application Management -> SharePoint Site Management.

This will link you to a configuration site where you can define your "Master Site Collection" and the involved site collections.

Central Administration

Home Operations Application Management Site Actions

SharePartXXL Taxonomy Extension Advanced - Central Administration

This page allows you to administrate your SharePartXXL Site collections

Master Site Collection
Site Collection that contains taxonomy administration and category sites

Site Collections
Select the site collections to be involved for central administrated SharePartXXL Taxonomy Extension. Remark: Make sure that the feature is deployed correctly to your site collections.

http://spxxl (Feature active)	<input checked="" type="checkbox"/> Managed by Master
http://spxxl/sites/SubSiteCollection1 (Feature active)	<input checked="" type="checkbox"/> Managed by Master
http://spxxl/sites/SubSiteCollection2	<input type="checkbox"/> Managed by Master

OK Cancel

If the feature is not already activated this will be done automatically. But you have to make sure, that Taxonomy Extension is deployed correctly to all site collections where you want to use it.

The category sites and meta data items lists are created at the master site collection only. So you will see all items cross site collection that are assigned to the same category. Remark: Access rights of this result items won't be copied from another site collection!

Customize category sites

If you want to add Web Parts for example you can do this by adding Web Parts to the Items Template list at Taxonomy Administration. After this you have to start Task "Copy Items Template Web Parts".

The category sites are based on the "SPXXL category blank site" site definition.

It is located at:

C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\SiteTemplates\SPXXL

If you want to add an additional list to all your category sites for example please modify the "onet.xml" file. More information about this you can find here:

<http://dotnet.sys-con.com/node/48162?page=0,0>

If you want to apply another theme per default you can have a look at this blog:

<http://www.sharepoint-tips.com/2006/03/automatically-applying-theme-to-site.html>

Customize meta data items list

With the SharePointXXL Taxonomy Extension you can browse category-based cross-site lists of meta data of the categorized items. These lists are created automatically if you create categories. To managed the features of these lists, e.g.

- **fields** (columns of meta data)
- **views** (e.g. Grouped by Author)
- **list versioning settings**

you can use the Items Template list on the Taxonomy Administration site. The Items Template list acts as a template for all meta data items lists.

Field / Column Management:

By default there are some fields/columns defined in the items template list, like

- **Type** (a icon that represents the type of the item, e.g. word document, image etc. It is linked to the source item)
- **Linked Title** (the title of the source item linked to the source item)
- **Description** (if the source item contains a column description this column is mapped automatically to result list)
- **Thumbnail** (if the source item contains a column description this column is mapped automatically to result list)
- **Created / Created By** (same as source columns)
- **Modified / Modified By** (same as source columns)
- **Modified Month** (The month of last modification, to allow views grouped by this)
- **Modified Year** (The year of last modification, to allow views grouped by this)
- **Type Of Content** (the content type of the source item)
- **Source** (a link to the list/library of the source item)
- **Title** (the title of the source item)
- **Title (linked to item with edit menu)** (provided by SharePoint, Please do not use)
- **Title (linked to item)** (the full meta data information is shown in detail view)
- **Edit (link to edit item)** (provided by SharePoint, Please do not use)
- **Approval Status / Approver Comments** (workflow information from source item)
- **Version** (provided by SharePoint, Please do not use)

If you add or remove columns in this list all result lists will be automatically modified with the same schema. All content from columns of the source item that are available in the items template list with same name and type are automatically available in the result list.

Example:

In your source list MyTasks you have a column "company". You want to have the value of this column as meta data in the result list. So you have to add a column "company" of the same type to the items template list. Then for all **newly** categorized items that have a column company of the same type, the values of this column are shown in all result lists.

View Management

In the result lists you have some views available by default:

- By Modification (list view, calendar view)
- By Creator
- By Content Type (e.g. document, task, contact, etc.)
- By Source List (where the item is originally hosted)
- By Approval State (of the source item, if versioning/workflow is enabled)

- By Relevance (Advanced Version only)
- Related Items

You can define your own custom views for the result lists using the items template list.

Example:

In your source lists or libraries you often use a column company. You have already added the column to the items template lists (see above). Now you want to make use of the column to group the result lists by company. So you have to create a view, e.g. "By Company", in the items template list that groups by company.

Tip:

You should enter some typical sample data in the Items Template list. In this way you can more easily configure the views.

After creating or modifying the views you have to go to the Taxonomy Management Center and use the command "Copy Items Template list". This will copy all views from Items Template list to items list on your category sites.

You can recreate the default fields / columns and views at any time using the command "Reset list views" on the Taxonomy Management Center. This will reset SharePointXXL views of "Items Template" list and "Categories" list to default. You will lose all custom changes in this case.

Customize rendering of related items

In the detail view of any categorized item a related items list is shown automatically. Per default this list is limited to the first 20 entries per category (ordered by title). If you want to see more, please click on the corresponding category name.



To change the displayed attributes or item limit you can modify "Related Items" view in the meta data items lists.

If you want to change this for all categories you can also modify the "Related Items" view in "Items Template" list.

Remark: Don't forget to copy changed view with task: "Copy Items Template list" at Taxonomy Management Center.

The SharePartXXL Taxonomy API

By installing the Taxonomy Extension SharePartXXL.Taxonomy.dll is deployed to your global assembly cache.

To add a reference to this dll you have to copy this file first.

To do this please run "cmd" and change to the directory
"c:\WINDOWS\assembly\GAC_MSIL\SharePartXXL.Taxonomy\1.0.0.0__c4dd89bc95ebaa
cf"

The SharePartXXL.Taxonomy.IApplication interface supports the following functions:

- `SPList GetCategorySPList();`
Returns the "Categories" SPList object
- `CategoryItem GetCategoryItemById(int id);`
Returns the category list item of given category item id
- `List<SPXXLCategoryFieldLookup> ListSPXXLCategoryFields(SPList spList);`
Returns all SPXXLCategory fields of a given SPList object
- `SPListItemCollectionWrapper<CategoryItem> ListCategoryByParent(int parentCategoryId);`
Returns all child category items of given parent category Id
- `SPListItemCollectionWrapper<CategoryItem> ListAllSubChildren(int parentCategoryId);`
Returns all child and sub child category items of given parent category Id

Look at the sample below to see how to use the API to assign categories to existing list items:

```
using System;
using Microsoft.SharePoint;
using SharePartXXL.Taxonomy.Wrapper;
using SharePartXXL.Taxonomy;

...
Guid siteCollectionGuid;
//ToDo set siteCollectionId
IApplication application = new Application(siteCollectionGuid);

//You can access the Categories list by using:
SPList categoriesSPList = application.GetCategorySPList();

SPList yourListToCategorize = null;

//ToDo set "yourListToCategorize"

//Get the "Lookup to SPXXL Categories" field:
SPField spXXLCategorySPField =
application.ListSPXXLCategoryFields(yourListToCategorize)[0];

foreach (SPListItem spListItem in yourListToCategorize.Items)
{
    SPFieldLookupValueCollection lookupValueCollection =
        new SPFieldLookupValueCollection();
    int categoryId = 0;

    //ToDo set categoryId
```

```

CategoryItem categoryItem =
    application.GetCategoryItemById(categoryId);

lookupValueCollection.Add(
    new SPFieldLookupValue(
        categoryItem.ID,
        categoryItem.UniqueTitle));

spListItem[spXXLCategorySPField.Id] = lookupValueCollection;

spListItem.Update();
}

```

Change language resource file

The Taxonomy Extension uses .NET resource files. They are located at different locations:

Field names and descriptions are defined at:
`..\12\Resources\SPXXL.resx*`

Solution name and description are defined at:
`..\12\TEMPLATE\FEATURES\SharePartXXLTaxonomy\Resources\Resources.resx*`

Labels and texts are defined at:
`..\12\CONFIG\Resources\SharePartXXLTaxonomy.resx*`

You can edit them with every text editor (e.g. Notepad). Please be careful to leave existing XML structure unchanged.

Modifications of files located at "`..\12\CONFIG\Resources\`" directory will affect only after you run command:
`"%CommonProgramFiles%\Microsoft Shared\web server extensions\12\BIN\stsadm.exe" -o copyappbincontent`

This command copies all resource files to all your application directories (for example:
`\Inetpub\wwwroot\wss\VirtualDirectories\80\App_GlobalResources`)

Mention: If you edit existing resource files they will be overwritten by updating SharePartXXL solution.

To avoid this you can create your own language resource files. If you want to use it in Spanish environment you can copy "SharePartXXLTaxonomy.resx" to "SharePartXXLTaxonomy.es.resx" for example.

***Remark:** In SharePoint default installation this is "C:\Program Files\Common Files\Microsoft Shared\web server extensions\" directory

Adding SPXXL Categories Lookup column with the API

To assign categories to your items of your lists or libraries you have to add a "SPXXLCategory" lookup column.

You can do this for all your lists as shown in the sample below:

```

using (SPSite siteCollection = new
SPSite("http://yourServerUrl"))
{
    SPField categorySiteColumn;

```

```

using (SPWeb rootSite = siteCollection.RootWeb)
{
    categorySiteColumn =
rootSite.Fields["yourSiteColumnName"];
}

foreach (SPWeb site in siteCollection.AllWebs)
{
    IList<Guid> listsToExtend = new List<Guid>();

    foreach (SPList spList in site.Lists)
    {
        if (spList.Hidden == false &&
            spList.Fields.ContainsField("yourSiteColumnName
") == false)
        {
            listsToExtend.Add(spList.ID);
        }
    }

    foreach (Guid uniqueID in listsToExtend)
    {
        site.Lists[uniqueID].Fields.Add(categorySiteColumn)
;
    }

    site.Dispose();
}
}

```

Limitations

Categorization of people and groups lists

Generally it's possible to add the additional categories column that comes with the SharePointXXL Taxonomy Extension to the people and groups list (people.aspx by default) too. That would give you the possibility, that people or user information can directly take part in the global taxonomy / category system, e.g. as responsible person for topic etc.

At this time there is a SharePoint bug that causes problems if someone adds more complex columns to this list, e.g. a default multivalue lookup field. Then the creation of new users will fail.

The bug is reported to MS, there is no solution at this time.

Please use lists of type contact for this reason and not the users list directly until a fix from MS is available.

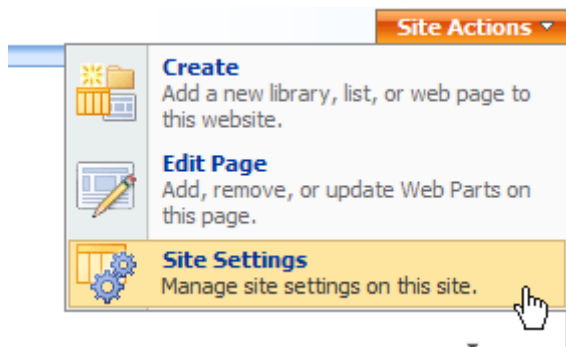
Deinstallation

Deinstall Taxonomy Extension

- Deactivate

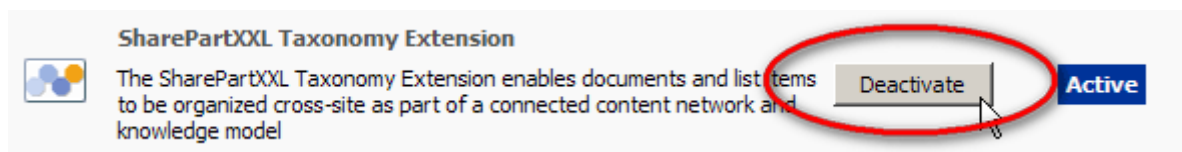
If you deinstall the Taxonomy Extension each relation between Dokumenten and Categories will be irretrievable lost.

Foreach site-collection you've used the Taxonomy Extension you have to click on the root-site at "Site Actions"->"Site Settings".



Click "Site Collection Features" on the right side.

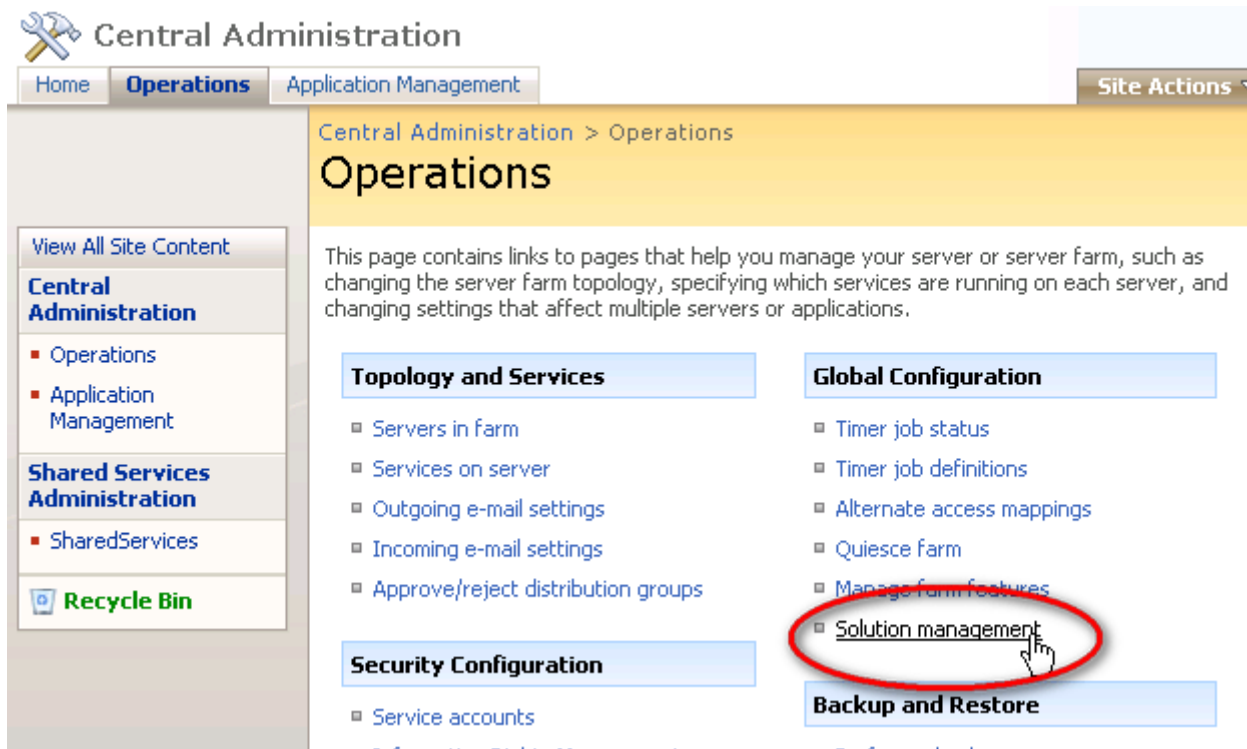
Search for "SharePartXXL Taxonomy Extension" inside the list. Press the "Deactivate" button and confirm.



Repeat for each corresponding site-collection!

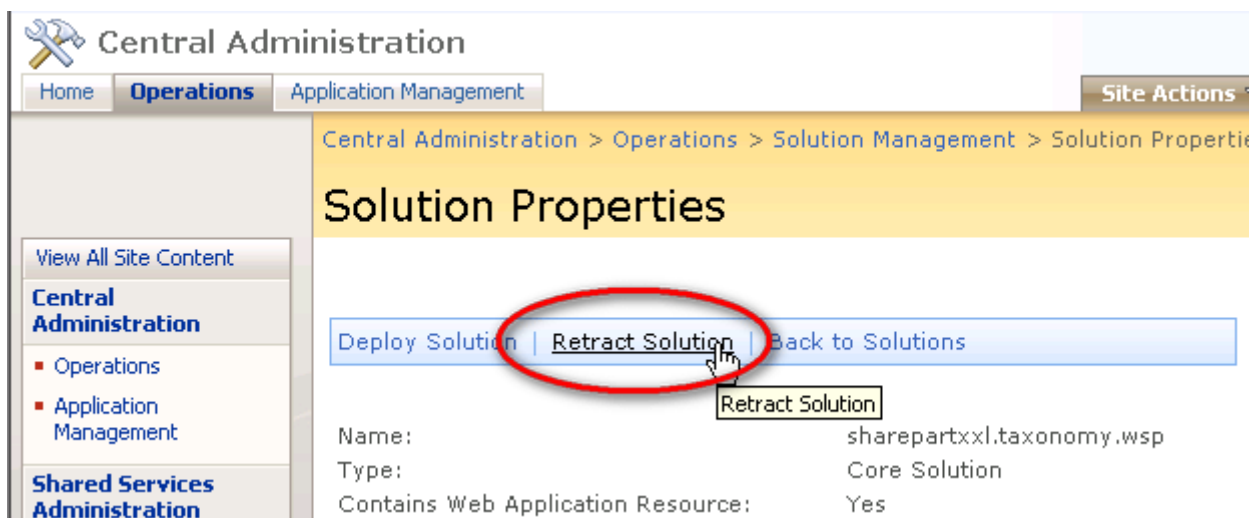
- Undeploy the solution

Please select the tab "Operations" at the SharePoint Central Administration site. Click on "Solution management" at the Global Configuration



You should find "sharepartxxl.taxonomy.wsp" inside the list, please click on this entry to see its properties.

Please click on "Retract Solution"



Make sure you've chosen both "Now" for the timer job and "All Contents Web Applications" as the retracting scope.

Retract When?
A timer job is created to retract this solution. Please specify the time at which you want this solution to be retracted.

Choose when to retract the solution:

Now

At a specified time:

9/10/2008 5 PM 00

Retract From?
The solution contains Web application scoped resources and should be retracted from specific Web applications. Please choose the Web

Choose a Web application to retract this solution:

All content Web applications

Confirm the uninstallation of the Taxonomy Extension for Microsoft SharePoint by the OK button. Now you'll return to the solution list from the last step.

After a short period of time the solution should have the status "not deployed" within the list (you can refresh it's status by pressing F5).

If so, click on the entry and finally remove the solution by clicking on "Remove solution"

Central Administration > Operations > Solution Management > Solution Properties

Solution Properties

Deploy Solution | **Remove Solution** | Back to Solutions

Name: sharepartxml.taxonomy.wsp
Type: Core Solution