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	ble the workflow	☑ Enable following workflow	w setting	
Auto title setting		Exclude file extension		
Options for this workflow setting		Always set title		
License management Manage license for Document Auto Title Workflow		You are using a trial licenserfo days left), please click here b	<u>r Document Au</u> manage license	<u>to Title (30</u> <u>e</u>
Document Aut	After settings o Title License Managen	s changed, please click OK N ent	ОК	Cancel
icense information and add ne	w license			
Automatically set title with le name when document is ploaded or modified (Powered by SharePointBoost)	License Information Farm ID: Site Collection ID: Current amount of users in this site collection License status: Add licenses(ASCII):	(87b36d9e-c2a2-4fd2-90fe-1792) 4b29d754-abb0-4b20-801e-7a1e; on: 12 No Registration Oick barrato get iscass	8ef24f7e} 75e9f644	

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

License information and add ne	ew license		
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	Current amount of users in this site collection:	: 12	
SharePointBoost)	License status:	50	
	Add icense(ASCII):	Click here to get license	
	735537c3c935WeaXsQHFxSUEWrRh8tmO5> NOX8ZXGZIpBM6JGkJtAOF8i1ePOkbkfTdzD Q=tTyXzxM+G74L8MdwrDh4wPdJH5aOf/AL ohr7Ut2y3bqjccc7ehTmj0CITspqLqTm01b0 Wx5vBeCZggKQeHTfWKf6NLU7bqu312z4XY 8Za9qUPXwA2R0QsdXw4WzRSOCBsq0UIFn zeTkyG+UZK31Aqgy9a6woqEr2expk8GVs5 vtruxyBfwWhqMbZFfJD1IvVam/bZv/VowrjN 6ZOJbPAjKbHhVimrnzwT0you01s/ML/bTA7v You Icense has been valdated, Please switch Refresh(F5) it	(4R9n7BUZ8Czy10Z9kem8aoupV+JM7Erd2a/YVcovIVD28Kis/ dsDXkpb7FT0Q/JZ2FfDwTBK0dq+q9hOkh2pC3IYp6rZh2Y+zD6 rmvEhPHuhNXA3q68cJKnl6nSXG8kF+Ys75NqIYgWpR5MKKNhr DnvRR7P1AbXte4v14w2w2059xHj8kj29gHL1hFQMXKxnuYfcHRj VebtMoPaFdD3kNc5n50Dc3lliKSofhiyBWvQNdG8EdtDiCWS+b7 DrrPGL56hdfHpLvb+Jc/Xodo62P3GHEcf35RzF/3nTgte17EkA0gL/ IH/Z/SYKMQ0BEy9a6woqEr2eImDraZEoQRnxd/C3MTf2BS8X61 4DkTcCEvamDGIBXot31UxPWtOPg9o6XjXsdBeA5aiaqoQWthv /1Q0XkX7VXRgbVke10USs32YjnGVK0unuf9XQ06DOtegfUtREaj to previous page and	GQOSphP 3APQsfA8 1Y3yOZaR +BGsCiTC 7GQP1zFC 00pPtnuB L1xRkdN0i NKA0m49 iQyldtY1sL
			ок

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>File A</u> ction <u>V</u> iew	Help				
	3 🗈 😫 💷 ▶ ■ 🗉 파				
🎭 Services (Local)	Name A	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	▁
				<u> </u>	·
	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 accent the terms in the License Agreement
Mondosoft SharePoint Solution Installer Abort

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	le
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.	
Kext -> Mondosoft SharePoint Solution Installer	

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:	
 SOLUTION DEPLOYMENT ***** BRY-52EEB6003C5 : http://by-52eeb6003c5:5469/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://192.168.2.112:81/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://192.168.2.112:82/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://192.168.2.112:83/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://192.168.2.112:83/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://192.168.2.112:83/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://by-52eeb6003c5:84/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://by-52eeb6003c5:85/ : The solution was successfully deployed. BRY-52EEB6003C5 : http://by-52eeb6003c5:85/ : The solution was successfully deployed. 	×
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://:	192.168.2.112:81/	/sites/Sharepoint/	
Mobile Site URL:	http://:	192. <mark>168.2.112:81/</mark>	/sites/Sharepoint/m/	
Version:	12.0.0.	4518		
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 definition 	 Master pages Site content types Site columns Site templates List templates Web Parts Workflows 	 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?	
O 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 E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp	an a
🔇 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.ppt×	
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

ist Information	1		
Name:	Shared Documents		
Veb Address:	http://192.168.2.11	2:81/sites/SiteCollection/Sharepoint List/Shared	Documents/Forms/AllItems.
escription:	Share a document w	ith the team by adding it to this document library	<i>.</i>
eneral Settings	;	Permissions and Management	Communications
eneral Settings Title, description	and navigation	Permissions and Management Delete this document library	Communications
General Settings Title, description Versioning setting	and navigation	Permissions and Management Delete this document library Save document library as template	Communications RSS settings

- 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	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	 Actions - 	Settings 🝷		View: All Documents			
Туре		Upload Document Upload a document from your computer to this library.			Modified By			
There are n					s" document library. To create a new item, click "New" or "Upload" above			
	Upload Multiple Documents Upload multiple documents from your computer to his library.							

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	ew 👻 Upload 👻 Actions 👻 View: All Docume				
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	
•	Installation requirements 🕻 NEW	Installation requirements	Hans	Completed	
•	SharePoint Trainning INEW	SharePoint Trainning	Hans	Completed	
•	Support Tranning I NEW	Support Tranning	Hans	Completed	
-	Trainning recording I NEW	Trainning recording	Hans	Completed	
(11)	Tutorial I NEW	Tutorial	Hans	Completed	
1	Workflow introduction	Workflow introduction	Hans	Completed	
1	Workflow trainning	Workflow trainning	Hans	Completed	
•	Workflow Trainnnig	Workflow Trainnnig	Hans	Completed	

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