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**Document Tagger SharePoint Add-in – Manual**

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## 1 INTRODUCTION

*Document Tagger SharePoint Add-in* tags documents in SharePoint document libraries with keywords, which helps organizations to take full advantage of their site's metadata driven SharePoint Search. But better search is just one advantage. You can also filter by tag and create SharePoint views for certain tags.

*Document Tagger* sends your document to a language processing engine, Google Cloud Natural Language, which quickly analyzes it and sends back the top 15 suitable keywords. Review the suggestions, remove those that are not relevant and add more keywords if needed. Then click on the 'Apply tags' button, to apply the tagging.

This way the addition of SharePoint metadata is much quicker than adding each word manually. You can find a detailed description of the possibilities *Document Tagger* gives in chapter 4 of this manual.

Documents are tagged in different ways depending on which interface you work with: classic or modern. Most of the images in the manual are taken from the modern interface, but when there are significant differences we show both interfaces.

### 1.1 LANGUAGE PROCESSING SERVICE

*Document Tagger* uses the [Google Cloud Natural Language](#) for the text analysis. As Google Cloud Natural Language supports document of the size less than 1MB, the current version of *Document Tagger* only reads the first 1MB of documents that are bigger than 1MB.

#### 1.1.1 RELEVANCE

Systems for text analysis are continuously improved, but semantic word processing is still a young science and you will probably have some suggestions you don't want to use. For best result, you should therefore always review the keyword suggestions and uncheck the ones you find irrelevant. *Document Tagger* still makes the process of tagging documents much easier and quicker than manual tagging.

#### 1.1.2 SECURITY

As *Document Tagger* sends documents to Google Cloud Natural Language for text analysis, Google Cloud's security model ensures that your organization's information is secure.

The content is purged immediately after the successful extraction of metadata. Also refer to the [Google Cloud Natural Language security policy](#).

## 1.2 LANGUAGES

The language of *Document Tagger* is automatically set to the same as on the SharePoint site. The supported languages are: Danish, Dutch, English, French, German, Italian, Norwegian, Portuguese, Spanish and Swedish. When the SharePoint site has another language, *Document Tagger* will be in English.

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For document analysis, as we use Google Cloud Natural Language, the languages that are supported for tagging are: English, Chinese, French, German, Italian, Japanese, Korean, Spanish and Portuguese: [<https://cloud.google.com/natural-language/docs/languages>]

When Google Cloud Natural Language starts supporting more languages in the future, *Document Tagger* will automatically support the analysis in those languages also.

### **1.3 REQUIREMENTS**

To use *Document Tagger* you need to have SharePoint 2013 or above (in-house or hosted) or Office 365 SharePoint Online.

Supported browsers are Microsoft Edge, Internet Explorer 9 and higher and the latest version of Google Chrome or Mozilla Firefox.

### **1.4 FORMATS**

*Document Tagger* supports DOCX, PDF, PPTX, TXT and XLSX files.

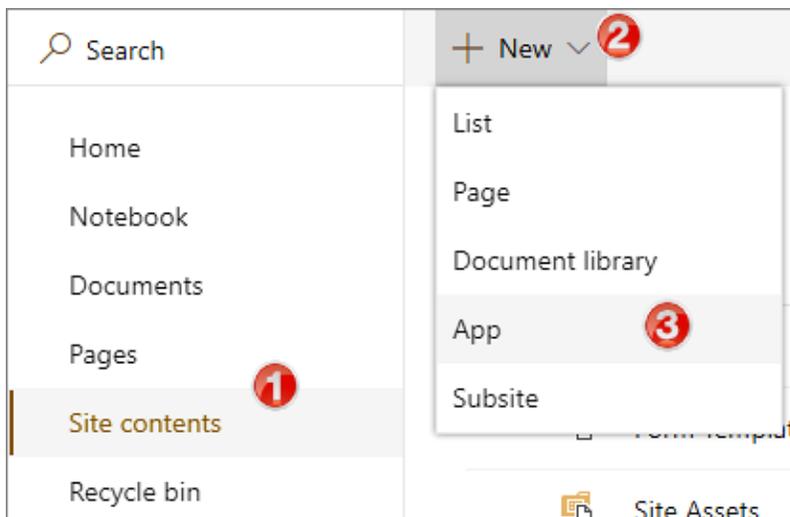
## 2 INSTALLATION OF DOCUMENT TAGGER SHAREPOINT ADD-IN

*Document Tagger* is available on SharePoint Store and can also be downloaded from the kalmstrom.com website. The person who installs *Document Tagger* must have administrator permission on the site collection.

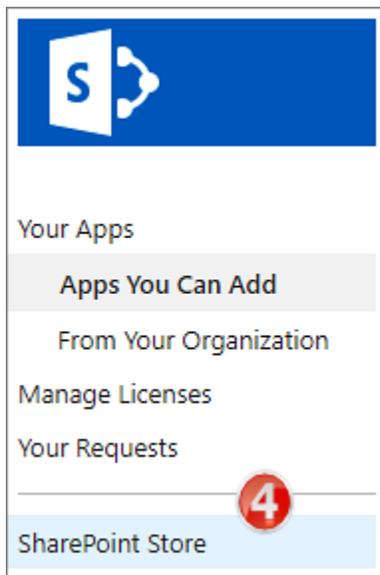
### 2.1 GET FROM SHAREPOINT STORE

Go to the SharePoint site where you want to use *Document Tagger* and click on **Site contents**.

In the Site contents, click on 'New' and 'App'.



Click on **SharePoint Store** in the left pane and select '*Document Tagger SharePoint Add-in*'.



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## 2.2 DOWNLOAD FROM KALMSTROM.COM

You can download *Document Tagger* directly from the kalmstrom.com website to your PC and then upload the add-in to the farm's or tenant's Add-in/App Catalog.

When this is done, you can install *Document Tagger* on any site by going into Site contents and add an app as described under Get from SharePoint Store. Select 'Apps You Can Add' and choose *Document Tagger*.

## 2.3 PERMISSIONS

Standard SharePoint permissions are used for *Document Tagger*. The permission for the Add-in itself is set automatically when the download is trusted.

### 2.3.1 USERS

People who should work with tagging documents must have at least Contribute permission over the document library/libraries where they need to tag documents,, in the SharePoint site where *Document tagger* is installed.

### 2.3.2 ADMINISTRATOR

The *Document Tagger* administrator must have Full control over the site where *Document Tagger* is installed.

At first time use, refer to chapter 3 below, the admin must have Full control over the site collection.

### 2.3.3 ADD-IN

*Document Tagger* has Manage permission on the SharePoint site where it is installed. Thanks to this permission restriction, *Document Tagger* cannot make any other changes on the SharePoint site than the ones needed for the add-in to work, no matter what permission the user has.

*Document Tagger* sets the required add-in permission when you have clicked on the Trust-it button during the installation.

### 2.3.4 VISITORS

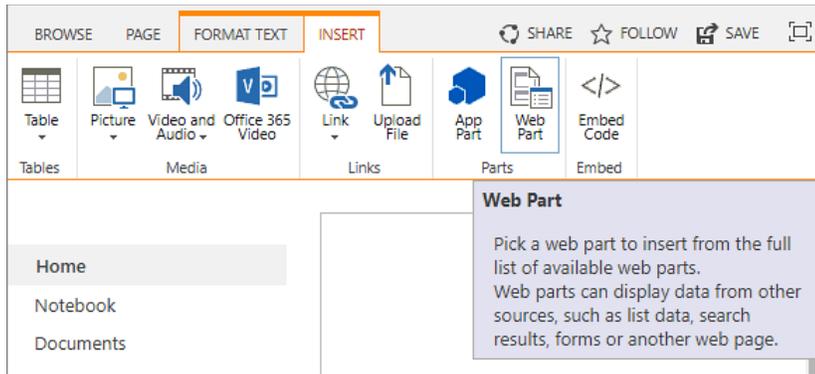
For people who just need to see the documents, it is sufficient with Read permission over document library. Visitors will not be able to tag documents or remove tags, but they will be able to use the keywords to find documents and to view the tagged documents.

## 2.4 ADD AS WEB PART

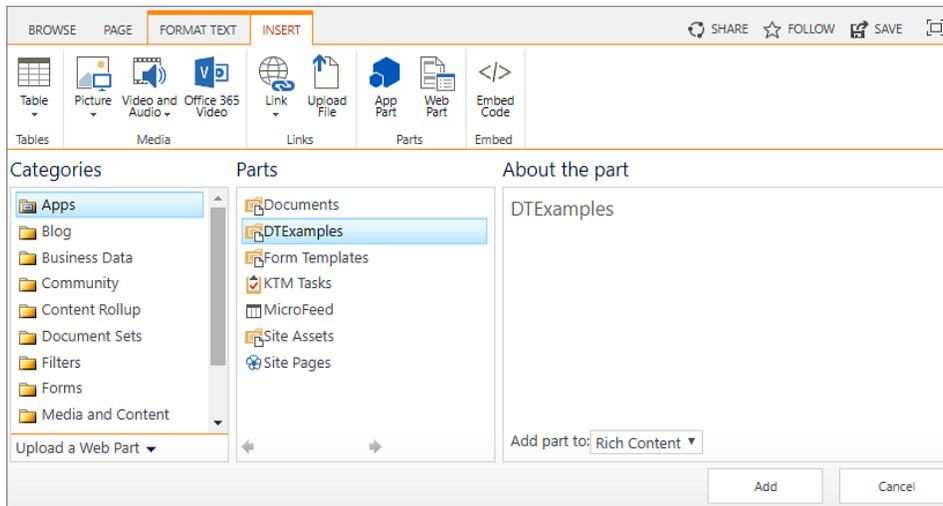
*Document Tagger* can also be used when a SharePoint library is added as a classic web part or app part:

1. Go to the SharePoint site where *Document Tagger* is installed.

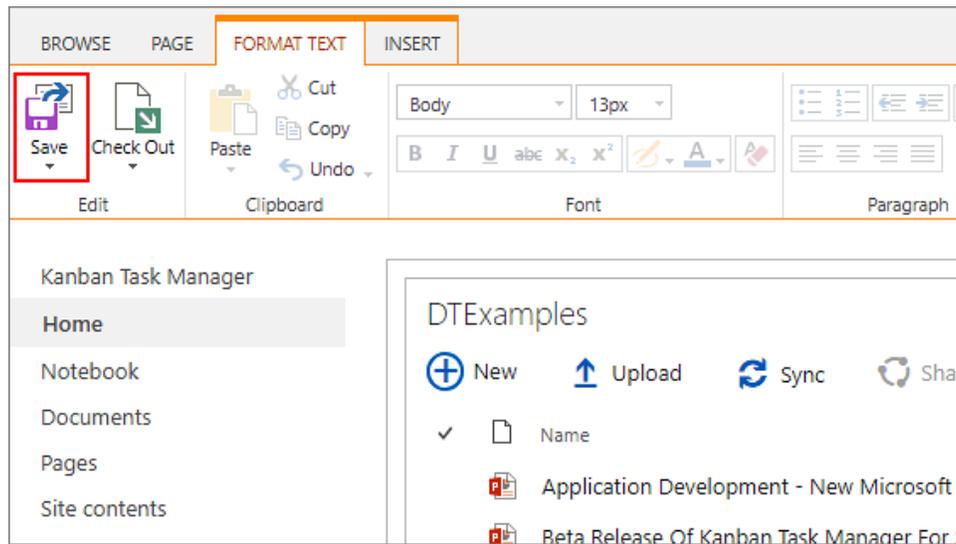
2. Click on 'Edit' on the top right of the SharePoint page where you want to add the web/app part. The page will open in Edit mode.
3. Open the INSERT tab and click on 'Web Part' or 'App Part'.



4. Select the SharePoint library you wish to add, here 'DTEExamples'.
5. Click on 'Add'.



6. Click on 'Save'.



7. Now the SharePoint library is added as a web part to the page.

When a SharePoint library has been added to a page, you can tag the documents in the same two ways as you tag them in the classic interface, *refer to 4.1.2*

## 2.5 TERM STORE

All *Document Tagger* keywords are added to the Enterprise Keywords folksonomy, which is stored in the SharePoint Admin center Term Store and available across the farm or tenant. The concept of tagging is well-known from social media, and usually this freedom of suggesting keywords, or tags, works in SharePoint too.

If you still need to edit the keywords, for example to remove wrongly spelled or inappropriate words, this is done in the Term Store. You need to be a SharePoint admin to perform this action.

1. In the SharePoint Admin center, click on the 'term store' link in the left pane.
2. (The first time this is done, add yourself as Administrator of the Term Store.)
3. Open the Keywords accordion and move or delete keywords.

### 3 FIRST TIME USAGE

When *Document Tagger* has been installed in a site, a “Get Started” page will be shown when you click on “Document Tagger SharePoint Add-in” in the Site contents.

From the “Get Started” page, you can generate an example library if you don't want to try *Document tagger* with your own files. You can also reach the Manual web page, to download this manual.

#### **Get started with *Document Tagger***

Congratulations! Now *Document Tagger* has been installed in this site, and there is a new 'Tag Document' button in all document libraries. When you click on that button, *Document Tagger* tags the selected documents with keywords, which you can either accept or reject.

If you don't want to try *Document Tagger* with your own files, you can create an example library in the [Document Tagger Settings](#) with documents that you can use for testing.

This is how you tag SharePoint document library files in sites where *Document Tagger* is installed:

1. Select one or several documents.
2. Click on the 'Tag Document' button.
3. In a few seconds, keywords will be suggested based on the text in your document.
4. Check the keywords. Remove those that are not needed and add keywords that are missing in the suggestion. Click OK when you are satisfied.
5. The tags are added to the document and to the Enterprise Keywords.

The Enterprise Keywords are stored centrally in SharePoint, which means that once a keyword has been added in one library, it will come up as a suggestion when a user starts writing a similar word in the same or another library.

The SharePoint Search is metadata driven, so by using *Document Tagger* you will have more relevant search hits. But better search is just one of the advantages. With tags you can easily analyze and categorize your documents in different ways, and you can create SharePoint views and forms using tags.

*Document Tagger* and metadata management is described in detail in the [manual](#). You are also always welcome to contact the [kalmstrom.com support](#). team if you have questions.

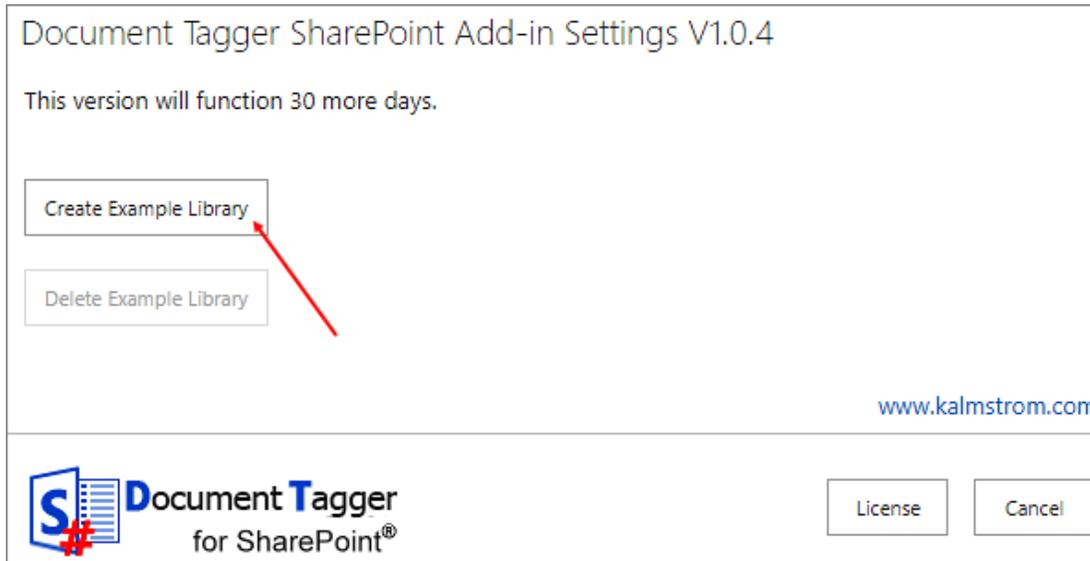
Good luck with *Document Tagger*

Peter Kalmström  
CEO and Systems Designer  
kalmstrom.com Business Solutions



#### 3.1 EXAMPLE LIBRARY

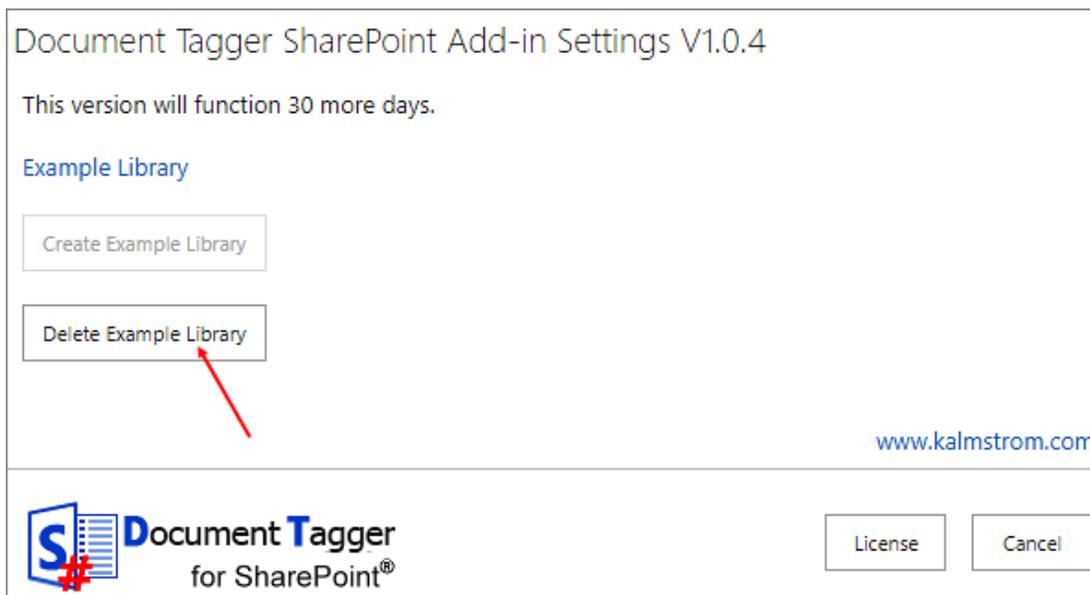
If you choose to first generate an example library for the evaluation, click on the '*Document Tagger* Settings' link in the “Get Started” page. Then click on 'Create Example Library' to create an Example library called 'DTEexamples' with different file formats.



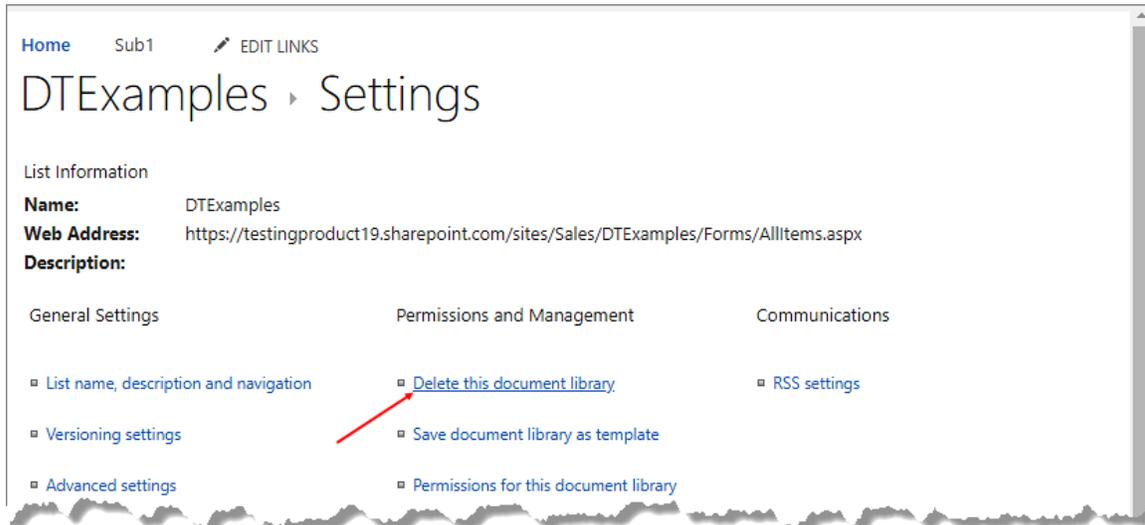
### 3.2 REMOVE EXAMPLE LIBRARY

To remove the example library, go to the *Document Tagger* Settings from the 'Document Tagger' link under Site contents. You can also reach the settings from the *Document Tagger* link in the Quick Launch.

Then click on 'Delete Example Library', and your example library will be deleted.



Another way to remove the example library is to open its library settings. Then click on 'Delete this document library'.



## 4 HOW TO TAG AND USE TAGS

With *Document Tagger*, you can tag newly uploaded documents as well as existing documents.

### 4.1 TAG A DOCUMENT

Select a document in a SharePoint document library and click on the 'Tag Document' button. *Document Tagger* will make a semantic analysis of the document you have selected and suggest the top 15 keywords based on the text of the selected document.



You can uncheck the boxes for the tags you find irrelevant. If you want to add another tag, write in your keyword in the field at the plus sign. Click on the plus sign or press Enter to add the keyword to the document tags. Write in another keyword, if necessary, and click on plus or press Enter. When you are finished, click on 'Apply tags' to save the tags.

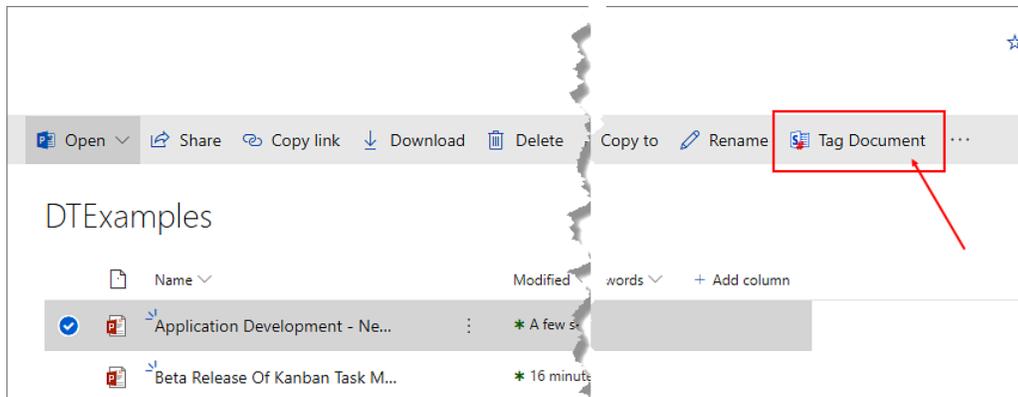
The tags will be displayed in the 'Enterprise Keywords' column in the document library.

Name	Modified	Modified By	Enterprise Keywords
Application Development - New Microsoft Competency for kalmstrom	2 minutes ago	Mayank Gharewal	SharePoint; Peter; development tools; platform; kalmstrom.com Business Solutions; definition; group; both; name change; Application Development; applications; statistics; Microsoft; comWe; level;
Beta Release Of Kanban Task Manager For SharePoint	A few seconds ago	Mayank Gharewal	SharePoint; Kanban Task Manager; Beta Release; SharePointThe; kalmstrom.com application; managers; solution; project; task management; delight; workgroups; phases; reach; site; tasks;
Booking Of Corporate Resouces In Outlook	A few seconds ago	Mayank Gharewal	Peter; forces; version; way; resource booking; knowledge; minds; problem; cases; advantage; issue; Calendar Browser; resources; Resouces; Calendar Browser V8;

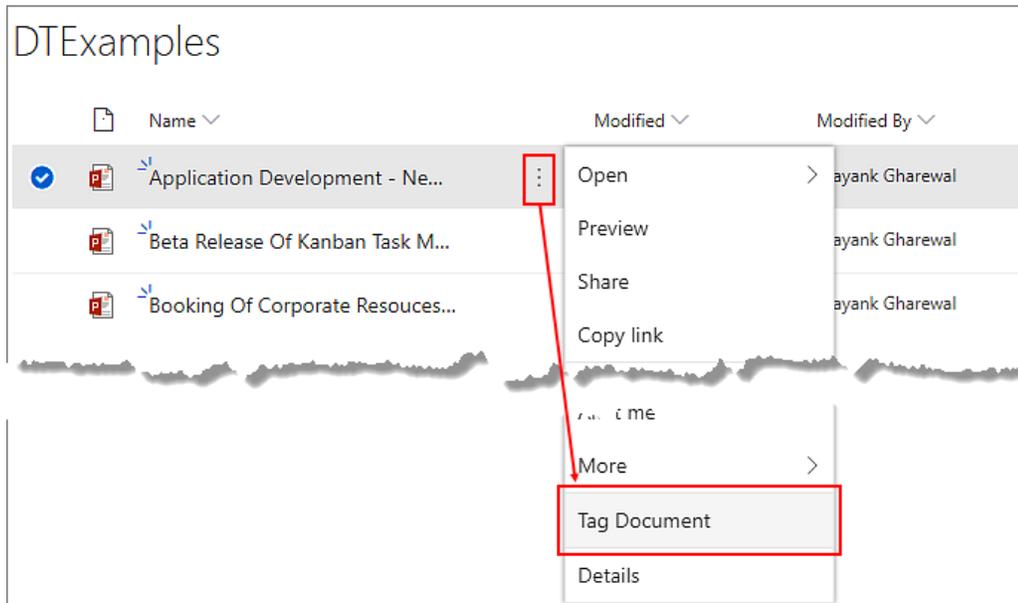
#### 4.1.1 TAGGING IN THE MODERN INTERFACE

In the modern interface, tagging can be done in two ways:

1. Select a document and click on the 'Tag Document' button in the command bar.



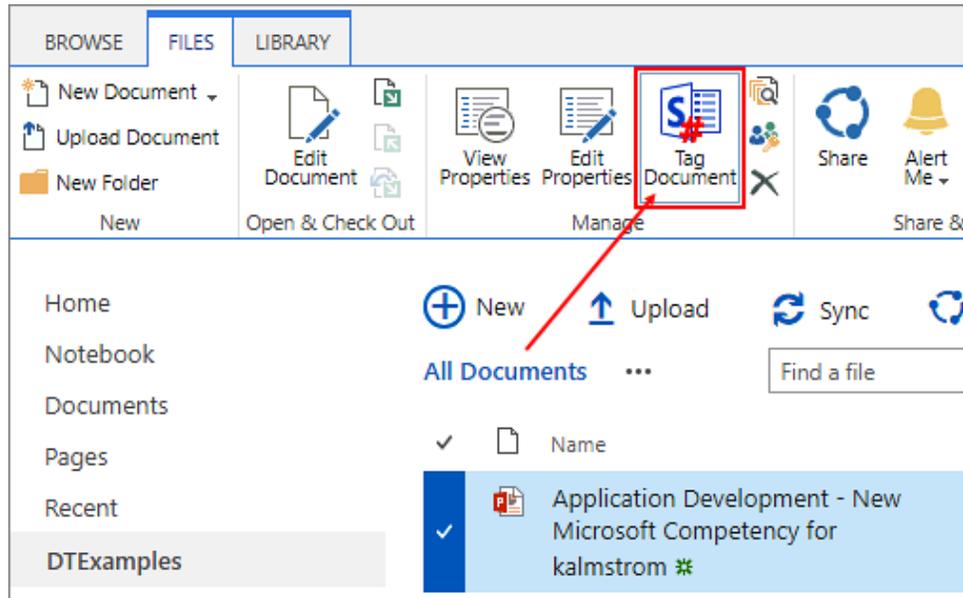
2. Select a document, click on the vertical ellipsis and then on 'Tag Document'.



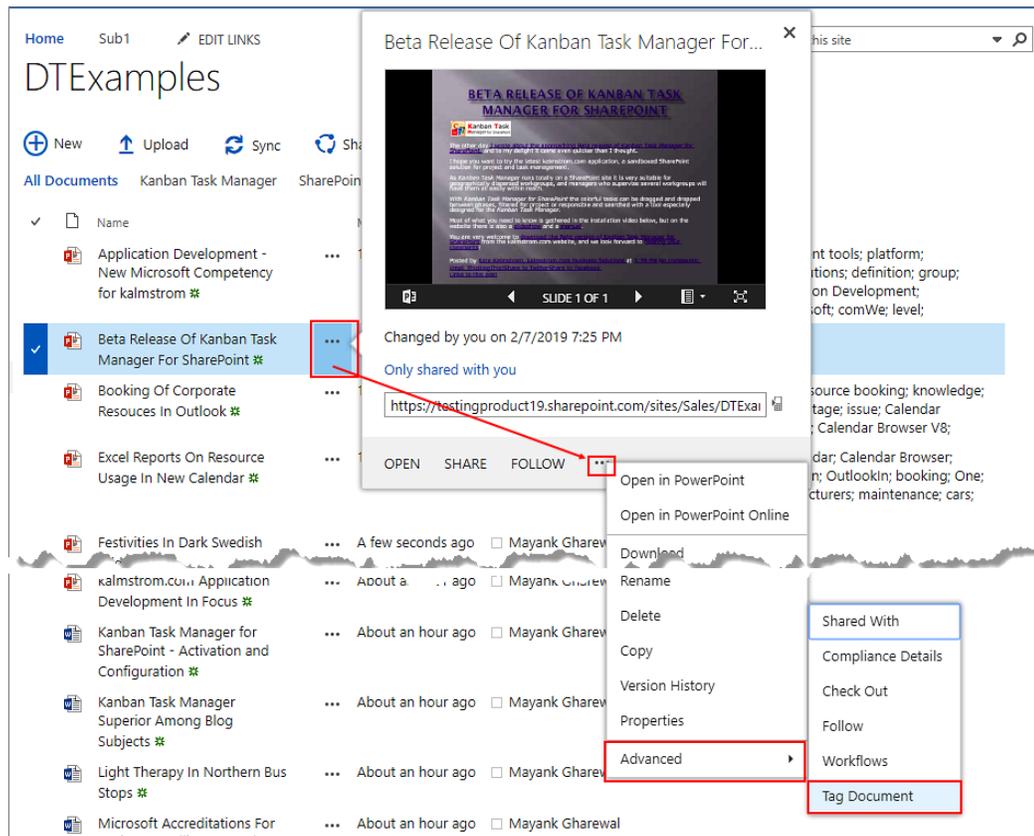
#### 4.1.2 TAGGING IN THE CLASSIC INTERFACE

In the classic interface, tagging can be done in two ways:

1. Select a document and click on the 'Tag Document' button, under the 'Files' tab in the ribbon.

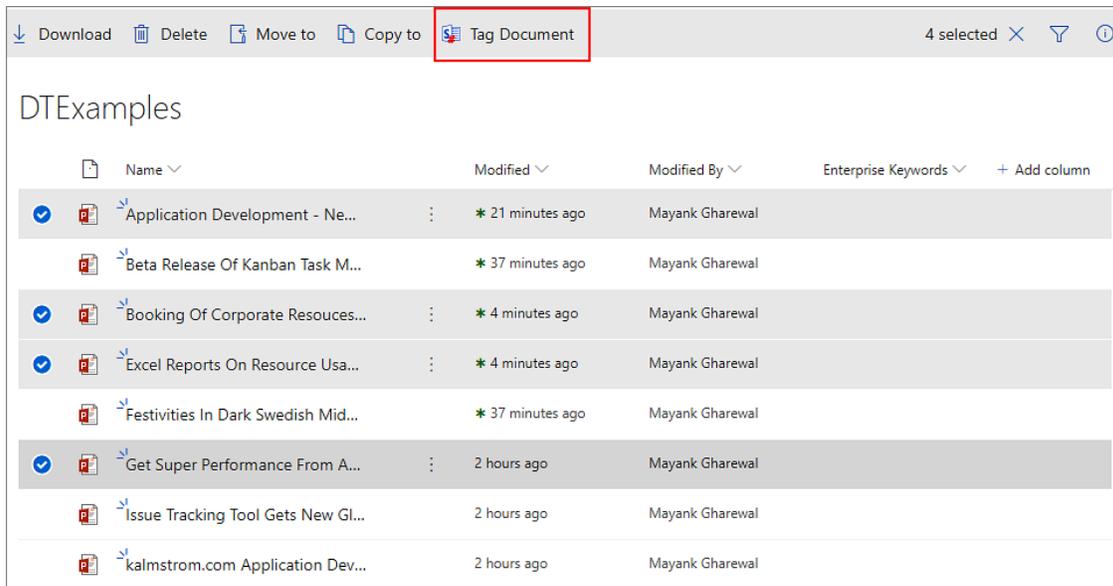


2. Select a document and click on the horizontal ellipsis. Again click on the horizontal ellipsis, go to 'Advanced' and select 'Tag Document'.



## 4.2 TAG MULTIPLE DOCUMENTS

With *Document Tagger*, you can tag multiple documents at a time. To tag multiple documents, select the documents and click on the 'Tag Document' button in the command bar or ribbon.



The screenshot shows a SharePoint document library interface. The command bar at the top includes buttons for 'Download', 'Delete', 'Move to', 'Copy to', and 'Tag Document'. The 'Tag Document' button is highlighted with a red box. Below the command bar, the library name 'DTExamples' is displayed. A table lists several documents with columns for Name, Modified, Modified By, and Enterprise Keywords. Four documents are selected, indicated by blue checkmarks in the left margin.

Name	Modified	Modified By	Enterprise Keywords
Application Development - Ne...	21 minutes ago	Mayank Gharewal	
Beta Release Of Kanban Task M...	37 minutes ago	Mayank Gharewal	
Booking Of Corporate Resouces...	4 minutes ago	Mayank Gharewal	
Excel Reports On Resource Usa...	4 minutes ago	Mayank Gharewal	
Festivities In Dark Swedish Mid...	37 minutes ago	Mayank Gharewal	
Get Super Performance From A...	2 hours ago	Mayank Gharewal	
Issue Tracking Tool Gets New Gl...	2 hours ago	Mayank Gharewal	
kalmstrom.com Application Dev...	2 hours ago	Mayank Gharewal	

When you tag multiple documents, *Document Tagger* will analyze the documents and suggest top 15 keywords for each of them.

Document	tags
<p> Application Development - New Microsoft Competency for kalmstrom.pptx</p>	<input checked="" type="checkbox"/> Peter <input checked="" type="checkbox"/> # development tools <input checked="" type="checkbox"/> # platform <input checked="" type="checkbox"/> # kalmstrom.com Business Solutions <input checked="" type="checkbox"/> # definition <input checked="" type="checkbox"/> # group <input checked="" type="checkbox"/> # both <input checked="" type="checkbox"/> # name change <input checked="" type="checkbox"/> # Application Development <input checked="" type="checkbox"/> # applications <input checked="" type="checkbox"/> # statistics <input checked="" type="checkbox"/> # Microsoft <input checked="" type="checkbox"/> # comWe <input checked="" type="checkbox"/> # SharePoint <input checked="" type="checkbox"/> # level <input type="text"/> +
<p> Booking Of Corporate Resources In Outlook.pptx</p>	<input checked="" type="checkbox"/> Peter <input checked="" type="checkbox"/> # forces <input checked="" type="checkbox"/> # version <input checked="" type="checkbox"/> # way <input checked="" type="checkbox"/> # resource booking <input checked="" type="checkbox"/> # knowledge <input checked="" type="checkbox"/> # minds <input checked="" type="checkbox"/> # problem <input checked="" type="checkbox"/> # cases <input checked="" type="checkbox"/> # advantage <input checked="" type="checkbox"/> # issue <input checked="" type="checkbox"/> # Calendar Browser <input checked="" type="checkbox"/> # resources <input checked="" type="checkbox"/> # Resources <input checked="" type="checkbox"/> # Calendar Browser V8 <input type="text"/> +
<p> Excel Reports On Resource Usage In New Calendar.pptx</p>	<input checked="" type="checkbox"/> # Excel Reports. <input checked="" type="checkbox"/> # Outlook <input checked="" type="checkbox"/> # calendar <input checked="" type="checkbox"/> # Calendar Browser <input checked="" type="checkbox"/> # resource booking tool <input checked="" type="checkbox"/> # version <input checked="" type="checkbox"/> # OutlookIn <input checked="" type="checkbox"/> # booking <input checked="" type="checkbox"/> # One <input checked="" type="checkbox"/> # Business Solutions <input checked="" type="checkbox"/> # rooms <input checked="" type="checkbox"/> # lecturers <input checked="" type="checkbox"/> # maintenance <input checked="" type="checkbox"/> # cars <input checked="" type="checkbox"/> # enhancements <input type="text"/> +
<p> Get Super Performance From An Average Laptop.pptx</p>	<input checked="" type="checkbox"/> # gamer <input checked="" type="checkbox"/> # RAM. <input checked="" type="checkbox"/> # lot <input checked="" type="checkbox"/> # SSD. <input checked="" type="checkbox"/> # Peter Kalmstrom <input checked="" type="checkbox"/> # price tag <input checked="" type="checkbox"/> # performance <input checked="" type="checkbox"/> # bit <input checked="" type="checkbox"/> # hard drive <input checked="" type="checkbox"/> # laptop <input checked="" type="checkbox"/> # costl <input checked="" type="checkbox"/> # screen <input checked="" type="checkbox"/> # computers <input checked="" type="checkbox"/> # recipe <input checked="" type="checkbox"/> # virtualization features <input type="text"/> +

You can uncheck the boxes for keywords you find irrelevant. If you want, you may also add a keyword by writing it in the field at the plus sign and click '+' or press Enter.

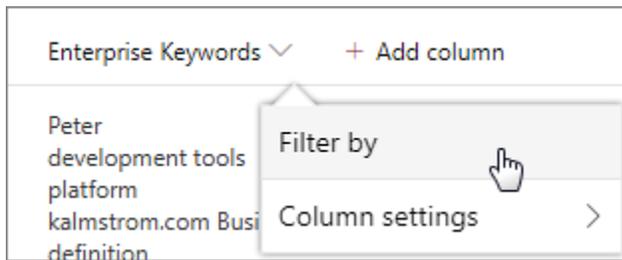
Then click on 'Apply tags' to save.

### 4.3 FILTER BY TAG

You may filter the Enterprise Keywords column by one or several tags.

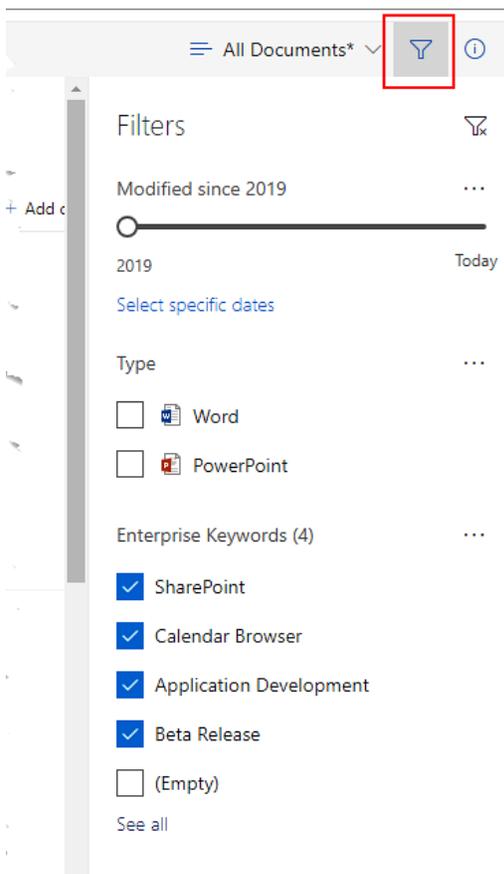
#### 4.3.1 FILTER ICON IN THE MODERN INTERFACE

To filter documents in the modern interface, click on the accordion to the right of the 'Enterprise Keywords' column and select 'Filter by'. A filter pane opens to the right, displaying all the keywords by which you can filter the column.



In the modern interface you can also filter any column in the right pane. Click on the filter icon at the top right corner of the command bar and a filter pane opens where you will see the columns that you could apply filter on.

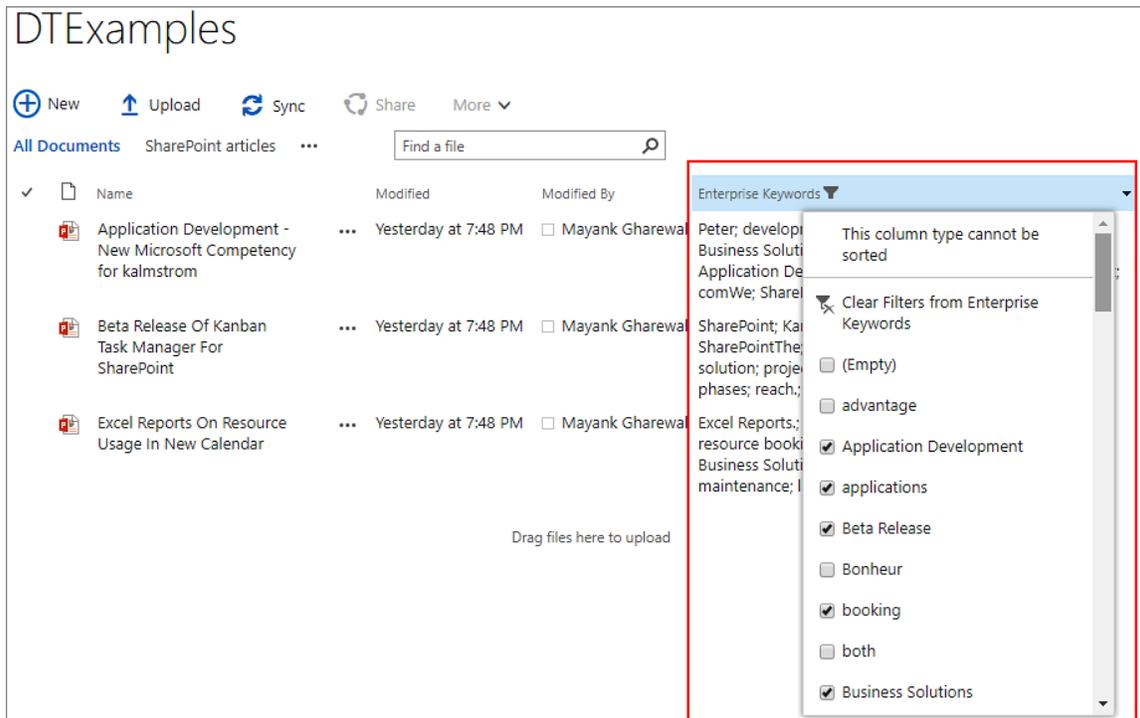
Under 'Enterprise Keywords' click on 'See all' to view all the keywords. Check the box for the keywords as per your needs. When you click on 'Apply', all the documents that have the selected keywords will be displayed.



To remove the filter, click on the clear filter icon at the top right corner of the filter pane.

#### 4.3.2 FILTER IN THE CLASSIC INTERFACE

In the classic interface, move the cursor over the 'Enterprise Keywords' column and expand the accordion. You can check the boxes for the keywords as per your needs. As you start checking the boxes, the documents start getting filtered according to the keywords.



To remove the filter, click on the 'Clear Filters from Enterprise Keywords' option in the dropdown.

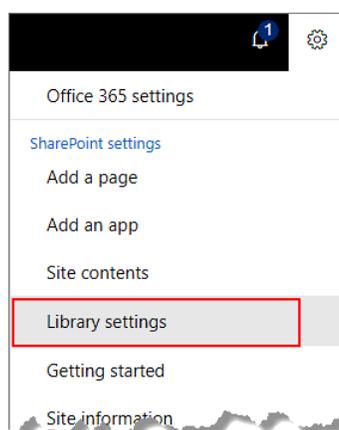
#### 4.4 VIEW BY TAG

You may create views where you see all documents that have one or more specified tag(s). This is especially useful if you want to keep track of any new documents added about a certain subject.

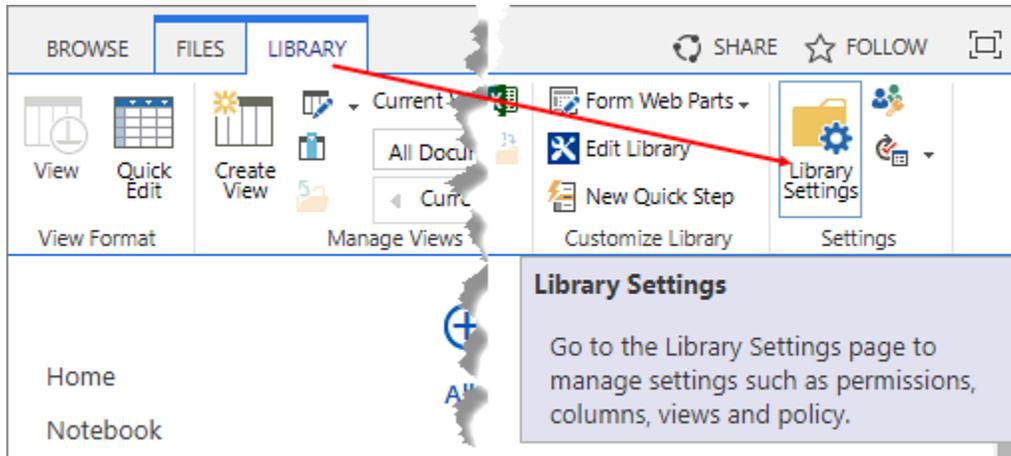
To create a view by tag, follow the steps below:

1. In the SharePoint library, go to 'Library settings'.

Modern interface:



Classic interface: Go to the SharePoint document library, then click on the 'Library Settings' button under the 'LIBRARY' tab in the ribbon.



2. Click on 'Create View'.

## DTEexamples ▸ Settings

List Information

**Name:** DTEexamples  
**Web Address:** https://testingproduct19.sharepoint.com/sites/Sales/DTEexamples/Forms/AllIt  
**Description:**

General Settings      Permissions and Management

- [List name, description and navigation](#)
- [Delete this document library](#)
- [Versioning settings](#)
- [Save document library as template](#)
- [Advanced settings](#)
- [Permissions for this document library](#)

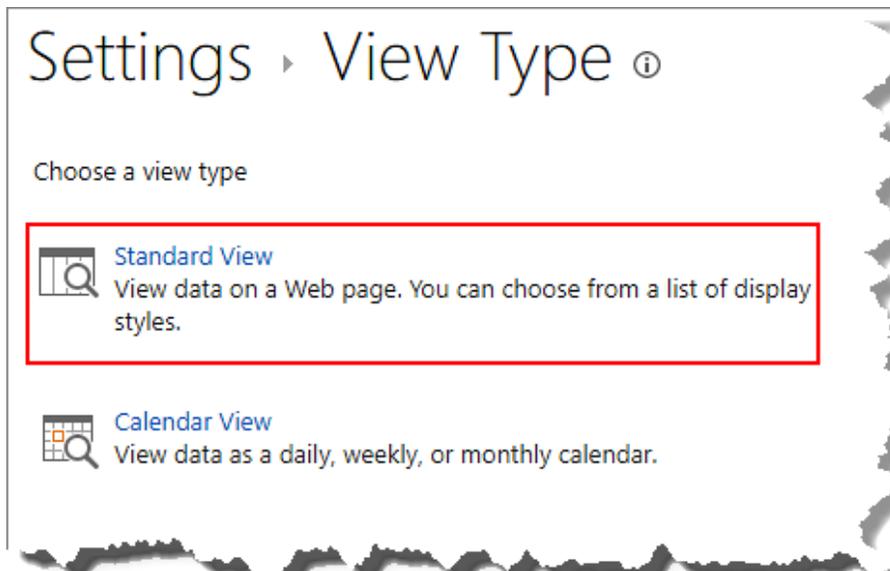
Views

A view of a document library allows you to see a particular selection of items or to see the items sorted in a particular document library:

View (click to edit)	Default View	Mobile View
All Documents	✓	✓
SharePoint		✓
Kanban Task Manager		✓

▫ [Create view](#)

3. Select 'Standard View'.



4. Name the view, for example "SharePoint articles". Under 'Filter', at 'Show the items when column', select 'Enterprise Keywords' from the dropdown. Keep 'is equal to' and write the keyword in the last box: 'SharePoint'. Then click 'OK'.

## Settings > Create View ⓘ

OK Cancel

**Name**  
Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

**View Name:**  
SharePoint articles

Make this the default view  
(Applies to public views only)

**Audience**  
Select the option that represents the intended audience for this view.

**View Audience:**

Create a Personal View  
Personal views are intended for your use only.

**Filter**

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

Show all items in this view

Show items only when the following is true:

Show the items when column

Enterprise Keywords

is equal to

SharePoint

And  Or

When column

None

is equal to

[Show More Columns...](#)

Tabular View

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

Enable this view for mobile access  
(Applies to public views only)

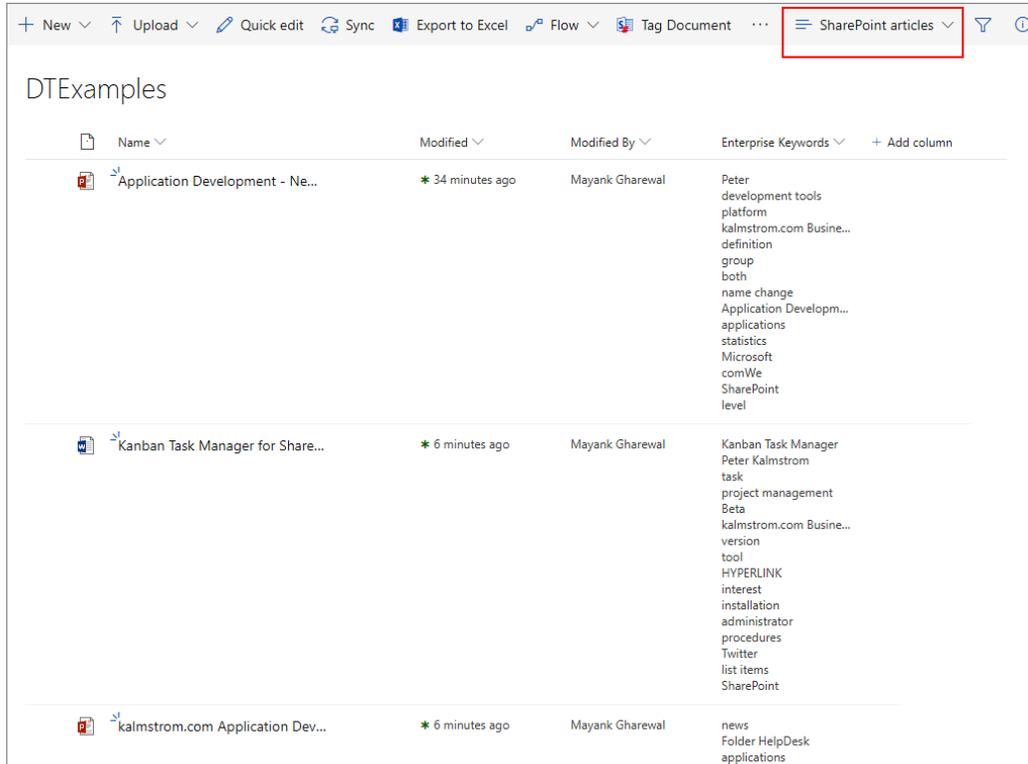
Make this view the default view for mobile access  
(Applies to public views only)

Number of items to display in list view web part for this view:  
3

Field to display in mobile list simple view:  
Name (linked to document with edit menu)

OK Cancel

- Now when you select the “SharePoint articles” view, all the documents having the tag ‘SharePoint’ will be displayed .



You can also create views for more than one tag, by adding more tags under the first one. Select 'And' or 'Or', select the Enterprise Keywords column again and write in the next tag.

## 5 UPGRADE

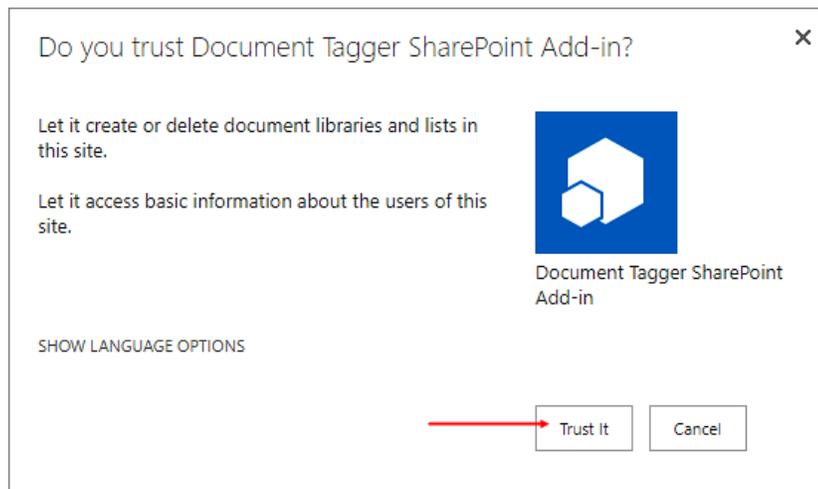
Subscribers who do not use a Premium copy should download the new version from [the kalmstrom.com Upgrade page](#) or get it from the SharePoint Store, depending on where you first got *Document Tagger* from.

Premium Subscribers will get a message from kalmstrom.com when their setup file has been updated.

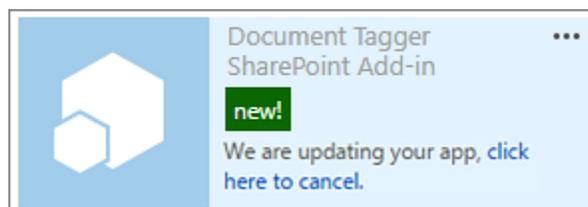
If you got your current version of *Document Tagger* from the SharePoint Store, you will get the message at step 3 below automatically.

If you have downloaded the current version of *Document Tagger* from the kalmstrom.com website you must first update the .app file in the App Catalog, refer to steps 1 and 2 below.

1. Download the ZIP file and extract it.
2. Upload the *Document Tagger* APP file to the App Catalog of your SharePoint farm or tenant. The older version will be overwritten.
3. On each site where *Document Tagger* is installed, you will now get a message in the Site contents about the new version.
4. Click on the GET IT button and then on Trust It.



5. The Site contents page will open again with the notice 'We are updating your app' on the *Document Tagger* tile.



Should you not get the message in the Site contents, remove the older app from the Site contents and add a new *Document Tagger* "From your organization".

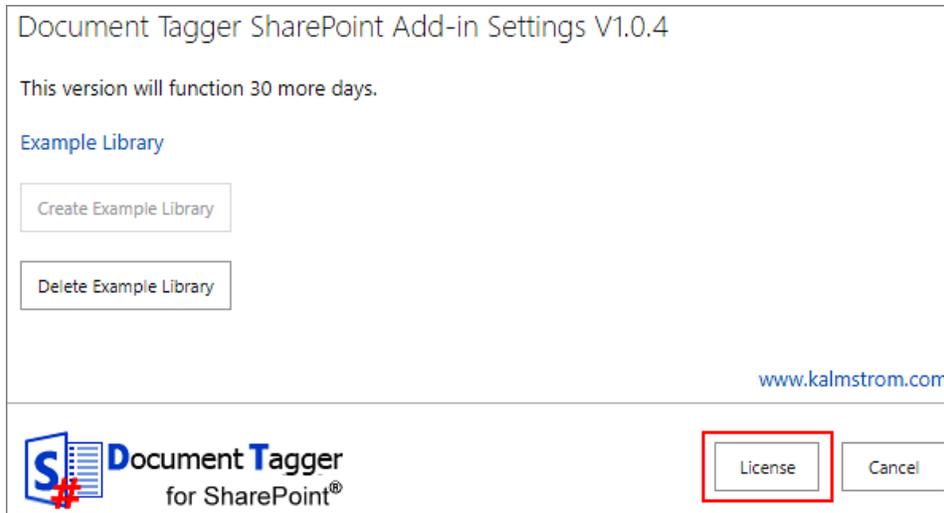
A PowerShell script for the whole process can be provided on request. The script is free for Premium subscribers.

## 6 REGISTRATION

You may evaluate *Document Tagger* without cost and with full functionality for 30 days.

When the 30 days evaluation period has expired, you must either order a register free Premium copy or register *Document Tagger*.

To register, go to the *Document Tagger* Settings page from the Site settings.



Document Tagger SharePoint Add-in Settings V1.0.4

This version will function 30 more days.

[Example Library](#)

Create Example Library

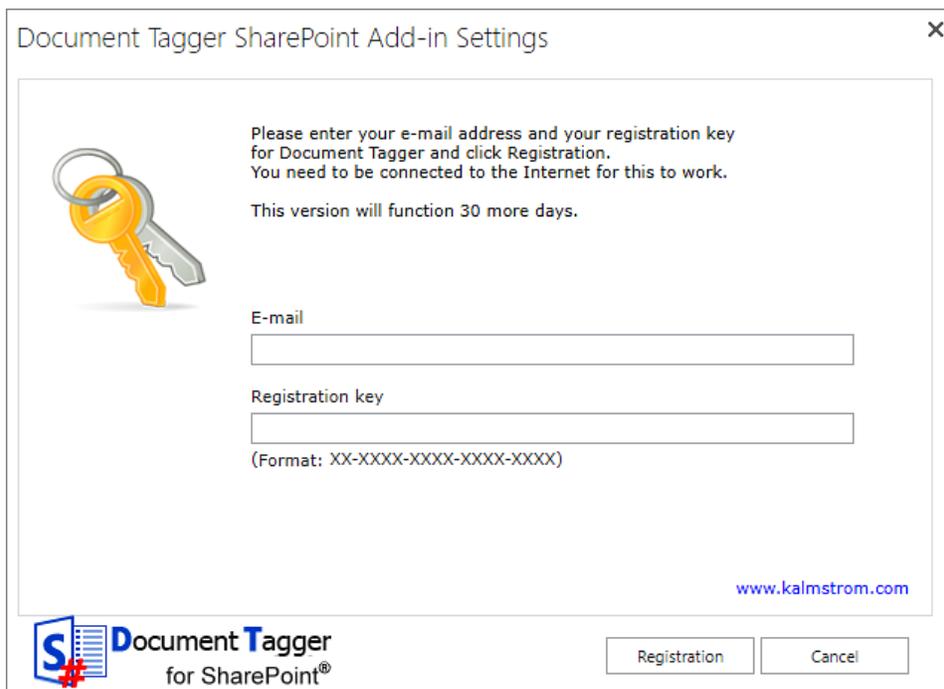
Delete Example Library

[www.kalmstrom.com](http://www.kalmstrom.com)

 Document Tagger  
for SharePoint®

License Cancel

Click on the 'License' button, and a registration dialog will open.



Document Tagger SharePoint Add-in Settings

Please enter your e-mail address and your registration key for Document Tagger and click Registration. You need to be connected to the Internet for this to work.

This version will function 30 more days.

E-mail

Registration key

(Format: XX-XXXX-XXXX-XXXX-XXXX)

[www.kalmstrom.com](http://www.kalmstrom.com)

 Document Tagger  
for SharePoint®

Registration Cancel

Enter an e-mail address with your company domain and the registration key you have received from kalmstrom.com. Then click on 'Registration'.

## 7 CONTACT

If you have any kind of problem or questions about *Document Tagger*, there are several ways of contacting us:

E-mail [support@kalmstrom.com](mailto:support@kalmstrom.com) – Technical issues

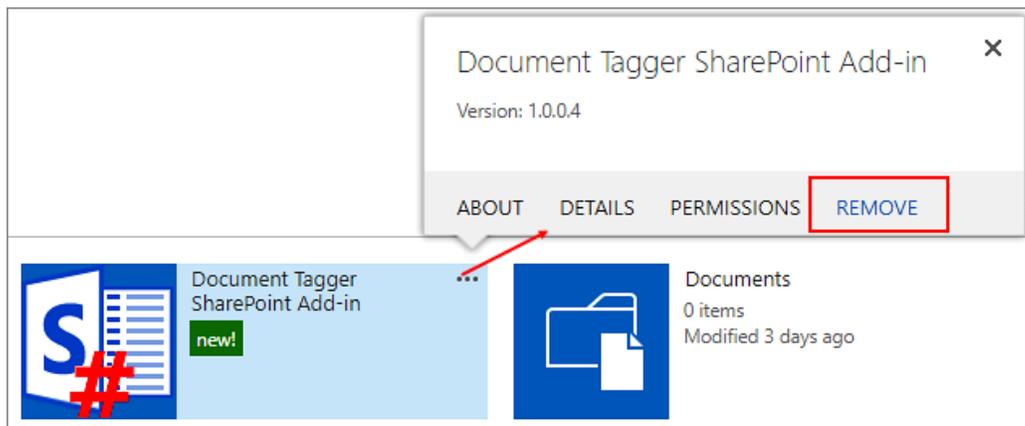
[sales@kalmstrom.com](mailto:sales@kalmstrom.com) – General issues

Telephone +46 739 206 106

## 8 REMOVE DOCUMENT TAGGER

Should *Document Tagger* not be used anymore, you can remove it. Currently Microsoft has not added a Remove option in the modern Site contents interface, so you must use the classic experience to remove *Document Tagger*.

To remove, go to the Site contents and find *Document Tagger SharePoint Add-in*. Click on the ellipses (...) and select REMOVE from the context menu.



## 9 MORE SHAREPOINT TIPS

You surely have noticed that *Document Tagger* uses what is best in SharePoint. For tips on SharePoint usage in general, please refer to [the kalmstrom.com Tips section](#).