SharePoint Document Auto Title Installation Instruction

System Requirements

Microsoft Windows SharePoint Services V3 or Microsoft Office SharePoint Server 2007.

License management

Click the trial link on the Document Auto Title workflow Settings page to get into the license management page.

Customize /	Auto Title Workflow			
Auto Title Workflow setti	ng page			
	After settings	s changed, please click OK	ОК	Cancel
Enable				
Check if you want to ena	able the workflow	Enable following workflow	v setting	
Auto title setting		Exclude file extension		
Options for this workflow	v setting	Always set title		
License management Manage license for Document Auto Title Workflow		You are using a trial license fo days left), please click here b	<u>Document Au</u> manage license	<u>to Title (30</u> 2
Document Aut	After settings o Title License Managen	s changed, please click OK n ent	ОК	Cancel
icense information and add ne	w license			
Document Auto Title	License Information			
Automatically set title with	Farm ID:	{87b36d9e-c2a2-4fd2-90fe-1792t		
ile name when document is ploaded or modified	Site Collection ID: Current amount of users in this site collection	4b29d754-abb0-4b20-801e-7a1e3	5691644	
Powered by	License status:	No Registration		
SharePointBoost)	Add license(ASCII):	Click hergito get license		

ОК

On the License Management page, click the link to purchase the license and send the Site Collection ID or Farm ID to sales@sharepointboost.com so that we can generate license code for you. Then please input the license code into the Add license box and click ok.

Document Auto Title License Management

Document Auto Title	License Information	
Automatically set title with	Farm ID:	{87b36d9e-c2a2-4fd2-90fe-17928ef24f7e}
file name when document is	Site Collection ID:	4b29d754-abb0-4b20-801e-7a1e75e9f644
uploaded or modified (Powered by	Current amount of users in this site	colection: 12
SharePointBoost)	License status:	50
	Add icense(ASCII):	Click here to get license
	eedfe854-a628-4bba-b66c- 735537c3c935WeaXsQHFx5UEWrf NOX8ZXGZIpBM6JGkJtAOF8i1cPC	Abstmo5X4R9n7BUZ8Czy1OZ9kem8aoupV+JM7Erd2a/YVcOvIVDZ8KlisGQ08phP kbkfTdzDdsDXkpb7FT0Q/J22ffDwTBK0dq+q9h0kh2pC3IYp6rZh2Y+zD8APQsfA8 H5aOf/ALrmyEhPHuhNXA3q68cUKnl6nSXG8kF+Ys75NqIYgWpR5MKKNhnY3y0ZaR

Now, close this page and refresh the previous page, you can use the SharePoint Document Auto Title with no limitation.

Installation

Download SharePoint Document Auto Title setup file from http://www.sharepointboost.com, release the file to a folder, and run "setup.exe".



Note:

You must be the SharePoint Farm Administrator.

Start "Windows SharePoint Services Administration" and "Windows SharePoint Services Timer" in services management prior to installation.

🍓 Services				_	<u> </u>
<u>File Action View</u>	Help				
⇔ → 🖬 😭 [3 🗟 😫 💷 ▶ ■ ॥ ■>				
🆏 Services (Local)	Name 🛆	Description	Status	Startup Type	
	🦓 Windows Installer	Adds, modi		Manual	
	🦉 🏶 Windows Internet Name Service (WINS)	Resolves N	Started	Automatic	
	🦓 Windows Management Instrumentation	Provides a	Started	Automatic	
	Windows Management Instrumentation Driver Extensions	Monitors all		Manual	
	Windows Presentation Foundation Font Cache 3.0.0.0	Optimizes		Manual	
	Windows SharePoint Services Administration	Performs a	Started	Automatic	
	Windows SharePoint Services Search	Provides fu	Started	Manual	
	🦓 Windows SharePoint Services Timer	Sends notif	Started	Automatic	
	Windows SharePoint Services Tracing	Manages tr	Started	Automatic	
	🦓 Windows SharePoint Services VSS Writer	Windows S		Manual	
	🦓 Windows Time	Maintains d	Started	Automatic	
	🦓 Windows User Mode Driver Framework	Enables Wi.,		Manual	_
	Extended Standard				

Run the setup file, and wait a few seconds for system check, then click "next".

SharePoint Document Auto Title 1.0.115.5
System Check Checking if SharePoint Document Auto Title 1.0.115.5 can be installed from this
 Windows SharePoint Service 3.0 is installed. You have permission to install and deploy SharePoint solutions. The Windows SharePoint Services Administration service is started. The Windows SharePoint Services Timer service is started. Solution file found. SharePoint Document Auto Title 1.0.115.5 is already installed.
All checks succeeded. Please click Next to proceed with the installation.
Kext -> Abort Mondosoft SharePoint Solution Installer Abort

After you have read and accepted the License Agreement, please click "next".

SharePoint Document Auto Title 1.0.115.5
End-User License Agreement Please read the following license agreement carefully
PLEASE READ THIS END-USER LICENSE AGREEMENT ("EULA") CAREFULLY. BY INSTALLING OR USING THE SOFTWARE THAT ACCOMPANIES THIS EULA ("SOFTWARE"), YOU AGREE TO THE TERMS OF THIS EULA. IF YOU DO NOT AGREE, DO NOT USE THE SOFTWARE AND, IF APPLICABLE, RETURN IT TO THE PLACE OF PURCHASE FOR A FULL REFUND. THIS SOFTWARE DOES NOT TRANSMIT ANY PERSONALLY IDENTIFIABLE INFORMATION FROM YOUR SERVER TO BRANDYSOFT COMPUTER SYSTEMS WITHOUT YOUR CONSENT.
 GENERAL. This EULA is a legal agreement between You (either an individual or a single entity, also used in the form "Your" where applicable) and Brandysoft Corporation ("Brandysoft"). This EULA governs the Software, which includes software (including online and electronic documentation) and any associated media and printed I accept the terms in the License Agreement
Mondosoft SharePoint Solution Installer <u>Abort</u>

Please select one or more web application and click "Next".

SharePoint Document Auto Title 1.0.115.5	
Deployment Targets Please select one or more web applications	Title
Web Applications: http://by-52eeb6003c5:5469/ (Central Administration) http://192.168.2.112/ (SharePoint - 80) http://192.168.2.112:81/ (SharePoint - 81) http://192.168.2.112:82/ (SharePoint - 82) http://192.168.2.112:83/ (SharePoint - 83) http://by-52eeb6003c5:84/ (SharePoint - 84) ittp://bry-52eeb6003c5:85/ (SharePoint - 85) 	
Please click the Next button to start the installation process.	
Kondosoft SharePoint Solution Installer ▲	bort

Wait for installing, and then click "next" for more deployment details.



Details are displayed, showing SharePoint Document Auto Title is installed successfully on which web applications.

SharePoint Document Auto Title 1.0.115.5 Installation Successfully Completed	Title
Details:	
	×
Mondosoft SharePoint Solution Installer	<u>C</u> lose

Activate and Use:

Then, click Site Actions (siteactions_menu.jpg) (SharePoint Document Auto Title site action menu), and select **Modify All Site Settings**.



In the Site Settings page, click "Site collection features".

Site Information				
Site URL:	http://1	192.168.2.112:81/	/sites/Sharepoint/	
Mobile Site URL:	http://1	192. <mark>168.2.112:81/</mark>	/sites/Sharepoint/m/	
Version:	12.0.0.	45 <mark>18</mark>		
Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
 People and groups Site collection administrators Advanced permissions 	 Title, description, and icon Tree view Site theme Site theme Top link bar Quick Launch Save site as template Reset to site 	 Master pages Site content types Site columns Site templates List templates Web Parts 	 Regional settings Site libraries and lists Site usage reports User alerts RSS Search visibility Sites and workspaces Site features 	 Search settings Search scopes Search keywords Recycle bin Site directory settings Site collection usage reports Site collection features Site hierarch Portal site connection

In the Site collection features list, click "Activate" button of SharePoint Document Auto Title.

<u>@</u>

Document Auto Title

Automatically set title with file name when document is uploaded or modified (Powered by SharePointBoost) Activate

(activate_feature.jpg)(SharePoint Document Auto Title activate feature)

After SharePoint Document Auto Title is activated, open the library which you want to add the Document Auto Title workflow on, and click **Document Library Settings** on the **Settings** menu, then click Workflowsettings link.

General Settings	Permissions and Management
Title, description and navigation	Delete this document library
Versioning settings	Save document library as template
Advanced settings	Permissions for this document library
Audience targeting settings	Manage checked out files
	Workflow settings
	Information management policy settings

On the Add a Workflow page, choose Document Auto Title Workflow in the workflow template, and then type the name.

Add a Workflow: Shared Documents

Use this page to set up a workflow for this document library.



Then choose the checkbox of "start this workflow when a new item is created""start this workflow when an item is changed", and click OK.

Start Options Specify how this workflow can be started.	Allow this workflow to be manually started by an authenticated user with Edit Items Permissions. Require Manage Lists Permissions to start the workflow.
	Start this workflow to approve publishing a major version of an item.
	Start this workflow when a new item is created.
	Start this workflow when an item is changed.

Then, you will enter the auto title workflow settings page as following.

Customize Auto Title Workflow

Auto Title Workflow setting page

After settings	changed, please click OK OK Cancel
Enable Check if you want to enable the workflow	Enable following workflow setting
Auto title setting Options for this workflow setting	 Exclude file extension Always set title
License management Manage license for Document Auto Title Workflow	You are using a trial license for Document Auto Title (30 days left), please click here to manage license

Uninstallation

Run the setup.exe again. (If the setup file has been deleted, please download it from http://www.sharepointboost.com.)

In the Repair and Remove page, select the Remove radio button and click next, SharePoint Document Auto Title will be uninstalled.

SharePoint Document Auto Title 1.0.115.5	
Repair or Remove Please select the operation you wish to perform	Title
SharePoint Document Auto Title 1.0.115.5 is already installed. What would you like to do?	
C Repair	
Retracts the solution from all web applications and deploys it once again.	
• Remove Retracts the solution from all web applications and deletes it from the SharePoint solution store.	
Mondosoft SharePoint Solution Installer	Abort

SharePoint Document Auto Title

SharePoint Document Auto Title provides a workflow to automatically set title with file name when document is uploaded or modified. This function is not provided by default SharePoint.

A complete tutorial of Share Point Document Auto Title is as following.

NOTE: The Document Auto Title Workflow can only be applied to document libraries.

Here we need to upload a number of documents which has no titles to SharePoint document library "Shared Documents".

🗁 Relative documents					
<u>File Edit View Favorites Tools H</u> elp					
🔇 Back 🝷 🕥 👻 🏂 🔎 Search Dolders 🛛 🕼	» 🗙 🍤 🛄 -				
Address 🛅 D:\Relative documents		💌 🄁 Go			
Name 🔺	Title				
How to use a document auto title workflow.docx					
Installation document.docx					
Installation requirements.xlsx					
SharePoint Trainning.pptx					
Support Tranning.pptx					
Trainning recording.xlsx					
Tutorial.docx					
Workflow introduction.docx					
Workflow trainning.docx					
Workflow Trainnnig.pptx					

1. Add Document Auto Title Workflow

Open Shared Documents, and click Document Library Settings on the Settings Menu.



2. Then, on the Settings page, click Workflowsettings link.

SiteCollection > Sharepoint List > Shared Documents > Settings Customize Shared Documents

lame:	Shared Documents		
Veb Address:	http://192.168.2.112	81/sites/SiteCollection/Sharepoint List/Shared	Documents/Forms/AllItems
escription:	Share a document wit	th the team by adding it to this document library	
General Setting	i	Permissions and Management	Communicat
		Permissions and Management Delete this document library	Communications
General Settings Title, description Versioning setting	and navigation	2	Communications

- Havancea becango
- Audience targeting settings
- Workflowsettings

Manage checked out files

Information management policy settings

On the Add a Workflow Page, click Document Auto Title Workflow template in the Workflow section, and type a unique name for this workflow in the Name section.

Add a Workflow: Shared Documents

Use this page to set up a workflow for this document library.

Workflow	Select a workflow template: Description:
Select a workflow to add to this document library. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.	Collect Feedback Collect Signatures Disposition Approval Document Auto Title Workflow
Name	Type a unique name for this workflow:
Type a name for this workflow. The name will be used to identify this workflow to users of this document library.	Auto Title workflow

In the Start Options section, click the check box "Start this workflow when a new item is created" and "Start this workflow when an item is changed" to ensure the Auto Title Workflow will start when you upload or modify a document. Then click OK.

Start Options Specify how this workflow can be started.	Allow this workflow to be manually started by an authenticated user with Edit Items Permissions. Require Manage Lists Permissions to start the workflow.			
	Start this workflow to approve publishing a major version of an item.			
	Start this workflow when a new item is created.			
	Start this workflow when an item is changed.			

3. Workflow configuration

Set workflow configurations on Customize Workflow page. Here we select the "Exclude file extension" and "Always set title check box". Then, click OK.

SiteCollection > Sharepoint List > Shared Documents > Customize Workflow Customize Auto Title workflow						
Auto Title workflow setting page After settings	s changed, please click OK OK Cancel					
Enable Check if you want to enable the workflow	Enable following workflow setting					
Auto title setting Options for this workflow setting	 Exclude file extension Always set title 					
License management Manage license for Document Auto Title Workflow	Please click here to manage license for Document Auto Title					

4. Start workflow

After settings done, return to the Shared Documents library.

Click Upload Multiple Documents on the Upload Menu.

SiteCollection > Sharepoint List > Shared Documents Shared Documents									
Share a document with the team by adding it to this document library.									
New 🔻	Upload	 Action 	ns 🔻	Settings 🝷		View: All Documents			
Туре		Upload Document				Modified By			
There are n		Upload a document from your computer to this library.				s" document library. To create a new item, click "New" or "Upload" above.			
			hle do	Documents cuments from your prary.					

Select the documents which you want to upload, and click OK.

After the status of "Auto title workflow" shows completed, the titles of documents are automatically added in the column Title as following.

SiteCollection > Sharepoint List > Shared Documents

Shared Documents

Share a document with the team by adding it to this document library.

New	✓ Upload ✓ Actions ✓ All Documents					
Туре	Name	Title	Modified By	Auto Title workflow		
2	How to use a document auto title workflow I NEW	How to use a document auto title workflow	Hans	Completed		
1	Installation document I NEW	Installation document	Hans	Completed		
8	Installation requirements ! NEW	Installation requirements	Hans	Completed		
•	SharePoint Trainning I NEW	SharePoint Trainning	Hans	Completed		
•	Support Tranning I NEW	Support Tranning	Hans	Completed		
8	Trainning recording I NEW	Trainning recording	Hans	Completed		
P	Tutorial I NEW	Tutorial	Hans	Completed		
M	Workflow introduction	Workflow introduction	Hans	Completed		
M	Workflow trainning INEW	Workflow trainning	Hans	Completed		
•	Workflow Trainnnig	Workflow Trainnnig	Hans	Completed		

(Add_title.jpg) (SharePoint Document Auto Title add title)