

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 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](#)

After settings changed, please click OK

OK

Cancel

Document Auto Title License Management

License information and add new license

Document Auto Title

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

License Information

Farm ID: {87b36d9e-c2a2-4fd2-90fe-17928ef24f7e}

Site Collection ID: 4b29d754-abb0-4b20-801e-7a1e75e9f644

Current amount of users in this site collection: 12

License status: No Registration

Add license(ASCII): [Click here to get license](#)

OK

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

License information and add new license

Document Auto Title Automatically set title with file name when document is uploaded or modified (Powered by SharePointBoost)	License Information Farm ID: {87b36d9e-c2a2-4fd2-90fa-17928ef24f7e} Site Collection ID: 4b29cd754-abb0-4b20-801e-7a1e75e9f644 Current amount of users in this site collection: 12 License status: 50 Add license(ASCII): Click here to get license
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```
eedfe854-a628-4bba-b66c-735537c3c935WeaXsQHfX5UEWrrR8tmO5X4R9n7BUZ8Czy1OZ9kem8aoupV+JM7Erd2a/YVcOv1VDZ8KlisGQO8phPNOX8ZXGZIpbM6JGkOtAOF8i1cPOkbfTdzDdsDXkpb7FT0Q/JZ2FFDwTBK0dq+q9hOkh2pC3IYp6rZh2Y+zD8APQsfA8Q=tTyXzxM+G74L8MdwRdh4wPdJH5aOf/ALrmvEhPHuhNXA3q68cJKnl6nSXG8kF+Ys75NqIYgWpR5MKKNhnY3yOZaRohr7Ut2y3bqjccc7aHTmj0cITspqLqTm01b0DnvRR7P1AbXta4v14w2wZ0S9xHj8kjz9gHLihFQMXKXnuYfCHRj+BGeCITCWx5vBaCZggKQeHTfWkF8NLU7bqu312z4XYVebtMoPaFdD3kNc5n50Dc3llik5ofhiyBWvQNdG8EdtDiCWS+b7GQP1zFC8Za9qUPXwA2R0QsdXw4WzR.SOCBsq0UlfN0rrPGL56hdfHpLv+Jc/Xodo62P3GHEcf35Rzf/3nTgte17EkA0gLOOpPtnuBzeTkyG+UZZK31Aggy9a6woqEr2expk8GVs5IH/Z/5YKNQ0BEy9a5woqEr2eImDraZEoQRnxd/C3MTf2BS8X611xRkdN0ivtruxyBfwWhcMbZfJD1lvVam/bZv/VowrjN4DkTcCEvamDGIBXot31UxPWtOPg9o6XjXedBeA5aiaqqQWthvNKA0m496Z0JbPAjKbHhVimrnzwt0you01s/ML/bTA7V1Q0XkX7VXRqbVke10USs32YjnGVK0unuf9XQ06D0tegfUtREajQyldtY1sL
```

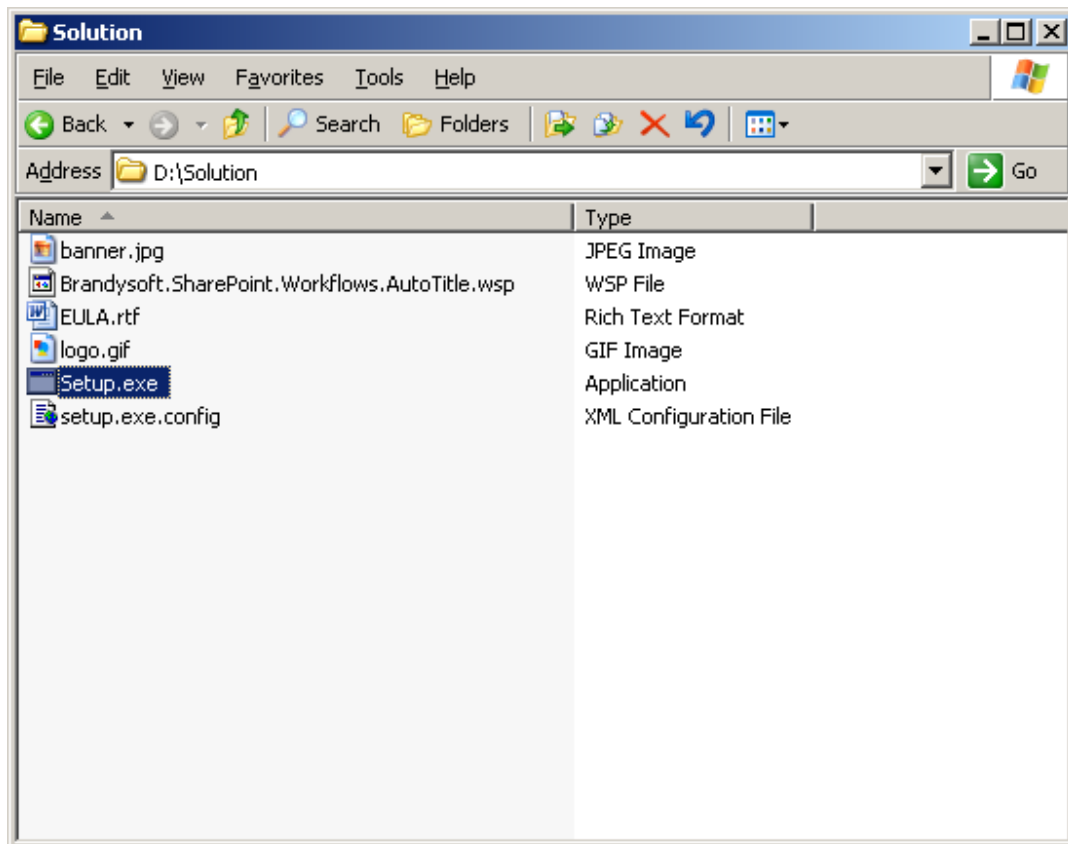
You license has been validated, Please switch to previous page and Refresh(F5) it

OK

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

Installation

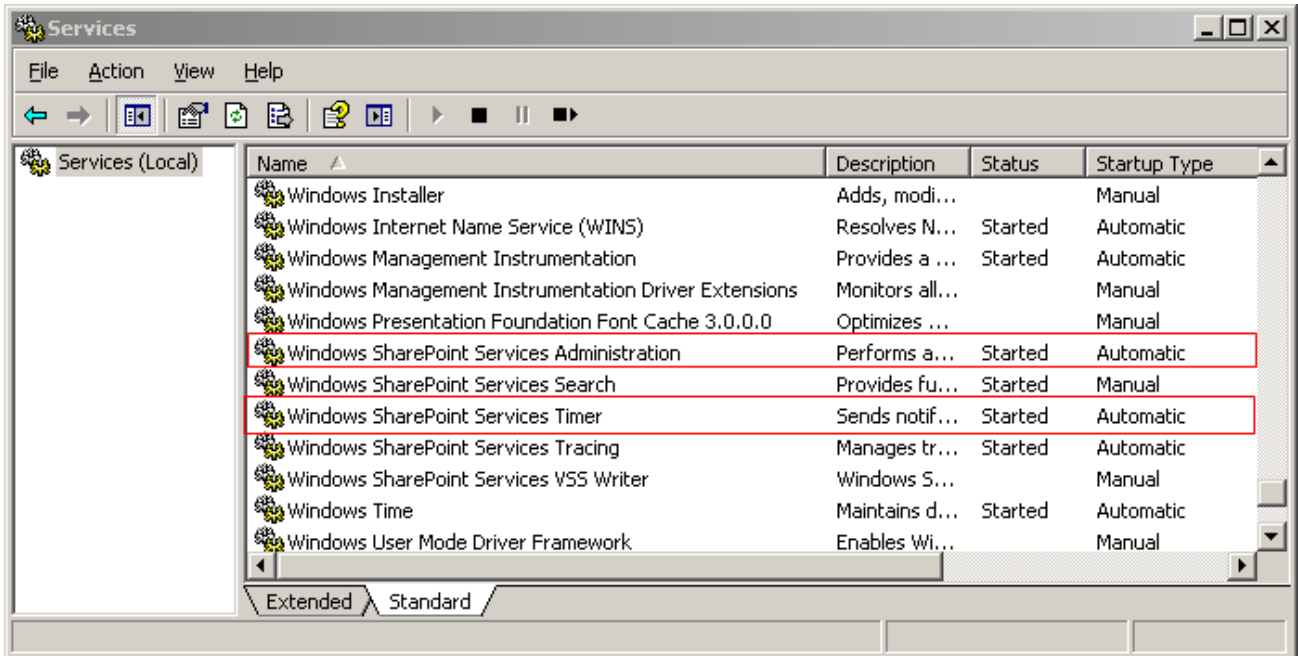
Download SharePoint Document Auto Title setup file from <http://www.sharepointboost.com>, release the file to a folder, and run "setup.exe".



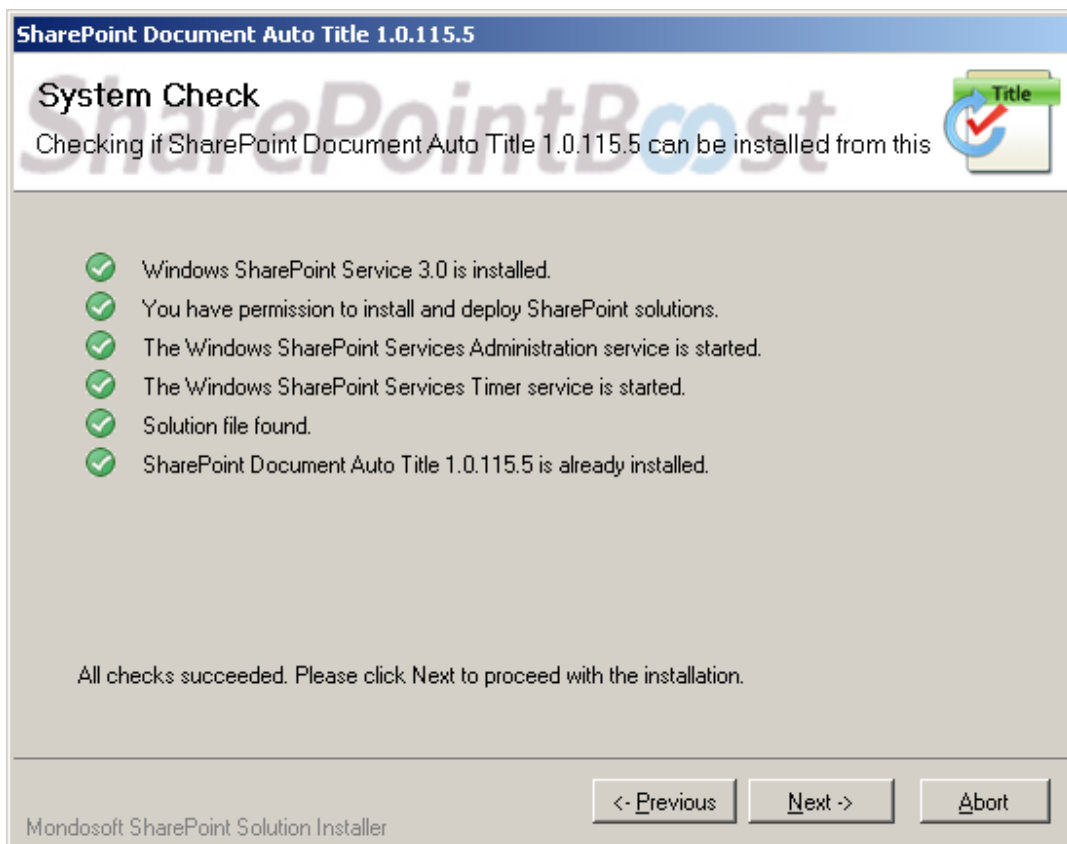
Note:

You must be the SharePoint Farm Administrator.

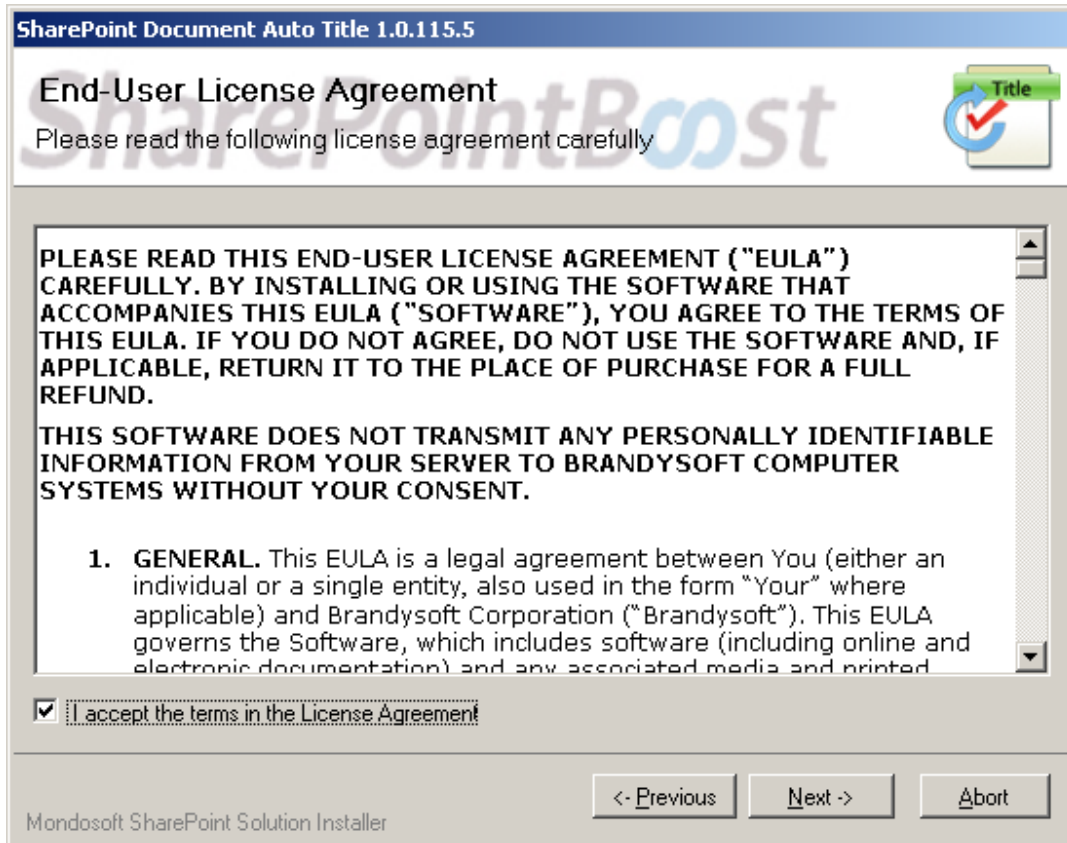
Start “Windows SharePoint Services Administration” and “Windows SharePoint Services Timer” in services management prior to installation.



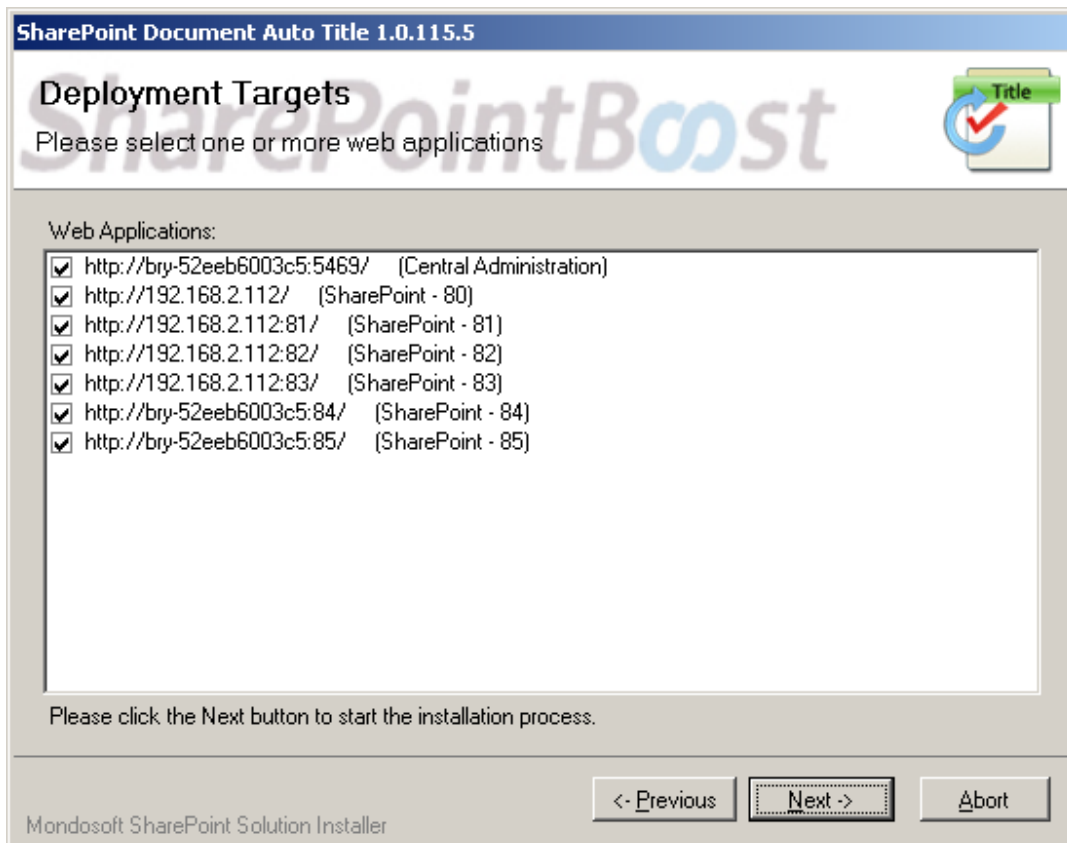
Run the setup file, and wait a few seconds for system check, then click “next”.



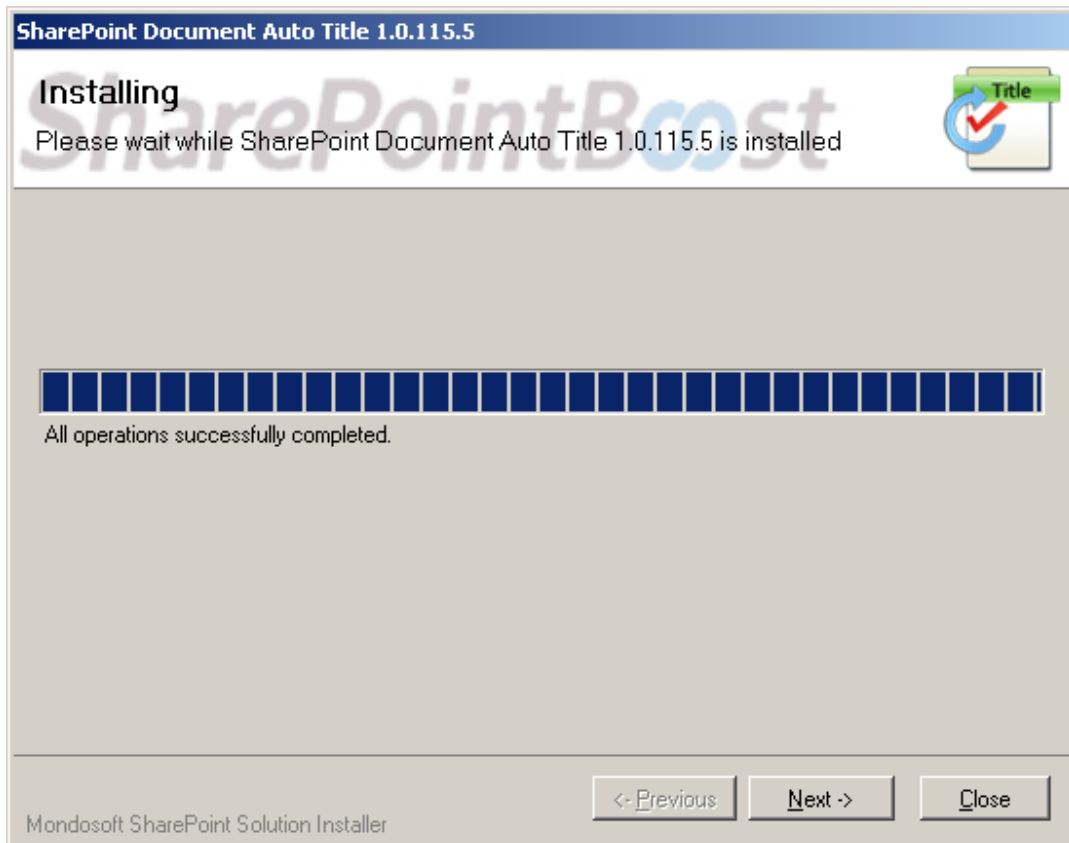
After you have read and accepted the License Agreement, please click “next”.



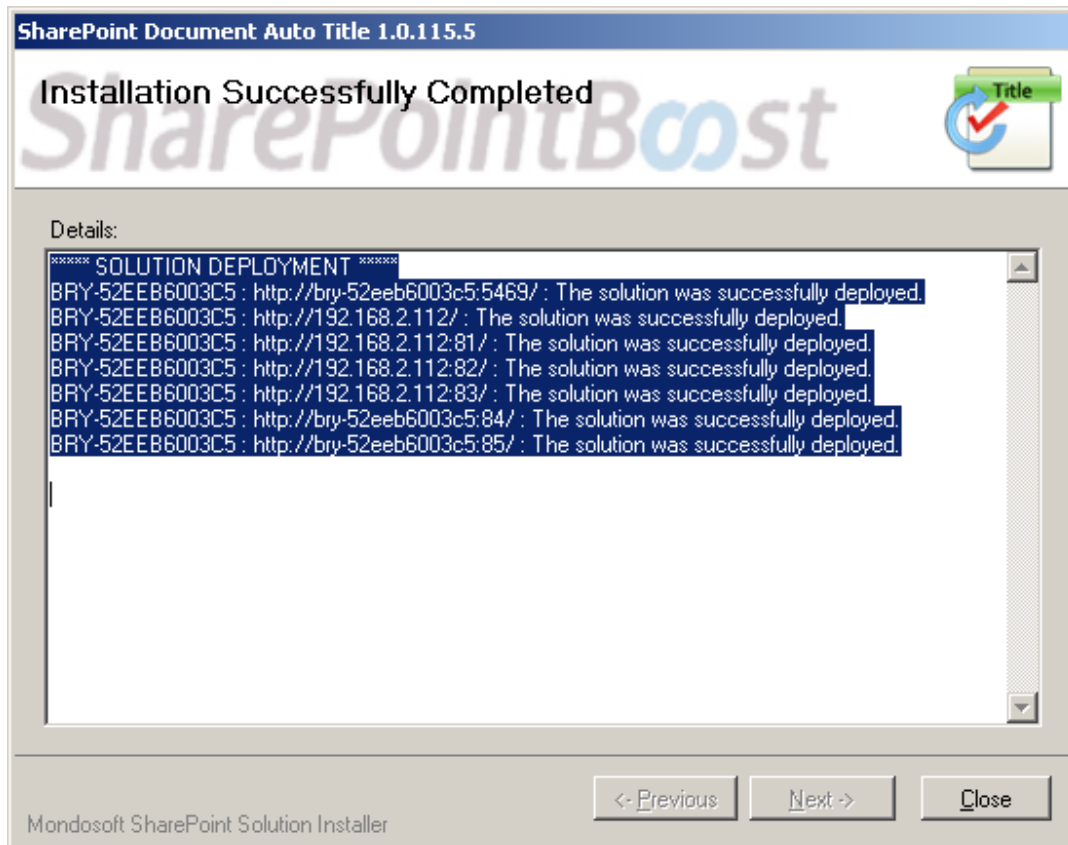
Please select one or more web application and click "Next".



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

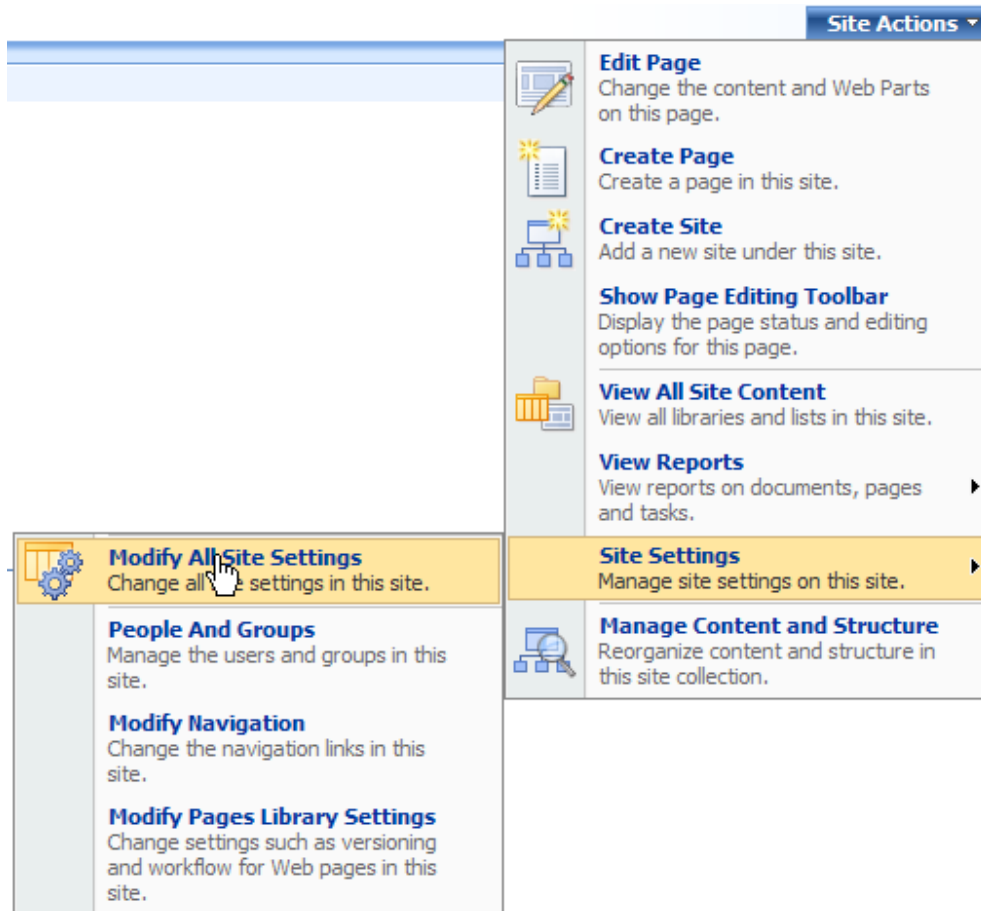


Details are displayed, showing SharePoint Document Auto Title is installed successfully on which web applications.

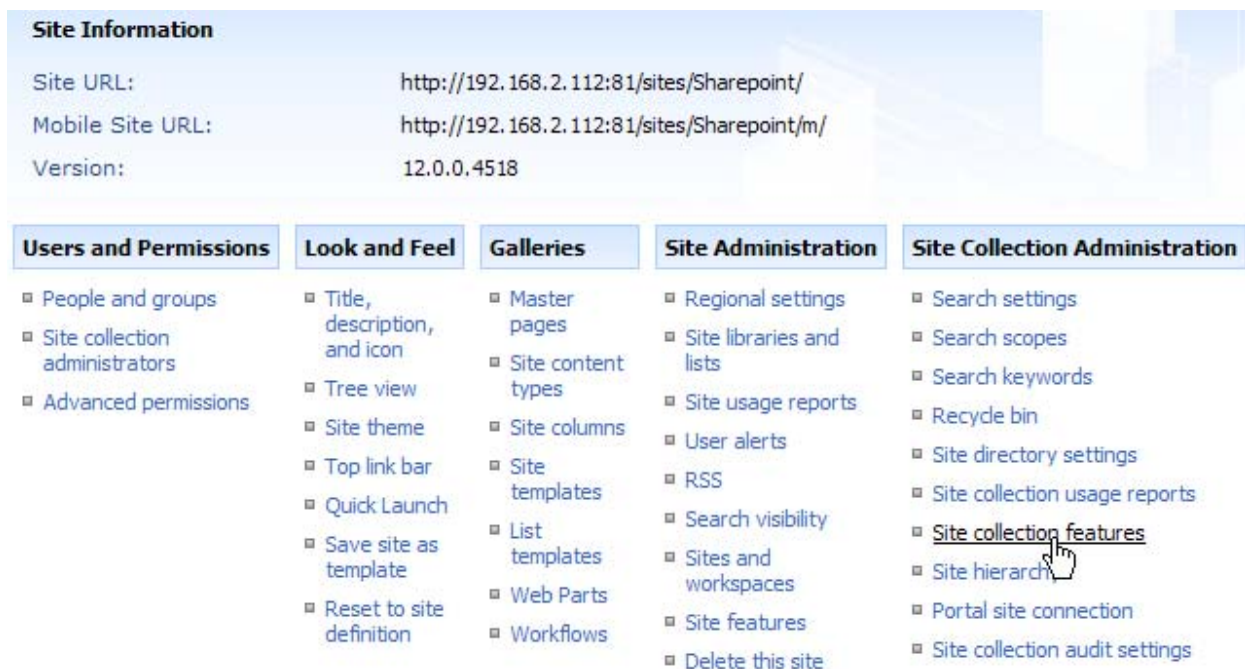


Activate and Use:

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”.



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

(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.

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.

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

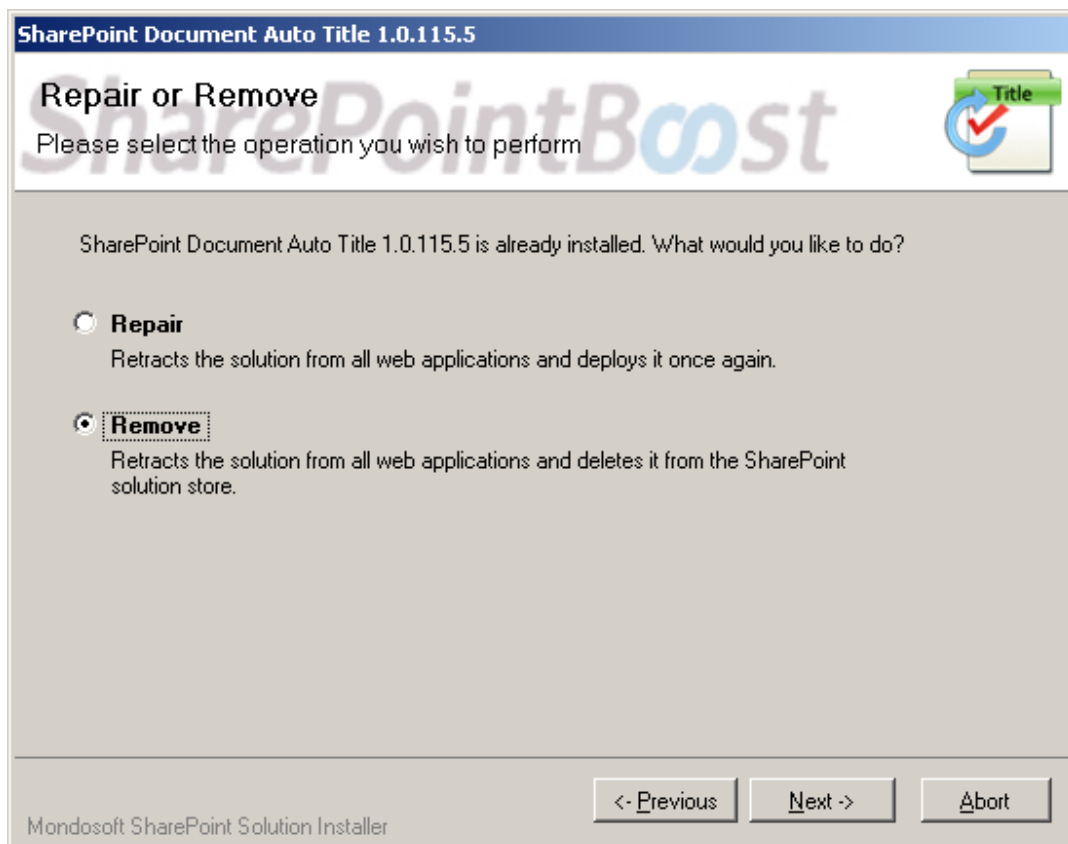
Manage license for Document Auto Title Workflow

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.



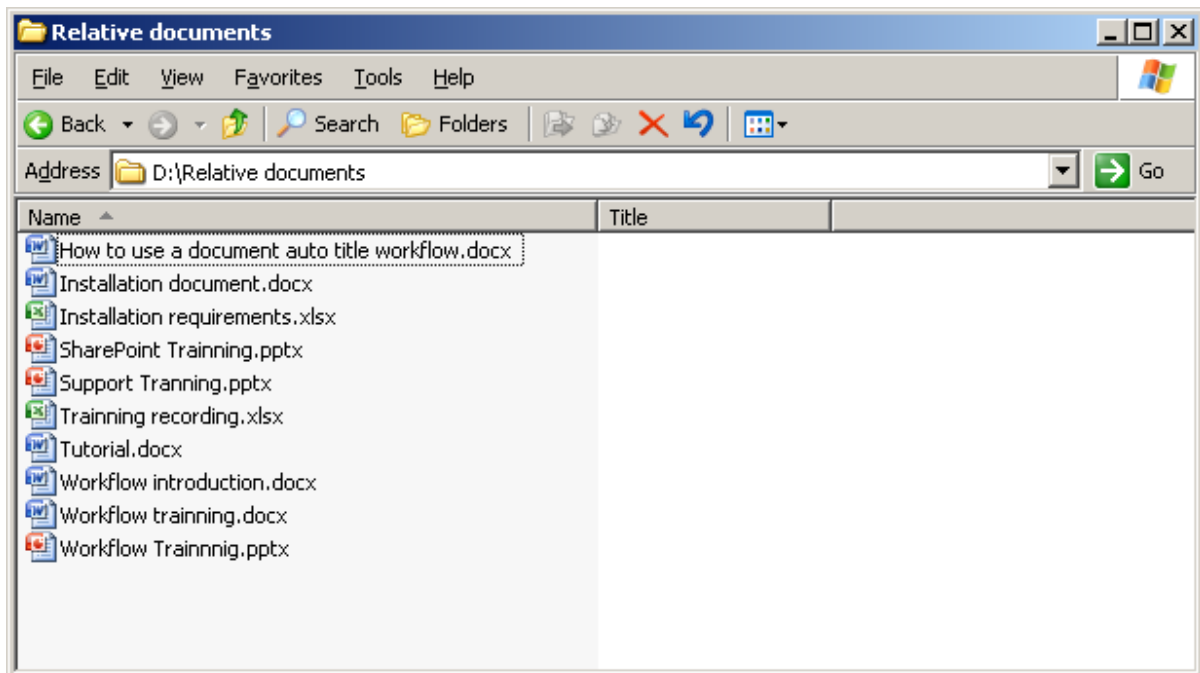
SharePoint Document Auto Title

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.

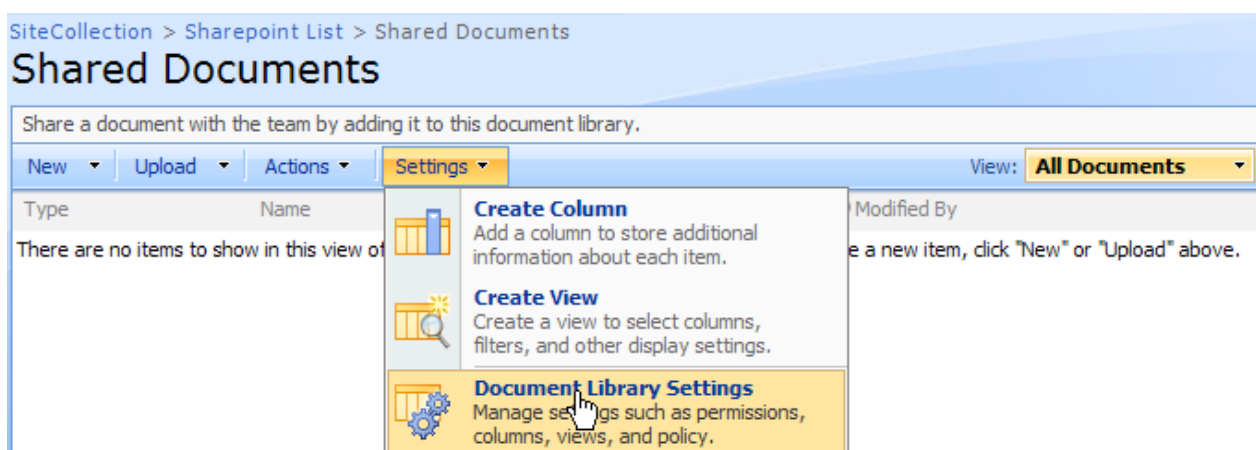
NOTE: The Document Auto Title Workflow can only be applied to document libraries.

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



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.

Customize Shared Documents

List Information

Name: Shared Documents
Web Address: <http://192.168.2.112:81/sites/SiteCollection/Sharepoint List/Shared Documents/Forms/AllItems.aspx>
Description: Share a document with the team by adding it to this document library.

General Settings

- ▣ Title, description and navigation
- ▣ Versioning settings
- ▣ Advanced settings
- ▣ Audience targeting settings

Permissions and Management

- ▣ Delete this document library
- ▣ Save document library as template
- ▣ Permissions for this document library
- ▣ Manage checked out files
- ▣ Workflow settings
- ▣ Information management policy settings

Communications

- ▣ RSS 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 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.

Select a workflow template:

Collect Feedback
Collect Signatures
Disposition Approval
Document Auto Title Workflow

Description:

Automatically set title with file name when document is uploaded or modified

Name

Type a name for this workflow. The name will be used to identify this workflow to users of this document library.

Type a unique name for this workflow:

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.

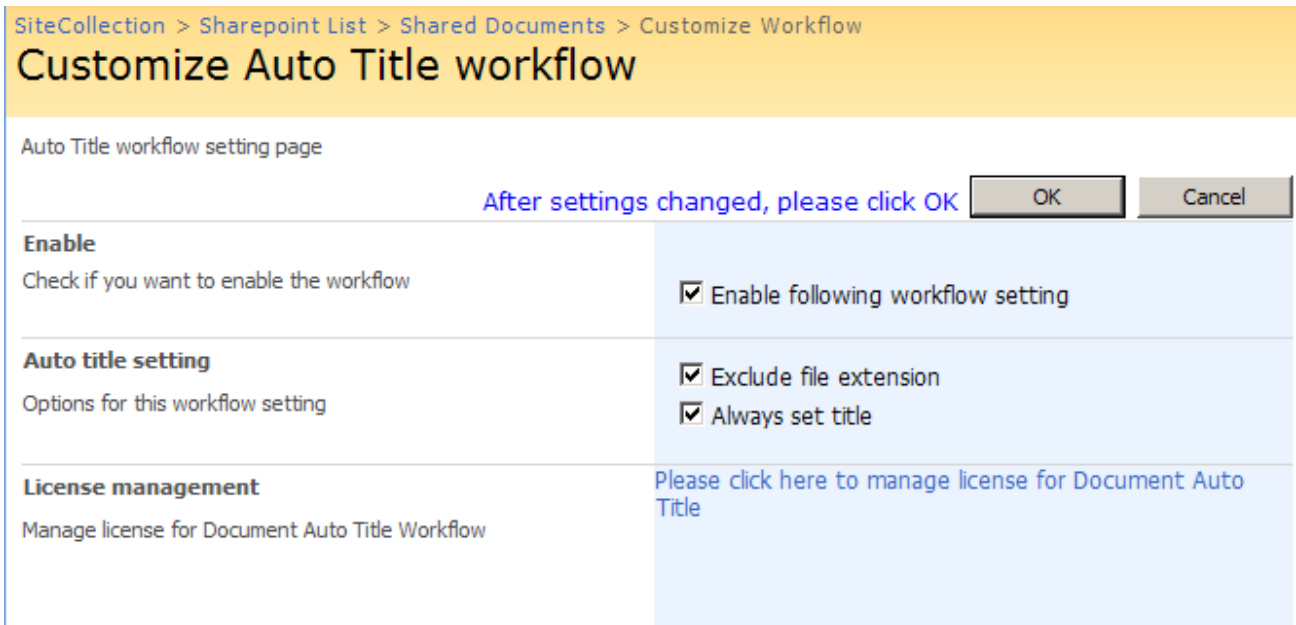
Start Options

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

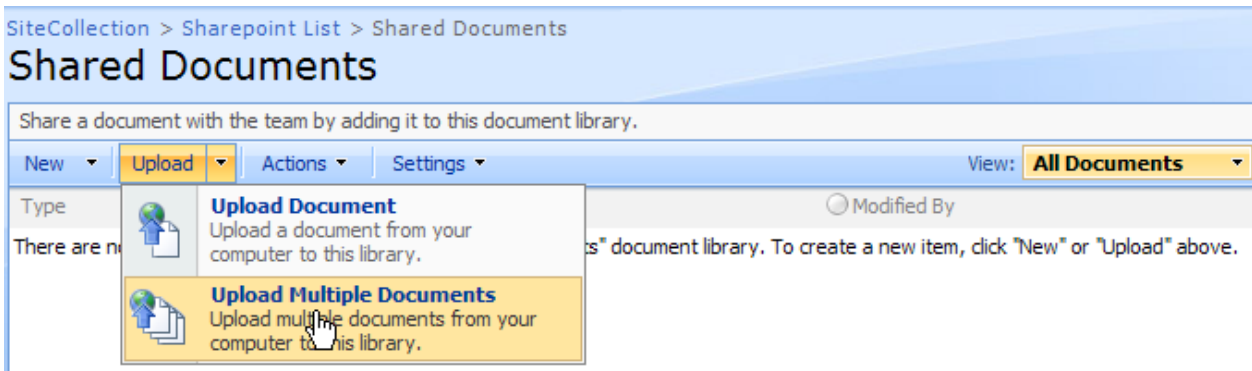
Set workflow configurations on Customize Workflow page. Here we select the “Exclude file extension” and “Always set title check box”. Then, click OK.



4. Start workflow

After settings done, return to the Shared Documents library.

Click Upload Multiple Documents on the Upload Menu.













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.

Shared Documents

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

New ▾ | Upload ▾ | Actions ▾ View: **All Documents** ▾

Type	Name	Title	Modified By	Auto Title workflow
	How to use a document auto title workflow !NEW	How to use a document auto title workflow	Hans	Completed
	Installation document !NEW	Installation document	Hans	Completed
	Installation requirements !NEW	Installation requirements	Hans	Completed
	SharePoint Training !NEW	SharePoint Training	Hans	Completed
	Support Training !NEW	Support Training	Hans	Completed
	Training recording !NEW	Training recording	Hans	Completed
	Tutorial !NEW	Tutorial	Hans	Completed
	Workflow introduction !NEW	Workflow introduction	Hans	Completed
	Workflow training !NEW	Workflow training	Hans	Completed
	Workflow Trainnig !NEW	Workflow Trainnig	Hans	Completed

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