



BOOST SOLUTIONS 2.0 Document Number Generator App User Guide

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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:

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

Installation

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\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 containing the configuration information for the installer.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/SharePoint 2019/Subscription Edition.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
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\ BoostSolutions.DocumentNumberGenerator16.2.wsp	A SharePoint solution package containing Document Number Generator files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Classifier.AutoNumber\Install.config	A file containing the configuration information for the installer.
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\ BoostSolutions.SharePointClassifier.Platform16.2.wsp	A SharePoint solution package containing product fundamental files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Classifier.Basic\Install.config	A file containing the configuration information for the installer.

Software Requirements

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

SharePoint Server Subscription Edition

Operating System	Windows Server 2019 Standard or Datacenter 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 above Microsoft Edge Mozilla Firefox Google Chrome
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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 above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2013

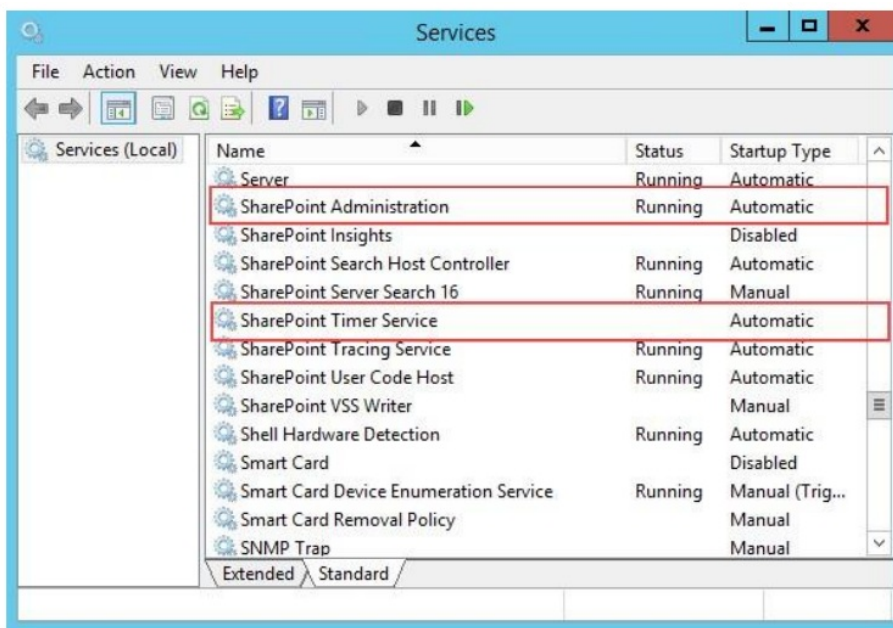
Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Microsoft Edge Mozilla Firefox Google Chrome

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 Service.



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.
6. **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.
7. Upon completion of the installation, details are displayed showing which web applications you product has been installed to.
8. Click Close to finish the installation.

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.

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.

Command Line Installation

The following instructions are for installing the solution files for Document Number Generator 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 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 2016

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\16\BIN

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

```
stsadm -o addsolution -filename BoostSolutions. Document Number Generator16.2.wsp
```

```
stsadm -o addsolution -filename BoostSolutions. SharePoint Classifier. Platform 16.2. wsp
```

```
stsadm -o addsolution -filename BoostSolutions. Foundation Setup 16.1.wsp
```

4. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions. Document Number Generator16.2.wsp –  
allow gac deployment –url [virtual server url] –immediate
```

```
stsadm -o deploysolution -name BoostSolutions. SharePoint Classifier. Platform16.2.wsp –  
allowgacdeployment –url [virtual server url] –immediate
```

```
stsadm -o deploysolution -name BoostSolutions. Foundation Setup16.1.wsp -allowgac deployment –  
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. Document Number Generator16.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions. SharePointClassifier. Platform16.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions. Foundation Setup16.1.wsp
```

The result should contain a 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. Document NumberGenerator 16.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions. SharePoint Classifier. Platform16.2.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. Document Number Generator16.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions. SharePoint Classifier. Platform16.2.wsp
```

The result should contain the parameter for which the value is FALSE and the parameter with the RetractionSucceeded value.

3. Remove the solution from the SharePoint solutions storage:

```
stsadm -o delete solution -name BoostSolutions. Document Number Generator16.2.wsp
```

```
stsadm -o deletesolution -name BoostSolutions. SharePoint Classifier. Platform16.2.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.FoundationSetup16.1.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 display solution -name BoostSolutions. Foundation Setup16.1.wsp
```

The result should contain the parameter for which the value is FALSE and the parameter with the RetractionSucceeded value.


3. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions. Foundation Setup 16.1.wsp
```

Feature Activation

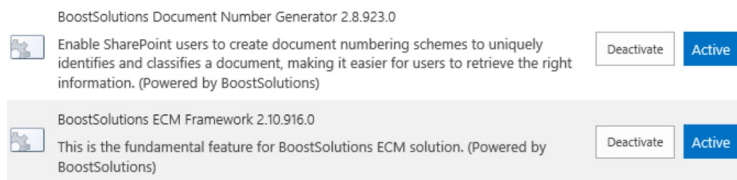
By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually

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

1. Click Settings  and then click Site Settings.

2. Under Site Collection Administration click Site collection features.

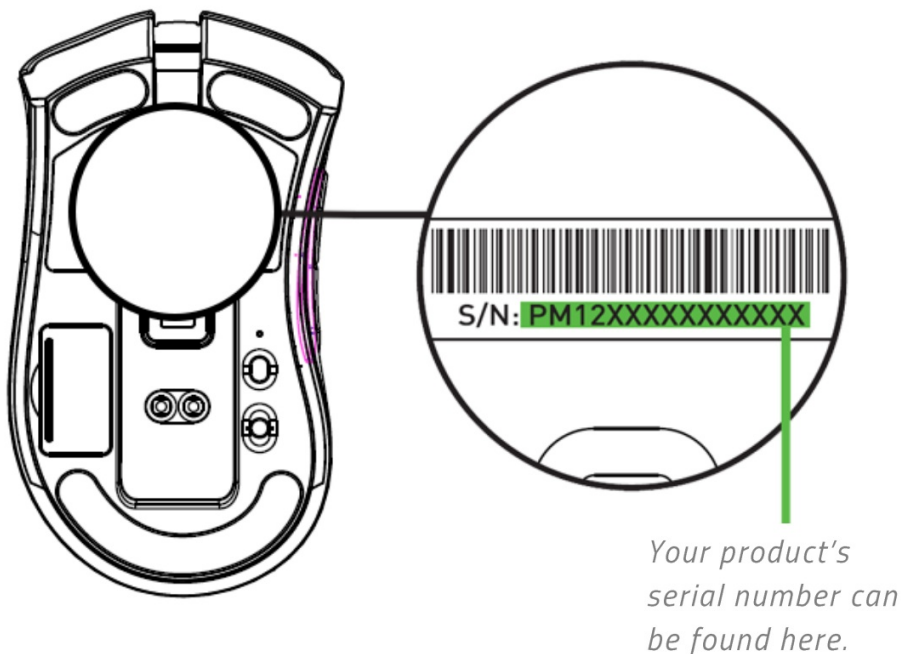
3. Find the application feature and click Activate. After a feature is activated, the Status column lists the feature as Active.



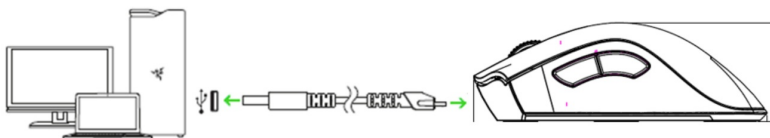
How to use Document Number Generator

Access Document Number Generator

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



Click Add New Scheme.



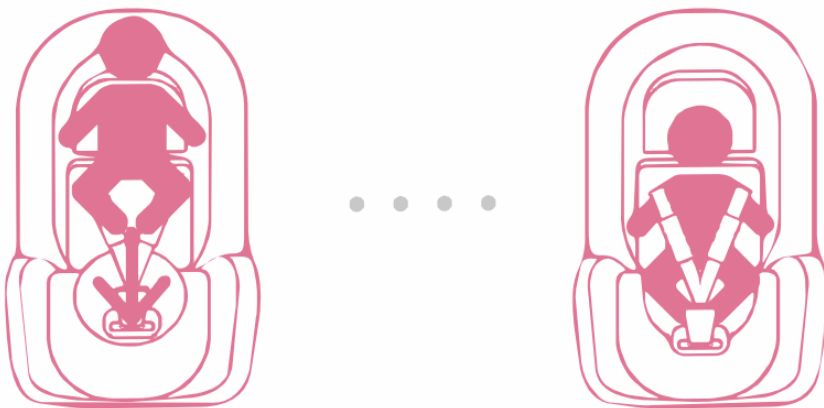
Add Document Numbering Scheme

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.

Which field should use the scheme:

Name
Title

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.

Formula *

Use **Add element** to add a combination of variable and separator and use **Remove element** to remove it.

[Reported by]_[Category]_[Ver.]_[Modified]

Reported by	▼	_	▼	Category	▼	_	▼
Ver.	▼	_	▼	Modified	▼	_	▼

✚ Add element
✕ Remove element

Columns	<p>Almost all SharePoint columns can be inserted in a formula, including:</p> <p>Single line of text, Choice, Number, Currency, Date and Time, People or Group and Managed Metadata.</p> <p>You can also insert the following SharePoint metadata in a formula: [Document ID Value], [Content Type], [Version], etc.</p>
Functions	<p>Document Number Generator allows you to insert the following functions in a formula.</p> <p>[Today]: Today's date.</p> <p>[Now]: The current date and time. [Year]: The current year.</p> <p>[Parent Folder Name]: The folder name where the document is located.</p> <p>[Parent Library Name]: The library name where the document is located.</p> <p>[Document Type]: docx, pdf, etc.</p> <p>[Original File Name]: The original file name.</p>
Customized	<p>Custom Text:</p> <p>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.</p>
Separators	<p>When you add multiple elements in a formula, you can specify the separator to conjoin these elements.</p> <p>The connectors include: – _ . / \ (The / \ separators cannot be used in the Name column.)</p>

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

Date Format

Specify a date format.

Regenerate

Specify if numbers are regenerated when documents are updated.

ever document
(in)

OK Cancel

(Default SharePoint Format)
yyyy-mm [2012-10]
mm-yyyy [10-2012]
mm-dd [10-16]
dd-mm [16-10]
MMM yyyy [Oct 2012]
yyyy MMM [2012 Oct]
MMM dd [Oct 16]
dd MMM [16 Oct]
MMMM yyyy [October 2012]
yyyy MMMM [2012 October]
mm-dd-yyyy [10-16-2012]
MMM dd yyyy [Oct 16 2012]
MMM-dd-yyyy [Oct-16-2012]
dd/mm/yy [16/10/12]
dd-mm-yyyy [16-10-2012]
yyyy-mm-dd [2012-10-16]
yyyy/mm/dd [2012/10/16]
d MMMM yyyy [10 October 2012]
yyyy-MMMM-dd [2012-October-16]

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.

Regenerate

Specify if numbers are regenerated when documents are updated.

☒ Regenerate document number (whenever document properties are edited, saved and checked in)

Note: When this option is enabled, the column valued user entered in the SharePoint item edit form will be overwritten automatically.



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
DOC Naming	Name [Reported by]_[Category]_[Ver.]_[Modified]	9/24/2019 2:52 PM	System Account			

 **Sales Doc** (1 scheme for this Content Type)

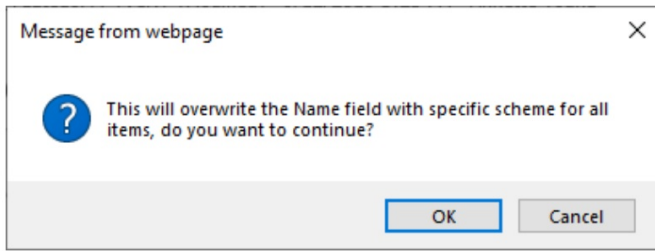
Scheme Name	Used For Field Formula	Modified	Modified By	Edit	Delete	Apply
Sales DOC Naming	Name [Product]_[ID]_[Created By]_[Published on]	9/24/2019 2:59 PM	System Account			

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.

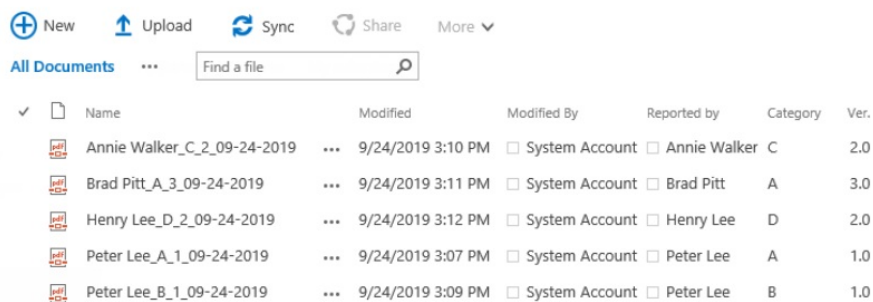
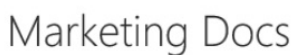
Note: This action is dangerous because the value of a specific field for ALL documents will be overwritten.



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



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 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: 8fa4fcbbcab9475d8b8f10d2c7b27e1e98226161275d49c683442a828de45bdd

☐ Farm License
Farm ID: {8fa4fcbb-eab9-475d-8b8f-10d2c7b27e1e}
Number of Users: 43 user(s)

☐ Site Collection License
Site Collection ID: Select a site collection
Site Collection:

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.

Register or Update license

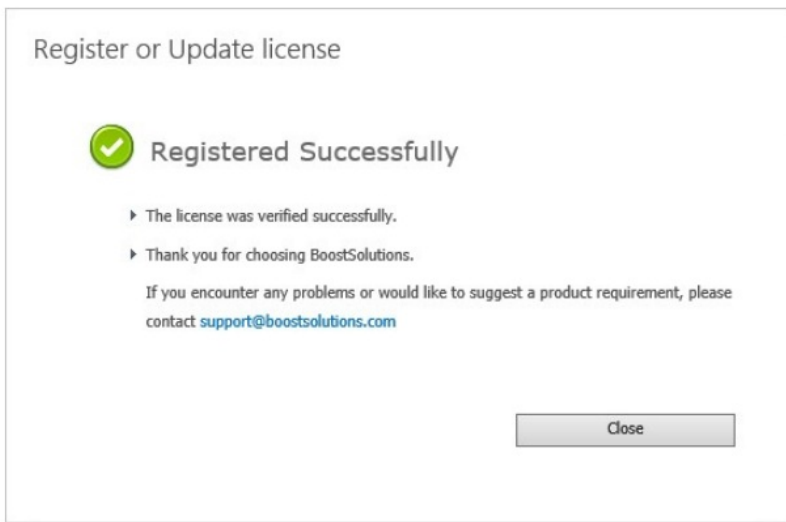
Please upload a license code file or enter the license code to activate the product.

☒ Upload a license code file
| Browse...

☐ Enter license code
[Large text area]

Register Close

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 [BoostSolutionsFoundation](#).

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Documents / Resources

 Document Number Generator 2.0 User Guide	BOOST SOLUTIONS 2.0 Document Number Generator App [pdf] User Guide 2.0 Document Number Generator App, 2.0 Document Number Generator, App
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References

- [Free SharePoint Tool | BoostSolutions Foundation](#)
- [SharePoint Web Parts and Add-ons for SharePoint 2016 & 2013 & 2010](#)
- [SharePoint Web Parts and Add-ons for SharePoint 2016 & 2013 & 2010](#)
- [Product Documentations | BoostSolutions](#)
- [General FAQ| BoostSolutions](#)