



Document Number Generator 2.0

User Guide

Copyright

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Our web site: <https://www.boostsolutions.com>

Content

| | | |
|-----|--|----|
| 1. | Introduction | 3 |
| 2. | Installation | 4 |
| 2.1 | Product Files | 4 |
| 2.2 | Software Requirements | 5 |
| 2.3 | Installation | 6 |
| 2.4 | Upgrade | 8 |
| 2.5 | Uninstallation | 8 |
| 2.6 | Command_Line Installation | 8 |
| 2.7 | Feature Activation | 11 |
| 3. | How to use Document Number Generator | 12 |
| 3.1 | Access Document Number Generator | 12 |
| 3.2 | Add Document Numbering Scheme | 12 |
| 3.3 | Manage Schemes | 15 |
| 4. | Troubleshooting & Support | 18 |
| | Appendix A: License Management | 19 |

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:

<https://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\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. |

2.2 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 |
|---------|---|

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

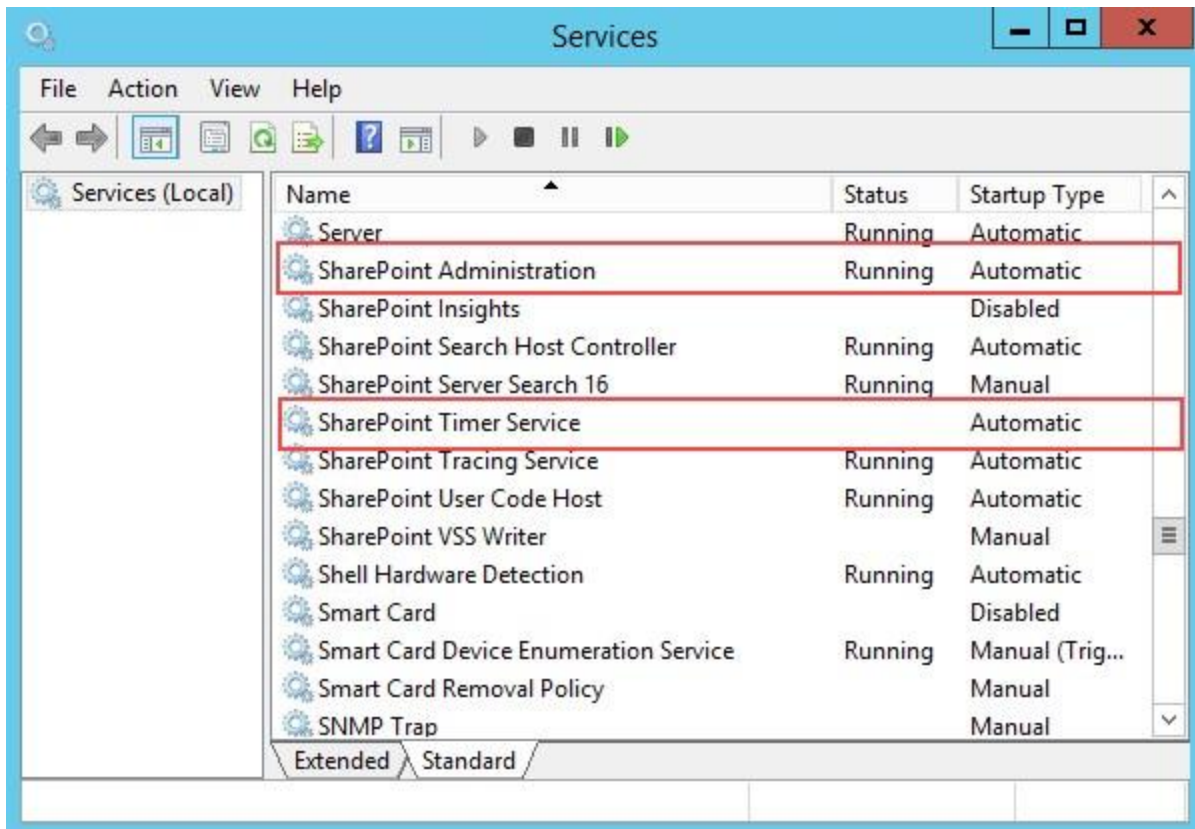
| | |
|------------------|--|
| Operating System | Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1 |
| Server | Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5 |
| Browser | Microsoft Internet Explorer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

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 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**.

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 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 <full path>BoostSolutions.DocumentNumberGenerator16.2.wsp
stsadm -o addsolution -filename <full path>BoostSolutions.SharePointClassifier.Platform16.2.wsp
stsadm -o addsolution -filename <full path>BoostSolutions.FoundationSetup16.1.wsp
```

4. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.DocumentNumberGenerator16.2.wsp -
allowgacdeployment -url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.SharePointClassifier.Platform16.2.wsp -
allowgacdeployment -url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.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.DocumentNumberGenerator16.2.wsp
stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform16.2.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.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.DocumentNumberGenerator16.2.wsp -immediate  
-url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.SharePointClassifier.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.DocumentNumberGenerator16.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform16.2.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.DocumentNumberGenerator16.2.wsp
```

```
stsadm -o deletesolution -name BoostSolutions.SharePointClassifier.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 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.


3. Remove the solution from the SharePoint solutions storage:



```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup16.1.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. 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**.

| | | | |
|---|--|------------|--------|
|  | BoostSolutions Document Number Generator 2.8.923.0 Enable SharePoint users to create document numbering schemes to uniquely identifies and classifies a document, making it easier for users to retrieve the right information. (Powered by BoostSolutions) | Deactivate | Active |
|  | BoostSolutions ECM Framework 2.10.916.0 This is the fundamental feature for BoostSolutions ECM solution. (Powered by BoostSolutions) | Deactivate | 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

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Column default value settings](#)
- [Document Number Generator Settings \(Powered by BoostSolutions\)](#)
- [Audience targeting settings](#)
- [Rating 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.

 A rectangular button with a blue border, containing a green plus sign icon followed by the text "Add New Scheme" in blue.

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.

Edit Document Numbering Scheme ✕

Scheme Name *

Enter a name for this scheme.

Content Type *

Specify which document type in this document library should use the scheme.

Select a content type:

Which field should use the 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.

Content Type *

Specify which document type in this document library should use the scheme.

Select a content type:

Which field should use the scheme:

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

Which field should use the scheme:

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

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:

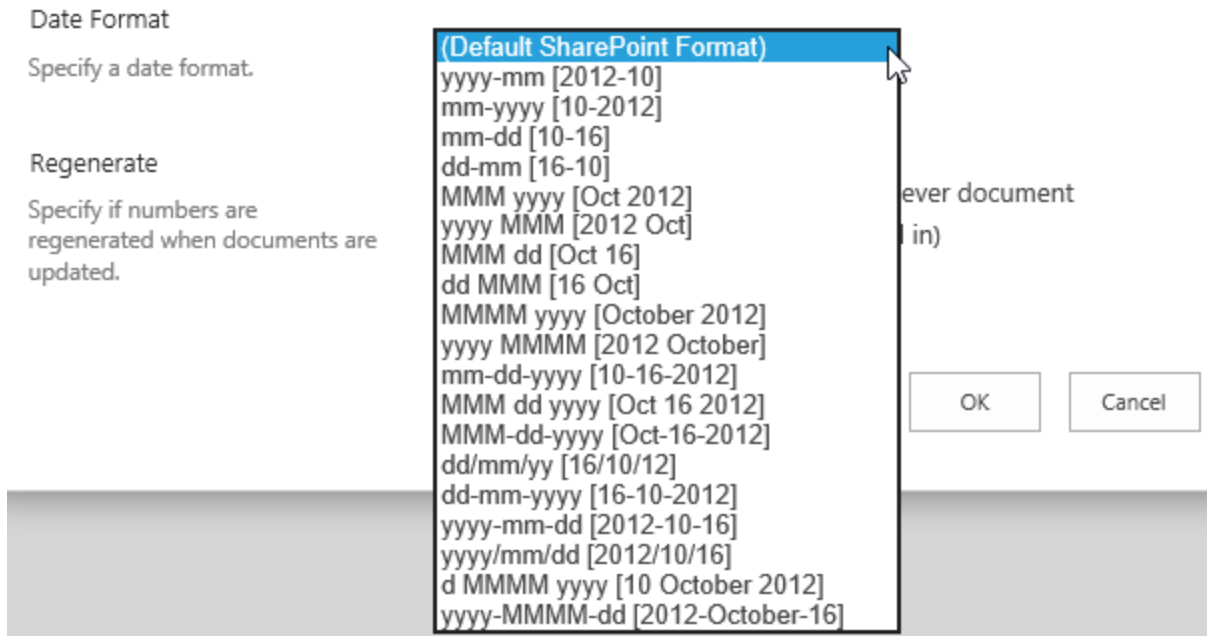
You can select Custom Text and enter anything you want. If any invalid characters are detected, the background color of this field will change and a message will appear to indicate that there are errors.

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.)

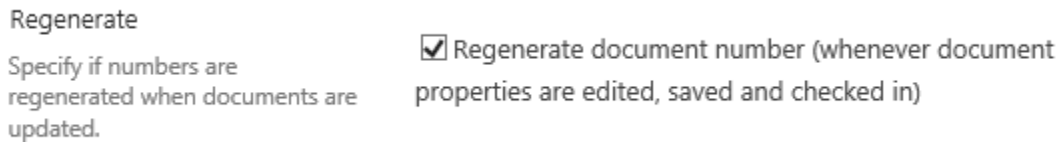
Date Format: In this section you can specify which date format you want to use in the formula.



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

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

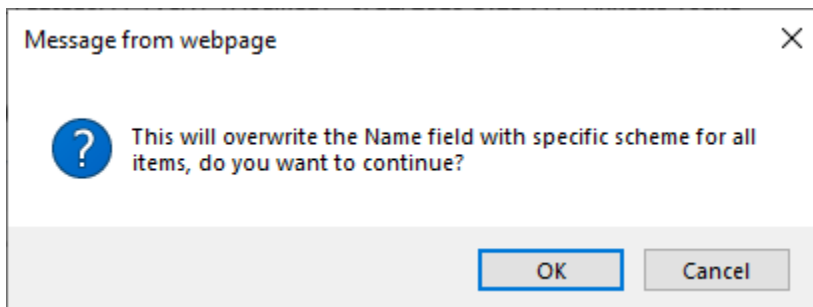
| Scheme Name | Used For Field Formula | Modified | Modified By | Edit | Delete | Apply |
|------------------|---|-------------------|----------------|---|---|---|
| Sales DOC Naming | Name [Product]_[ID]_[Created By]_[Published on] | 9/24/2019 2:59 PM | System Account |  |  |  |

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.

Marketing Docs

 New  Upload  Sync  Share More ▾

All Documents ... 

| ✓ |  | Name | | Modified | Modified By | Reported by | Category | Ver. |
|---|---|-----------------------------|-----|-------------------|---|---------------------------------------|----------|------|
| |  | Annie Walker_C_2_09-24-2019 | ... | 9/24/2019 3:10 PM | <input type="checkbox"/> System Account | <input type="checkbox"/> Annie Walker | C | 2.0 |
| |  | Brad Pitt_A_3_09-24-2019 | ... | 9/24/2019 3:11 PM | <input type="checkbox"/> System Account | <input type="checkbox"/> Brad Pitt | A | 3.0 |
| |  | Henry Lee_D_2_09-24-2019 | ... | 9/24/2019 3:12 PM | <input type="checkbox"/> System Account | <input type="checkbox"/> Henry Lee | D | 2.0 |
| |  | Peter Lee_A_1_09-24-2019 | ... | 9/24/2019 3:07 PM | <input type="checkbox"/> System Account | <input type="checkbox"/> Peter Lee | A | 1.0 |
| |  | Peter Lee_B_1_09-24-2019 | ... | 9/24/2019 3:09 PM | <input type="checkbox"/> System Account | <input type="checkbox"/> Peter Lee | B | 1.0 |

4. 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: 8fa4fcbeab9475d8b8f10d2c7b27e1e982261612
75d49c683442a828de45bdd

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:

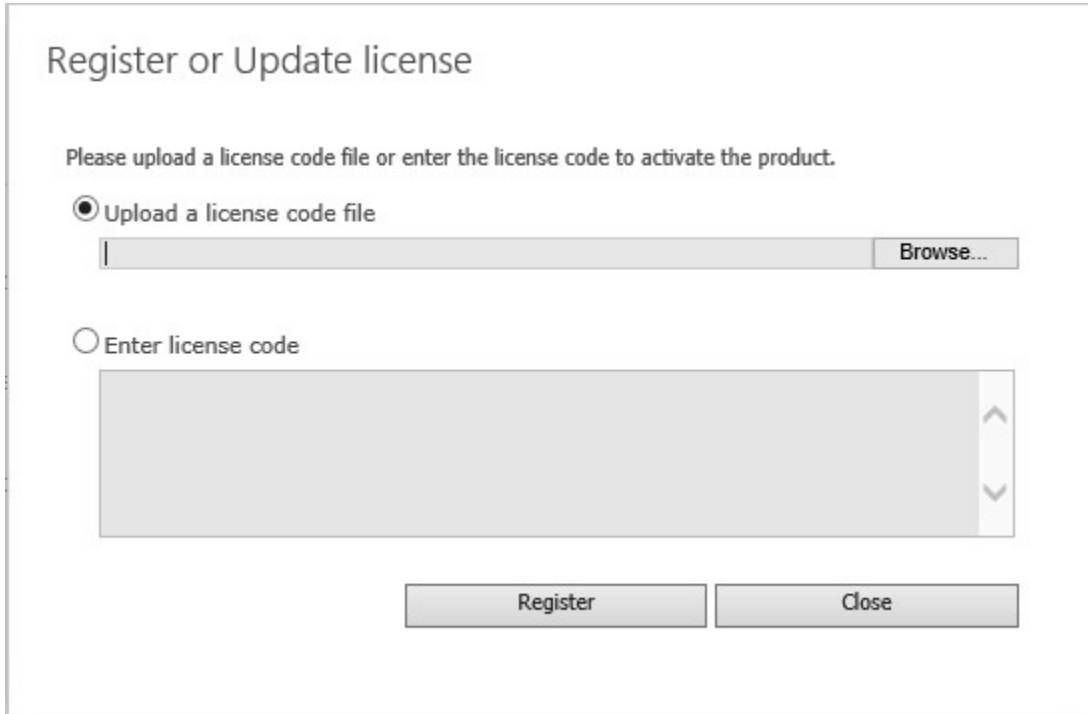
Download Close

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.

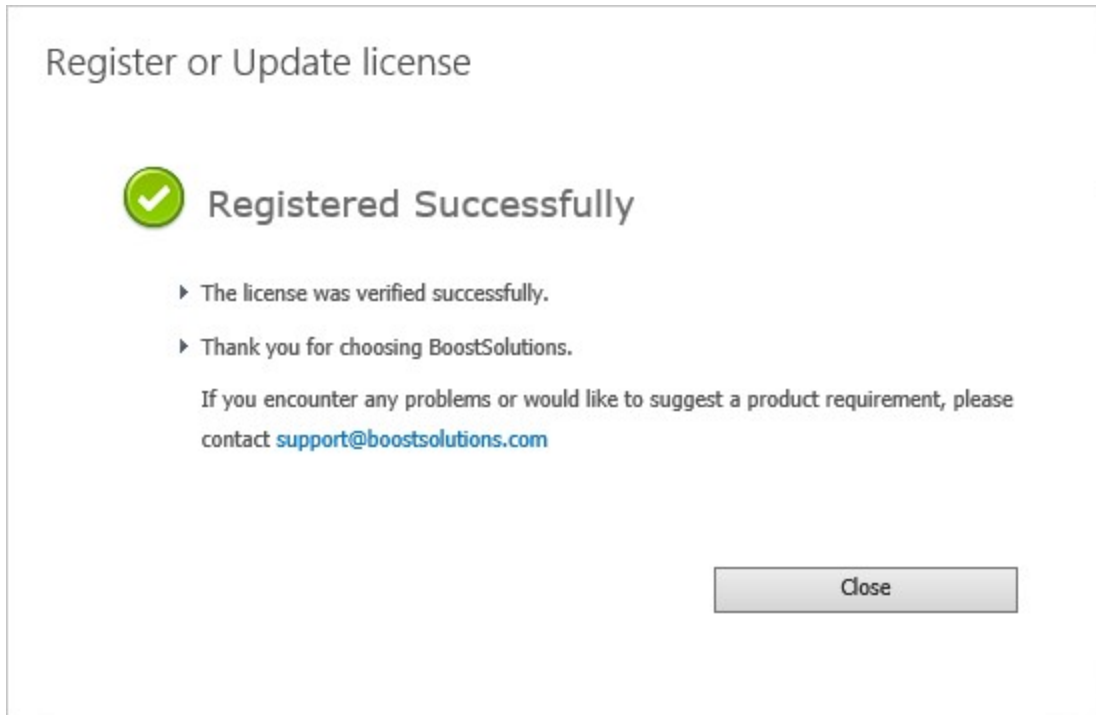
License Registration

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.



The screenshot shows a dialog box titled "Register or Update license". Inside the dialog, there is a prompt: "Please upload a license code file or enter the license code to activate the product." Below this prompt are two radio button options. The first option, "Upload a license code file", is selected. It is followed by a text input field and a "Browse..." button. The second option, "Enter license code", is unselected and is followed by a larger text input field with a vertical scrollbar on the right side. 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.



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