



# **Document Maker 1.0**

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## **User Guide**

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## 1. Introduction

Document Maker enables users to generate documents based on a set of templates in SharePoint list. Users can reuse data from SharePoint lists to generate individual documents or multi-item documents and then set rules to name these documents. Documents then can be saved as attachments, saved to the document library or saved to an auto-created folder. Users can choose from four document formats to save their generated documents.

This user guide is used to instruct and guide users to configure and use Document Maker.

For the latest copy of this and other guides, please visit the link provided:

<http://www.boostsolutions.com/download-documentation.html>

## 2. Installation

### 2.1 Product Files

After you download and unzip the Document Maker zip file from [www.boostsolutions.com](http://www.boostsolutions.com), you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Document Maker_V1_User Guide.pdf	A user guide for Document Maker in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundation\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\DocumentMaker\ BoostSolutions.DocumentMaker14.1.wsp	A SharePoint solution package containing Document Maker files and resources for SharePoint 2010 or SharePoint Foundation 2010.

### 2.2 Software Requirements

Before you install Document Maker, ensure your system meets the following requirements:

**SharePoint 2010**

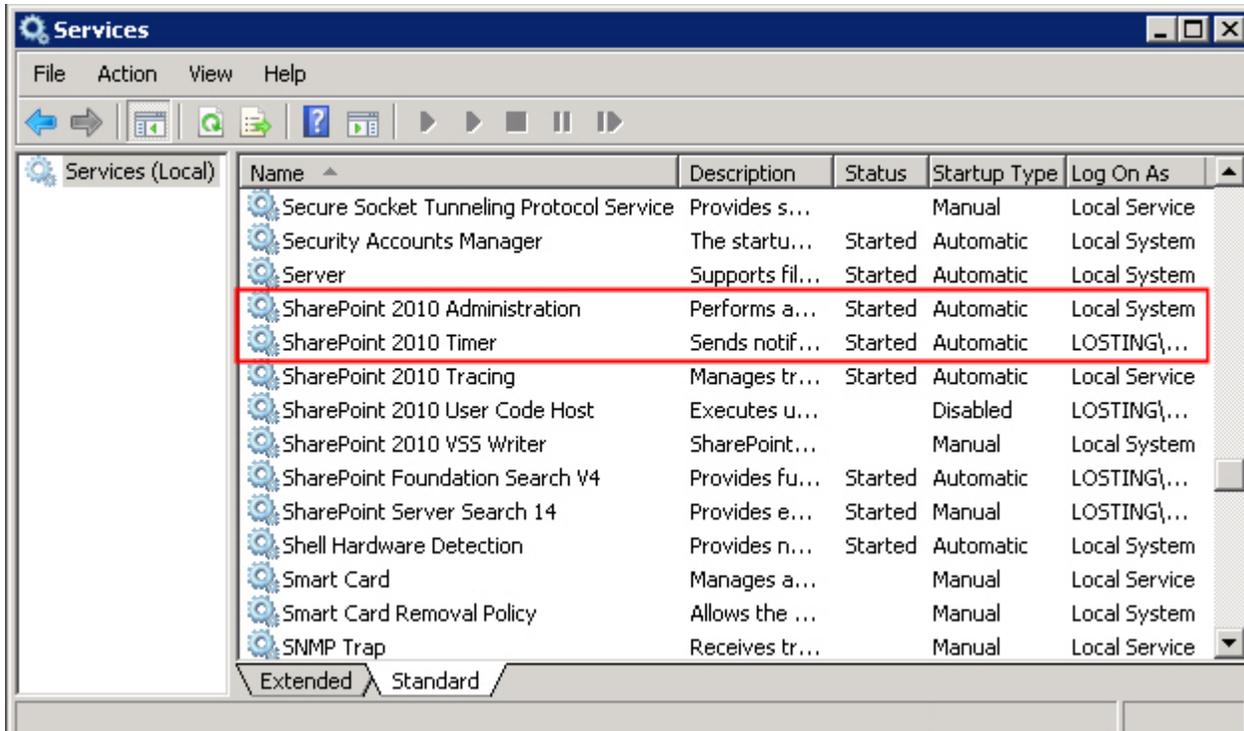
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome
Client Side Operating System	Microsoft Windows 8 x64 Microsoft Windows 7 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2012 x64 Note: This product needs Microsoft .NET Framework 4.0 and Visual Studio Tools for Office.
Microsoft Office Word	Microsoft Office Word 2007 Microsoft Office Word 2010 Microsoft Office Word 2013 Note: Microsoft Office 2007 SP3 is needed when Microsoft Office Word 2007 is installed in Microsoft Windows 8 or Microsoft Windows Server 2012.

**2.3 Server Installation**

Follow these steps to install Document Maker on your SharePoint servers.

**Installation Preconditions**

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint 2010 Administration** and **SharePoint 2010 Timer**.



Document Maker must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration -> System Settings** for a list of servers running this service.

### **Required Permissions**

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

### **To install Document Maker on SharePoint server.**

- a. Download the zip file (\*.zip) for Document Maker from the BoostSolutions website, then extract the file.
- b. Open the created folder and run the **Setup.exe** file.

**Note** If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

- c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.
- d. Review and accept the End-User License Agreement and click **Next**.
- e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

**Note** If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

- f. Upon completion of the installation, details are displayed showing which web applications Document Maker has been installed to. Click **Close**.

## 2.4 Upgrade

Download the latest version of Document Maker and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

## 2.5 Uninstallation

If you want to uninstall Document Maker, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

## 2.6 Command\_Line Installation

The following instructions are for installing the solution files for Document Maker using the SharePoint STSADM command line tool.

### Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

### To install Document Maker to SharePoint servers.

- a. Extract the files from the product zip pack to a folder on one SharePoint server.
- b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- c. Add the solution files to SharePoint in the STSADM command line tool.

```
stsadm -o addsolution -filename BoostSolutions.DocumentMaker14.1.wsp
```

```
stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.DocumentMaker14.1.wsp -allowgacdeployment -url [virtual server url] -immediate
```

```
stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.wsp -allowgacdeployment -url [virtual server url] -immediate
```

- e. Wait for the deployment to complete. Check the final status of the deployment with this command:

```
stsadm -o displaysolution -name BoostSolutions.DocumentMaker14.1.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp
```

The result should contain a <Deployed> parameter for which the value is TRUE.

- f. In the STSADM tool, activate the features.

```
stsadm -o activatefeature -name BoostSolutions.DocumentMaker_DocumentMakerFeature -url [site collection url] -force
```

### **To remove Document Maker from SharePoint servers.**

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.DocumentMaker14.1.wsp -immediate -url [virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.DocumentMaker14.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.DocumentMaker14.1.wsp
```

### **To remove BoostSolutions Foundation from SharePoint servers.**

The BoostSolutions Foundation is designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, DO NOT remove Foundation from the servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup14.1.wsp -immediate -url  
[virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp
```

## 2.7 Install Document Maker Plugin

To compose a template, you must first install the Document Maker plugin in Word. With the Document Maker add-in, you can connect to SharePoint list and insert columns in the template.

Follow these steps to install the Document Maker Plugin on your client side.

### Required Permissions

To perform this procedure, you must be a local administrator.

### To install the Document Maker Plugin on Client Side.

- a. Download the zip file (\*.zip) for Document Maker from the BoostSolutions website, then extract the file.

Or, download the Document Maker Plugin in the Document Maker Settings page.

 Create new template

 Upload a template

 **Download Document Maker plugin**

- b. Run the **DocMakerPlugin\_x64** or **DocMakerPlugin\_x86** file.
- c. The Document Maker Plugin Setup Wizard will appear, click **Next** to continue.
- d. In the Ready to Install window, click **Install**.
- e. While the procedure is running, installation details will be displayed in the Installation window.
- f. After the process is completed, click **Finish** to close the setup wizard.

**Uninstall the Document Maker Plugin on Client Side**

If you want to uninstall the Document Maker Plugin, double-click the **DocMakerPlugin\_x64.exe** file.

In the **Repair or Remove installation** window, select **Remove** and click **Next**. The application will be removed.

## 2.8 Feature Activation

### Activate features in site collection

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

- a. On the Site Actions menu  click **Site Settings**.
- b. Under **Site Collection Administration** click **Site collection features**.
- c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



#### **BoostSolutions Document Maker 1.0.812.0**

Generates a variety of documents with list items in SharePoint such as proposals, contracts, quotes and more (Powered by BoostSolutions).

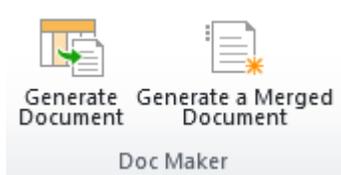
Deactivate

Active

### 3. Introduction to Document Maker

Document Maker is an easy-to-use solution that quickly helps you to create repetitive and recurring documents within SharePoint using pre-made templates that you produce in Microsoft Word.

Once the Document Maker features are activated, the product commands will be available in the list or document library ribbon.



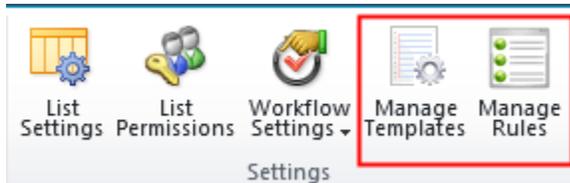
Generate Document and Generate Merged Document are located in the **Items** -> **Doc Maker** group.

- **Generate Document**

Generate individual documents for each list item.

- **Generate Merged Document**

Generate a merged document which contains all the list items you select.



Manage Templates and Manage Rules are located in the **List** -> **Settings** group.

- **Manage Template**

Enter the Document Maker template page to manage templates.

- **Manage Rules**

Enter the Document Maker Rules page to specify rules for generated documents.

## 4. Manage Templates

Document Maker enables you to compose templates for document creation. To generate documents using data from list, you must first insert list columns into the templates. The value of the column, then, will be inserted in the area you designated in the template creation when the document is generated.

You can also provide default content that appears in every generated word document, such as a preferred framework for a sales order or an official disclaimer in a page footer.

To manage templates, you must have at least **Design** permission level in list or library.

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**Note** Templates for the whole site collection will be stored in a hidden library in your root site. The URL is <http://<rootsite>/BoostSolutionsDocumentMakerTemplate/Forms/AllItems.aspx>

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### 4.1 Create a Template

- a. Navigate to the list or library where you want to create a template.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Manage Templates** in the Settings group.



Or, enter the List or Library Settings page and under the **General Settings** section, click **Document Maker Settings (Powered by BoostSolutions)**.

## General Settings

[Title, description and navigation](#)

[Versioning settings](#)

[Advanced settings](#)

[Validation settings](#)

[Rating settings](#)

[Audience targeting settings](#)

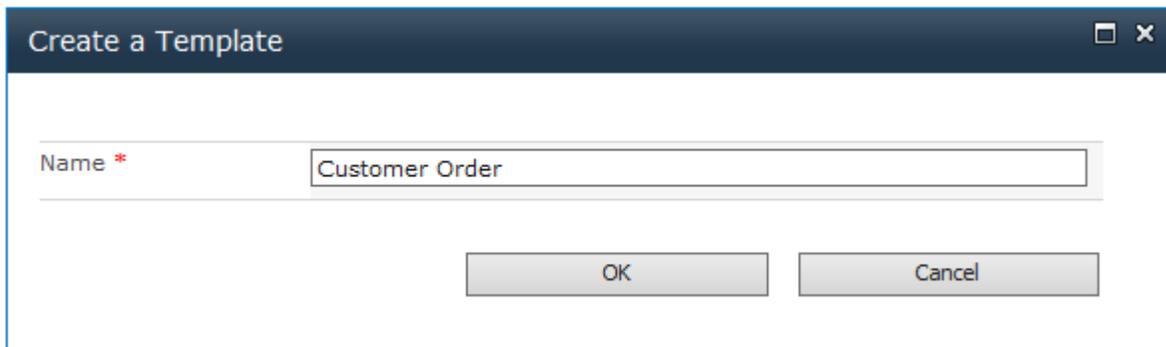
[Metadata navigation settings](#)

[Per-location view settings](#)

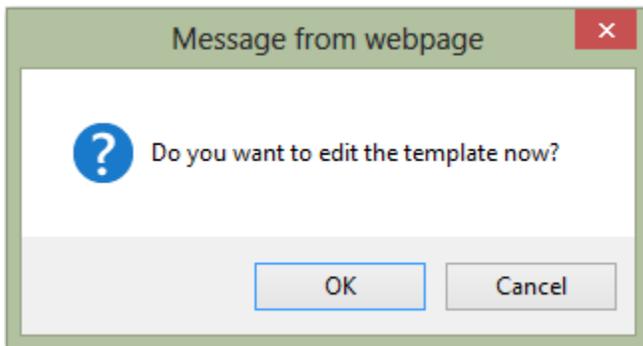
[Document Maker Settings \(Powered by BoostSolutions\)](#)

[Form settings](#)

- c. On the Document Maker Settings page, click **Create new template**.
- d. Enter a name in the **Create a Template** dialog box.



- e. Click **OK** to create the template. A dialog will open asking if you want to edit the template. To edit the template click **OK**, otherwise click **Cancel**.



**Note:** It is recommended that you use IE 8 or above browsers so that a word file will open smoothly so that you can edit the template.

- f. After clicking **OK**, the template will open in Word. You can configure the template based on your company policy.

For more information on how to configure a document template, please refer to section [4.2 Configure Document Template](#).

- g. Once you have finished configuring the template, click  to save the template.
- h. In the Template Settings page, you can view the basic information for the template (Template Name, Modified, Modified By, Applied Rule and Actions).

Templates							
Template Name	Modified	Modified By	Applied Rule	Actions			
Sales Receipt	8/15/2013 10:57:45 AM	Hans S. Ma	Generate	<a href="#">Edit Template in Word</a>	<a href="#">Download a Copy</a>	<a href="#">Edit Properties</a>	<a href="#">Delete</a>
Sales Report	8/15/2013 10:57:23 AM	Hans S. Ma		<a href="#">Edit Template in Word</a>	<a href="#">Download a Copy</a>	<a href="#">Edit Properties</a>	<a href="#">Delete</a>
Quote	8/15/2013 10:57:09 AM	Hans S. Ma		<a href="#">Edit Template in Word</a>	<a href="#">Download a Copy</a>	<a href="#">Edit Properties</a>	<a href="#">Delete</a>

## 4.2 Upload a Template

If you have premade templates, you can upload and use them to generate documents.

- a. Navigate to the list or library where you want to upload a template to.
- b. On the Ribbon, click the List or Library tab and then click **Manage Templates** in the Settings group.

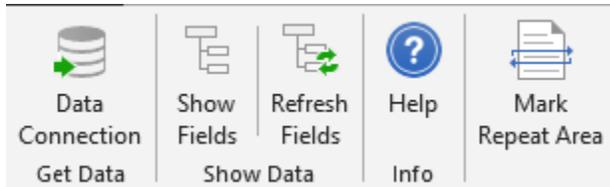
Or, enter the List or Library Settings page, in the General Settings section and click **Document Maker Settings (Powered by BoostSolutions)**.

- c. In the Document Maker Settings page, click **Upload a template**.
- d. A dialog box will appear. In the dialog box click Browse... to select your premade document template from your local computer or server.
- e. Click **OK** to upload the selected template.

## 4.3 Configure Templates in Word

To configure a template, you will need to install the Document Maker plugin. For instructions on how to install the Document Maker Plugin, please refer to section [2.7 Install Document Maker Plugin](#).

Once the plugin is installed, a **Document Maker** tab will appear on your ribbon in Word.



- **Data Connection**

Connect to a SharePoint list and get list fields and other related fields.

- **Show Fields**

This function controls the Document Maker pane. You can decide whether or not to show the List Fields pane by clicking the Show Fields.

- **Refresh Fields**

Click this option to refresh the fields so that you get up-to-date fields from list.

- **Mark Repeat Area**

Mark repeat information in the document. This is very useful when you want to generate a merged document using multiple items.

- **Help**

Get Document Maker plugin help documents from the BoostSolutions website.

- a. Click the **Document Maker** tab on the Word Ribbon and then click **Data Connection** in the Get Data group.

Connect to SharePoint

SharePoint List

List URL:

Windows Authentication  
 Form Authentication

User Authentication

User name:

Password:

Test Connection

OK Cancel

- Input the URL of the SharePoint list you want to get data from.
- Select the Authentication type (**Windows authentication** or **Form Authentication**) you want to use and enter the correct user authentication.

**Note:** The user must have at least **View Only** permission level for SharePoint list.

- Click **Test Connection** to check whether the user can access the list.
  - Click **OK** to save the connection.
- b. In the template you are creating, click on the area where you want to insert a field(s).
- c. In the **Document Maker** pane, select one field and double-click it. The field will be inserted as a **Rich Text Content Control**.

<b>List Fields</b>	<p>SharePoint list fields and related fields from lookup list. To show related fields, you need to select them as additional fields in the list.</p> <div data-bbox="548 327 1292 527" style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p>Add a column to show each of these additional fields:</p> <p><input checked="" type="checkbox"/> Name</p> <p><input type="checkbox"/> Name (linked to item)</p> <p><input checked="" type="checkbox"/> Street Address</p> <p><input checked="" type="checkbox"/> Zip Code</p> </div>
<b>Custom Fields</b>	<p>Custom fields, include [Today], [Now], [Me]. [Today] represents the current day. [Now] represents the current date and time. [Me] represents the current user who generated the document.</p>
<b>Calculated Fields</b>	<p>A calculated fields can be used to compute data in column or items in the document. (The supported calculated field functions please see <a href="#">Appendix 2: Supported Calculated Field Functions</a> for details.)</p>

- d. To get up-to-date fields from the list, click **Refresh Fields**.
- e. To generate a merged document, you will need to mark a table or area as repeat.
- f. Click  to save template.

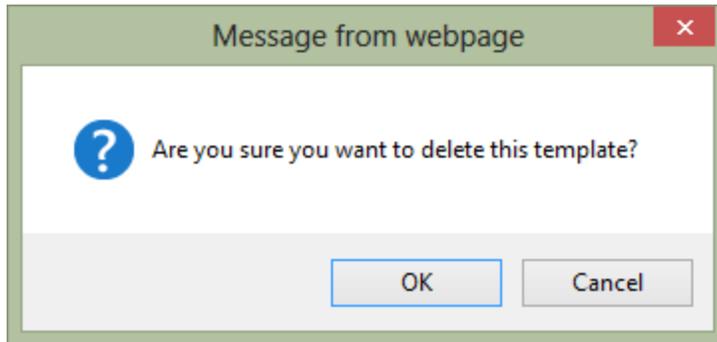
## 4.4 Modify a Template

- a. Navigate to the list or library where you want to modify a template.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Manage Templates** in the Settings group.
- c. In the Document Maker Settings -> Templates page, locate the template and then click **Edit Template**.
- d. If you want to change the properties of the template, click **Edit Properties**.

## 4.5 Delete a Template

- a. Navigate to the list or library where you want to delete a template.

- b. On the Ribbon, click the List or Library tab and then click **Manage Templates** in the Settings group.
- c. In the Document Maker Settings -> Template page, locate the template and then click **Delete**.
- d. A message box will appear asking you to confirm that you want to proceed with the deletion.



- e. Click **OK** to confirm the deletion.

## 5. Managing Rules

After a template is created, you will need to configure a rule to specify the documents generation.

To manage rules for a list or library, you must have at least **Design** permission level.

### 5.1 Rules Settings

When you create a rule, the following settings need to be configured:

Settings	Description
Select Template	Select a template(s) to apply the rule to.
Naming Rule	Specify a rule for automatic document naming. You can combine columns, functions, customized texts and separators to dynamically generate document names.
Date Format	Specify a date format you want to use in the document name.
Output Types	Specify the output type (DOCX, DOC, PDF, XPS) for the generated document(s).
Distribute Document	Specify the path where you want to save the generated document(s).
Merged Document Generation	Specify whether a merged document can be generated. Note: This option is optional.
Merged Documents Naming Rule	Specify a naming formula for merged documents.
Target Location	Specify the document library to save merged documents.

### 5.2 Create a Rule

- Navigate to the list or library where you want to create a rule.
- On the Ribbon, click the **List** or **Library** tab and then click **Manage Rules** in the Settings group.



- c. In the Document Maker Settings -> Rules page, click **Add Rule**.

**Note:** You cannot add a rule if no template exists in the current list.

- d. In the Rule Name section, enter a name.

<b>Rule Name</b>	
Enter a name for this rule.	Generate Receipt

- e. Specify which templates should use this rule. You can select multiple templates for one rule.

<b>Select Template</b>	
Specify which templates should be used in this rule.	<input type="checkbox"/> Contract <input checked="" type="checkbox"/> Sales Receipt

**Note:** Only one rule can be applied to a template. Once a rule has been applied to a template, a second rule then cannot be applied unless the first rule is removed.

- f. In the Naming Rule section, you can use **Add element** to add a combination of variables and separators and use **Remove element** to remove them.

<b>Naming Rule</b>																	
You can combine columns, functions, customized texts and separators to dynamically generate document names.	<div style="border: 1px solid #ccc; padding: 5px;"> <p>[ID]-[Customer]-[Today]</p> <table border="1"> <tr> <td>ID</td> <td>▼</td> <td>-</td> <td>▼</td> <td>Customer</td> <td>▼</td> <td>-</td> <td>▼</td> </tr> <tr> <td>Today</td> <td>▼</td> <td></td> <td>▼</td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p> <input type="button" value="+ Add element"/> <input type="button" value="X Remove element"/> </p> </div>	ID	▼	-	▼	Customer	▼	-	▼	Today	▼		▼				
ID	▼	-	▼	Customer	▼	-	▼										
Today	▼		▼														

In the dropdown list, you can select Columns, Functions and Custom Text as an element for the document name.

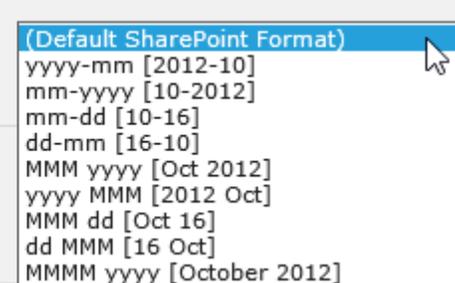
### Columns

Almost all SharePoint columns can be inserted in a formula, including: Single line of text, Choice, Number, Currency, Date and Time, People or Group and Managed Metadata.

You can also insert the following SharePoint metadata in a formula: [Document ID Value], [Content Type], [Version], etc.

<p><b>Functions</b></p>	<p>Document Number Generator allows you to insert the following functions into a formula.</p> <p>[Today]: Today's date.</p> <p>[Now]: The current date and time.</p> <p>[Me]: The user who generated the document.</p>
<p><b>Customized</b></p>	<p>Custom Text:</p> <p>You can select Custom Text and enter anything you want. If any invalid characters are detected (such as: / \   # @ etc.), the background color of this field will change and a message will appear to indicate that there are errors.</p> 
<p><b>Separators</b></p>	<p>When you add multiple elements in a formula, you can specify separators to join these elements.</p> <p>Connectors include: - _ . / \ (The / \ separators cannot be used in the Name column.)</p>

- g. In the Data Format section, you can specify which date format you want to use.

<p><b>Date Format</b></p> <p>Specify which date format you want to use in the file name.</p>	
<p><b>Output Types</b></p> <p>Specify which document format you want to use for generated documents.</p>	

**Note** This option is used only when you add at least one [Date and Time] column in the Naming Rule section.

- h. In the Output Types section, specify the document format after generation.

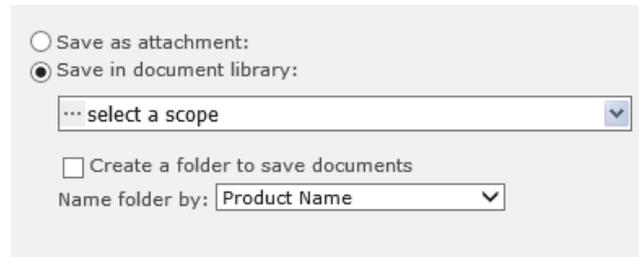
<p><b>Output Types</b></p> <p>Specify which document format you want to use for generated documents.</p>	<p><input type="checkbox"/> DOCX <input type="checkbox"/> DOC <input checked="" type="checkbox"/> PDF <input type="checkbox"/> XPS</p>
--	--

Four file formats are supported: DOCX, DOC, PDF, and XPS.

- i. In the Distribute Document section, specify the path to save the generated documents.

### Distribute Document

Specify the location where the documents are stored. If you select "save as attachments", you need to set attachment enabled in list settings. If you "save to document library" you can specify whether a folder will be created in the library. The folder name can be generated automatically based on rules such as date, created by, version, etc.



There are two options for you to choose to save generated documents.

- **Save as attachment**

Choose this option to attach the generated documents to the corresponding items.

To save the document as attachment, you need to enable attachment feature in the list.

### Attachments

Specify whether users can attach files to items in this list.

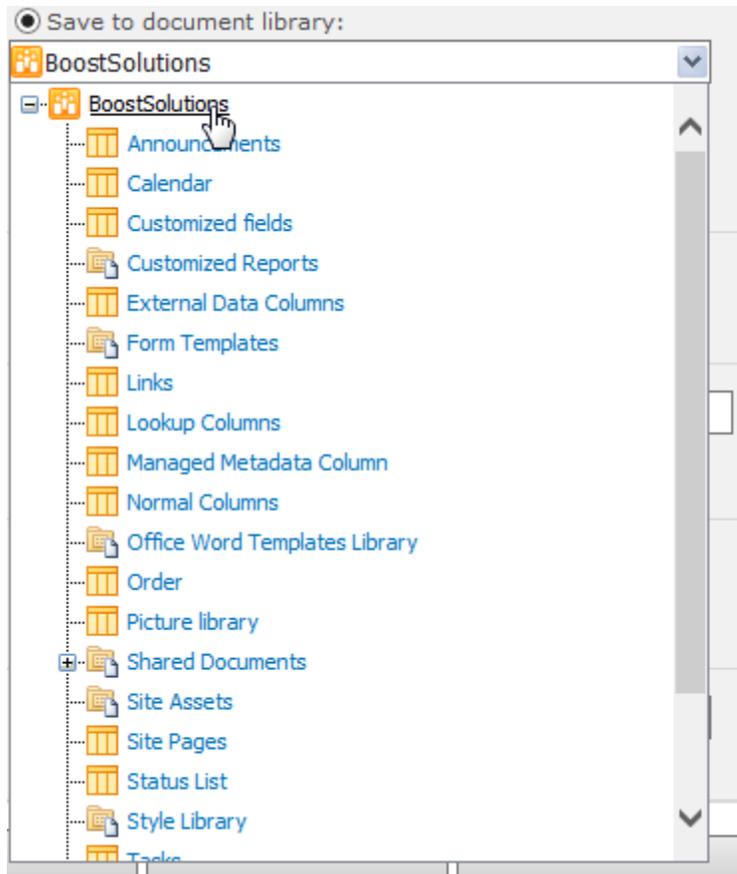
Attachments to list items are:

- Enabled
- Disabled

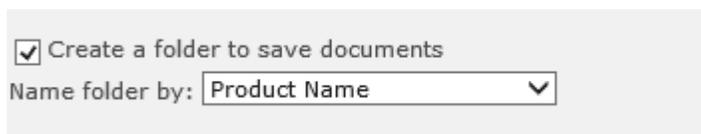
Use the option **Overwrite existing documents** to decide whether or not to overwrite an existing attachment for the current item.

- **Save in document library**

Choose this option to save the documents to a SharePoint document library. Simply select a library in the **Save to document library** dropdown list.



Use the **Create a folder to save documents** option to save the documents into an automatically created folder and specify a column name as the folder name.



- j. In the **Merged Document Generation** section, select the **Enable** option to enable the generation of a merged document using multiple items.



- k. In the **Merged Documents Naming Rule** section, specify the naming rule.

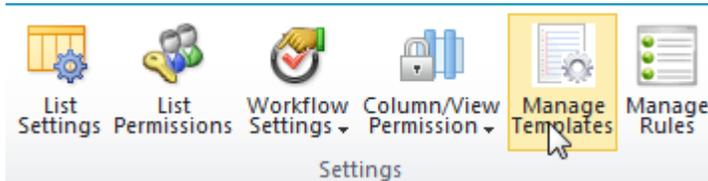
You can insert [Today], [Now] and [Me] in the rule to dynamically generate names.



- l. In the **Target Location** section, select a document library to save the merged documents.
- m. Click **OK** to save the settings.
- n. In the Rule Settings page, you can view the basic information of the rule (Rule Name, Output Type, Template, Modified, and Modified By).

### 5.3 Modify a Rule

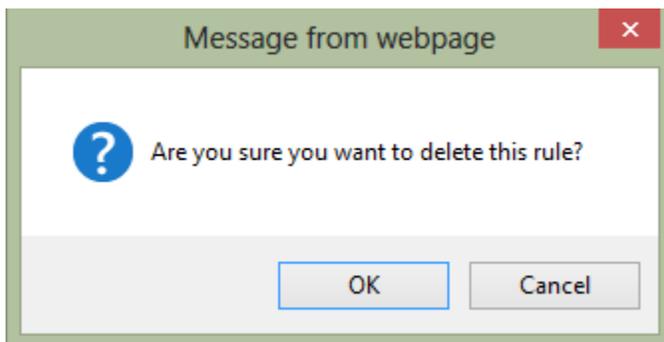
- a. Navigate to the list or library where you want to modify a rule.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Manage Rules** in the Settings group.



- c. In the Document Maker Settings -> Rule page, find the rule and click **Edit**. Make your changes and then click **OK** to save the changes.

### 5.4 Delete a Rule

- a. Navigate to the list or library where you want to delete a rule.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Manage Rules** in the Settings group.
- c. In the Document Maker Settings -> Rule page, find the rule you want to delete and click **Delete**.
- d. A message box will appear asking you to confirm that you want to proceed with the deletion.



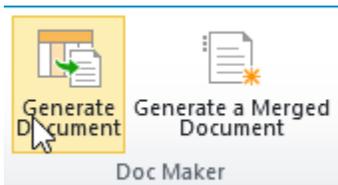
- e. Click **OK** to confirm the deletion.

## 6. Using Document Maker

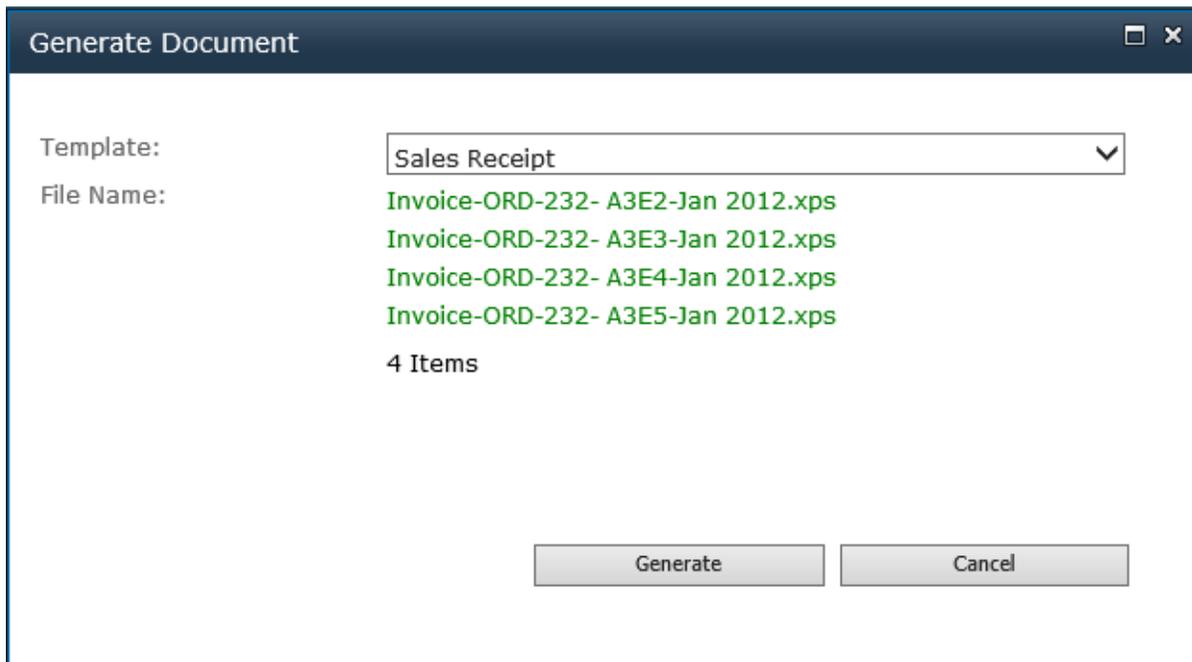
Document Maker allows you to generate individual document for each list item or merge multiple list items into one document.

### 6.1 Generate Individual Document

- Navigate to the list or library you want to generate document for.
- Select one or more item(s).
- On the Ribbon, click **Generate Document**.

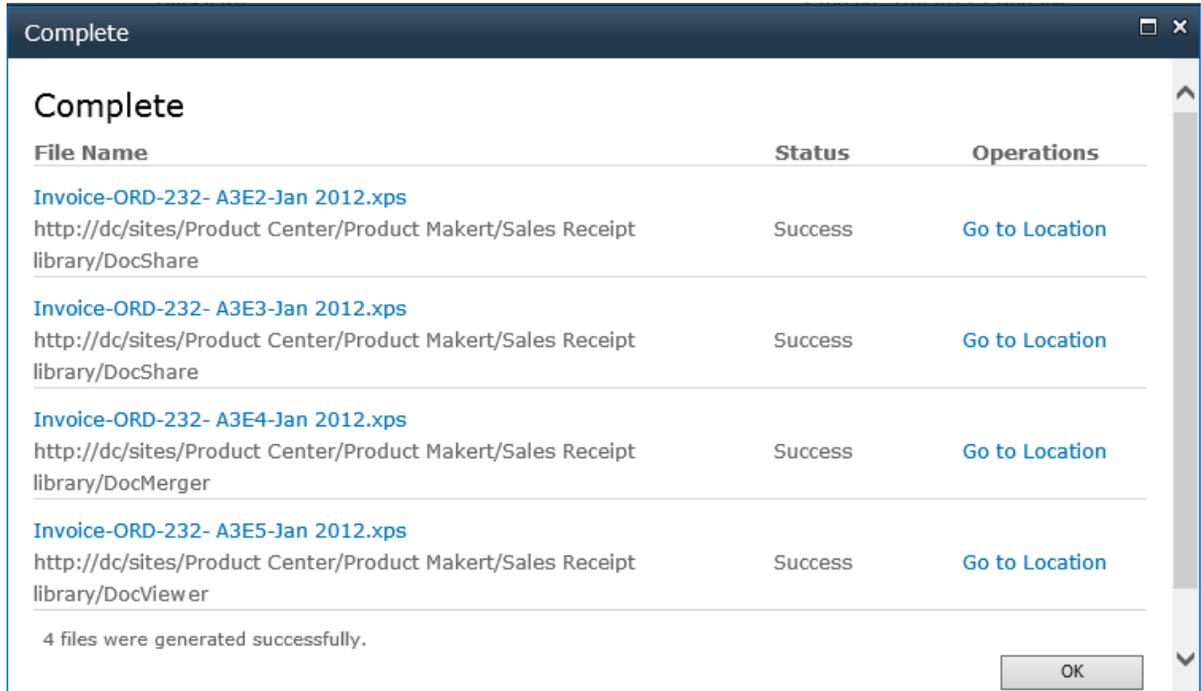


- A Document Maker – Generate Document dialog box will appear. You can select a template you want to use in the **Select Template** dropdown list. The generated documents file names and the number of files generated will also appear in the dialog box, under the **Select Template** dropdown list.



- Click **Generate** to generate the documents.

- f. Once the document creation is finished, you will see the results of the operation. Click **Go to Location** to enter the library or folder where the documents are stored. Click on a file name to open or save it.
- g. Click **OK** to close the dialog box.



- h. If the document generation procedure failed, the Status will show as **Fail**. And you can view the Error Message under the **Operations** column.

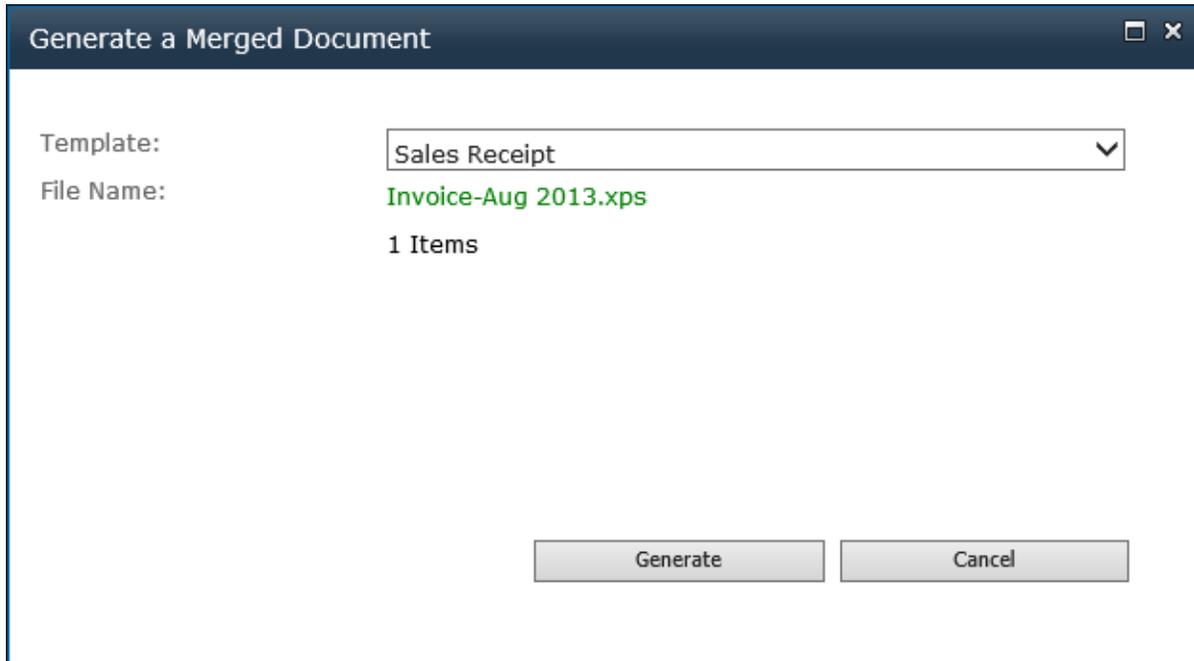
File Name	Status	Operations
BoostSolutions_ORD-8482-J8P472_Apr 2013.pdf	Fail	Error Message
Total 0 files executed successfully.		Cannot create subfolder. The target library is not allowed to create folders.

## 6.2 Generate a Merged Document

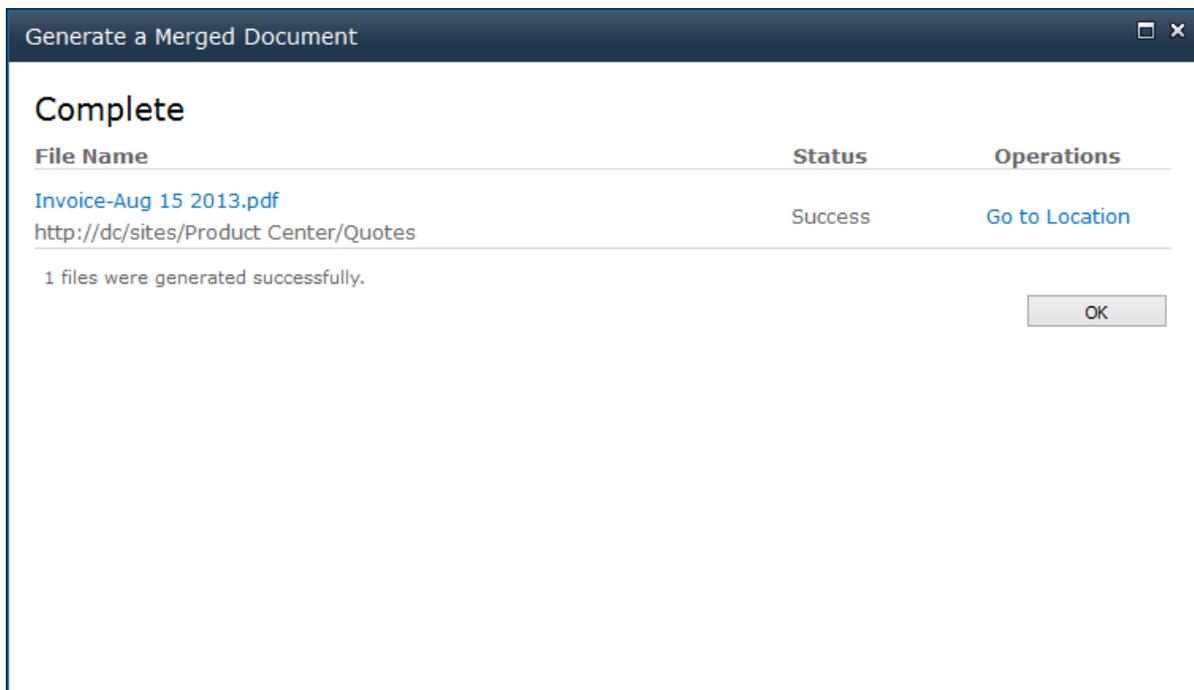
This function allows you to merge multiple items into one document. To generate a merged document, you need to enable **Merged Document Generation** option in rule.

- a. Navigate to the list or library you want to generate a document for.
- b. Select the items you want and click **Generate a Merged Document** on the Ribbon.

- c. A **Generate a Merged Document** dialog box will appear. From this dialog box, you can select a template you want to use in the **Template** dropdown. The generated documents file names and the number of files generated will also appear in the dialog box.



- d. Click **Generate** to generate the document.
- e. Once the creation of the document is completed, you will be able to see the operation results. Click **Go to Location** to enter the library or folder where the documents are stored. Click on the file name to open or save it.



- f. Click **OK** to close the dialog box.

## 7. Case Studies

Suppose you are a sales specialist and after you have processed an order, you need to send an invoice or receipt (in .pdf format) to your customer. The invoice or receipt template and the file name should be consistent and based on your company policy.

Here is the **Sales Order** list containing all the details of the customer's orders, including Product Name, Customer, Payment Method, etc.

rt > Sales Order > All items ▾										
Search this site...  										
<input type="checkbox"/>		Product Name	Qty.	Unit Price	Line Total	Payment Method	Check No.	Sales Tax	Discount	Customer
		<a href="#">ShareDoc</a>	1	\$899.00	\$899.00	Bank Transfer	11233	\$0.00	\$179.80	<a href="#">Lucy Green</a>
		<a href="#">ViewDoc</a>	1	\$699.00	\$699.00	Bank Transfer	11233	\$0.00	\$139.80	<a href="#">Lucy Green</a>
		<a href="#">ShareDoc</a>	2	\$899.00	\$1,798.00	Share-it	V24154545		\$359.60	<a href="#">Joe Lee</a>
		<a href="#">TransferDoc</a>	1	\$699.00	\$699.00	Paypal	5562248	\$0.00	\$139.80	<a href="#">Bill Bily</a>
		<a href="#">MergeDoc</a>	1	\$2,299.00	\$2,299.00	Paypal	5562248	\$0.00	\$459.80	<a href="#">Bill Bily</a>
		<a href="#">ComposeDoc</a>	1	\$1,569.00	\$1,569.00	Paypal	5562248	\$0.00	\$313.80	<a href="#">Bill Bily</a>

In the Sales Receipt template, insert the list fields in the table as follows:

<h1>Sales Receipt</h1>					
 <b>BoostSolutions</b> We make your SharePoint life easier		<b><i>Make your SharePoint life Easier.</i></b>		Date [Purchase Date]	
WISHWILL International Limited Haidian District, Beijing, P.R. China 100081 Phone: +86-10-82604161 Fax: +86-10-82604161 sales@boostsolutions.com		SOLD TO		[Customer] [Customer:Company Name] [Customer:Street Address] [Customer:ZIP Code] Phone [Customer:Phone] Customer ID [Customer:Customer ID]	
<b>Payment Method</b>				<b>Check No.</b>	
[Payment Method]				[Check No.]	
Qty	Item #	Description	Unit Price	Discount	Line total
[Qty.]	[Product Name]		[Unit Price]	[Discount]	[Line Total]
Total Discount				[Total Discount]	
Subtotal					[subtotal]
Sales Tax					0.00
Total					[Total]

***Thank you for your business!***

Set the rule for the template as follows:

<p><b>Select Template</b></p> <p>Specify which templates should be used in this rule.</p>	<input checked="" type="checkbox"/> Sales Receipt <input type="checkbox"/> Contract
<p><b>Naming Rule</b></p> <p>You can combine columns, functions, customized texts and separators to dynamically generate document names.</p>	<div style="border: 1px solid #ccc; padding: 2px; background-color: #e0ffe0;">             [Customer]-[Purchase Date]         </div> <div style="display: flex; gap: 5px; margin-top: 5px;"> <span>Customer</span> <span>▼</span> <span>-</span> <span>▼</span> <span>Purchase Date</span> <span>▼</span> <span>▼</span> </div> <div style="margin-top: 10px; display: flex; justify-content: space-around;"> <span style="color: green;">+</span> Add element             <span style="color: blue;">X</span> Remove element         </div>
<p><b>Date Format</b></p> <p>Specify which date format you want to use in the file name.</p>	<div style="border: 1px solid #ccc; padding: 2px;">             MMM dd yyyy [Oct 16 2012] ▼         </div>
<p><b>Output Types</b></p> <p>Specify which document format you want to use for generated documents.</p>	<input type="checkbox"/> DOCX <input type="checkbox"/> DOC <input checked="" type="checkbox"/> PDF <input type="checkbox"/> XPS
<p><b>Distribute Document</b></p> <p>Specify the location where the documents are stored. If you select "save as attachments", you need to set attachment enabled in list settings. If you "save to document library" you can specify whether a folder will be created in the library. The folder name can be generated automatically based on rules such as date, created by, version, etc.</p>	<input type="radio"/> Save as attachment: <input checked="" type="radio"/> Save in document library: <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> <span>Product Center\Quotes</span> ▼         </div> <input checked="" type="checkbox"/> Create a folder to save documents Name folder by: <span>Product Name</span> ▼

Enable the merged Document Generation option and configure the following sections:

<p><b>Merged Document Generation</b></p> <p>Specify whether merged documents can be generated using this rule.</p>	<input checked="" type="checkbox"/> Enable
<p><b>Merged Documents Naming Rule</b></p> <p>Specify a naming rule for the merged documents.</p>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">             Receipt-[Today]-[Me]         </div> <div style="border: 1px solid #ccc; padding: 2px;">             [Me] ▼         </div>
<p><b>Target Location</b></p> <p>Specify the target location to store the merged documents.</p>	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <span>Product Center\Quotes</span> ▼         </div> <input type="checkbox"/> Create a folder to save documents Name folder by: <span>[Today]</span> ▼

If you want to send the order details to **Tom Smith**, for example, just select the item that is related to Tom Smith and click **Generate Document** on the Ribbon. You will get a PDF file as follows:

# Sales Receipt



**BoostSolutions**  
We make your SharePoint life easier

*Make your SharePoint  
life Easier.*

Date

---

WISHWILL International Limited  
Haidian District, Beijing, P.R. China  
100081  
Phone: +86-10-82604161  
Fax: +86-10-82604161  
sales@boostsolutions.com

**SOLD** Joe Lee  
**TO** SPField  
4401 Freidrich Lane | Bldg 2 Suite 200  
  
Phone  
Customer ID

Payment Method	Check No.
Share-it	V24154545

Qty	Item #	Description	Unit Price	Discount	Line total
2	ShareDoc		\$899.00	\$359.60	\$1,798.00
		Total Discount		\$359.60	
				Subtotal	\$1,798.00
				Sales Tax	0
				Total	\$1,438.40

*Thank you for your business!*

If your customer Lucy Green, for example, has purchased three products, you would want to place the three orders into one document. In this example, you should select the three items and then click **Combine Generate** on the Ribbon. The resulting PDF file will be generated as follows:

# Sales Receipt



*Make your SharePoint life Easier.*

Date 8/13/2013

WISHWILL International Limited  
 Haidian District, Beijing, P.R. China  
 100081  
 Phone: +86-10-82604161  
 Fax: +86-10-82604161  
 sales@boostsolutions.com

**SOLD** Bill Bily  
**TO** AAB8C  
 410 South Johnstone  
 74003  
 Phone +01 3252222  
 Customer ID CU-01286-V1Z5K7

Payment Method	Check No.
Paypal	5562248

Qty	Item #	Description	Unit Price	Discount	Line total
1	ComposeDoc		\$1,569.00	\$313.80	\$1,569.00
1	MergeDoc		\$2,299.00	\$459.80	\$2,299.00
1	TransferDoc		\$699.00	\$139.80	\$699.00
Total Discount				\$913.40	
Subtotal					\$4,567.00
Sales Tax					\$0.00
Total					\$3,653.60

*Thank you for your business!*

## 8. Troubleshooting & Support

### **Troubleshooting FAQ:**

<http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

### **Contact Info:**

Product & Licensing Inquires: [sales@boostsolutions.com](mailto:sales@boostsolutions.com)

Technical Support (Basic): [support@boostsolutions.com](mailto:support@boostsolutions.com)

Request a New Product or Feature: [feature\\_request@boostsolutions.com](mailto:feature_request@boostsolutions.com)

### **Live chat:**

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

## Appendix 1: Supported Lists, Libraries and Galleries

Document Maker can work on these lists and libraries.

Lists	Announcement, Calendar, Contacts, Custom List, Custom List in Datasheet View, Discussion Board, External List, Import Spreadsheet, Status list(do not show product buttons), Survey(do not show product buttons), Issue Tracking, Links, Project Tasks, Tasks
Libraries	Asset, Data Connection, Document, Form, Wiki Page, Slide, Report, picture(product buttons are in the Settings menu)
Galleries	Web Parts Gallery, List Templates Gallery, Master Pages Gallery, Themes Gallery, Solutions Gallery
Special lists	Categories, Comments, Posts, Circulation, Resources, Whereabouts, Group Calendar, Phone Call Memo, Agenda, Attendees, Objectives, Decisions, Things To Bring, Text Box

## Appendix 2: Supported Calculated Field Functions

The following table shows the calculated field functions that are supported in Microsoft Word.

	Name	Instance	Comment
<b>Custom Functions</b>	Sum	Sum([YourColumn])	<ol style="list-style-type: none"> <li>1. Not case sensitive.</li> <li>2. Does not support recursively nested.</li> <li>3. Supports external scientific computing.</li> </ol>
	Max	Max([YourColumn])	
	Min	Min([YourColumn])	
	Average	Average([YourColumn])	
	Count	Count([YourColumn])	
<b>System functions</b>	Abs	Math.Abs	<ol style="list-style-type: none"> <li>1. Case sensitive.</li> <li>2. Supports recursively nested.</li> <li>3. Supports external scientific computing.</li> </ol>
	Acos	Math.Acos	
	Asin	Math.Asin	
	Atan	Math.Astan	
	Atan2	Math.Astan2	
	BigMul	Math.BigMul	
	Ceiling	Math.Ceiling	
	Cos	Math.Cos	
	Cosh	Math.Cosh	
	Exp	Math.Exp	
	Floor	Math.Floor	
	Log	Math.Log	
	Log10	Math.Log10	
	Max	Math.Max	
	Min	Math.Min	
	Pow	Math.Pow	
	Round	Math.Round	
	Sign	Math.Sign	
	Sin	Math.Sin	
	Sinh	Math.Sinh	
Sqrt	Math.Sqrt		
Tan	Math.Tan		
Tanh	Math.Tanh		
Truncate	Math.Truncate		

## Appendix 3: License Management

You can use Document Maker without entering any license code for a period of 30 days from when you first use it.

To use product after expiration, you will need to purchase a license and register the product.

### Finding License Information

1. In the products main page, click the trial link and enter the License Management Center.
2. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information

Download the license type information and send to sales@boostsolutions.com to get license.

**Choose a license type**

Server License  
Server Code: e4c9171bd1aa49cea8903e0a7e0e812643f8360be a74459ca3bf6b2e0240f194

Farm License  
Farm ID: {e4c9171b-d1aa-49ce-a890-3e0a7e0e8126}  
Number of Users: 24 user(s)

Site Collection License  
Site Collection ID: 1316fb72-1436-41cf-949d-56ca6020320e Change  
Site Collection: http://pro-mac

Download Close

In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

3. Send the above information to us ([sales@boostsolutions.com](mailto:sales@boostsolutions.com)) to generate a license code.

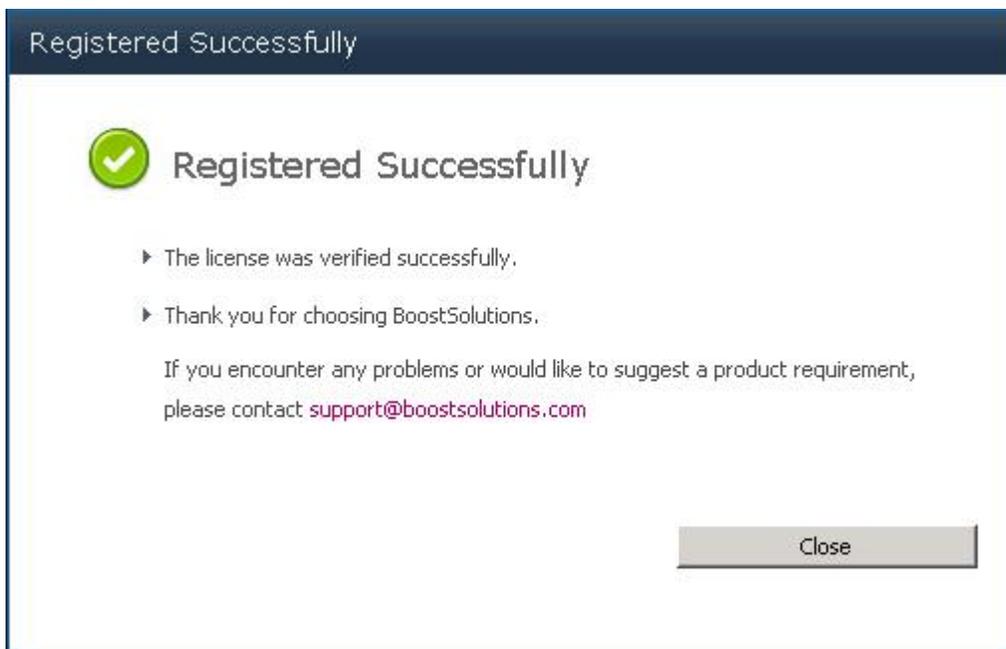
### License Registration

1. When you receive a product license code, enter the **License Management Center** page.
2. Click **Register** on the license page and a **Register or Update license** window will open.



The screenshot shows a dialog box titled "Register or Update license". The main text reads: "Please upload a license code file or enter the license code to activate the product." There are two radio button options: "Upload a license code file" (which is selected) and "Enter license code". Under the first option, there is a text input field and a "Browse..." button. Under the second option, there is a larger text input field. At the bottom of the dialog, there are two buttons: "Register" and "Close".

3. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.



The screenshot shows a dialog box titled "Registered Successfully". It features a green checkmark icon in a circle. The main text reads: "Registered Successfully". Below this, there are two bullet points: "▶ The license was verified successfully." and "▶ Thank you for choosing BoostSolutions." A paragraph of text follows: "If you encounter any problems or would like to suggest a product requirement, please contact [support@boostsolutions.com](mailto:support@boostsolutions.com)". At the bottom right, there is a "Close" button.

For more details on license management, see the [BoostSolutions Foundation](#).