SharePoint 2013 Dev with CSOM and REST – Working with Managed Metadata

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Outline

- **Support for Managed Metadata in CSOM and REST**
- **Terms and Term Sets**
- **Adding Taxonomy Fields to Lists**
- **Setting Taxonomy Field Values**

Managed Metadata

- **REST API**
  - No support at RTM ☹

- **Client Object Model**
  - Microsoft.SharePoint.Client.Taxonomy.dll or SP.Taxonomy.js
  - Implementation very close to Server Object Model

```
var lcid = Application.CurrentCulture.LCID;
var session = TaxonomySession.GetTaxonomySession(context);
var store = session.TermStores.GetByName("Managed Metadata Service");
var group = store.CreateGroup("Managed Code", Guid.NewGuid());
var set = group.CreateTermSet("Projects", Guid.NewGuid(), lcid);
set.CreateTerm("Penske Project", lcid, Guid.NewGuid());
set.CreateTerm("Manhattan Project", lcid, Guid.NewGuid());
set.CreateTerm("Alan Parsons Project", lcid, Guid.NewGuid());
```

Adding Taxonomy Fields

- **Two steps**
  - Create field (as we've done previously)
    - Associated hidden Note field automatically created
  - "Attach" field to desired set of terms

```
var taxfield = list.get_fields().addFieldAsXml("<Field Type=\"TaxonomyFieldType\" Name=\"Project\" ...  />",
    true, SP.AddFieldOptions.defaultValue);
var session = SP.Taxonomy.TaxonomySession.getTaxonomySession(context);
var store = session.get_termStores().getByName("Managed Metadata Service");
var group = store.get_groups().getByName("JavaScript");
var set = group.get_termSets().getByName("Projects");

context.load(taxfield);
context.load(store, "Id");
context.load(set, "Id");
context.executeQueryAsync(success1, fail);

function success1() {
    var taxField2 = context.castTo(taxfield, SP.Taxonomy.TaxonomyField);
    taxField2.set_sspId(store.get_id());
    taxField2.set_termSetId(set.get_id());
    taxField2.update();
    context.executeQueryAsync(success2, fail);
}
```

Setting Taxonomy Field Values

- **Get reference to item, term and taxonomy field**
- **Use taxonomy field's SetFieldValueByTerm**

```
var lcid = Application.CurrentCulture.LCID;
var session = TaxonomySession.GetTaxonomySession(context);
var store = session.TermStores.GetByName("Managed Metadata Service");
var group = store.Groups.GetByName("Managed Code");
var set = group.TermSets.GetByName("Projects");
var term = set.Terms.GetByName("Alan Parsons Project");

context.Load(term);
context.ExecuteQuery();

// Upload file

var item = file.ListItemAllFields;
var field = list.Fields.GetByInternalNameOrTitle("Project");
var taxField = context.CastTo<TaxonomyField>(field);
taxField.SetFieldValueByTerm(item, term, lcid);
item.Update();

context.ExecuteQuery();
```

Summary

- **Support for Managed Metadata in CSOM and REST**
- **Terms and Term Sets**
- **Adding Taxonomy Fields to Lists**
- **Setting Taxonomy Field Values**

- **Resources**
  - Creating Managed Metadata Columns
    - Andrew Connell
    - http://www.andrewconnell.com/blog/SP2010-Managed-Metadata-Creating-Managed-Metadata-Columns
  - How to provision SharePoint 2010 Managed Metadata columns
    - Wictor Wilen
    - http://www.wictorwilen.se/Post/How-to-provision-SharePoint-2010-Managed-Metadata-columns.aspx