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BOOST SOLUTIONS 1.0 SharePoint Document Auto Title User Guide

Document Auto Title 1.0
User Guide

Copyright

Contents

Product Introduction

SharePoint Document Auto Title provides a SharePoint workflow to automatically set a SharePoint document title with its file name when the document is uploaded or modified.
This user guide will help you to install and configure Document Auto Title on your SharePoint environment.
For latest version of this user guide or other user guides, please visit:
https://www.boostsolutions.com/download-documentation.html

Installation

2.1 Product Files
After you download and unzip the Document Auto Title zip file from **https://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 Auto Title _V1_User Guide.pdf	User guide for Document Auto Title in PDF format.
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.
Library\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file that contains the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\AutoTitle\ BoostSolutions.AutoTitleSetup15.1.wsp	A SharePoint solution package containing Document Auto Title files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\AutoTitle\ BoostSolutions.AutoTitleSetup16.1.wsp	A SharePoint solution package containing Document Auto Title files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\AutoTitle\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements
Before you install Document Auto Title, ensure your system meets the following requirements:
SharePoint Server Subscription Edition

Operating System	Microsoft Windows Server 2019 Standard or Datacenter Microsoft Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2019

Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 or greater Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

| Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 10 or greater Microsoft Edge 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
Browser	Microsoft Internet Explorer 8 or greater Mozilla Firefox Google Chrome

2.3 Installation
Follow these steps to install Document Auto Title 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 Service.
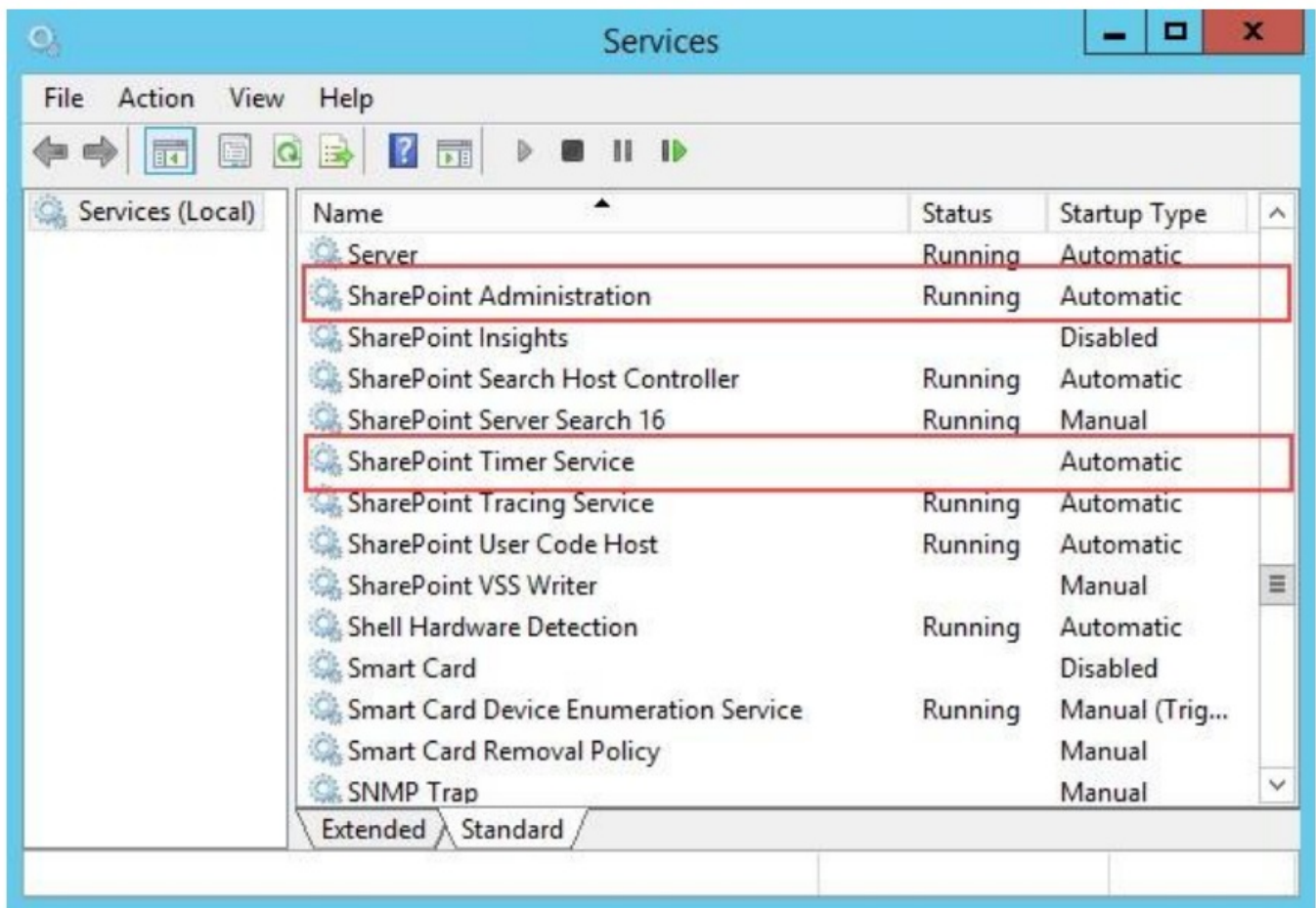
Document Auto Title must be run on one front-end Web server in the SharePoint farm where Microsoft SharePoint Foundation Web Application services are running. Check Central Administration → System Settings for a list of servers running this service.

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 Auto Title on SharePoint server.
a. Download the zip file (*.zip) of the product of your choice 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 you product has been installed to. Click Close.
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.
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 Auto Title in SharePoint 2016 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 Auto Title 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.

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

stsadm -o addsolution -filename BoostSolutions.AutoTitleSetup16.1.wsp

stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp

d. Deploy the added solution with the following command:

stsadm -o deploysolution -name BoostSolutions.AutoTitleSetup16.1.wsp -allowgacdeployment –url [virtual server url] –immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.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.AutoTitleSetup16.1.wsp

stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.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 SharePointBoost.Workflows.AutoTitle –url [site collection url] – force

To remove Document Auto Title from SharePoint servers

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.AutoTitleSetup16.1.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.AutoTitleSetup16.1.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 B BoostSolutions.AutoTitleSetup16.1.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 you 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.FoundationSetup16.1.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.FoundationSetup16.1.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.FoundationSetup16.1.wsp

2.7 Feature Activation

Activate feature 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 Quick Launch, click Application Management.

b. On the Application Management page, under Manage Applications, click Manage Web applications.

c. Select a web application you want to configure and click Manage Features on the ribbon.

d. Find Document Auto Title's feature and click Activate. After a feature is activated, the Status column lists the feature as Active.
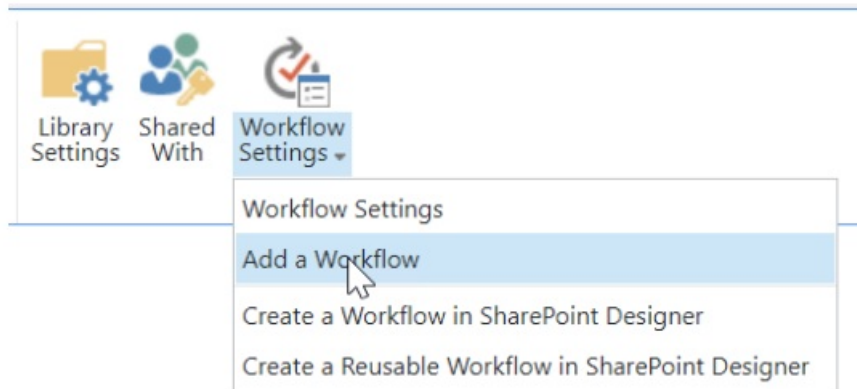
How to Use Document Auto Title

Normally, when a document is uploaded to a SharePoint Document library, the document title will not be set automatically, unless the document has "Title" metadata. The ideal situation is that the uploaded document title is the same as the file name by default without inputting the title manually in Document Library. With Document Auto Title, a SharePoint workflow template named "Document Auto Title Workflow" is used to automatically set titles for documents when documents are uploaded or modified.

3.1 Entering the Document Auto Title Workflow Settings Page
To add a Document Auto Title workflow, you must have at least Design permission level.
a. Navigate to the Document Library where you want to add a Document Auto Title workflow and then click Add a Workflow in the Settings group.

Or enter the Library Settings page and under the Permissions and Management section, click Workflow Settings.
b. On the Add a Workflow page, select Document Auto Title from the workflow template list.
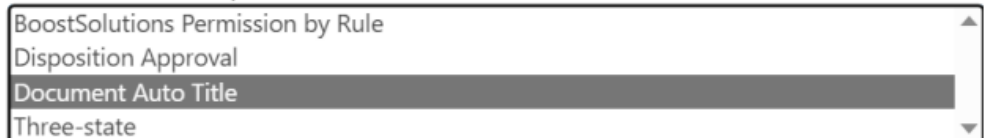
c. Give your workflow a name and select a task list and history list for it.
d. Select the Creating a new item will start this workflow and Changing an item will start this workflow options if you wish to start this workflow automatically.

Start Options
Specify how this workflow can be started.

☑ Allow this workflow to be manually started by an authenticated user with Edit Item permissions.

☐ Require Manage Lists Permissions to start the workflow.

☐ Start this workflow to approve publishing a major version of an item.

☑ Creating a new item will start this workflow.

☑ Changing an item will start this workflow.

e. Click Next to enter the workflow settings page.

3.2 Enable/Disable the Document Auto Title
Document Auto Title provides an option to decide if the workflow works on the library. If you enable the workflow, it will apply the settings to the documents after uploading or modifying.

Enable
Check if you want to enable the workflow.

☑ Enable the following workflow settings

3.3 Configure Document Auto Title
Select the Exclude file extension option if you do not want the file extension to be added in the title.
Select the Always set title option to always set the title for your documents. Click OK to save the settings.
Auto Title Settings
Choose to exclude the file extension in the title and whether to always set the title for your document.

☑ Exclude file extension

☑ Always set title

3.4 Start a Workflow
Enter the Document library, drag the files and drop them to the document library.
After all the documents are uploaded to the document library, the titles of these documents are automatically added to the Title column as follows:

Documents

Troubleshooting & Support

Troubleshooting FAQ:
https://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**

Appendix 1: License Management

You can use Document Auto Title 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
a. In the products main page, click the trial link and enter the License Management Center.
b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

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.
c. Send the above information to us (**sales@boostsolutions.com**) to generate a license code.

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

c. 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 **Free SharePoint Tool | BoostSolutions Foundation**.

Documents / Resources

BOOST SOLUTIONS 1.0 SharePoint Document Auto Title [pdf] User Guide
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