Document Number Generator 2.0

User Guide

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1. Introduction

BoostSolutions Document Number Generator can be used to uniquely identify and classify any document. A document numbering scheme needs to be set up in one document library first; once a document comes into that library, the specific field will then be replaced by a generated value according to the document numbering scheme.

This user guide will guide you to install and configure Document Number Generator on your SharePoint.

For latest version of this copy or other user guides, please visit our document center:

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

2. Installation

2.1 Product Files

After you download and unzip the Document Number Generator zip file from
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 Number Generator_V2_User Guide.pdf	User guide for Document Number Generator 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\Foundtion\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundtion\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.AutoNumber\ BoostSolutions.DocumentNumberGenerator14.2.wsp	A SharePoint solution package containing Document Number Generator files and resources for SharePoint 2010 or SharePoint

	Foundation 2010.
Solutions\Classifier.AutoNumber\ BoostSolutions.DocumentNumberGenerator15.2.wsp	A SharePoint solution package containing Document Number Generator files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.AutoNumber\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.Basic\ BoostSolutions.SharePointClassifier.Platform14.2.wsp	A SharePoint solution package containing product fundamental files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.Basic\ BoostSolutions.SharePointClassifier.Platform15.2.wsp	A SharePoint solution package containing product fundamental files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.Basic\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Document Number Generator, 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

SharePoint 2013

| Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5

	Microsoft Internet Explorer 8 or above
Browser	Mozilla Firefox
	Google Chrome

2.3 Installation

Follow these steps to install Document Number Generator on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.
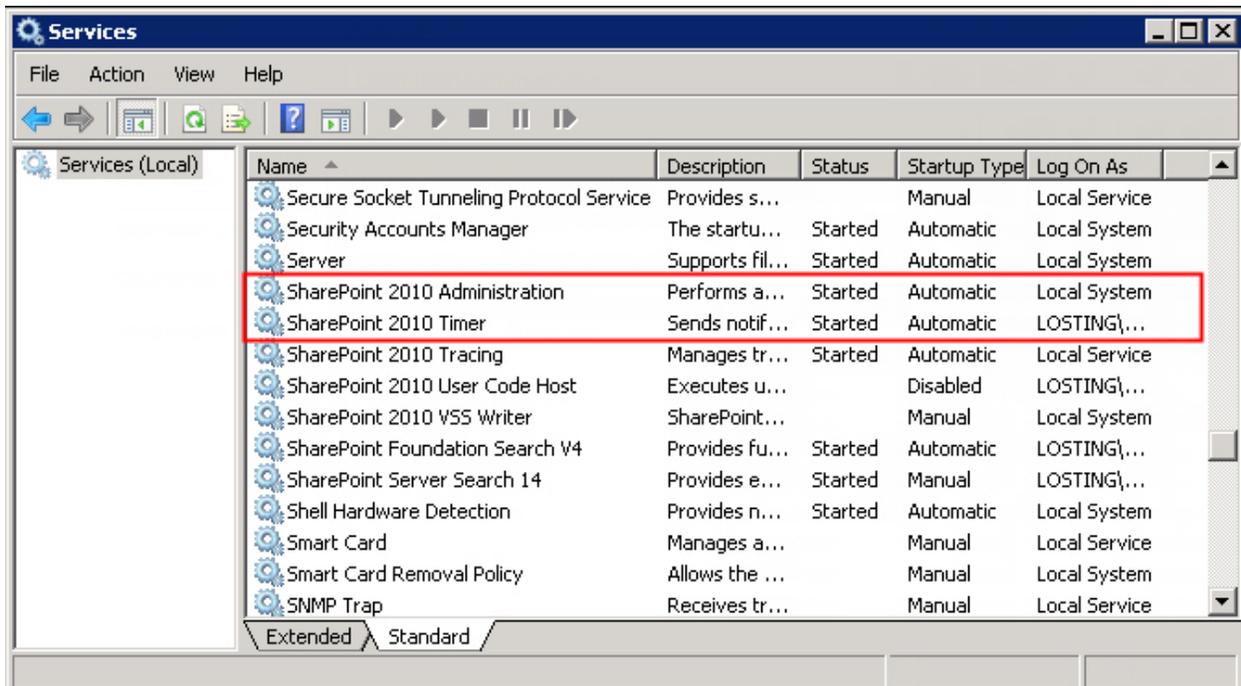
Document Number Generator must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration → System Settings** for a list of servers running this service.

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 Number Generator on SharePoint server.

1. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.

2. 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.

3. 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**.

4. Review and accept the End-User License Agreement and click **Next**.

5. 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.

6. Upon completion of the installation, details are displayed showing which web applications you product has been installed to.

7. Click **Close** to finish the installation.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

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

Note: if you have installed Classifier 1.0 on your SharePoint servers, to upgrade to Document Number Generator 2.0 or above, you need to:

Download the new version of Classifier (2.0 or above), and upgrade the product.

Or,

Remove Classifier 1.0 from your SharePoint servers, and install Document Number Generator 2.0 or above.

2.5 Uninstallation

If you want to uninstall the product, 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 Number Generator in **SharePoint 2010** by 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 Number Generator to SharePoint servers.

If you have installed BoostSolutions products before, please skip the steps of Foundation installation.

1. Extract the files from the product zip pack to a folder on one SharePoint server.

2. 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

    - **SharePoint 2013**

    C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

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

    stsadm -o addsolution -filename <full path>BoostSolutions.BulkPropertiesEditor14.2.wsp

    stsadm -o addsolution -filename <full path>BoostSolutions.SharePointClassifier.Platform14.2.wsp

    stsadm -o addsolution -filename <full path>BoostSolutions.FoundationSetup14.1.wsp

4. Deploy the added solution with the following command:

    stsadm -o deploysolution -name BoostSolutions.DocumentNumberGenerator14.2.wsp -allowgacdeployment –url [virtual server url] –immediate

    stsadm -o deploysolution -name BoostSolutions.SharePointClassifier.Platform14.2.wsp -allowgacdeployment –url [virtual server url] –immediate

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

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

stsadm -o displaysolution -name BoostSolutions.DocumentNumberGenerator14.2.wsp

stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform14.2.wsp

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

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

6. In the STSADM tool, activate the features.

stsadm -o activatefeature -name SharePointBoost.ListManagement –url [site collection url] –force

stsadm -o activatefeature -name SharePointBoost.ListManagement.AutoNumber –url [site collection url] –force

To remove Document Number Generator from SharePoint servers.

1. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.DocumentNumberGenerator14.2.wsp -immediate -url [virtual server url]

stsadm -o retractsolution -name BoostSolutions.SharePointClassifier.Platform14.2.wsp -immediate -url [virtual server url]

2. 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.DocumentNumberGenerator14.2.wsp

stsadm -o displaysolution –name BoostSolutions.SharePointClassifier.Platform14.2.wsp

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

3. Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.DocumentNumberGenerator14.2.wsp

stsadm -o deletesolution –name BoostSolutions.SharePointClassifier.Platform14.2.wsp

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is mainly 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, please do not remove Foundation from the servers.

1. Removal is initiated with the following command:

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

2. 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.

3. Remove the solution from the SharePoint solutions storage:

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

2.7 Feature Activation

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

To activate product feature, you must be a site collection administrator.

1. On the Site Actions menu Site Actions ▾ click **Site Settings**.

2. Under **Site Collection Administration** click **Site collection features**.

3. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

3. How to use Document Number Generator

3.1 Access Document Number Generator

Enter the **Document Library Settings** page and click the **Document Number Generator Settings** link under the **General Settings** tab.

General Settings

Title, description and navigation
Versioning settings
Advanced settings
Validation settings
Column default value settings
Document Number Generator Settings (Powered by BoostSolutions)
Rating settings
Audience targeting settings

Click **Add New Scheme**.

Click **Add New Scheme** to add a new document numbering scheme.

    Whenever a scheme is created, it will be displayed under its respective content type. Use icon buttons on each line to manage schemes.

➕ Add New Scheme

3.2 Add Document Numbering Scheme

Click **Add New Scheme** to add a new document numbering scheme. You will see a new dialog window.

Scheme Name: Enter a name for this scheme.

Content Type: Specify which field should use this scheme, you need to select content type first to determine the specific field.

All content types attached in the document library can be selected.

Select one field to apply the scheme, only single line of text column is supported.

Note:

1. Name is a specific column and cannot contain these characters: \ / : * ? " < > |.

    If you insert SharePoint columns in the formula and apply it to a Name column with these characters, then the new name cannot be generated.

2. Multiple schemes cannot be applied to one column in one Content Type.

Formula: In this section you can use **Add element** to add a combination of variables and separators and use **Remove element** to remove them.

|	
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.
Functions	Document Number Generator allows you to insert the following functions in a formula.
	[Today]: Today's date.
	[Now]: The current date and time.
	[Year]: The current year.
	[Parent Folder Name]: The folder name where the document is located.
	[Parent Library Name]: The library name where the document is located.
	[Document Type]: docx, pdf, etc.
	[Original File Name]: The original file name.
Customized	Custom Text:
	You can select Custom Text and enter anything you want. If any invalid characters are detected, the background color of this field will change and a message will appear to indicate that there are errors.
Separators	When you add multiple elements in a formula, you can specify the separator to conjoin these elements.
	The connectors include: - _. / \ (The / \ separators cannot be used in the Name column.)

Date Format: In this section you can specify which date format you want to use in the formula.
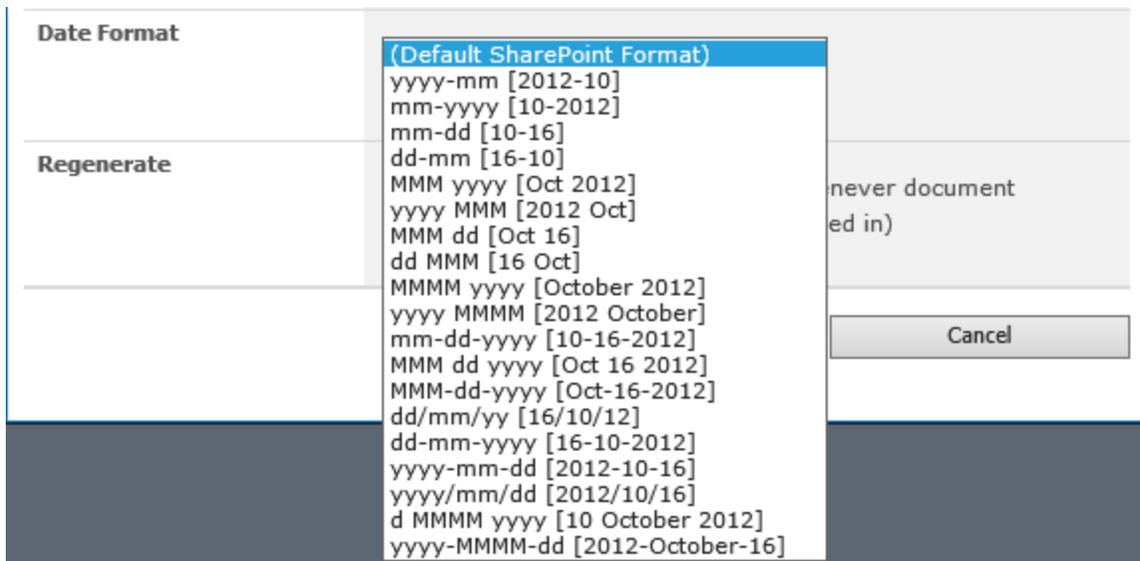
Note:

1. To avoid invalid characters, yyyy/mm/dd and dd/mm/yy formats should not be specified for the Name column.

2. This option is useful only when you add at least one [Date and Time] type column in the Formula.

Regenerate: This option determines whether you want to regenerate the document numbering scheme when the specific document is edited, saved or checked in. By default, this option is disabled.
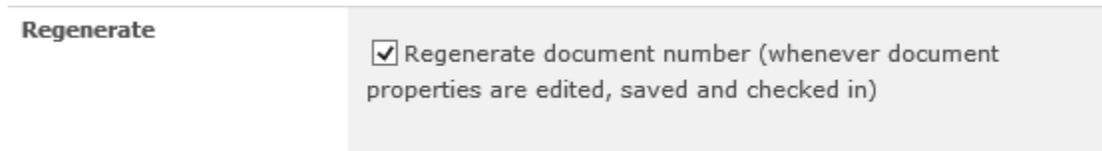
Note: When this option is enabled the column valued user entered in the SharePoint item edit form will be overwritten automatically.

3.3 Manage Schemes

Once a document numbering scheme is successfully created, the specific scheme will be shown under its respective content type.

Click **Add New Scheme** to add a new document numbering scheme.

Whenever a scheme is created, it will be displayed under its respective content type.
Use icon buttons on each line to manage schemes.

🔑 **Document** (1 scheme for this Content Type)

Scheme Name	Used For	Field Formula	Modified	Modified By	Edit	Delete	Apply
Report Naming	Name	SalesReport-[Year]-[Created By]	5/16/2013 8:49 PM	Hans	📝	✕	⊙

🔑 **Analysis** (1 scheme for this Content Type)

Scheme Name	Used For	Field Formula	Modified	Modified By	Edit	Delete	Apply
Analysis Naming	Name	AnalysisReport-[Area]-[Year]-[Created By]	5/16/2013 8:59 PM	Hans	📝	✕	⊙

Use the icon 📝 to edit the scheme.

Use the icon ✕ to delete the scheme.

Use the icon ⊙ to apply this scheme to all documents stored in the current document library.

Note: This action is dangerous because the value of a specific field for **ALL** documents will be overwritten.

Message from webpage

This will overwrite the Title field with specific scheme for all items, do you want to continue?

OK   Cancel
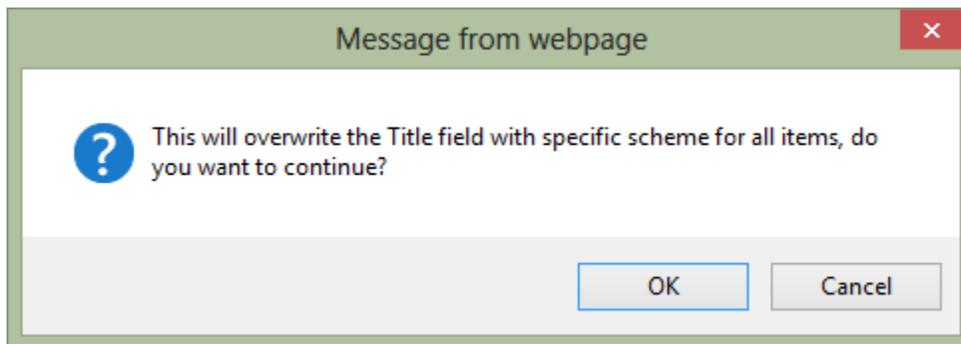
Click **OK** to confirm and continue.

There will be an icon that shows the scheme is currently running. Once it is done, it will display an icon indicating the results.

After scheme configured, the unique number will be assigned to the incoming documents as follows.

▸ Docs Center ▸ All Documents ▾

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☐	Type	Name↑	Modified	☐ Modified By
	📊	AnalysisReport-Africa-2013-Hans	5/16/2013 8:59 PM	Hans
	📊	AnalysisReport-Asia-2013-Nick	5/16/2013 9:01 PM	Nick
	📊	AnalysisReport-Euro-2013-System Account	5/16/2013 9:01 PM	Nick
	📊	SalesReport-2013-Hans	5/16/2013 8:49 PM	Hans
	📊	SalesReport-2013-Henry	5/16/2013 8:52 PM	Henry

4. Troubleshooting & Support

Troubleshooting FAQ:

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

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

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

Appendix A: License Management

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

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

Finding License Information

1. Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.

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
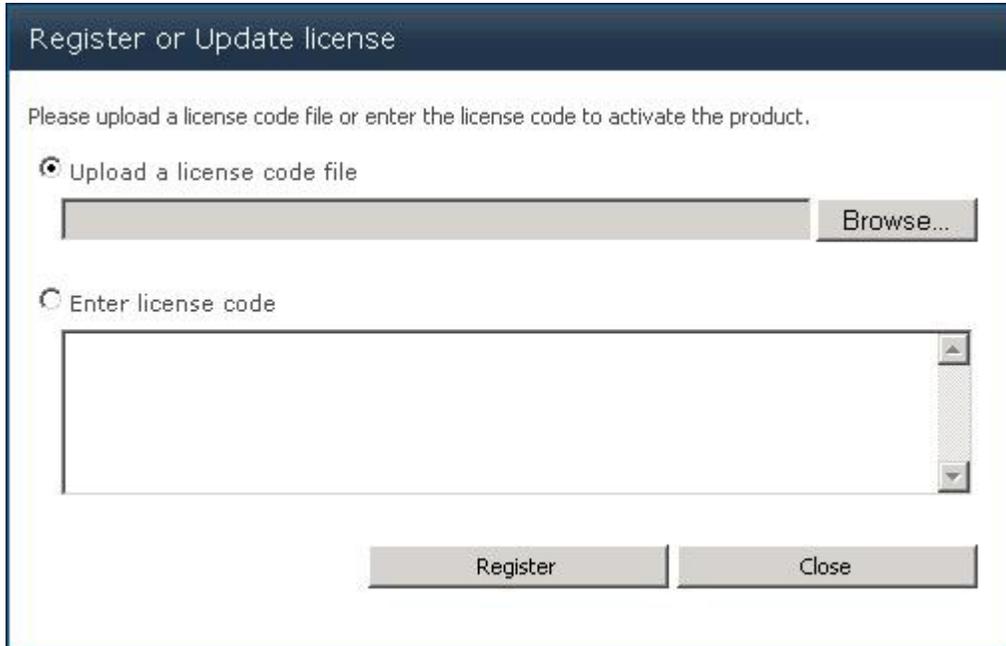Site Collection: http://pro-mac

Download   Close

In order for BoostSolutions to create a license for you, you need to 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) 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.

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

For more details on license management, see the BoostSolutions Foundation.