

Lab B (Module 6)
Working with Tags and Comments

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In this lab you add comments and tags to the existing document sets located in the M&A site. Comments are added using a modified Welcome page that contains a Note Board Web Part and Tag Cloud Web Part.

# Task 1: Add Tags and Comments to a Document Set

In this task you add a tags and a note to an existing documents set.

1. Using Internet Explorer, navigate to the Mergers and Acquisitions site located at <http://intranet/ECMForTheMassesV3/MandA/>. This URL is included as a favorite in the student demo image.
2. **In the left Quick Launch pane,** select **New Mergers and Acquisitions library.**
3. Select the **Blue Yonder Acquisition** document set link to open the document set.
4. In the upper-right corner of the web page, click the **I Like It** Social Ribbon button .
5. In the upper-right corner of the web page, click the **Tags & Notes** Social Ribbon button.



1. Click in the tag text box, and type **Camera**. Notice the suggested tags display for selection.



7. Select **Camera [Keywords]**.

8. Enter the new tag named **ECM Demo**.

9. Click the **Save** button.

10. Select the **Note Board** tab.



11. Click in the text box and enter a comment.

12. Click the **Post** button to save the comment.

13. In the top-right corner of the dialog, close the dialog by clicking the **X**.

# Task 2: Add a Note Board Web Part to a Document Set Welcome Page

In this task you add a Note Board Web Part to the Welcome page of an existing document set.

1. Using Internet Explorer, navigate to the demo library at http://intranet/ECMForTheMassesV3/MandA/. This URL is included as a favorite in the student demo image.
2. **In the left Quick Launch pane, to open the library,**select **New Mergers and Acquisitions library.**
3. To open the document set’s Welcome page, select the **Blue Yonder Acquisition** document set link.
4. To open the Welcome page in edit mode, click **Site Actions** and select **Edit Page**.



1. Copy the address for the Welcome page from the Internet Explorer address bar. This should be done from the Welcome page while in edit mode.
2. Click the **Add a Web Part** link located in Zone 3.
3. In the Categories pane on the left side of the gallery, select the **Social Collaboration** category.
4. Select **Note Board** in the Web Parts pane.



1. To add the Web Part to Zone 3, click the **Add** button.
2. Hover over the new Web Part, and select the drop-down arrow located in the right top section of the Web Part. Select **Edit Web Part** to display the Web Part’s property pane.



1. In the Property Pane on the right side of the web page, expand the **Custom Properties** section.
2. Paste the URL copied in step 4 into the **URL for Note** text box.



1. Remove all URL parameters from the address except for ID, FolderCTID, List, and RootFolder.

**Note:**If this URL is incorrect the embedded Note Board comments and the Tags and Notes Note Board comments for the Welcome page will not be coordinated.

1. Select the **Page** ribbon tab.
2. Click **Stop Editing** ribbon button.
3. To open the document set’s Welcome page, select the **Blue Yonder Acquisition** document set link.
4. Verify the Note Board Web Part is located in the Welcome page and displays the comment entered from Task 1.
5. Click in the Note Board and add a comment.
6. Click **Post** to add the comment.

# Task 3: Add a Tag Cloud Web Part to a Document Set Welcome Page

In this task you add a Tag Cloud Web Part to the document set Welcome page to display tags associated with the document set.

1. Using Internet Explorer, navigate to the demo library located at http://intranet/ECMForTheMassesV3/MandA/. This URL is included as a favorite in the student demo image.
2. **In the left Quick Launch pane, to open the library,** select **New Mergers and Acquisitions library**
3. To open the document set’s Welcome page, select the **Blue Yonder Acquisition** document set link.
4. To open the Welcome page in edit mode, click **Site Actions** and select **Edit Page**.



1. To open the Welcome page in edit mode, Click **Site Actions** and select **Edit Page**.
2. Click the **Add a Web Part** link in Zone 1.
3. In the Categories pane on the left side of the gallery, select the **Social Collaboration** category.
4. In the Web Parts pane, select **Tag Cloud**.
5. Click the **Add** button to add the Web Part to Zone 1.
6. Hover over the new Web Part and select the drop-down arrow in the right-top section of the Web Part. Select **Edit Web Part** to display the Web Part’s property pane.
7. Set the Show Tags property to **Under the Current URL By All Users** value.



1. Click **OK**.
2. Select the **Page** ribbon tab.
3. Click the **Stop Editing** ribbon button.
4. Select the **Blue Yonder Acquisition** document set link to open the document set’s Welcome page.
5. Verify the Tag Cloud Web Part is located in the Welcome page.
6. **Note**: Depending on the when the two timer jobs execute, all the tags might not be available immediately.

# Task 4: Run the Timer Job to Process the Tags

In this task you run the Social Data Maintenance Job to process the newly created tag.

1. On the Start menu, point to **All Programs**, **Microsoft SharePoint 2010 Products**, and**SharePoint 2010 Central Administration**.
2. In the Monitoring section,click **Check Job Status** link.
3. In the Timer Links section in the left column, click the **Job Definition** link.
4. Use the paging control located at the bottom of the Job Definition page to move to the page containing the **User Profile Service Application - Social Data Maintenance Job** link.
5. Click the **User Profile Service Application - Social Data Maintenance Job** link.
6. Click **Run Now** button.

# Exercise 5: Manage Tags and Comments from the Central Administration Site

In this exercise you use the User Profile Service to find and remove notes and tags.

1. On the Start menu, point to **All Programs**, **Microsoft SharePoint 2010 Products**, and**SharePoint 2010 Central Administration**.
2. In the Application Management section, click the **Manage service applications** link.
3. Click the **User Profile Service Application** link.
4. Click the **Manage Social Tags and Notes** link located in the My Site Settings section.



1. In the Type drop-down control, Select **Tags**.
2. In the User control, enter **administrator**.
3. Click the **Find** button.



1. Select the check box associated with a **Blue Yonder Acquisition**created in Task 1.
2. Click the **Delete** link.
3. Click **OK** to confirm the deletion of the tag.
4. In the Type drop-down control, Select**Notes**.
5. in the User control, enter **administrator**.
6. Click the **Find** button.



1. Select the check box associated with the comment created in Task 1.
2. Click the **Delete** link.
3. Click **OK** to confirm the deletion of the comment.