



2013

Metadata Management and Tagging Guide

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Metadata Management and Tagging Guide for WorkZone Find

PURPOSE

The purpose of this user manual is to:

- Explain the core functionality of the metadata administration tool - WorkZone Find ModelBuilder.
- Provide the descriptions of tagging the items with metadata terms both automatically and manually.

TARGET AUDIENCE

The manual is primarily targeted at model administrators who build and maintain WorkZone Find information models and super users or subject matter experts who use the WorkZone Find metadata to create automatic tagging for automatic classification of the documents.

Working with WorkZone Find ModelBuilder

This chapter explains how to use WorkZone Find ModelBuilder.

The Information Model

The information model is a comprehensive and multidimensional metadata model which can hold the corporate taxonomies to effectively classify information items (for example, documents and folders). It consists of:

- **Categories.** The information model is a list of categories. A category is, for example, an "Event" category holding the list of all the events held in the company.
- **Terms.** Each category contains a list of different terms. A term is, for example, "Dinner" under the "Event" category.
- **Synonyms and Relations.** A term can have one or more synonyms, and a term from one category can have a relation to a term in another category. For example, a term "Dinner" (under the "Event" category) and a term "Room # 211" (under the "Location" category) can be related.

WorkZone Find ModelBuilder

WorkZone Find ModelBuilder is the tool which enables you to create and administer the information model (corporate taxonomies). It is a Windows-based application which is installed on the WorkZone Find server and on the workstations of the information workers who are responsible for managing the information model.

Opening the Information Model

The information model is stored on the WorkZone Find server. WorkZone Find ModelBuilder is used to retrieve the information model from the WorkZone Find server to view and edit it.

To open the information model, perform the following steps:

1. Open WorkZone Find ModelBuilder.
2. In the **Locate Model Server** dialog box, select one of the following options:
3. **Access via a web service** – select this option button and specify the location of WorkZone Find server (Model Server): type the name of the computer which hosts the WorkZone Find application.

Note: WorkZone Find ModelBuilder stores the names of the last 10 WorkZone Find servers to which it has successfully connected. They are listed in the drop-down list.

4. **Direct access** – select this option button if WorkZone Find ModelBuilder is installed on the same computer as the WorkZone Find server. This will enable you to access the information model directly, without involving Internet Information Server (IIS). This option also has a slight performance advantage over accessing the information model via a web service.

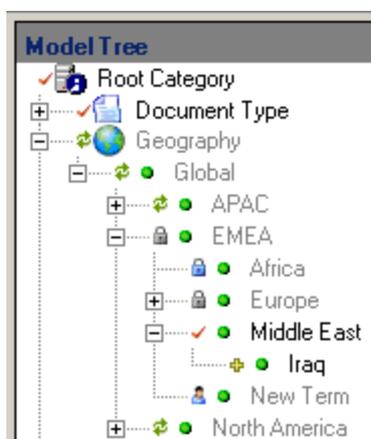
Checking the Information Model Out and In

When you open an information model in WorkZone Find ModelBuilder, by default the information model will be checked in and locked for editing. The  icon near the root category shows that the information model is locked and you check it in or out. If the  icon is displayed, it means that you have no rights to modify it.

In this case, log in either as a model administrator or a different user who has the Modify rights. See section [User rights](#).

CHECK OUT STATES

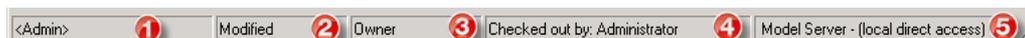
Each item in the information model can be in one of the six states. Each state has the corresponding icon.



Icon	Description
	The item is checked in and can be checked out by the current user.
	The item is checked in and the current user does not have rights to check it out – see also User rights .
	The item is checked out by another user. The name of the user who checked the item out is displayed on the status bar. See also How to undo the check out performed by other users .
	The item is checked out by you (the currently logged on user). See also How to impersonate a user .
	The item is checked out by you (the currently logged on user), but from a different computer. See also How to undo the check out performed by other users .
	The item has just been added and has not been checked in yet.

INFORMATION DISPLAYED IN THE STATUS BAR

The status bar contains five fields which display information about the state of the information model or selected item.



Field	Description
1	<p>The name of the user who is editing the model.</p> <ul style="list-style-type: none"> • If this field is blank, the current user is unknown. In this case make sure that the Active Directory (AD) Connector has been run at least once. • If the user name is enclosed in angular brackets (for example, "<Admin>"), you are impersonating the user - see section How to impersonate a user.
2	<p>The current state of the model. It shows whether the information model has been edited or not. If blank, no changes have been made.</p>
3	<p>The state of the selected item.</p> <ul style="list-style-type: none"> • Read Only – the user cannot edit the selected item. It is either not checked out or the user is not authorized to modify the item. • Blank – the user may edit the selected item. • Owner – the user may edit the selected item and change its security settings (Rights).
4	<p>If the selected item is checked out, the name of the user who has checked it out is displayed in this field – or "Administrator" if you are logged in as such.</p>
5	<p>Contains the location of the WorkZone Find server from which the information model was loaded.</p>

How to check out the Information Model

To make changes to an existing information model, you must check out either:

- the root category;
- one or more categories;
- one or more terms in the model.

Note: If you check out the root category of the information model, the entire information model will be locked.

If you need to make changes only to a small part of the information model, check out only the part you need to make changes to. This allows other model administrators to check out the other parts of the information model.

To check out the model, perform the following steps:

1. Right-click the part of the information model that you want to work on, and select Check Out.

Note: If you start with an empty information model, only the root category will be displayed in the tree view. In this case, right-click the root category to check out the information model.

2. In the **Check Out** dialog box, select the check-out option:
 - **Recursive** – select this option to check out the selected items and all its child items.
 - **Non Recursive** – select this option to check out the selected items only.

How to undo a check out

To discard all the changes made to the model, perform the following steps:

1. Right-click the previously checked out item of the information model in the model tree.
2. Select **Undo Check Out**.

Working as Model Administrator

When you are logged on as the model administrator, you can:

- Check out and edit items even without Modify rights.
- Undo checkout of the items which are checked out by other users.

To log on as Model Administrator, click **Tools > Security > Login as Administrator**.

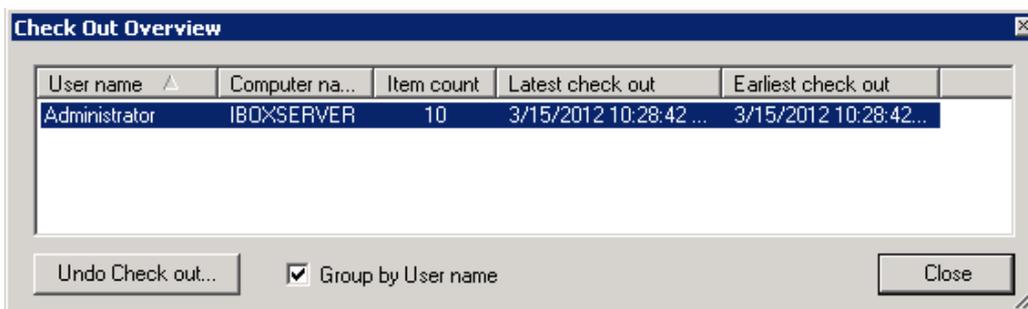
The password is blank by default. If you have changed the password and want to revert it to blank again, on the server side run iBoxMigrate.exe with these switches: /modelserver /clearadminpsw. It is located on C:\Program Files\ScanJour\WorkZone Find\Miscellaneous\iBoxUtil.

How to undo the check out performed by other users

To undo the checkout performed by other users, log on as the Model Administrator or specify the Model Administrator password when asked.

Perform the following steps:

1. Click **Check In/Out > Check Out Overview**. The **Check Out Overview** dialog box is displayed. It contains the following information:
 - **User name** – the name of the user who performed the checkout.
 - **Computer name** – the name of the computer from which the checkout was performed.
 - **Item count** – the number of the items which were checked out.
 - **Latest check out** – date and time when the items were checked out for the last time.



2. To undo any of these checkouts, select the corresponding record in the list and click **Undo Check out**.

How to impersonate a user

When working with model administration rights, it is useful to see the information model as if you were a different user. This is called impersonating a user.

To impersonate a user, perform the following steps:

1. Log in as the Model Administrator.

Optional: Click **Tools** and enable **Edit Security when Impersonating**. This will allow you to change security settings even when you are impersonating a user who does not have the Owner rights.

2. Click **Tools > Security > Login As**.
3. Select the user you want to impersonate and click **OK**.

How to disable change management

When you are logged in as the Model Administrator and you are the only user working with the information model, you may choose to disable change management.

This will allow you to edit the entire model and save the changes without having to check out and check in.

Note: If you reload the information model, you will have to select Disable Change Management again.

Perform the following steps:

1. Log in as Model Administrator.
2. Click **Tools** and select the **Disable Change Management** check box.

Managing categories in the Information Model

The order of the categories can be changed by drag and drop function.

To change the order of the categories, do one of the following:

- Check out the root category and move the category to the required location in the information model;
- Check out the category as well as all categories between the original and the final positions of the category that you are moving. After this, move the category.

When you have built your information model, back up it. This can be done by the Microsoft Excel export/import function.

Important: However, when exporting the metadata model to Microsoft Excel, the number of characters in a category name cannot be greater than 31 because Microsoft Excel does not accept a tab name greater than 31 characters – see section [Backing Up the Information Model Using Microsoft Excel](#).

You can also save the model to a .dat file. This file will also back-up the autoterm rule and category icons – see section [Backing up the Information Model Using a DAT File](#).

How to add a category

1. Check out the root category (and all other categories below the point at which you want to add the new category).
2. Select a place in the tree, where you want to add the new category.

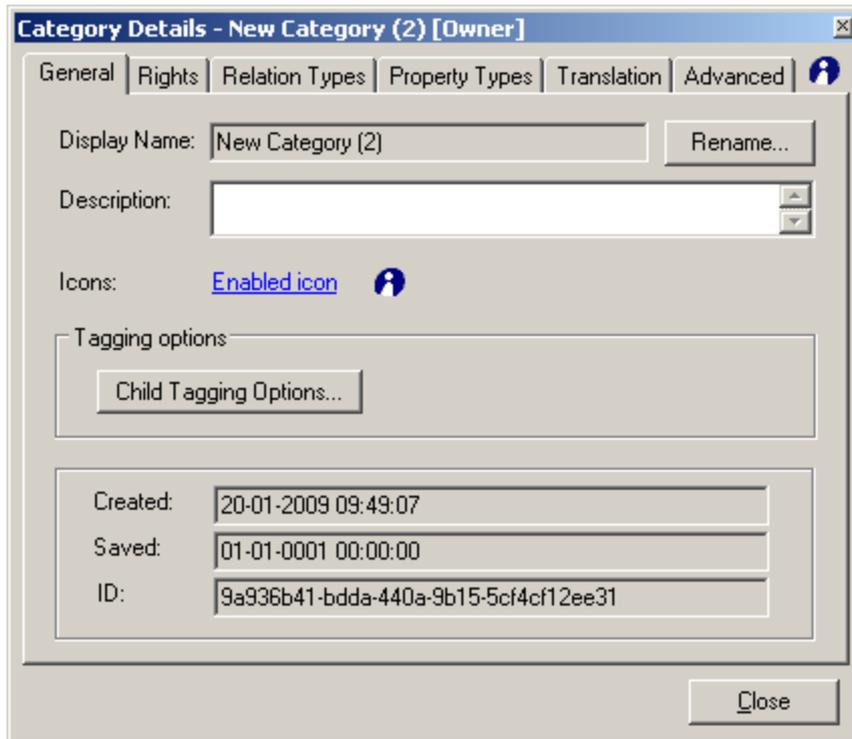
Note: If you select the root category, or if one or more of the categories below the selected category are not checked out, then new category will be inserted as the last category in the tree.

3. To add a new category to the information model, perform one of the following:
 - Right-click the root category and select **Add Category**.
 - Click the **Add Category** icon in the WorkZone Find ModelBuilder taskbar.
 - Click **Insert > Add Category**.
 - Press <**Ctrl+D**>.
4. A new category will appear in the model tree with a unique default name, for example, "New Category". You can rename it.

How to add an icon to a category

When the new categories are created, they are assigned the default WorkZone Find icon . You can assign a different icon to the category. To do this, perform the following steps:

1. Double-click the category.
2. In the **Category Details** dialog box, on the **General** tab click **Enabled icon**.



3. From the **Browse for Enabled Icon** dialog box, navigate to the location of the required icon and click **Open**. Icon size must be 16x16 px.
4. When you select a new icon, WorkZone Find ModelBuilder will automatically generate a disabled version of the icon (used when displaying the non-taggable terms in iBox Tagging Client). To change the disabled icon, click **Disabled** icon.

Adding synonyms to terms

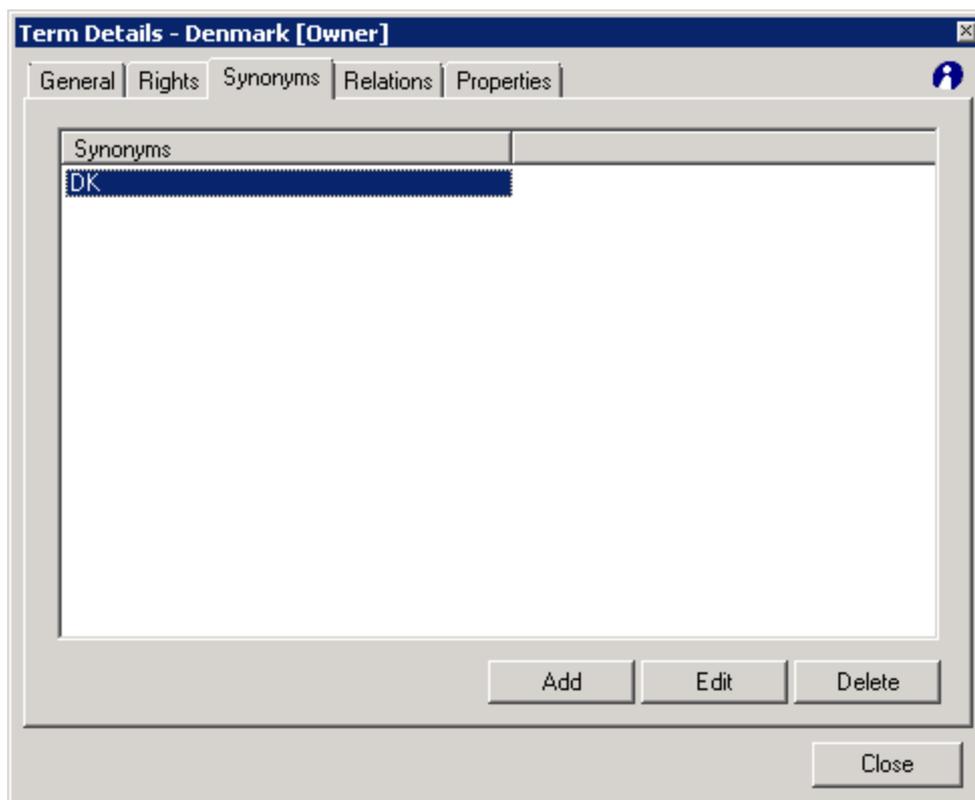
You can add one or more synonyms to a term.

Synonyms are words with the exact or similar meaning. For example, you can add an alias as a synonym to a name. When an item is tagged with a term that has a synonym, then both the term and the synonym are added as tags.

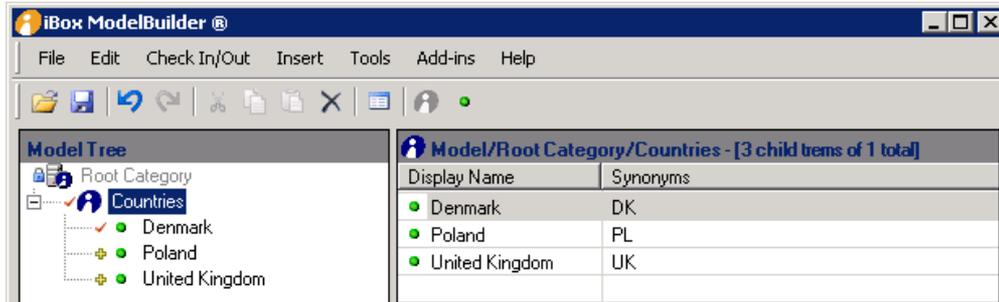
When you perform a search using a metadata term which has a synonym, you will get results for both: the term and the synonym.

[How to add a synonym](#)

1. Double-click the term to which you want to add a synonym. For example, the term "Denmark" under the category "Geography".
2. In the **Term Details** window, click the **Synonyms** tab.
3. Click **Add** and type the name of a synonym, for example, "DK".
Click **Add** to add more synonyms for the term in question, if required.



4. Click **Close**.
5. Click the category to which the term belongs. Verify that the synonym "DK" is displayed.



You can check added synonym using WorkZone Find.

Example

In the procedure described below, the synonym "DK" is used as an example. To verify the synonym in WorkZone Find, perform the following steps:

1. Open WorkZone Find search page.
2. Type "DK". "DK" is identified as a synonym for the term "Denmark". Therefore, the term "Denmark" is displayed below the search field with the synonym in brackets as shown below:



3. Select the "Denmark (DK)" search term and click **Search**.
4. Check that WorkZone Find finds the Microsoft Word document previously tagged with the term "Denmark".

Adding terms to a category

The **Add Term** button (you can use the <**Insert**> key) adds a new term at the same level as the selected term (or a new top level term if a category is selected).

The **Add Child Term** button (you can press the <**Ctrl+Insert**> keys) adds a new term as a child of the selected term.

In all cases, adding a term is only possible if the parent of the new term is checked out.

[How to add a term](#)

1. Check out the category to which you want to add a term.
2. Select the category and click **Add Term**.
3. A new term is created with a unique default name. The new term is open for renaming. Enter a term name (press <**Esc**> to accept the default name).

Note: By default, the terms are ordered alphabetically. When you rename them, their position can change.

Managing relations

You can create relations between items in the information model. First, you need to define the relational type, for example, a relation type named **Lives In** between a category named "Author" and a category named "Geography".

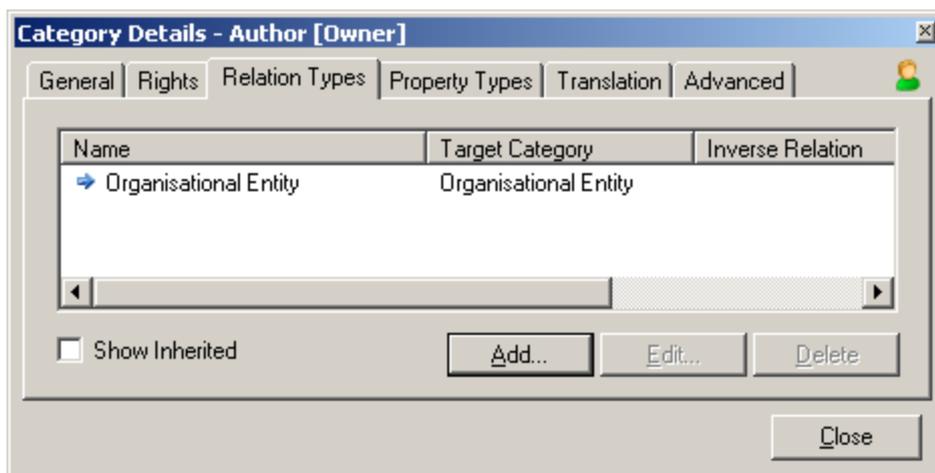
Second, you need to relate the two terms using the relation **Lives In**. For example, "Line Hansen" and "Denmark".

Relation types are used to define relations between terms. The relation type specifies that terms in Category A can be related to (linked to) terms in Category B. Category A and Category B can be the same category or the root category.

For example, you can create a relation type named Lives In between a category named "Author" and a category named "Geography".

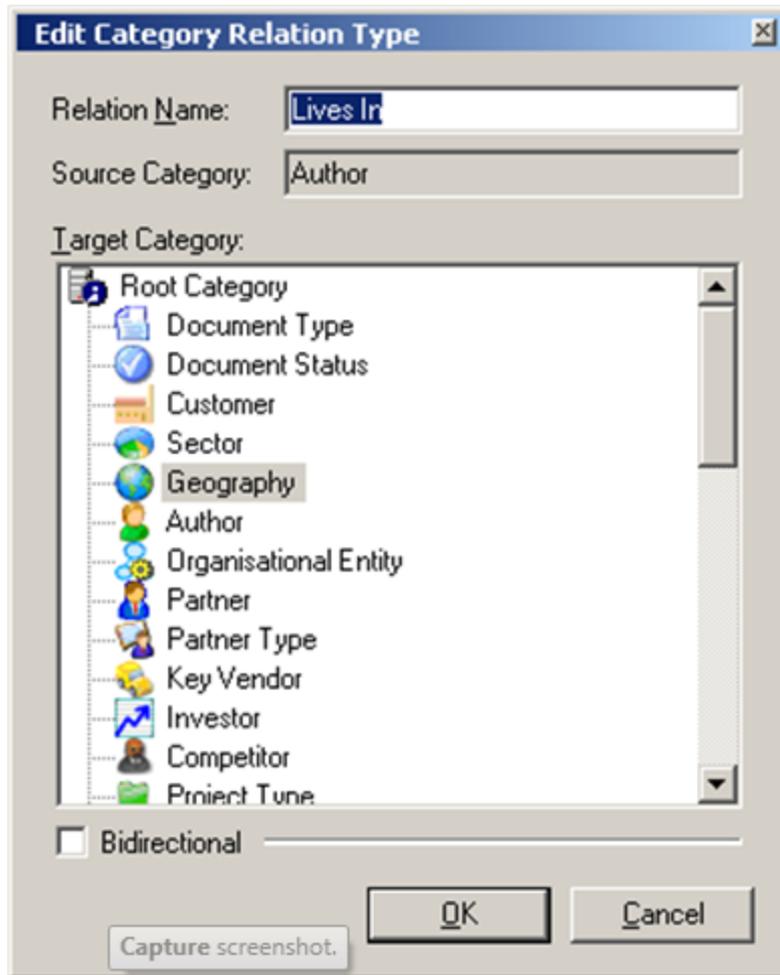
Example

1. Double-click the "Author" category.
2. In the **Category Details** dialog box, click the **Relation Types** tab.



Note: The list displays existing relation types. If you check Show Inherited, you will also see the inherited relation types, for example, the relation types defined on the root category.

3. Click **Add**. Type the name of your new relation type **Lives In**.
4. Select the "Geography" category as the target one and click **OK**.



Note: If you select the root category as the target category, you can make "Lives In" relations from any term in the "Author" category to any other term in the information model, regardless of the category to which it belongs.

If you want the WorkZone Find users to see to which organizational entity a person belongs, add a relation between the name of a person and an organizational entity. This can be useful if, for example, there are more multiple persons with the same name in the system. Also, it enables users to see which people belong to which organization unit.

Example

To add a relation to the organizational entity "Delivery" from the term Jane Doe (the name of a person) who already belongs to the "Author" category, perform the following steps:

1. Double-click the term, for example, "Jane Doe", to which you want to add a relation.
2. In the **Term Details** dialog box, click the **Relations** tab.
3. Click **Add**.
4. In the **Term Relation Editor** dialog box, select the required item from the **Relation Type** drop-down list
5. Select the term in the **Target Term** section, for example, "Delivery".



6. Click **OK**.

Note: Click **Add** to add more relations, if required.

7. Double-click the term, for example, "Jane Doe", to verify that a relation has been added – in this example to the "Delivery" term. In the Term Details dialog box, click the Relations tab and check the relations.

Note: Whenever a document is tagged with the main term, for example, "Jane Doe", the document is automatically tagged with the related term, "Delivery".

8. Click **Close**.

Tagging options

WorkZone Find ModelBuilder provides various options which can be set for individual terms to define the behaviour of a term in the iBox Web Based Tagging Client. These options include:

- **Taggable:** You can make a term available for tagging, or you can disable it, if it is a grouping term that should not be used for tagging.
In the information model tree, the  icon in front of a term shows that the term is taggable.
The  icon shows that it is not taggable.
- **Suggest Term:** If the term exists in the item you are tagging (for example, file, folder name or site name), it is suggested as a tag by iBox Web Based Tagging Client.
- **Auto Tagging:** You can enable the term for automatic tagging – see section [Working with automatic tagging](#).

You can also set the above options for all child terms of a given term.

How to make a term not taggable

By default, a term is taggable. It means that you can apply the term to a file or a folder from iBox Web Based Tagging Client. However, some terms in the information model may be very generic and used just for grouping lower level terms, and should therefore not be available for tagging. To achieve this, the term must be not taggable.

For example, if an employee has left the company, you may want to make the term not taggable.

To make the term not taggable, perform the following steps:

1. Double-click the term which you want to edit.
2. In the **Term Details** dialog box on the **General** tab under **Tagging options**, clear the **Taggable** check box (it is selected by default).

How to make a term taggable

To make the term taggable, perform the following steps:

1. Double-click the term which you want to edit.
2. In the **Term Details** dialog box on the **General** tab under **Tagging options**, select the **Taggable** check box.

How to test tagging options

You can verify that your settings have been applied. Remember to save your changes in WorkZone Find ModelBuilder first. If the **AutoUpdateSeachindex** setting is set to **False** in WorkZone Find Index Manager, you must rebuild the index. To rebuild the index, in WorkZone Find Index Manager, click **Seach Index > Rebulid**.

To test the tagging options which you have configured, perform the following steps:

Note: In the procedure described below, the terms "Jane Doe" and "John Smith" are used as an example for testing the tagging options.

1. Open WorkZone Find ModelBuilder and click **File > Save**.
2. Open a new MS Word document.
3. Type some terms already available in the information model, for example, "Jane Doe" and "John Smith".
4. Save the document to an WorkZone Find enabled path of the server.
5. Verify the following settings in Web Based Tagging Client:
 - The term "John Smith" is set as **Not taggable** and is greyed out in Web Based Tagging Client.
 - The term "Jane Doe" is set as **Taggable** in Web Based Tagging Client.

Saving changes to the Information Model

You can save your changes in two ways:

- Save a part of the model, for example, a category or a term. To do this, right-click the item and select **Check In**.
- Save the entire model. To do this, click the **Save** icon.

After you have saved the changes, you can choose to check in the changes, or to leave the information model checked out if you wish to keep working on it.

How to save separate items

If you wish to save only the terms and categories which have been updated, use the check in function.

Perform the following steps:

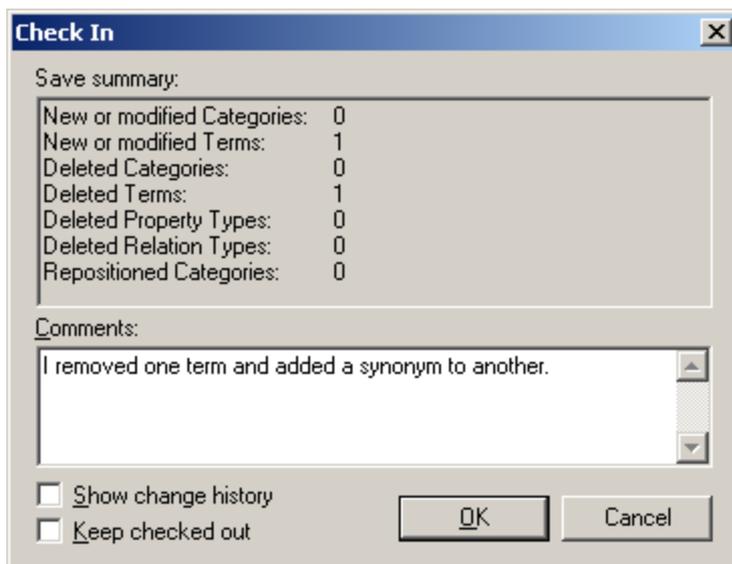
1. Right-click the item in the information model you wish to check in and select **Check In**.
2. In the **Check In** dialog box, choose the check in option of your choice:
 - **Recursive**: Check in the selected items and all child items.
 - **Non Recursive**: Check in only the selected items.
3. Click **OK**.
4. The **Check In** dialog box is displayed if there are any changes.
The icon near the selected item is changed to . It means the Information Model is checked in.
The model has no pending changes. The **Modified** status in the status bar disappears.

Note: Whenever changes are saved, WorkZone Find ModelBuilder synchronises the information model with the server, for example, any changes made by other users will be reflected in WorkZone Find ModelBuilder.

How to save the entire model

To save changes which you have made to the Information Model, perform the following steps:

1. Click **Save**.
The **Check In** dialog box is displayed:



Summary

The window contains a summary of all changes made to the model.

Comments

Enter a comment if needed. Comments are displayed in the change history.

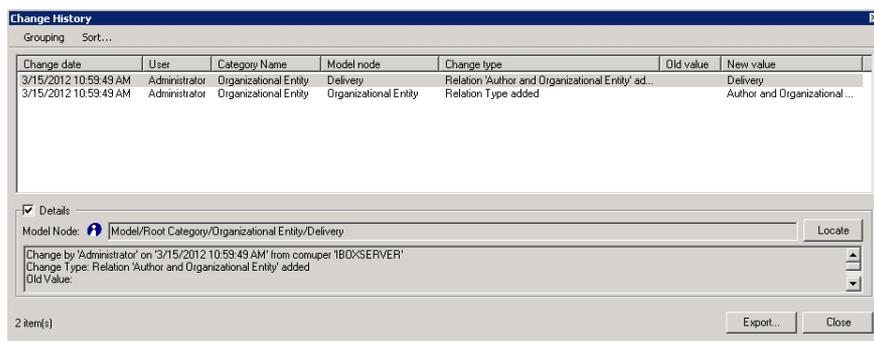
Keep checked out

If you select the **Keep checked out** check box, your changes will be saved but the items that you have checked out will remain checked out so that you can continue working on them.

Show change history

If you select the **Show change history** check box, the **Change History** window will display after your changes have been saved. The window will contain all the changes that have been made to the information model since the last time WorkZone Find ModelBuilder was synchronised with the server.

2. Click **OK** to save the changes.
3. If you selected the **Show change history** check box, the change history is displayed.



Backing up the Information Model manually

You can back up your information model manually. ScanJour recommends you to do this at least in these two situations:

- Before and after you make major changes to the information model.
- Before you upgrade to a new WorkZone Find version.

You can manually create the information model backup:

- Using an .xls file – for example, in the first phase of an WorkZone Find implementation project to build up the information model in WorkZone Find ModelBuilder. See section 2.13 Backing Up the Information Model Using Excel.
- Using a .DAT file – for example, during project implementation after the icons have been added. See section 2.14 Backup the Information Model Using a DAT File.

Note: After you have created an information model, ScanJour recommends that you back up the information model by using the automatic and scheduled backup through the WorkZone Find Command Line Interface.

Backing Up the Information Model Using Microsoft Excel

The export/import functionality of Microsoft Excel is primarily used in the first phase of an WorkZone Find implementation project to build up the information model in WorkZone Find ModelBuilder.

Note that the Microsoft Excel functionality Export to Excel/Import from Excel has the following peculiarities:

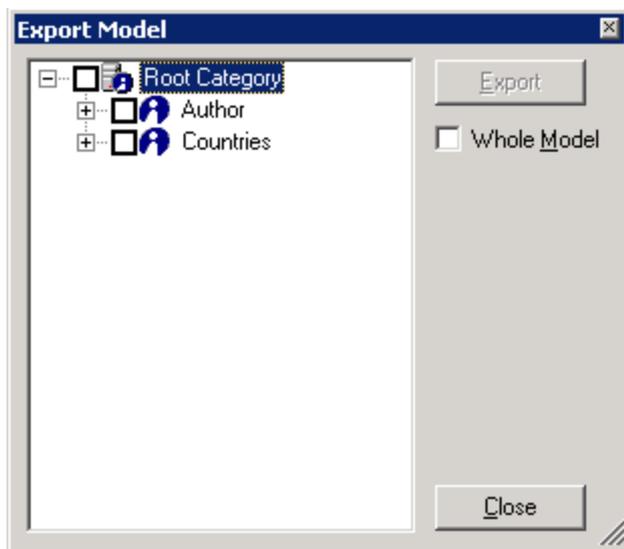
- It does not save icons or the unique ID of each term.
- It does not accept the length of a category name that exceeds 31 letters (because Microsoft Excel does not accept a tab name greater than 31 characters).
- It only accepts Microsoft Office 2003 format (.xls format) – but not .xlsx or other formats.

Note: If you use Microsoft Office 2007 or 2010, you must save the backup files in Microsoft Office 2003 format (.xls).

How to export the Information Model to Microsoft Excel

Follow the procedure below to create a Microsoft Excel backup of your information model. Open WorkZone Find ModelBuilder.

1. Click **Add-ins > Export to Excel**.
2. In the **Export Model** window, select the categories in the information model that you want to export.
To export the entire model, select either the **Root Category** or the **Whole Model** check box.



3. Click **Export**.
4. In the message box, click **OK**.
5. Click **Yes** in the confirmation dialog box.

6. In the **Save As** dialog box, specify the location for the model to be saved. Click **Save**.
7. Click **Close**.

How to add data to the Information Model Using Microsoft Excel Import

The WorkZone Find ModelBuilder function Import from Excel can only be used to add data to the information model. The Microsoft Excel version cannot be used to, for example, edit an existing model structure or rename terms.

It is important to use a predefined style sheet when importing an information model from Microsoft Excel into WorkZone Find ModelBuilder.

Note: If you want to move, delete, or rename the terms after they have been used for tagging, you must do this directly in WorkZone Find ModelBuilder. Making such changes before importing an information model from Microsoft Excel may result in term duplication and/or loss of tags.

You can import an information model only from .xls files (Microsoft Office 2003 format).

If you use Microsoft Office 2007 or 2010, you must save the backup files in Microsoft Office 2003 format, (.xls).

Open WorkZone Find ModelBuilder.

1. Open WorkZone Find ModelBuilder.
2. Check out the root category.
3. Click **Add-Ins > Import from Excel**.
4. In the **Import Model** dialog box, click **Load**.
5. In the **Open** window, browse to the information model folder.

Note: If you use Microsoft Office 2007 and the .xls files are not displayed, type "." into the **File name** field and press <**Enter**>.

6. Select the file to be imported. Click **Open**.
7. In the **Import Model** dialog box, select the **Whole Model** check box to import the whole model, or select the part of it to be imported. If the selected categories are not created yet, the import function will create them. Click **Load**.
8. In the **Administrator Login** dialog box, enter the password. Click **OK**.
9. Click **OK** in the notification dialog box.
10. Validate that the information model or its part was loaded.
11. Save the information model.

How to import terms with relations

Before you import a category (source category) where the terms hold relations to terms in another category, you first have to import the category (target category) you are relating to. Otherwise, it may result in duplication of terms in the target category. For reference, see section 2.8 Creating Relations.

1. Open WorkZone Find ModelBuilder.
2. Create the categories of your choice as described in section 2.4 Adding Categories to the Information Model.
3. Export the information model into an Microsoft Excel sheet as described in section 2.13 Backing Up the Information Model Using Excel.
4. Save the Microsoft Excel sheet and open it.
5. Fill in the appropriate rows and columns with terms, synonyms, relations and tagging options.

1	A	B	C	G	O	P	Q	R
2	Author							
3								
4	Term	Child Term 1	Synonym 1	Relation 1	Tagable	Auto Tagging	Suggest	
5				Organisational Entity				
6	Jane Doe		jane@doe.doe		No	Yes	No	
7	John Smith				Yes	Yes	Yes	
8					Yes	Yes	Yes	
9					Yes	Yes	No	
10					Yes	Yes	Yes	
11								
12								
13								
14								
15								

1. The name of the category (for example, Author) must be displayed in column A row 1 and should be the same as the sheet name displayed on the Excel tab.
2. The first term (for example, "Jane Doe") must start in column B row 6.
3. Synonyms must be added to a specific column (for example, "Synonym 1"). You can create synonyms by adding new columns and naming them Synonym 2, Synonym 3, and so on.
4. Relations must be added in a specific column. You can create more relations by adding new columns naming them Relation 2, Relation 3, and so on.
5. Define the tagging options for each individual term. In this example, "Jane Doe" is not taggable whereas "John smith" is taggable.

How to use a predefined style sheet

It is important to use a predefined style sheet when importing an information model from Microsoft Excel into WorkZone Find ModelBuilder. You can generate the predefined style sheet by exporting a model from WorkZone Find ModelBuilder as described in section 2.13.2 Add Data to an Information Model Using Excel Import.

When importing an information model into WorkZone Find ModelBuilder via Microsoft Excel, the prerequisites must be met.

Prerequisites list

Make sure that the spelling of the categories in the tabs and worksheet headings (cell A1) are the same (both spelling and capitalisation).

1. Make sure that the spelling of the categories in the tabs and worksheet headings (cell A1) are the same (both spelling and capitalisation).
2. The first term must be added in cell 6B, the next term must be added in cell 7B, third term in cell 8B, and so on.
3. Child terms must be added in the row beneath – not in the same row as - the “parent” term and in the column to the right (for example, a child to the term in cell 6B has to be written in cell 7C, a child to the term in cell 7C has to be written in cell 8D, and so on).
4. Additional levels of child terms (3rd tier) can be added in subsequent columns.
5. The first “Synonym 1” starts in the column immediately after the last “Child term”. The synonym must be placed in the same row as the term it refers to.
6. “Synonym 2, 3...” must be added in new adjacent columns in the same row as the term it refers to.
7. All “Synonym 1” must be placed in the same column, different row. The same applies for Synonym 2, 3...
8. The first “Relation 1” must be placed in the column following the last “Synonym”. The relation must be placed in the same row as the term it refers to.
9. All “Relation 1” must be placed in the same column, different rows. The same rule applies to “Relation 2”, “Relation 3”, and so on.
10. Make sure that you do not have empty rows between the terms.
11. All tagging options must be assigned **Yes** or **No** for each individual term.

Possible error messages and their reasons

If the information model does not follow the rules above when you try to import it, you will get the following error message:

“There were errors during the import process. See log file for details.”

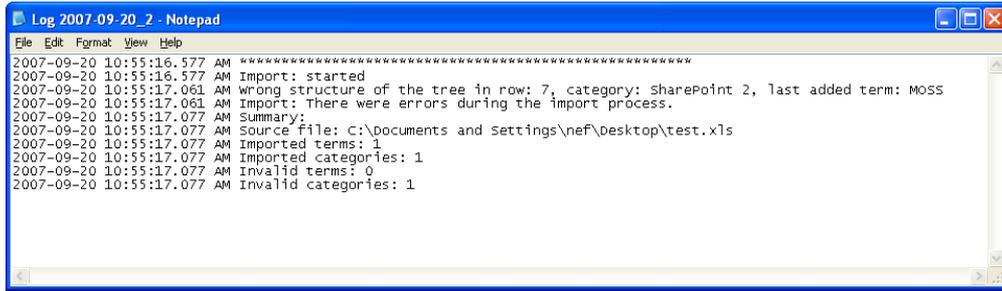
In case the format of the import model is insufficient and the above import error message is displayed, a log will be created at the local machine from which the import took place.

The log file contains a complete overview of the formatting errors of the Microsoft Excel model.

The log file can be found in the following path:

C:\ProgramData\iBox\ModelBuilder\import

This log file explains in detail which category (tab) contains an error and in which specific row it is located. For example:



```
Log 2007-09-20_2 - Notepad
File Edit Format View Help
2007-09-20 10:55:16.577 AM *****
2007-09-20 10:55:16.577 AM Import: started
2007-09-20 10:55:17.061 AM Wrong structure of the tree in row: 7, category: SharePoint 2, last added term: MOSS
2007-09-20 10:55:17.061 AM Import: There were errors during the import process.
2007-09-20 10:55:17.077 AM Summary:
2007-09-20 10:55:17.077 AM Source File: c:\documents and settings\nef\Desktop\test.xls
2007-09-20 10:55:17.077 AM Imported terms: 1
2007-09-20 10:55:17.077 AM Imported categories: 1
2007-09-20 10:55:17.077 AM Invalid terms: 0
2007-09-20 10:55:17.077 AM Invalid categories: 1
```

Backing up the Information Model Using a DAT File

Saving the information model to a .dat file is the only way to save all the different items of the information model, including icons and GUIDs. You can restore your information model using this DAT backup when needed.

How to save the Information Model as a DAT file

Perform the following steps:

1. Open WorkZone Find ModelBuilder.
2. Click **Tools > Advanced > Save to file** in the main menu.
3. From the **Save As** dialog box, select a location to save the information model.
In the field **File name**, type the name of the backup file.
4. Click **Save**.

How to enable the Save the file option

If the option **Save to file** is not displayed in the **Tools** menu, click **Tools > Local iBox Settings** - see [Advanced WorkZone Find settings](#).

In the **iBox Settings Editor** dialog box, set the **Show Advanced Tab** value to **True**, click **Apply** and close the window. The **Save to File** menu item will be displayed.

ScanJour recommends that you use a .dat file (DAT backup) to create backup for the information model on a regular basis and particularly before and after the extensive information model changes.

How to restore the Information Model using a DAT backup

Perform the following steps:

1. Open WorkZone FindModelBuilder.
2. Click **Tools > Advanced > Open from File**.
3. From the **Open** dialog box, browse to the location of the previously saved backup .dat file.
4. Select the file and click **Open** to load the information model.
5. If you want to load the information model to the server and apply your changes, click **Tools > Advanced > Save entire model to**, select the server, and then click **OK**.

How to enable the Open from file menu item

If the **Open from file** menu item is not displayed in the Tools menu, perform the following steps:

1. Click **Local iBox Settings**.
2. In the **iBox Settings Editor** window, set the **Show Advanced Tab** value to **True**.

3. Click **Apply**.
4. Click **Close**.

You can also make changes to the information model when you are offline using a DAT file – see [Working Offline on the Information Model](#). Due to the uniqueness of the GUID's it is now possible to import the model to another environment.

Working Offline on the Information Model

You can work offline on the information model and later load some or all of your changes to the server.

To work offline on the information model and apply your changes when you are online again, perform the following steps.

1. Open WorkZone Find ModelBuilder.
2. Check out the terms or categories you want to modify.
3. Click **Tools > Advanced > Save to file**.
4. From the **Save As** dialog box, select a location to save the information model. In the **File** name field, type the name of the information model copy.
5. Click **Save**.
6. When you are offline, click **Tools > Advanced > Open from File** to load the model to WorkZone Find ModelBuilder.
7. From the **Open** dialog box, browse to the location of the previously saved backup .dat file.
8. Select the file and click **Open** to load the information model.
9. Make the changes to the information model and save the .dat file (see pt. 3-5 above).
10. When you are online and want to apply your changes, click **Tools > Advanced > Open from File**.
11. From the **Open** dialog box, browse to the location of the previously saved backup .dat file.
12. Select the file and click **Open** to load the information model.
13. Click **Tools > Advanced > Save entire model to**, select the server and click **OK**. Your changes will be applied.

Configuring advanced WorkZone Find ModelBuilder options

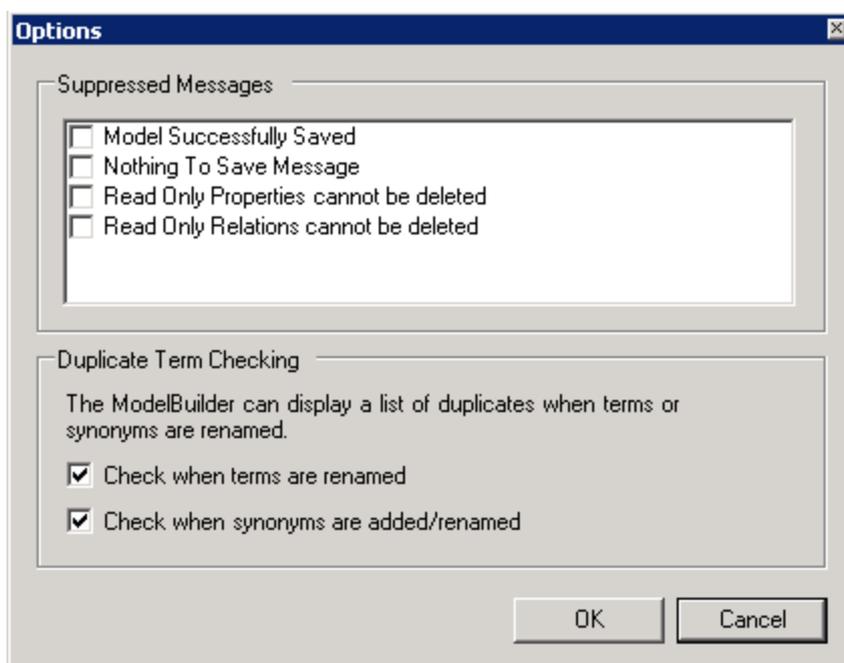
From this section you will learn how to customize WorkZone Find ModelBuilder.

[How to customize WorkZone Find ModelBuilder messages](#)

You can define the messages to be displayed when working with WorkZone Find ModelBuilder.

Perform the following steps:

1. Open WorkZone Find ModelBuilder. Click **Tools > Options**.
2. In the **Suppressed Messages** section, clear check boxes for messages which you do not want to receive.



3. In the **Duplicate Term Checking** section, you can select if WorkZone Find ModelBuilder should check for duplicates:

- when you rename a term.
- when you create or rename the synonyms.

ScanJour recommends leaving both check boxes selected.

Note: If the duplicate term checker is enabled and a term is added twice, but with different capitalization, the terms will be regarded as duplicates.

[How to view the history of changes](#)

In WorkZone Find ModelBuilder you can view the history of changes made by the different users.

Perform the following steps:

1. Open WorkZone Find ModelBuilder. To get latest changes on the history list, click **Check In/Out > Get Latest Changes**.

2. In the main menu, select **Check In/Out > Show History**.
3. In the **Show History** dialog box, select the required options. Click **OK**.
4. In the **Change History** dialog box, click **Grouping** and select the way in which the log entries should be grouped, for example, Group by Date, Group by Date & Time, Group by Category Name, and so on.
Click **Sort** and select the order for the log entries to be displayed. You can combine each of these three options either in descending or ascending order.
5. To view the detailed information about the individual log items select a log entry and select the Details check box. The detailed information on the selected log entry will be displayed.
6. Click **Close**.

How to clear the history

To clear the history, click **Check In/Out > Clear History**. You need the Administrator rights to perform this procedure.

How to synchronize the terms against backend systems

To retrieve the information from backend systems, synchronisation can be enabled for terms and categories. This means that data contained in a customer list in the backend system can be imported to WorkZone Find ModelBuilder using connectors.

How to enable synchronisation for terms and categories

1. Check out the model.
2. Right-click the category you want to enable for synchronisation and select **Enable synchronisation**.
3. Verify that the category icon contains the synchronisation marker: . The category is now ready for synchronisation against backend systems.

When new terms are added to categories via synchronisation, you can set the security for the new terms. By default, the security settings are inherited from the parent category.

How to set the specific security settings for a term

1. Check out the term.
2. Right-click the term and select **Details**.
3. In the **Term Details** dialog box, click the **Rights** tab. Set the rights as required.
4. Click **Close**.
5. Check in the term.

How to import the terms from the SharePoint 2010 term store

One of the most important features in SharePoint 2010 is Managed Metadata Service. This allows the organisation to share metadata taxonomies and terms across multiple SharePoint webs and site collections.

SharePoint 2010 Managed metadata service is a hierarchical collection of centrally managed terms to be used as attributes for items in Microsoft SharePoint Server 2010.

The WorkZone Find SharePoint 2010 integration enables the user to import and use SharePoint metadata in the WorkZone Find components using an ODBC connection.

Before you start, you need to have the required permissions to perform this procedure.

Prerequisites

To view managed metadata service application properties, current user account must be:

- A member of the Administrators group on the computer running the SharePoint Central Administration Web site.
- A member of the Farm Administrators group.

The procedure below explains how to import the terms from the SharePoint 2010 term store into WorkZone Find. The first step is to create a customised view in SharePoint Managed Metadata database. This view will be used by WorkZone Find ODBC Connector to extract the terms from the SharePoint 2010 term store.

After this, you have to create system ODBC sources which enables you to access SharePoint Metadata Service Database as ODBC source.

How to create a customized view

1. Go to the SharePoint Central Administration web site.
2. Under **Application Management**, select **Manage Service Applications**.
3. Click in a column other than "Name" to select the Managed Metadata Service row.

Note: If you click the name of the managed metadata service, the **Term Store Management Tool** opens.

4. On the ribbon, click **Properties**.
5. In the **Create New Managed Metadata Service** dialog box, copy the **Database Instance Name** from Database Server string and Database Name that hosts SharePoint managed Metadata Service – you will need this information later.
6. Click **Cancel**.
7. You now have to create a customised WorkZone Find TermStore View in the Managed metadata Service database on the SharePoint server.

Note: WorkZone Find SharePoint Add on must be installed.

8. Locate the WorkZone Find SharePoint Add On installation directory. The default location is:

```
C:\Program Files\ScanJour\WorkZone Find\SharePoint Server Components\TermStore\
```

9. From the command prompt, run the install.bat batch file with parameters for specific Database Instance Name on Local Machine and Database Name from step 5 above to create a customised view. Use this format:

```
install.bat [DataBaseInstanceName on Local machine] [DatabaseName]
```

Note: If there is a space in the database name, it has to be written in double quotes. For example: "SP 2010 managed metadata DB". This operation should be performed on the database server, locally.

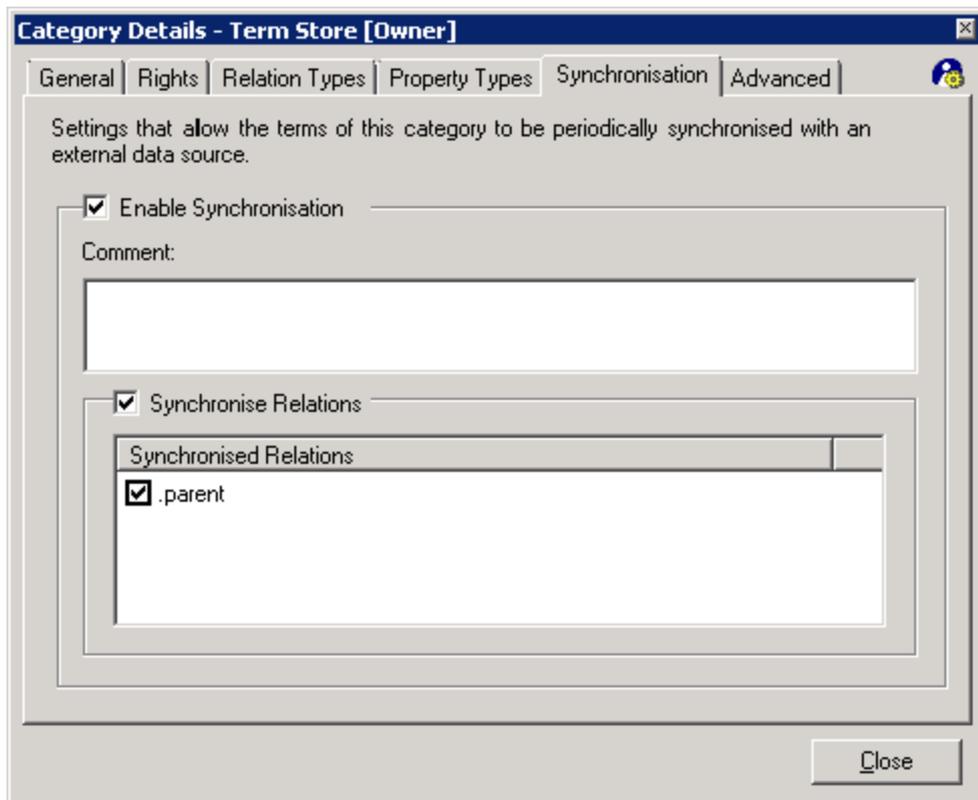
How to configure ODBC data source

To create system ODBC sources which enables you to access SharePoint Metadata Service Database as ODBC source, perform the following steps:

1. On the WorkZone Find server, use the odbcad32.exe Windows tool. It is located on:
 - C:\windows\syswow64\odbcad32.exe – for 64 bit operating systems;
 - C:\windows\system32\odbcad32.exe – for 32 bit operating systems.
3. On the **System DSN** tab, click **Add**.
4. Select the SQL Server driver from the list. Click **Next**.
5. Specify the name of the ODBC Connection.
6. Enter a description of the data source.
7. Select the SQL Server from the **Server** drop-down list. Click **Next**.
8. Specify the authentication mode (Integrated Windows security / SQL Server authentication) and the login credentials, if applicable. Click **Next**.
9. Change the default database to **iBoxTermStore**. Click **Next**.
10. Click **Finish** to end the ODBC SQL Server setup.
11. In the next window, click **Test Data Source** to ensure that you can connect to the data source.
12. Click **OK** to save the settings.

How to create synchronized category

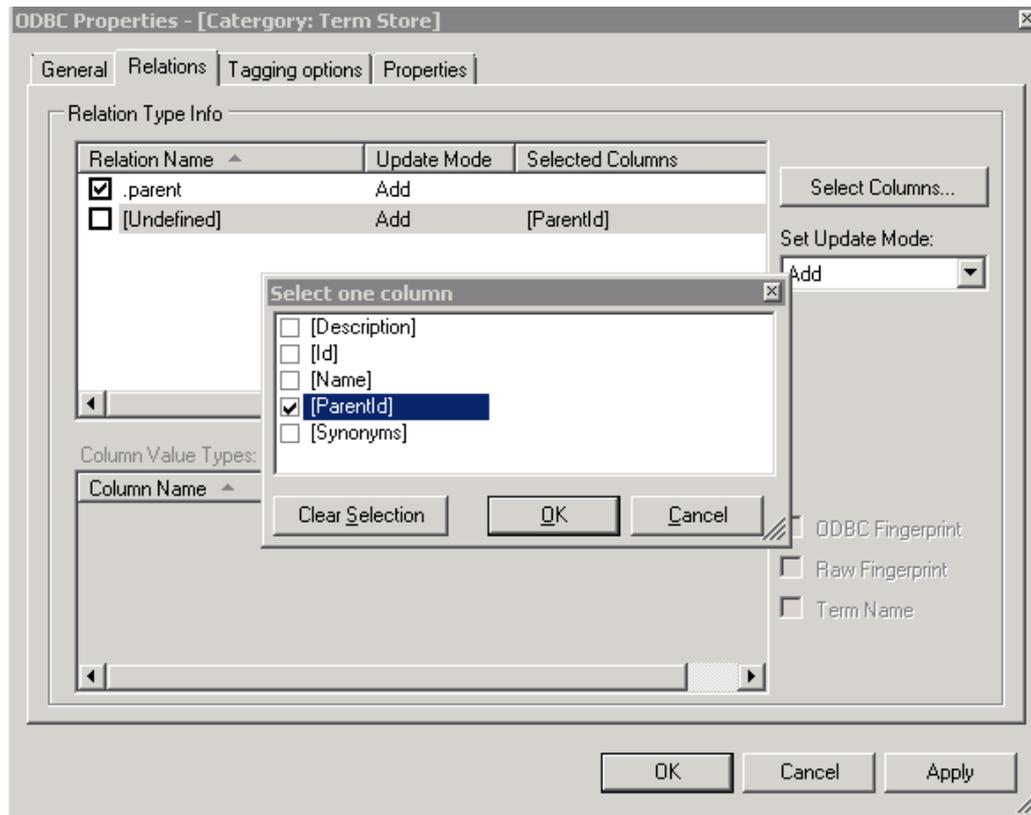
1. Create a new category in WorkZone Find ModelBuilder which will be the destination for imported SharePoint Managed Metadata.
2. In the **Category Details** dialog box, click the **Synchronization** tab.
3. Select the **Enable synchronization** and **Synchronize Relations** check boxes:



Note: If the “.parent” relation is not visible, click **Tools > Local iBox Settings**, then click the **Advanced** tab and set the **ShowAdvancedTab** value to **True**.

[How to configure WorkZone Find ODBC Connector](#)

1. Open WorkZone Find AD ODBC Manager.
2. On the **ODBC Connector** tab, click **Edit**.
3. In the **ODBC Connector Settings** dialog box, select the required category and click **Edit**. The **ODBC Properties** dialog box is displayed.
4. On the **General** tab, in the **Data Source Name** section, select the ODBC DNS which you created during the ODBC DataSource Configuration.
5. Click **Connect**.
6. From the Table name drop-down list, select:
 TableName=> [dbo].[iBoxTermStore],
 ID column => [ID],
 Display Name Column => [Name],
 Synonym columns => [Synonyms].
7. Click **Select Columns**. The **Select one column** dialog box is displayed. Select the column which contains the parentID and click **OK**.



8. Select the **RAW Fingerprint** check box to bind the .parent relation to the [ParentId] table column.
9. Click **OK**.
10. Start ODBC Connector.
11. When the scan completes successfully, the terms will be added in WorkZone Find ModelBuilder.

Populating the terms automatically using Auto Term Rule Editor

You can add the metadata terms automatically to the information model based on information blocks, for example, folders, files, SharePoint lists and so on; and their associated properties using the Auto Term Rule Editor.

Auto Term Rule Editor is designed to populate model terms based on the information blocks.

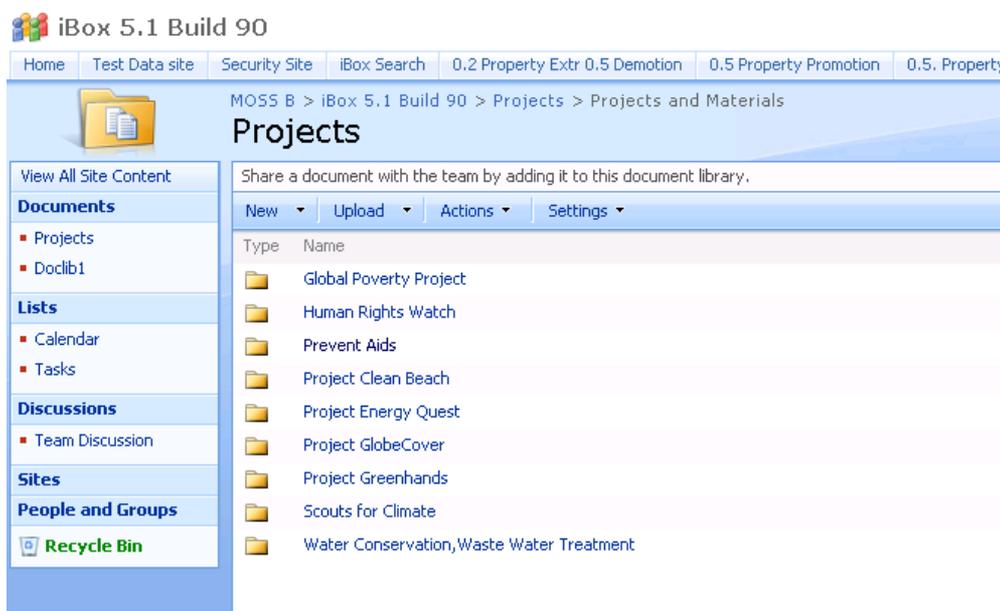
For example, if you are maintaining individual folders (in NTFS or SharePoint) for every project with the folder name matching the project name, an WorkZone Find ModelBuilder category called Projects can be created and populated with terms containing the names of the projects by choosing the folder as the source information block in the Auto Term Rule Editor.

To work with the Auto Term Rule feature, make sure that the WorkZone Find AutoTerm service is running on WorkZone Find server.

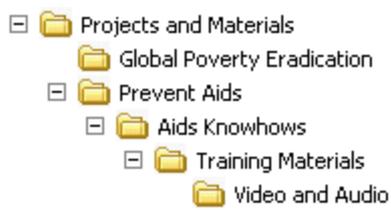
Example of use

The example below explains the use of Auto Term Rule Editor to populate metadata terms based on folder information blocks.

For instance, all the project documents are stored in SharePoint in relevant project folders:



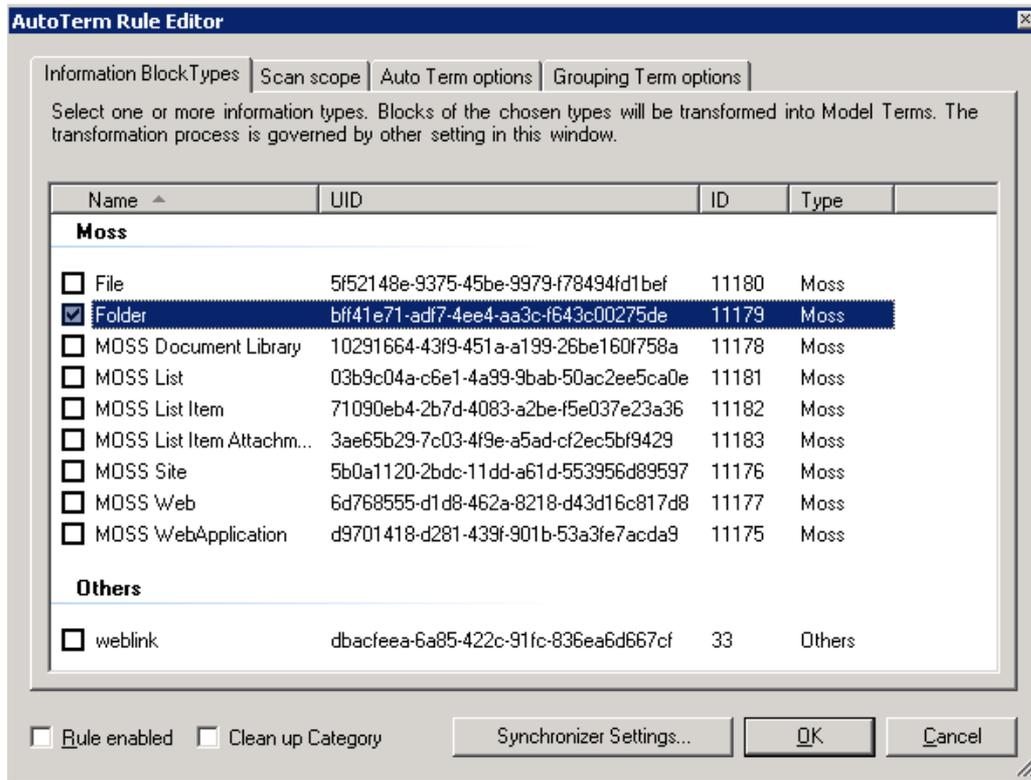
In this example, the folder "Prevent Aids" contains a set of subfolders and we want to create model terms for the subfolders as well.



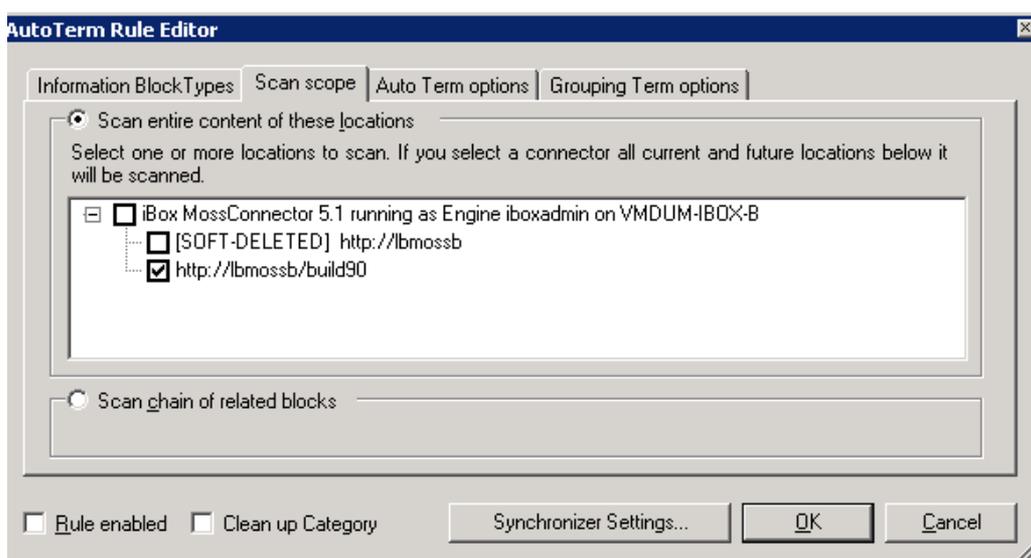
The procedure below explains how to use the AutoTerm Rule feature to populate metadata terms from both top level folders and sub level folders.

How to populate metadata terms

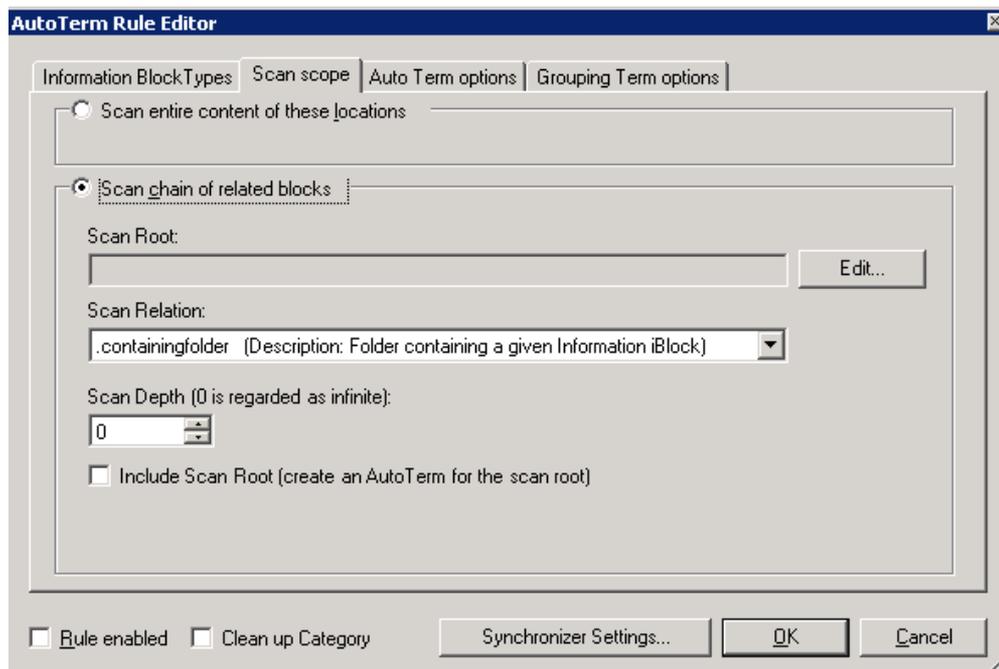
1. Right-click a category and select **Edit AutoTerm Rule**.
2. On the **Information Block Types** tab of the **AutoTerm Rule Editor** dialog box, select the **Folder** check box in the SharePoint section (the purpose is to create terms matching the terms on the SharePoint folders).



3. Click the **Scan scope** tab. Select the **Scan chain of related blocks** option button.



- Click **Edit** next to the **Scan Root** field.



- In the **Scan Root** field, specify the Unique ID (UID of the parent block, in this example, "Projects and Materials").

How to find UID

- Open WorkZone Find Index Manager.
 - Click the **iBlocks** tab. In this example, the folder "Projects and Materials" is the parent folder and it is located on the SharePoint site called "Build 90".
 - From the **Filter by** drop-down list, select **Location**.
 - From the **iBlock loc** drop-down list, select the relevant location. In this example, the exact location of the "Projects and materials" folder is <http://lbmossb/build90>.
 - Click **Go**. All the iBlocks - including the "Projects and Materials" folder - in the specified location are displayed in a list.
 - Double-click the name of the parent folder iBlock - "Projects and Materials". A window containing detailed information of the parent folder is displayed.
 - In the UID field, UID of the specific folder is available. Double-click UID and copy it.
- Paste UID into the **Scan Root** field. Click **OK**.
 - Leave the default value selected in the **Scan Relation** drop-down list. Current version of WorkZone Find supports only the .containingfolder relation.

8. From the **Scan Depth** list, select the number of levels of subfolders to be included when terms are auto created.
9. In this example, there are four levels of subfolders. Therefore the number 4 is selected. If you want to create a term for the parent folder, select the **Include Scan Root** check box (create an Auto Term for the scan root).
10. Click the **Auto Term options** tab.
11. Select the **Create Auto Terms** check box. The **Name source** drop-down list is enabled.
 Select Name (DataType: String (as the goal is to create terms based on the Name property of SharePoint folders).
 Other properties for automatically populating the information model terms are available in the drop-down list.
 - **Cutting characters** - it is possible to use only a part of a property. To do this, specify a character, for example, a punctuation mark in the **Cutting characters** field.
 If, for instance, folder names contain commas to separate words or strings of words, use comma as a cutting character. In this case only the first part, for example, "Water Conservation", of the folder name "Water Conservation, Waste Water Treatment" is used to create auto terms.
 Only the part of the property located before the split character is extracted for term creation. The rest of the property will be ignored.
 - More than one split character – you can specify more than one split character, for example ",", ".", and ":".
 When used to create grouping terms, split characters work differently – this is explained in the following sections.
12. Click **Auto Term Options**.

How to create the term creation options

- **Tag source** - The source, for example, the folder, needs to be tagged with the new term when the term is created. In our example, the Auto Term Rule will create a term called 'Project Greenhands' in the information model since we have a folder with that name. If you select the Tag Source check box, the folder 'Project Greenhands' will automatically be tagged with the term 'Project Greenhands' when the term is created.
- **Make Term Taggable** - Any term in the information model can be marked as taggable or non-taggable. A term marked as taggable means that it is available for tagging. Generally, grouping terms that should not be used for tagging should be marked as non-taggable. Refer to section [Tagging options](#) to learn more.
- **Make Term Suggestable** - If the feature "Suggest term" is enabled, the term will be suggested to the user when the user tags a document which contains content related to the term. Refer to section [Tagging options](#) to learn more.
- **Auto Tagging** - WorkZone Find automatically tags documents with matching terms only if the terms are marked for auto tagging. If a term is not marked for auto

tagging, a document containing the term will not be automatically tagged even if the category is used in an auto tagging rule. If you want the automatically created terms to be used for auto tagging, select this option. Refer to section [Tagging options](#) and section [Working with automatic tagging](#) to learn more.

- **Use term as Fingerprint** - By default the value of the Fingerprint property is generated on basis of the iBlock ID. For example, `Fingerprint=$.7ec37bf2-12f0-46c7-8ade-773a67a74a7b`, where `7ec37bf2-12f0-46c7-8ade-773a67a74a7b` is iBlock ID. Select this checkbox if you want to use the name of the term as a basis for the Fingerprint property.

How to configure the term update options

- **Update Name** - Select this check box if the name of the new terms needs to be updated when the source name changes. In this example, terms are created based on the SharePoint folder structure. If one of the folders is renamed, the corresponding term created in WorkZone Find ModelBuilder will be renamed if this option is chosen.
- **Update Security** - Select this check box if the new term security needs to be in sync with a change in source security.
- **Update Hierarchy** - Select this check box if the hierarchy of new terms needs to be updated with the change in the source hierarchy. For example, if you included subfolders to create auto terms, and if one of the subfolders is moved to another folder, then the corresponding term will also move to the new hierarchy.
- **Delete if Source Deleted** - Select this option if you want the terms to be deleted from the information model if the source is deleted. In our example, if one of the folders is deleted, the associated term will also be deleted from the information model.
- **Delete if Source Soft Deleted** - Select this check box if you want the terms to be deleted from the information model if the source is soft deleted.

HOW TO CONFIGURE THE SECURITY OPTIONS

- **Same as Source** - Select this option button if the security of the new terms should be the same as the source security. In the example, if the security settings of one of the folders are such that only "Jane Doe" can view and modify it, the corresponding term created in the information model will have the same security (that is, only "Jane Doe" can view and modify the term).
- **Same as Category** - Select this option button if the new terms need to inherit the security specified in WorkZone Find ModelBuilder category regardless of the source security.
- **Allow Everyone Access** - If this option button is selected, all users will have access to new terms regardless of the security specified in the source block or in the information model category in which the terms are created.

How to configure the term hierarchy options

- **None** - If this option is selected, the new terms are created as stand-alone terms without belonging to any hierarchy.
- **Mimic Source Relation** - If this option is selected, term hierarchy is created with 'Containing Folder' relation. In other case there will be no hierarchy.
- **Use Grouping Term** - If this option is selected, the duplications in terms will be avoided.

Using Grouping Term Options

You can populate the terms automatically by using the settings on the **Grouping Term options** tab of the **AutoTerm Rule Editor** dialog box.

The difference between creating terms through Auto Term options and Grouping Term options is described below.

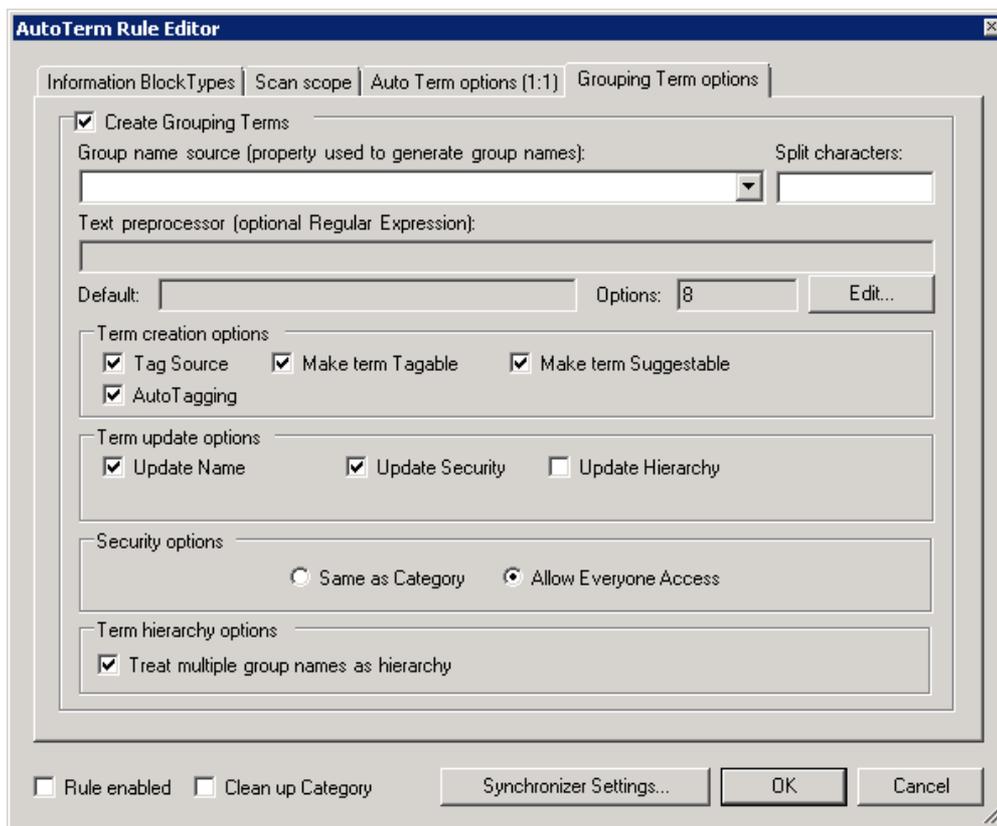
When you use Auto Term options, a new term is created for every information block type in the scan scope (1:1).

When you use Grouping Term options, Auto Term Rule checks for duplicates before a new term is added to the model. Therefore, the terms created using the grouping term options, do not contain duplicates.

For example, you have files with different extensions stored in a SharePoint document library. You can automatically create terms based on these file extensions using grouping term options, and then automatically tag the files with these terms by means of a property query. To do this, you need to create extensions as tags in an "Extensions" category.

[How to create extensions as tags](#)

1. Create a category called "Extension" in WorkZone Find ModelBuilder. Check out the new category.
2. Right-click the category and select **Auto Term Rule Editor**.
3. On the **Information Block Types** tab, select the **File** check box, because the extension property is associated with files.
4. On the **Scan scope** tab, select the location which contains files with different extensions.
5. Click the **Grouping Term options** tab (to avoid creating a term for every file, you should not use the **Auto Term options** tab). Select the **Create Grouping Terms** check box.
6. From the **Group name source** drop-down list, select **Extension**.



7. Term creation options, Term update options, and Security options should be configured the same way as described in section 2.17 Automatic Term Population Using Auto Term Rule Editor.

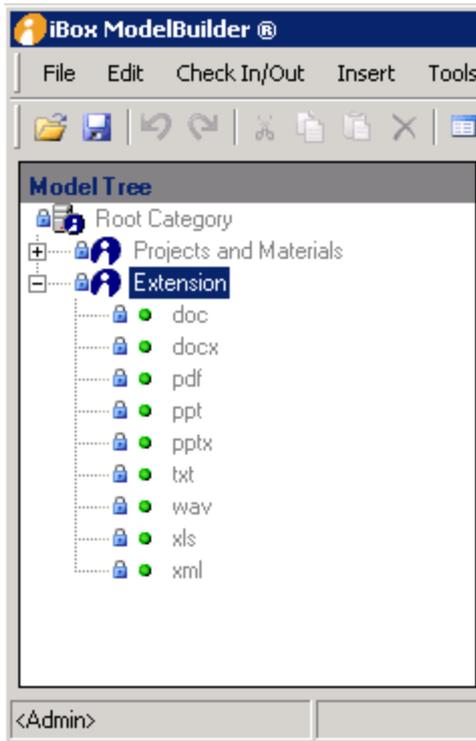
Note: There is no “same as source” option in the security options because source security cannot be inherited by a grouping term.

If the property selected in **Group name source** is stored as an array, then if you select the **Treat multiple group names as hierarchy** check box, a hierarchy of terms will be created.

For example, if there is a “multiple lines of text” property in SharePoint and if you use it in **Group name source** list to create grouping terms, a term hierarchy will be created in the information model where the first line is the parent term and the second line is its child term, and so on.

8. Select the **Clean-up Category** check box in the following situations:
 - if you make changes to an Auto Term Rule for which terms are already populated;
 - if you want to delete the old terms and clear the category before populating new terms.
9. Select the **Rule enabled** check box to enable the rule.
10. Click **OK** to save the settings.

11. Save the information model and restart WorkZone Find ModelBuilder again. Now you can see that the "Extension" category has been populated with different file extensions:



Using auto term options and grouping term options together

Wrong use of these settings can clutter WorkZone Find ModelBuilder and this will result in poor performance.

You can use the Auto Term options and Grouping term options functionalities together while creating an Auto Term Rule. The terms populated using the Grouping Term options functionality will be the parent terms. The terms populated using the Auto Term options functionality will be the child terms based on the relation with the parent term.

This is applicable only when you select the **Use Grouping Term** option button in the **Term hierarchy options** section on the **Auto Term options** tab.

The terms populated with Auto Term options functionality could contain duplicates (if there are duplicates in the source blocks), because new terms are created for every source block regardless of the fact that they already exist in the model.

The terms populated by Group Term options functionality do not contain duplicates. The Auto Term Rule checks for duplicates before adding a new term to the category.

Advanced WorkZone Find settings

Further customization of WorkZone Find ModelBuilder can be performed from the WorkZone Find Settings Editor.

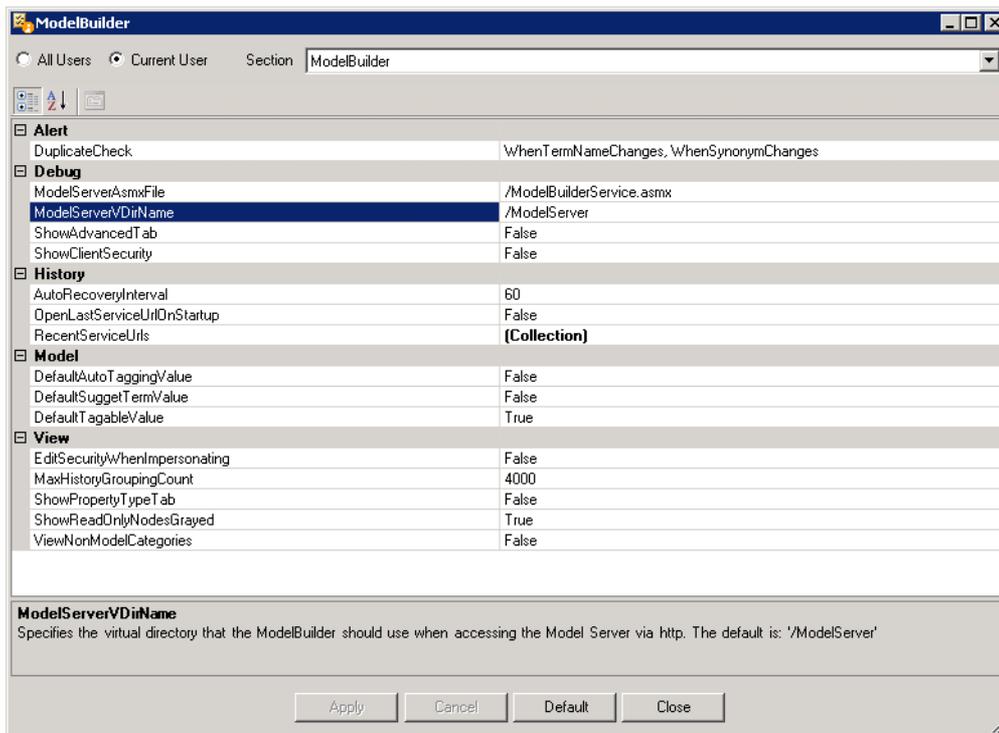
Note: These parameters are normally set during the WorkZone Find installation process. ScanJour recommends that you leave the default values. If you make changes, close and reopen WorkZone Find ModelBuilder for changes to take effect.

How to access the advanced WorkZone Find settings

To access the advanced WorkZone Find settings, perform the following steps.

Note: If you want to edit the settings for all users, you must be logged on as administrator.

1. Open WorkZone Find ModelBuilder.
2. Select **Tools > Local iBox Settings**.
3. In the **WorkZone Find Settings Editor** dialog box, configure the settings as required. Click an item to see further information in the help text at the bottom of the window.



Managing security and user rights

The users can have reading, writing, and editing rights which are determined by Active Directory. The tag that a user can apply or even see is handled in the Rights settings in WorkZone Find ModelBuilder. You can set user rights for each category and term in the information model. The process of setting up WorkZone Find Model Security is similar to setting access rights on files and folders using Windows Explorer.

Before changing security settings in WorkZone Find ModelBuilder, it is necessary to run AD Connector. Once you have changed the security settings and saved the changes, run AD Connector again to activate the changes.

File Security should not be based on "Authenticated Users" but only on more static groups and users in order for WorkZone Find to respect file security settings.

USER RIGHTS

There are four types of user rights in the information model:

- View
- Tag
- Modify
- Owner

The **View** and **Tag** rights affect only the search and tagging interfaces. The **Modify** and **Owner** rights affect only WorkZone Find ModelBuilder.

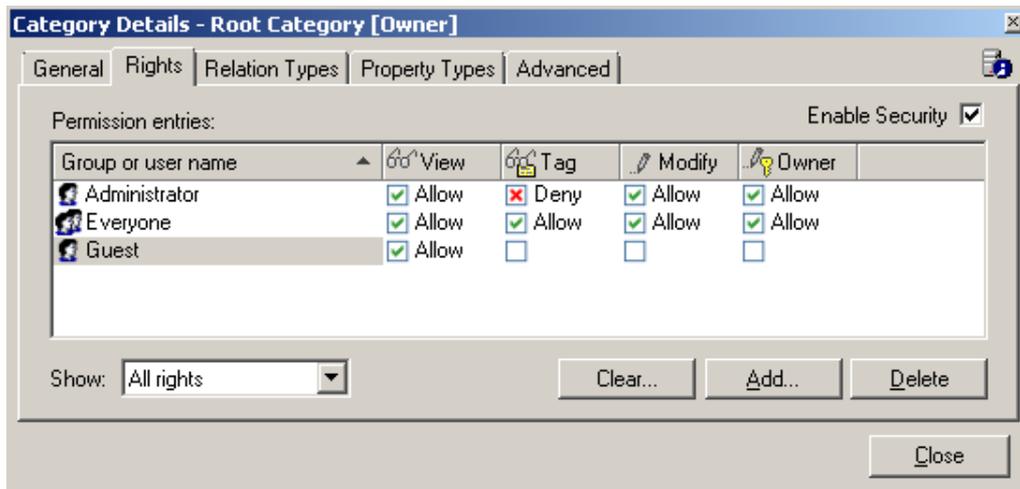
The **View** rights determine whether terms and tags are visible for the user in the Search and Tagging interfaces.

The **Tag** rights determine whether the user is allowed to tag with a specific term.

- If you deny the **Tag** rights on a term level, the terms are still visible and not allowed for tagging. If the **Suggest Term** functionality is enabled, it will still be shown under "Suggest Term", but it will be not possible to tag with.
- The **Tag** rights are dependent on **View** rights.
- If you deny the **View** rights, then the **Tag** rights will also be denied.

The **Modify** rights determine if a user can check out and edit a model category or a term in WorkZone Find ModelBuilder.

The **Owner** rights determine if a user can change the security settings for a given category or term in WorkZone Find ModelBuilder.



SECURITY RIGHTS

A security right can have three values: Empty, Allow, or Deny.

- **Empty** displayed as a cleared check box. It means that the right has not been granted. In the figure above, the user "Guest" has not been granted the **Tag** rights.
- **Allow** displayed as . It means that the right is inherited whereas a green checkmark means that it is explicit.
- **Deny** displayed as . It means that the right is inherited, whereas means that it is explicit. **Deny** means that the user does not have the right.

SECURITY RIGHTS PRECEDENCE

The denied or granted rights for an individual user overrule the rights denied or granted for the groups which the individual user is a member of.

The **Allow** rights take precedence over the **Empty** rights.

The **Deny** rights take precedence over the **Allow** rights.

Example

The user "Guest" is a member of the "NOVIEW" group and this group does not have the **View** rights (empty). In this case, even though all members of the group do not have the **View** rights, "Guest" will have view rights, because the **Allow** rights defined for the user will take precedence over the **Empty** rights defined for the group.

ENABLING SECURITY

All the categories have the **Enable Security** check box. This can be used to enable or disable security for a category and all its child terms.

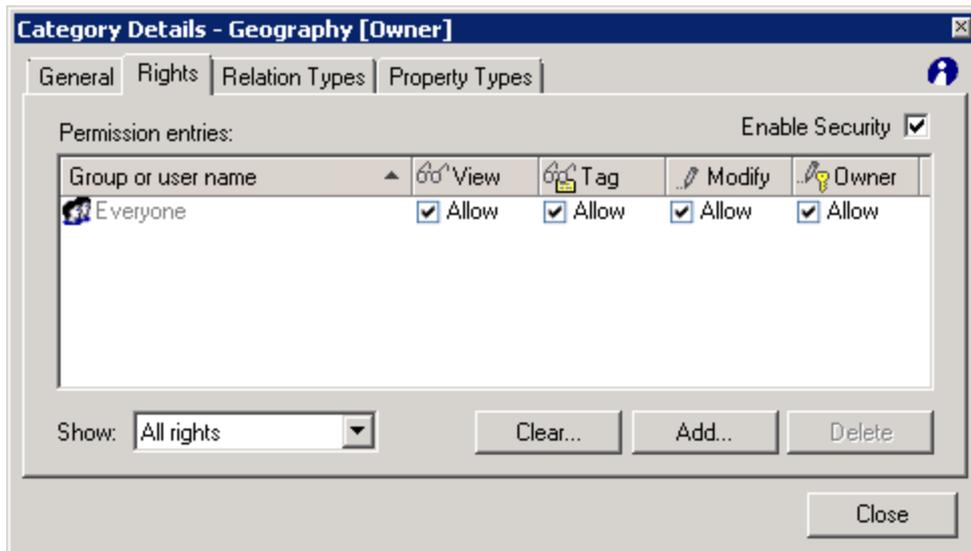
Disabling security on the root category will disable security on all child categories. Enabling security on a child category will require enabling security on the root category.

Note: The permission sets are not lost when you disable security. They will be available and take effect again when you enable the security.

How to enable security

1. Check in as a model administrator - see section [Saving changes to the Information Model](#).

2. Check out a category.
3. Right-click the category and select **Details**.



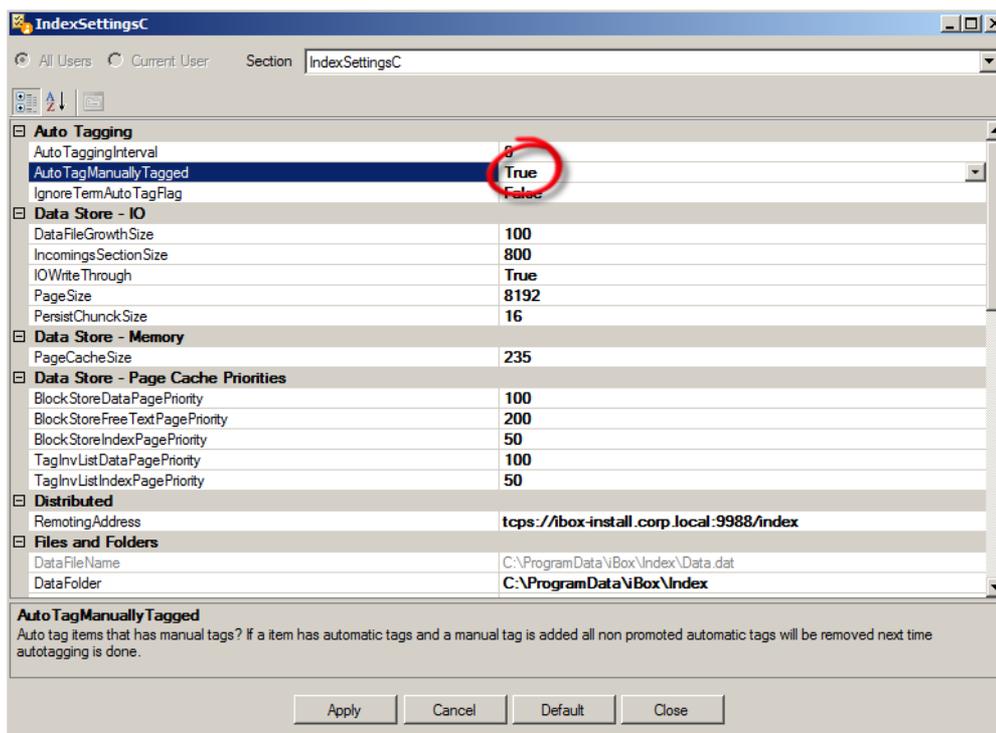
4. In the **Category Details** dialog box, select the **Enable security** check box.
5. Click **Close**. Now that security is enabled, the rights can be edited for groups or users (**Empty**, **Allow**, or **Deny**).
From the **Show** drop-down list, you can choose which rights should be displayed: **All rights**, **User interface rights**, or **Administrative rights**.
On the **Rights** tab of a category there are three buttons:
 - **Clear** - click this button to clear the non-inherited permission entries for the selected item and its child items.
 - **Add** - click this button to add a new user or group.
 - **Delete** - click this button to delete the selected user or group.

Working with automatic tagging

The automatic tagging in WorkZone Find is set up using Automatic Tagging Configuration component. It is accessible in the WorkZone Find Index Manager.

How to enable automatic tagging

1. Open WorkZone Find Index Manager.
2. Click **File > Index Settings (<Servername>) ...**
3. The **IndexSettingsC** section is displayed.
4. In the sub section **Auto Tagging**, set the **AutoTagManuallyTagged** value to **True**.
5. Go to another field after changing the field using the tabulator or by clicking, and click the **Apply** button to confirm the change.
6. You can now close Index Manager.



How to access the Automated Tagging Configuration

1. Open WorkZone Find Index Manager.
2. Click **File > Automated Tagging Configuration**.
3. The **Automated Tagging Configuration** dialog box is displayed. In this dialog box you can assign queries to locations. It contains two lists:
 - A list of auto tagging queries.
 - A list of scanable locations.

4. Automatic tagging in WorkZone Find is divided into two types:
- Automatic Property Tagging
 - Automatic Free text Tagging

Automatic tagging is triggered by the index at regular intervals which can be configured.

In WorkZone Find auto tagging rules are not inherited correctly if rules are already applied at lower level locations. ScanJour recommends placing all the auto tagging rules on the same level.

Automatic property tagging in NTFS

Automatic property tagging can be used to automatically tag information items based on the following:

- NTFS properties
- MS Office properties

Below is an example of how automatic property tagging works. In this example folders with different names are related to the company names in the NTFS share. The aim is to automatically tag these folders based on their names using a property query. To do this, you need to create company names as terms in the "Company" category.

1. In WorkZone Find ModelBuilder create a category called "Company" that contains the names of companies. You can use ODBC Connector to automatically populate such a category with company names. For more information, refer to the [Configuration Guide](#).
2. Enable the terms for auto tagging.

How to enable the terms for auto tagging

1. Double-click the category.
2. In the **Category Details** dialog box, click **Child Tagging Options**.
3. In the **Auto Tagging** section, select the **Enable on all terms** check box.
4. Click **OK**.

3. Open WorkZone Find Index Manager. Click **File > Automated Tagging Configuration**.
4. In the **Automated tagging configuration** dialog box, right-click **Auto tagging queries** and select **New query**.
5. In the **Name** field, type a name for the query, for example, "P_Company_FolderName", where:
 - P** - means that it is a property query,
 - Company** - defines the category used in the query,
 - Folder** - represents the Block Type,
 - Name** - specifies that the property query is based on the iBlock Name.
6. In the **Type** field drop-down list, select **Property**.
7. On the **General** tab, select **Exact** from the **Text matching** drop-down list.

Note: You can also select the Prefix for property and free text queries in all the repositories supported by WorkZone Find (NTFS, SharePoint, and Captia) from the drop-down list. For the prefix matching to work, the exact term name in full should be present as the beginning part of the property.

8. Click the **iBlock types** tab. Select the type of information items to auto tag using this query, in this example, "Folder".

- Click the **iBlock property types** tab. Select the **Name** item, because auto tagging will be based on the name of the folder.

Note: The automatic property tagging will work only if there are terms in the information model matching the name selected in the auto tagging query, and if these terms are enabled for auto tagging.

- Click the **Categories** tab. Select the category that contains terms matching the item property (folder name), in this example, "Company".
- Click the **Category property types** tab. Select "Name", because the matching on which it is based is the name of the company.
- Click **OK** to save the query. The added query is displayed under **Auto tagging queries** section of the tree.
- Associate the query with the required location.

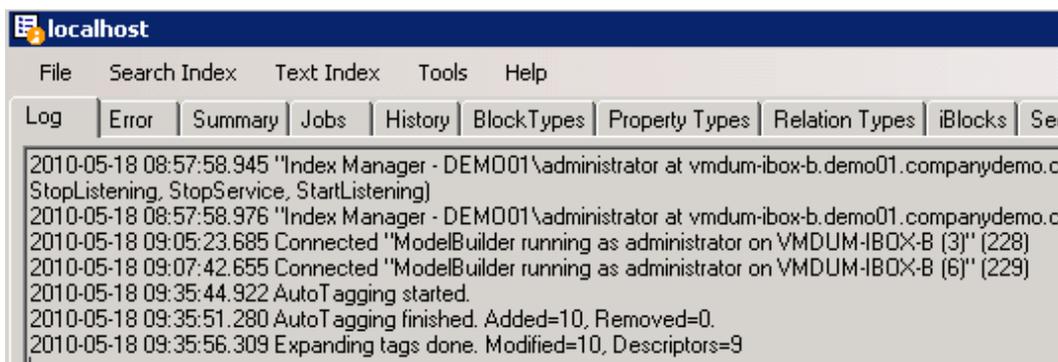
How to associate the query

- Select the location in the left pane of the **Automated tagging configuration** window. All the available queries will be displayed in the right pane.
- Select a query and click the  button to associate the query with the location. In this example, folders in the NTFS share are called "iboxshare" on the server "server". You need to link that scan location with the auto tagging query.

- Click **OK** to save the configuration.

Note: The location must be included into the connector scan scope before it can be used for automatic tagging.

- To run auto tagging, in WorkZone Find Index Manager click **Tools > Auto tag**.
- Click the **Log** tab. The log shows that the auto tagging has started and a number of auto tags have been added.



- After the auto tagging process has run successfully, find the required items in the search results and verify that the folder is tagged with the appropriate terms. In this

example, it should be tagged with the company name "Intel" as shown below: 10 folders in the share were used for auto tagging. The index log also showed that 10 tags were added automatically, so that all the files and folders in the share were automatically tagged with companies.

How to manage automatic property tagging based on file system and MS Office properties

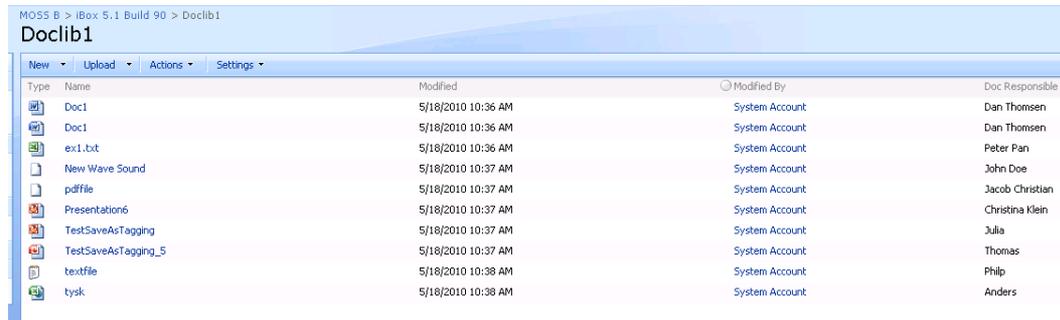
WorkZone Find supports automatic property tagging based on file system properties. The properties like Author, Title, Name, URN, URL, Size, FileExtension, Owner, and so on, can be used for auto tagging purpose provided that there are matching terms in the information model and that the terms are enabled for auto tagging.

WorkZone Find can use NTFS, Captia, SharePoint or MS Office properties supported by WorkZone Find for auto tagging purposes. The lists of supported properties are displayed in the **Automated Tagging Configuration** dialog box on the b tab (in the Index Manager, click **File > Automated Tagging Configuration**).

Automatic property tagging in SharePoint

You can convert SharePoint metadata stored in SharePoint Columns into WorkZone Find Metadata and subsequently use it to automatically tag information items in SharePoint. It is only possible to convert SharePoint Columns which have the following SharePoint Properties: "Single Line of Text", "Multiple Line of Text", "Choice Fields", "Date & Time", "Currency", "Hyperlink", "Look up", "Person/group".

Example: The SharePoint Document Library has a SharePoint Column named "Doc Responsible". The documents have applied values – see the SharePoint property value applied to documents in the "Doc Responsible" column:

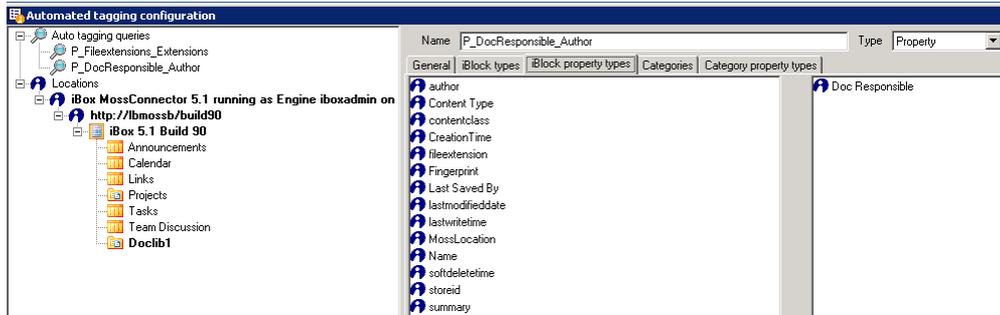


Type	Name	Modified	Modified By	Doc Responsible
Doc1	Doc1	5/18/2010 10:36 AM	System Account	Dan Thomsen
Doc1	Doc1	5/18/2010 10:36 AM	System Account	Dan Thomsen
ex1.txt	ex1.txt	5/18/2010 10:36 AM	System Account	Peter Pan
New Wave Sound	New Wave Sound	5/18/2010 10:37 AM	System Account	John Doe
pdffile	pdffile	5/18/2010 10:37 AM	System Account	Jacob Christian
Presentation6	Presentation6	5/18/2010 10:37 AM	System Account	Christina Klein
TestSaveAsTagging	TestSaveAsTagging	5/18/2010 10:37 AM	System Account	Julia
TestSaveAsTagging_5	TestSaveAsTagging_5	5/18/2010 10:37 AM	System Account	Thomas
textfile	textfile	5/18/2010 10:38 AM	System Account	Philp
tysk	tysk	5/18/2010 10:38 AM	System Account	Anders

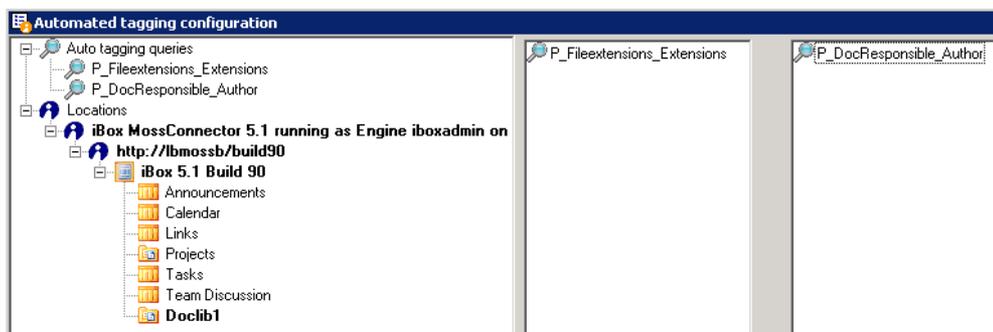
The process is as follows: Extract the metadata stored in SharePoint, convert it to WorkZone Find metadata using AutoTerm Rule Editor feature, and subsequently use the property values to automatically tag the appropriate documents in SharePoint.

How to perform automatic free text tagging

1. Create a category called "Author" in WorkZone Find ModelBuilder and automatically populate the category with the SharePoint property "Doc Responsible". You can either create terms manually in WorkZone Find ModelBuilder or use the auto term rule feature in WorkZone Find ModelBuilder to automatically populate the category with the SharePoint property values.
2. When the category has been populated, ensure that the terms inside are enabled for auto tagging.
3. Open WorkZone Find Index Manager. Click **File > Automated Tagging Configuration**.
4. In the **Auto Tagging Configuration** dialog box, create a property query – see section [Automatic property tagging in NTFS](#).
5. Select the property on the **iBlock Property Type** tab. In this example, the SharePoint property is called "Doc Responsible". Therefore, select the iBlock property type named "Doc Responsible".



- Once the query is created, save it and link the query to the location as explained in section [Automatic free text tagging](#). In this example, the location is “Doclib1” document library as shown below:



- Click **OK** to save the configuration.
- In WorkZone Find Index Manager, click **Tools > Auto tag** to start the automatic configuration.
- In the SharePoint Document Library, right-click the different documents to open Tagging Client and verify that they have been tagged with an appropriate “Doc-ument Responsible” tag.

Automatic free text tagging

WorkZone Find allows automatic tagging of files based on their free text (content).

The preconditions for automatic free text tagging are as follows:

- The file must contain the metadata term that you want to tag with.
- Auto tagging must be enabled for the term in WorkZone Find ModelBuilder.

How to configure WorkZone Find for automatic free text tagging

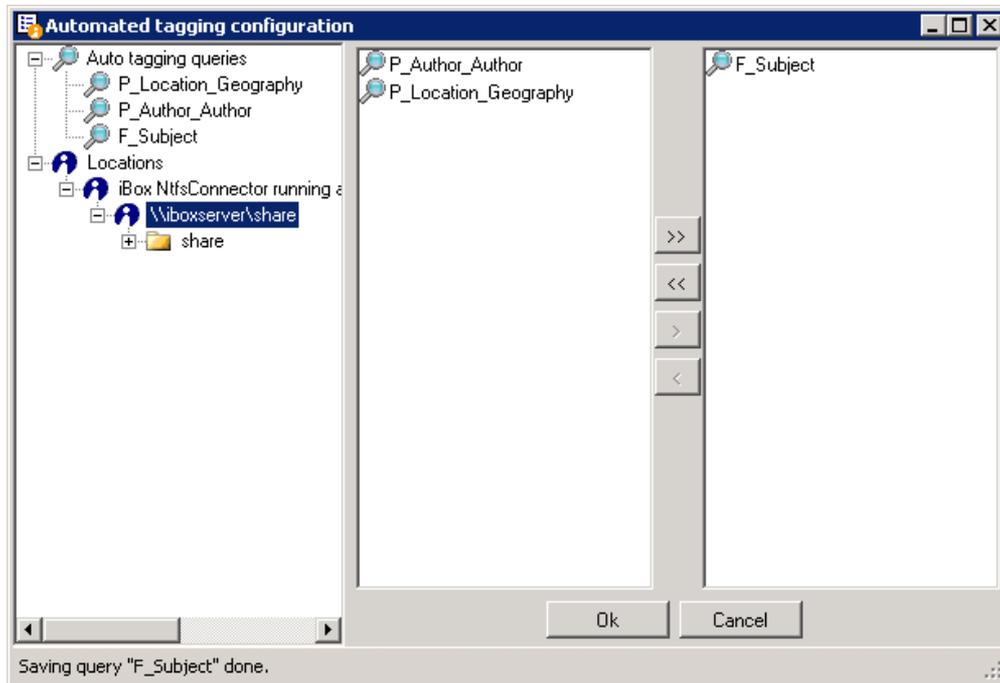
1. Open WorkZone Find Index Manager.
2. Click **File > Automated Tagging**.
3. In the **Automated tagging configuration** dialog box, right-click the **Auto tagging queries** item in the tree and select **New query**.
4. Type a name in the **Name** field. From the **Type** drop-down list, select **Automated tagging configuration**. Select the **Use advanced freetext options** check box. From the **Text matching** drop-down list, select **Exact**.

Note: When naming queries, it is important to follow a uniform naming convention which makes it easier to identify and maintain auto tagging queries.

5. On the **iBlock types** tab, select **File**.
6. On the **Categories** tab, select one or more categories that contain terms used for automatically tagging files based on their free text contents. In this example, "Subject".
7. On the **Category property types** tab, select **Name**. Click **OK** to save the query.
8. Link the location of the documents to be automatically tagged with the "Subject" with the free text query created.

How to link the document location with a free text query

1. Expand the **Location** node of the tree.
2. Select the connector and the scan location.
3. Select the queries that you want to apply to the selected location.
4. Click **OK**.
9. Click **OK** to save the configuration. In the example below, the query "F_Subject" (F stands for free text, and Subject is the category used in the query) has been applied to the highlighted location to the left.



Advanced automatic tagging

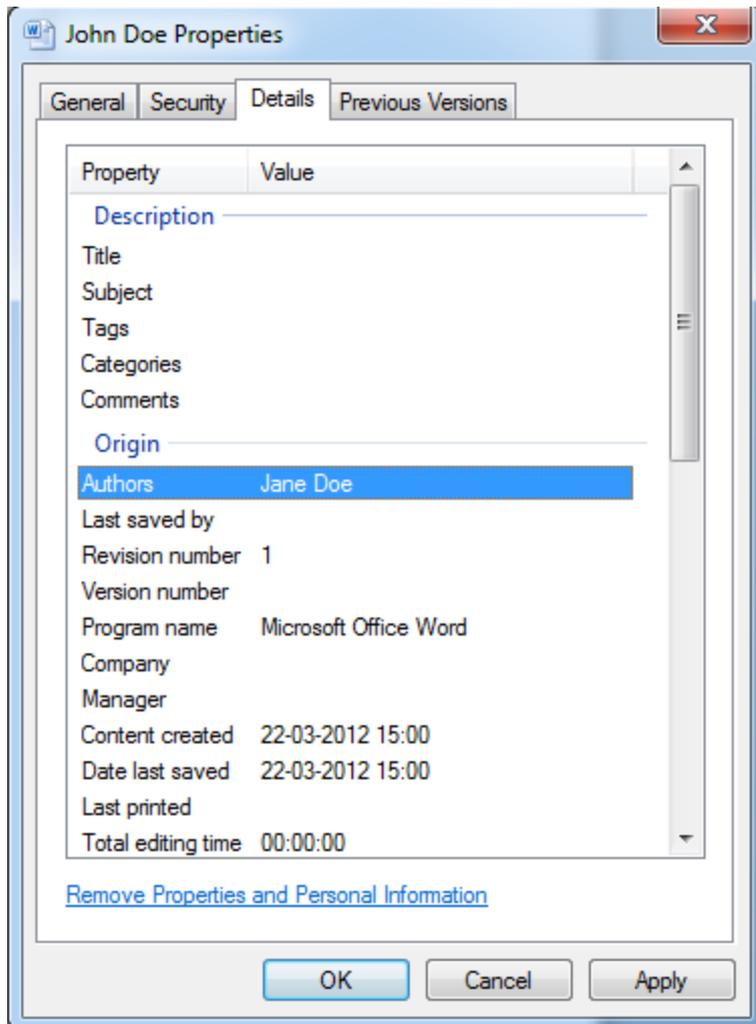
You can automatically tag an information item with a metadata term matching a specific property of the document.

Example

There is a category called "Author" in WorkZone Find ModelBuilder which contains names of all the employees in the organization as its terms. You want to automatically tag a document if the author property of the document matches any of the terms in the "Author" category.

Note: "Author" is a Microsoft Office document property and it is only applicable to Microsoft Office files (Word, Excel, PowerPoint, and so on).

In the example below, the Microsoft Word document "Test1.docx" has a value called "Jane Doe" in its author property:



There is a term called "Jane Doe" in the "Author" category in WorkZone Find ModelBuilder. The challenge here is that only the "Author" property of this document and the terms in the "Author" category should match.

How to configure advanced auto tagging

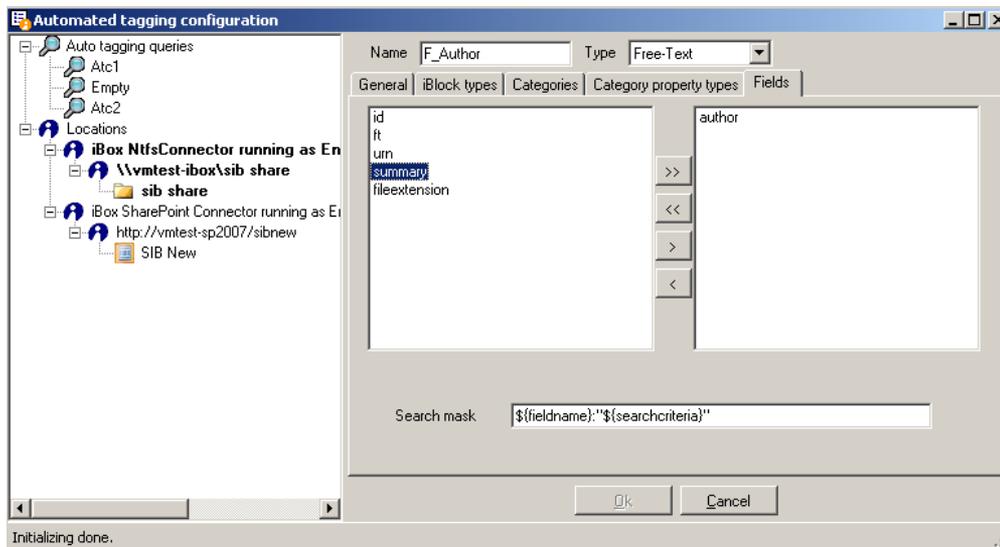
1. Open the automated tagging configuration window – see section [Working with automatic tagging](#).
2. In the **Automated tagging configuration** window, right-click **Auto tagging queries**.
3. Create a new free text query and assign a relevant name – see section [Automatic free text tagging](#).
4. On the **General** tab, select the Use advanced freetext options check box. The **Fields** tab will be displayed.
5. Click the **iBlock types** tab and select **File** to tag the documents automatically.
6. Click the **Categories** tab and select one or more categories that contain the names of authors. In this example, the category is "Author".

7. Click the **Category** property types tab and select "Name".
8. Click the **Fields** tab and select "Author". You need to do this because matching should be based on the "author" property of the document.

Note: Other Lucene fields can also be used. The list of fields that can be used for auto tagging can be configured under LuceneTextIndexSettings.

[More information on Lucene](#)

Contact WorkZone Find support for further information on how to configure it.



9. You can specify the search mask to include additional conditions while doing the matching. For example, use wild card characters such as "*" (asterisk) to perform prefix matching. In this example, if you specify "*" in the search mask after the search criteria, the auto tagging engine will perform a prefix matching rather than an exact matching. So, if a metadata term in the author category in WorkZone Find ModelBuilder is called "Jane", and if a document contains the value "Jane Doe" in its author property, the document will be automatically tagged with the term "Jane" even though there is no exact match.

It is possible to specify all the supported Lucene operators and fields in the search mask field.

Note: When specifying additional operators and fields, remove the quotation marks enclosing the search criteria in the search mask.

10. Click **OK** to save the query.
11. In WorkZone Find Index Manager, click **Tools > Auto tag** to run the auto tagging.
12. Wait until the auto tagging process has run successfully. The documents have now been tagged. In this example, the document "John Doe.docx" has been automatically tagged with the term "Jane Doe".

Advanced Automatic Tagging Search Mask

The search mask defined in the **Fields** tab enables the auto tagging administrator to create custom rules.

To use the search mask feature, you must understand how the auto tagging process works in WorkZone Find. The feature is based on [Lucene technology](#).

When auto tagging is executed, WorkZone Find traverses all categories and builds a query for each term. All the iBlocks that match the query will be tagged with the term.

This query is built using the search mask you define (or the default mask if you have changed nothing). The default search mask for the automatic tagging is defined as:

```
${fieldname}:"${searchcriteria}"
```

Example

In the example from section [3.3.1 Advanced Automatic Tagging](#), this means that when the auto tagging encounters the term "Jane Doe", the following query is built:

```
author:"Jane Doe"
```

As you can see, `${fieldname}` is substituted with the actual field name, and `${searchcriteria}` is substituted with the contents of the term.

If more than one field is selected, the query is constructed as an OR-query like this:

```
(fieldname1:${searchcriteria}) OR
(fieldname2:${searchcriteria}) OR ...
```

If the query from the example was extended with a field named "creator", the query would look like this:

```
author: "Jane Doe") OR (creator: "Jane Doe")
```

How to find not exact matches

Understanding this substitution (see Example) and knowing the syntax of the Lucene free text search opens a lot of opportunities.

If, for example, the "Jane Doe" was actually called "Jane Mary Doe", and in some of the documents her middle name was used, then the auto tagging would only tag the documents which had an author with the exact name "Jane Joe".

There are two possible solutions to this problem.

One solution to this problem is to add aliases to the "Jane Doe" term which contain all variants of her name (as synonyms in WorkZone Find ModelBuilder), but someone would have to maintain these aliases.

An easier (but not as exact) solution is to change the search mask to accept all authors who have the names "Jane" and "Doe" within a certain distance of each other.

When you do a phrase free text search in WorkZone Find, you can use the operator `~` followed by a number to indicate that you want to find all documents which contain all the words in the phrase within some distance of each other.

If you do the search with a distance 1, then type:

```
"Jane Doe"~1
```

As a result you will find documents containing "Jane [some word] Doe" and documents containing "Doe Jane".

The **distance** is the number of word moves which should be done to put the words in the right place.

You will not find "Jane [some word] [some other word] Doe" when you search with a distance of 1.

The phrase distance search can be used in the query by changing the search mask:

```
${fieldname}:"${searchcriteria}"~2
```

This mask will generate the following query:

```
author:" Jane Doe"~2
```

You can use all the search operators available in Lucene when you declare auto tagging search masks.

Note, that some search operators are **word** operators and some are **phrase** operators.

When you use the word operators, you have to remove the quotes from the search mask. For example, if you want to use the truncation operator `*`, the search mask would look like this:

```
${fieldname}:${searchcriteria}*
```

But if the term contains a phrase, for example, more than one word (like "Jane Doe"), this would expand the search criteria:

```
author:Jane Doe*
```

This search finds all documents containing the word "Jane" in the author field or words starting with "Doe" in the free text. This is, however, not recommended.

To avoid this, you should only use the word operators (and remove the quotes from the mask) when you are certain that the terms used in the query do not contain more than one word.

Disabling automatic tagging

In some situations you may want automatic tagging to be executed on a parent level, but with some of the child levels left unaffected by the automatic tagging.

You can disable automatic tagging for specific locations by assigning an empty query to them.

[How to disable automatic tagging](#)

1. In the **Automated tagging configuration** dialog box, right-click **Auto tagging queries** and select **New query**. In the **Name** field, specify a name for the empty query.
2. From the **Type** drop-down list, select **Empty**.
3. Click **OK** to save the query.
4. Select the location to be disabled for automatic tagging. Link the empty query to the location.
5. Click **OK** to save configuration. Documents in the location linked to an empty query are not automatically tagged.

Scheduling Automatic Tagging

ScanJour recommends that you set automatic scanning and auto tagging to regular intervals. This is done using WorkZone Find Index Manager.

You can also force auto tagging if you want new auto tagging rules to be applied immediately, without waiting for the next scheduled scan.

[How to set scan intervals](#)

1. Open WorkZone Find Index Manager.
2. Click **File > Index settings**.
3. In the **IndexSettingsC** dialog box, change the **Auto TaggingInterval** value (in hours).

[How to perform force auto tagging](#)

1. Open WorkZone Find Index Manager.
2. Click **Tools > Auto tag** to run auto tagging.
3. Wait for the auto tagging process to run successfully.

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