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Websio Document Identification Number Feature for MOSS 2007/WSS 3.0



User Guide



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About Document Identification Number Feature

Document Identification Number Feature (DIN) provides an ability to assign unique Identification Number to SharePoint items such as documents, tasks, events or custom items on different levels such as Site Collections, Sites, Document Libraries, Lists and Folders.

The Feature is realized as Windows SharePoint Services feature and distributed as SharePoint solution.

DIN provides reach configuration capabilities and enables to use different patterns for the Identification Number.

Examples of Identification Number format (for details see section

"Configuration")^{*}:

#	Format	Result value
1	COUNTER	00025
2	YEAR / MONTH / DAY – COUNTER	2009/09/23-00025
3	DOC: YEAR - MONTH : COUNTER	DOC:2009-09-00025

^{*} You can create your own formats using Document Identification Number Configuration



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Configuration Screens:

Document Identification Number Configuration

This page allows you to configure Websio Auto Reference for different sites, libraries and lists.

New						
	URL	Numerator Format	Numerator Field	Counter Value	Counter Minimal Length	Reset Counter to 1
Edit	http://vmmps2007:8080/demosite/Shared Documents	DOC: YEAR - MONTH : COUNTER	Reference	3	0	Each month
Edit	http://vmmps2007:8080/demosite/	YEAR - MONTH - DAY : COUNTER	Reference	2	5	Each day
Edit	http://vmmps2007:8080/	COUNTER	Reference	5	5	Never
Edit	http://vmmps2007:8080/demosite/Shared Documents/Quotes	Q- YEAR - COUNTER	Reference	3	5	Never

Document Identification Number

URL* Type the Site/Library/List/Folder URL. Test URL

Format* Not Set Not Set Not Set Not Set Not Set Not Set Not Set Not Set

Field* Type List Counter which you want to select the field.

 Choose Field

Counter*

Counter Minimal Length*

Reset Counter to 1*



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Installation

Server Requirements

- Microsoft Windows SharePoint Services (WSS) v3.0
 - Microsoft Office SharePoint Server 2007 (MOSS)
- OR**

Workstation Requirements

- The same as for MOSS 2007 / WSS 3.0

Installation Steps

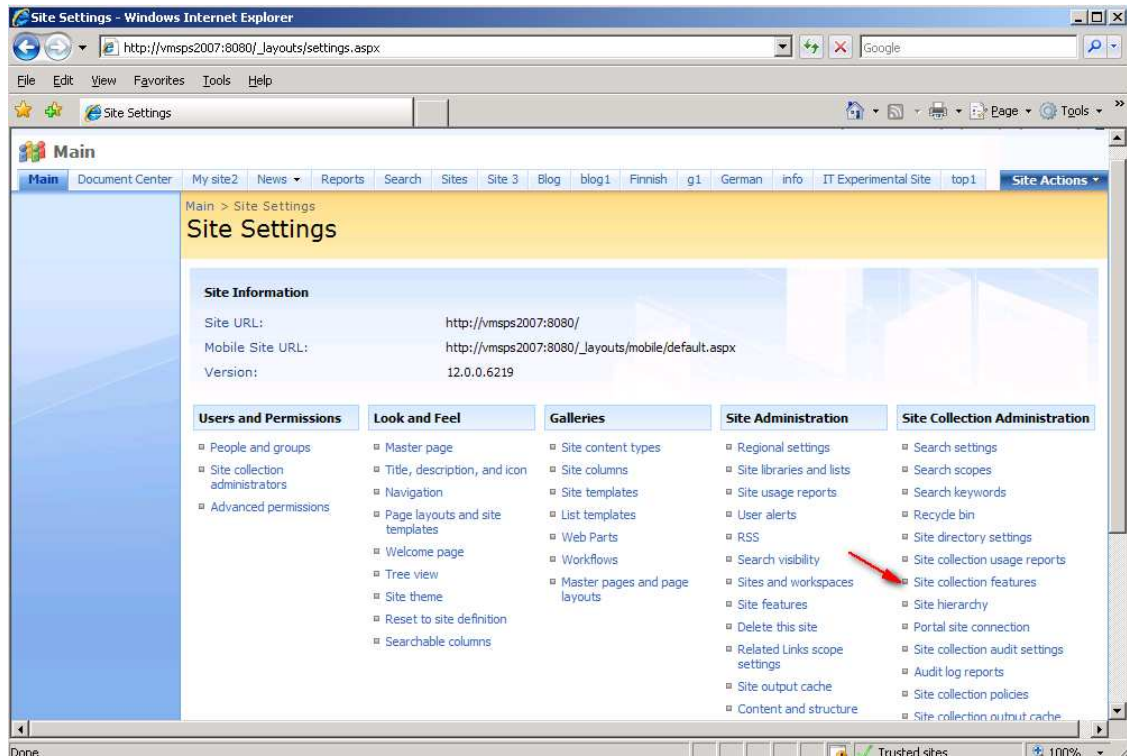
1. Unzip AutoReferencePlugin.zip file on your MOSS/ WSS front-end server.
2. *Double-click the "setup.exe" file in order to begin the installation wizard.
3. **Important!** In case you have number of front-end servers, repeat steps 1 and 2 on each of them.
4. You have to configure the Feature for each Site Collection, where you are going to use it. For version with centralized administration from SharePoint Central Administrator please contact us: sales@websio.com



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5. Open Site Collection Setting and select "Site collection features":





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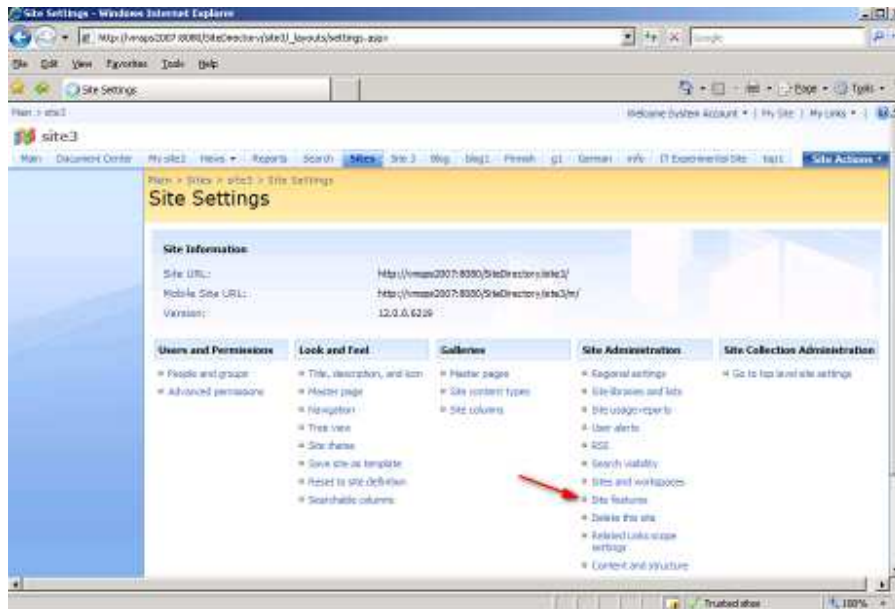
6. In the list of installed features select "Websio Document Identification Number Configurator" and press "Activate"

Features such as user profiles and search, included in the Office SharePoint Server Standard License	Deactivate	Active
Question	Activate	
Report Server Integration Feature Enables rich reporting using Microsoft SQL Server Reporting Services.	Deactivate	Active
Reporting Creates reports about information in Windows SharePoint Services.	Deactivate	Active
Routing Workflows Workflows that send a document for feedback or approval.	Deactivate	Active
TestPart	Activate	
Three-state workflow Use this workflow to track items in a list.	Activate	
Translation Management Workflow Manages document translation by creating copies of the document to be translated and assigning translation tasks to translators.	Deactivate	Active
UI Custom Actions This example shows how you can customize various areas inside Windows SharePoint Services.	Deactivate	Active
Websio Copy/Cut feature Websio Copy/Cut feature	Deactivate	Active
Websio Document Identification Number Configurator Configure Websio Document Identification Number Feature	Deactivate	Active
Websio List Rotator	Deactivate	Active

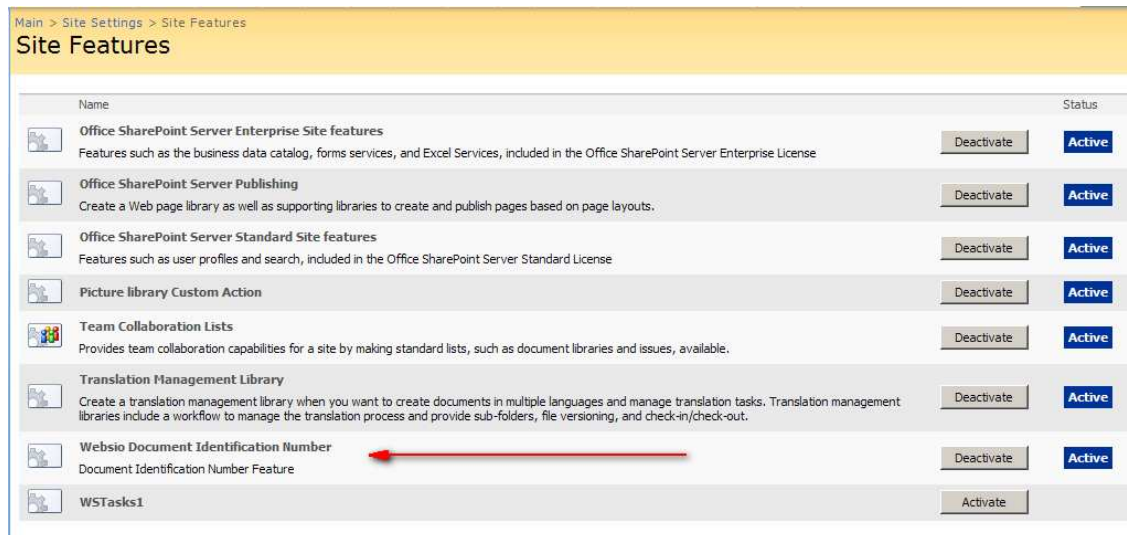
7. The Feature is based on MOSS/WSS event handlers. MOSS/WSS doesn't allow event handler based features to be activated on the site collection level. You have to activate it on each site where you are going to use it. Open Site settings and select "Site features"



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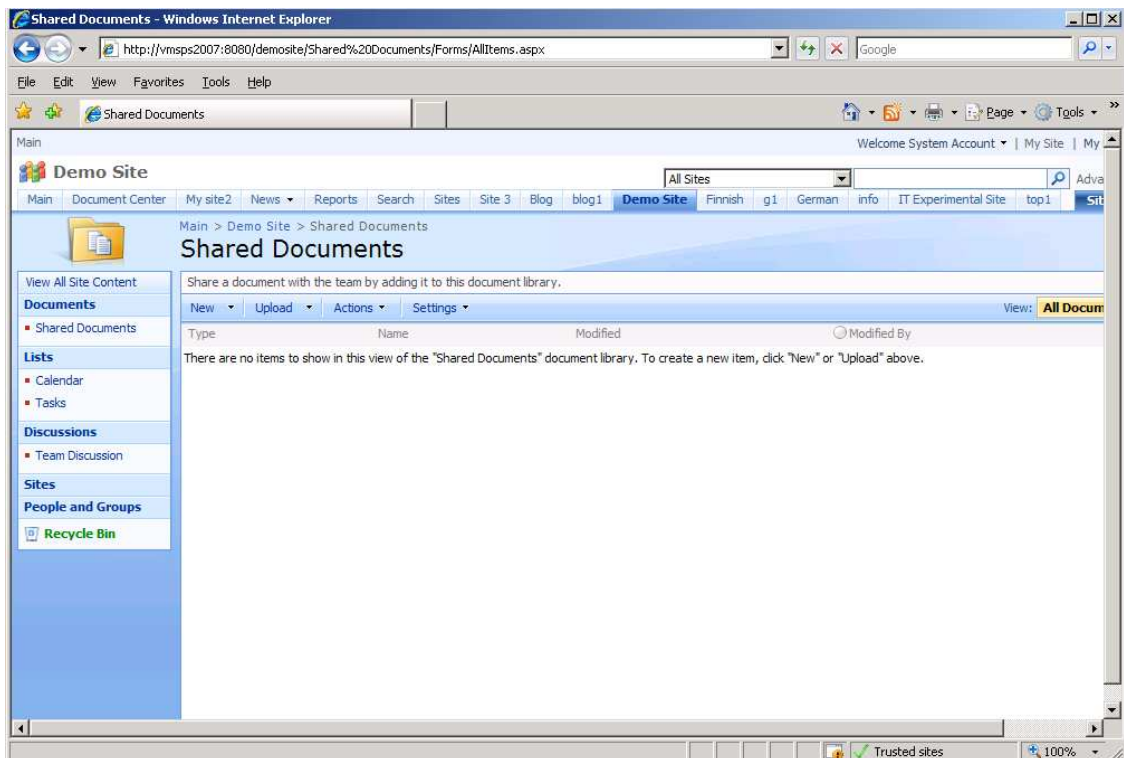


8. In the list of installed features find and activate "Websio Document Identification Number" feature



Quick Start

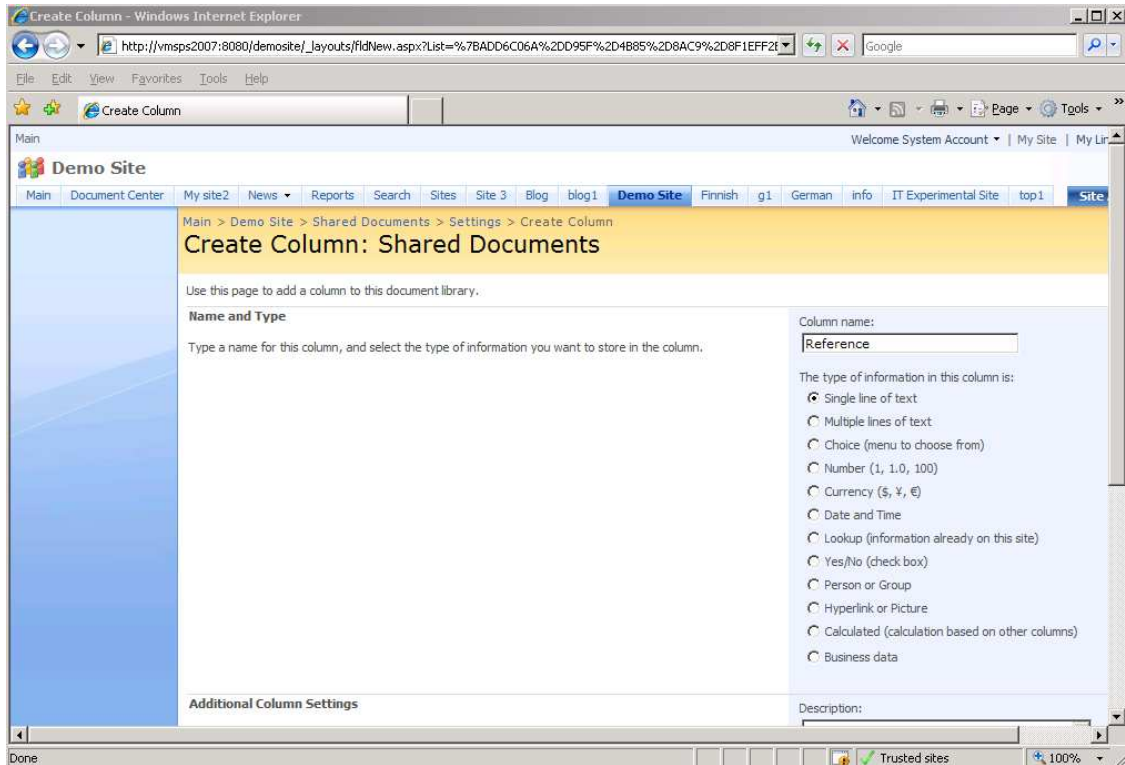
1. Create or select previously created Document Library. In our example we'll use standard "Shared Documents" library on the "Demo Site"



2. Open library setting and add new column "Reference". Of course, you can select any name you want. Selected field may be created on the library level or it may be site field. Also you can use fields from assigned to the library Content Types. Only one requirement: the field must be of type "Single line of text".



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3. Press "OK" and return to the Shared Documents. Copy Document Library URL. In our example it will be:
<http://vmmps2007:8080/demosite/Shared%20Documents>
4. Open Site Collection Settings. Under Site Collection Administration you'll find new option: "Websio Document Identification Number". Select it.



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Main > Site Settings

Site Settings

Site Information

Site URL: <http://vmmps2007:8080/>
Mobile Site URL: http://vmmps2007:8080/_layouts/mobile/default.aspx
Version: 12.0.0.6421

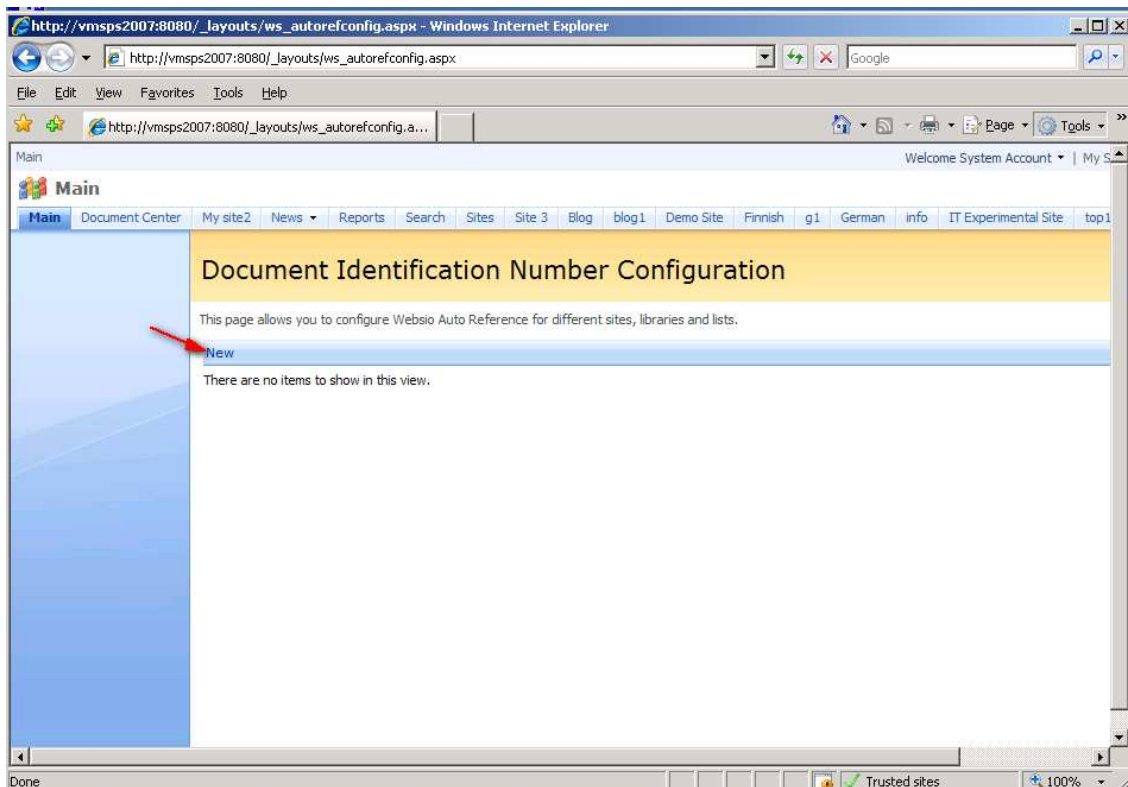
Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none">People and groupsSite collection administratorsAdvanced permissions	<ul style="list-style-type: none">Master pageTitle, description, and iconNavigationPage layouts and site templatesWelcome pageTree viewSite themeReset to site definitionSearchable columns	<ul style="list-style-type: none">Site content typesSite columnsSite templatesList templatesWeb PartsWorkflowsMaster pages and page layouts	<ul style="list-style-type: none">Regional settingsSite libraries and listsSite usage reportsUser alertsRSSSearch visibilitySites and workspacesSite featuresDelete this siteRelated Links scope settingsSite output cacheContent and structureContent and structure logs	<ul style="list-style-type: none">Search settingsSearch scopesSearch keywordsRecycle binSite directory settingsSite collection usage reportsSite collection featuresSite hierarchyPortal site connectionSite collection audit settingsAudit log reportsSite collection policiesSite collection cache profilesSite collection object cacheSite collection output cacheVariationsVariation labelsVariation logsTranslatable columnsScanner Plug-in SettingsDocument Identification Number



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5. In the new opened window press "New":



6. Type in the field URL " <http://vmmps2007:8080/demosite> "



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7. In the first cell of "Format" select "Counter".

Document Identification Number Configuration

URL*

Format*

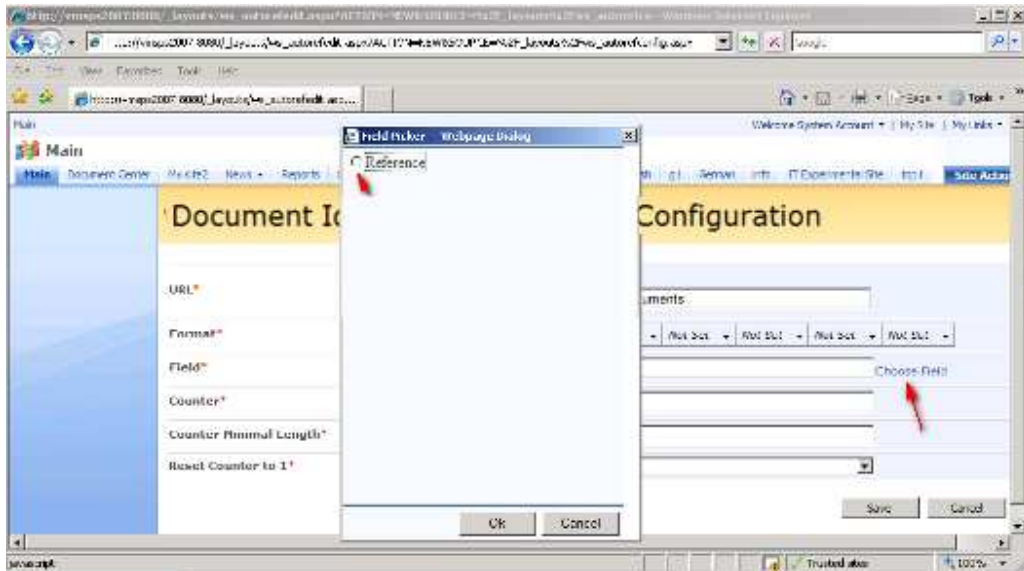
Field*

Counter*

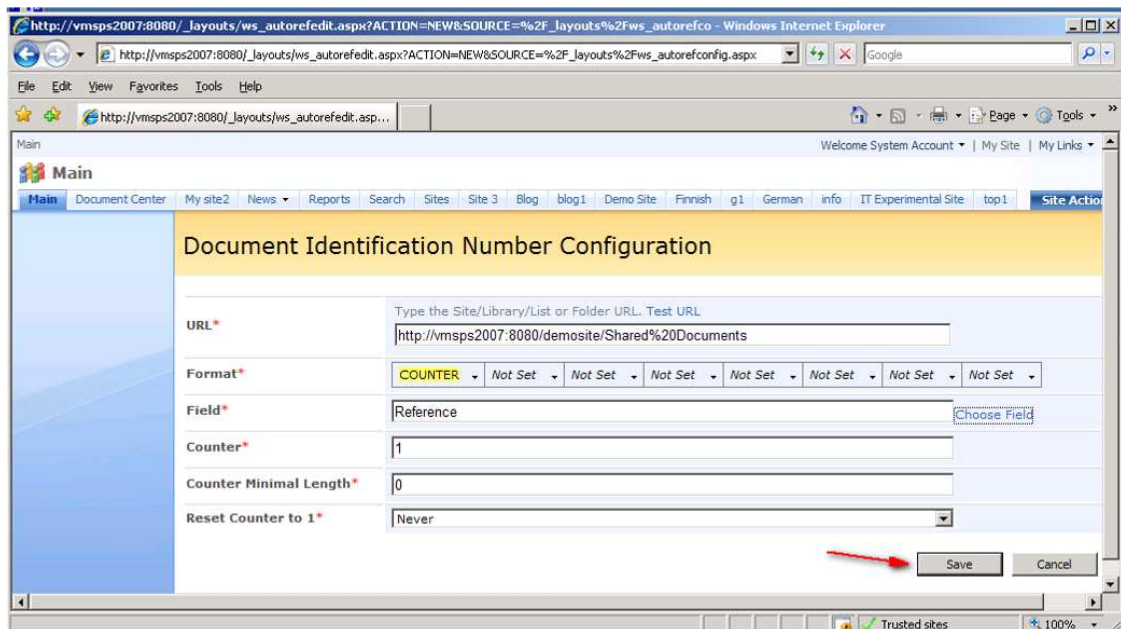
Counter Minimal Length*

Reset Counter to 1*

8. Paste previously copied URL to the first Field row.
(<http://vmmps2007:8080/demosite/Shared%20Documents>). Press link
"Choose Field". In the new opened window select previously created field
"Reference". Press "OK".



9. Stay other fields without changes and press "Save". For advanced configuration options see section "Configuration".

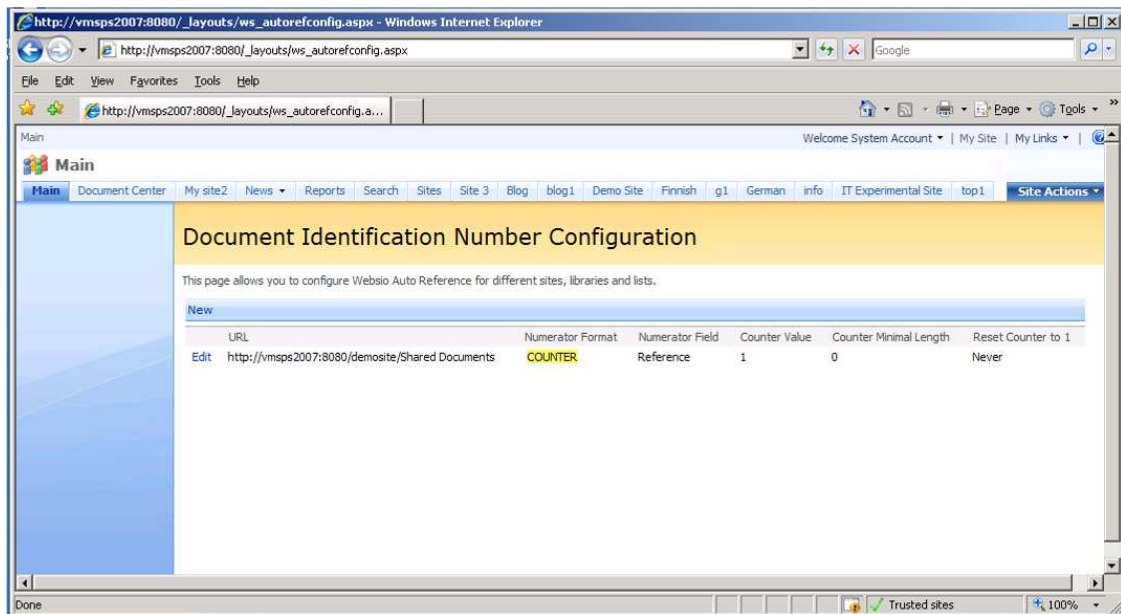




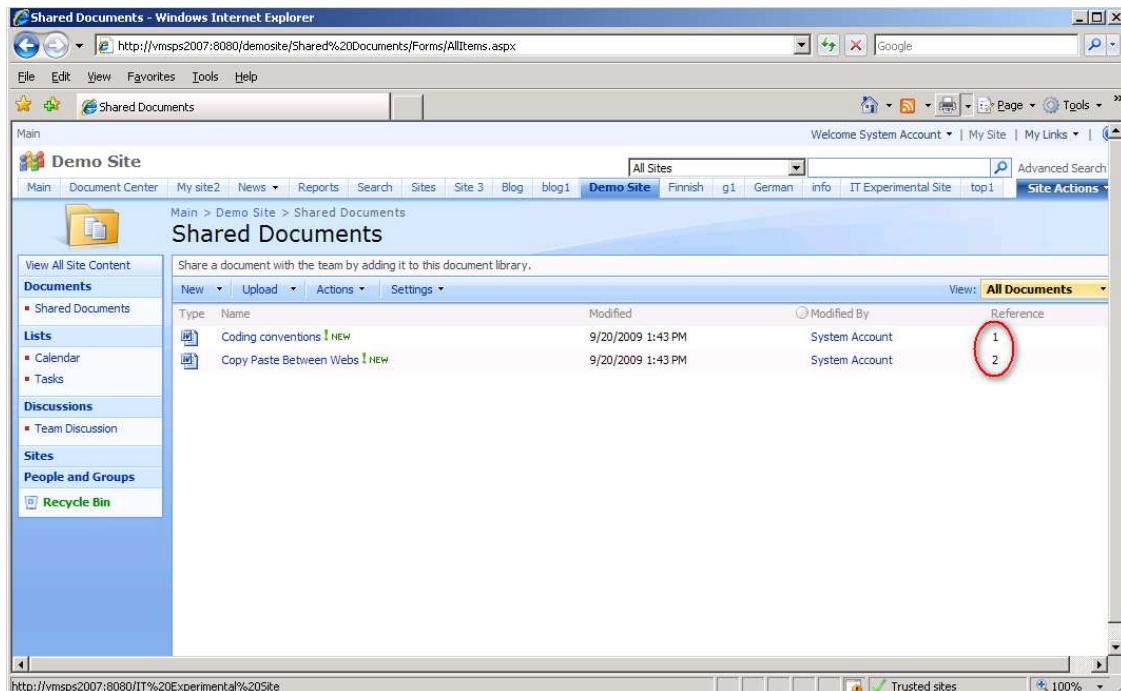
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10. New record added to the configuration list:



11. Now return to the Document Library and upload two documents. As you can see, field "Reference" received values 1 and 2.





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12. Important! The Feature works as asynchronous event handler. In some cases you'll need to refresh current view to see the results.



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Configuration

1. Open Site Collection Settings and select "Document Identification Number" under "Site Collection Administration"

Main > Site Settings
Site Settings

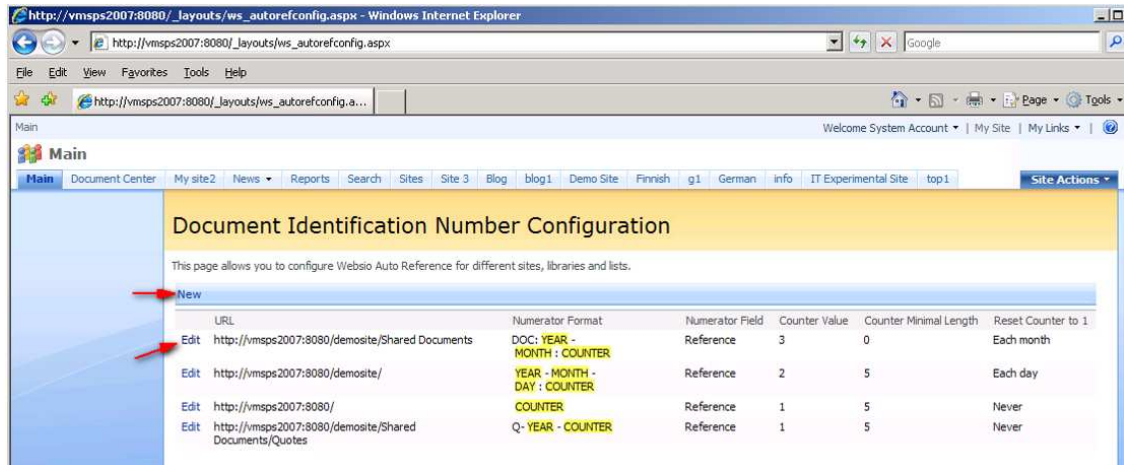
Site Information

Site URL: <http://vmmps2007:8080/>
Mobile Site URL: http://vmmps2007:8080/_layouts/mobile/default.aspx
Version: 12.0.0.6421

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none">People and groupsSite collection administratorsAdvanced permissions	<ul style="list-style-type: none">Master pageTitle, description, and iconNavigationPage layouts and site templatesWelcome pageTree viewSite themeReset to site definitionSearchable columns	<ul style="list-style-type: none">Site content typesSite columnsSite templatesList templatesWeb PartsWorkflowsMaster pages and page layouts	<ul style="list-style-type: none">Regional settingsSite libraries and listsSite usage reportsUser alertsRSSSearch visibilitySites and workspacesSite featuresDelete this siteRelated Links scope settingsSite output cacheContent and structureContent and structure logs	<ul style="list-style-type: none">Search settingsSearch scopesSearch keywordsRecycle binSite directory settingsSite collection usage reportsSite collection featuresSite hierarchyPortal site connectionSite collection audit settingsAudit log reportsSite collection policiesSite collection cache profilesSite collection object cacheSite collection output cacheVariationsVariation labelsVariation logsTranslatable columnsScanner Plug-in SettingsDocument Identification Number

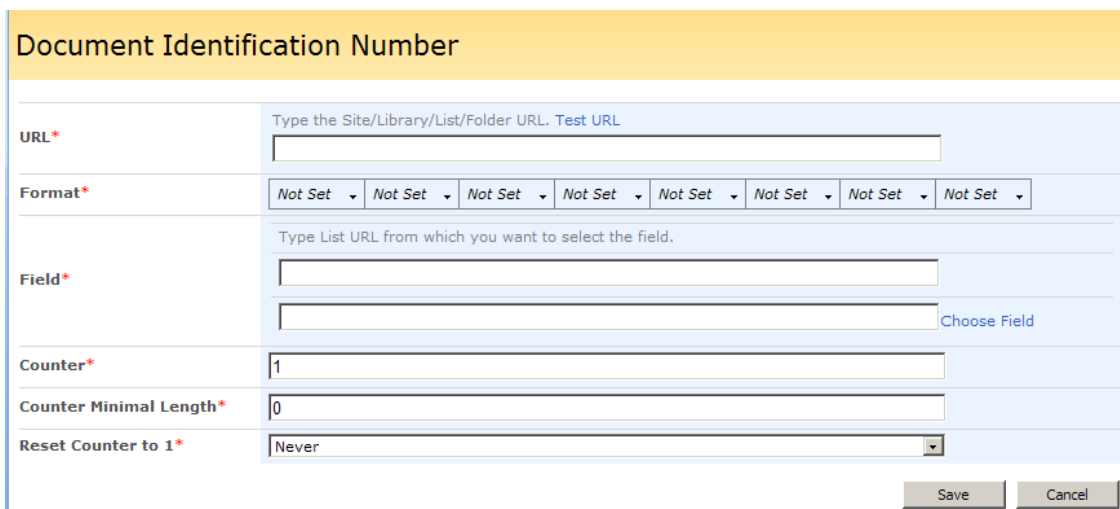
2. New window with list of all configured Identification Numbers will be opened.
To add new record press "New", to edit existing record – click on the link

"Edit" near the record.



URL	Numerator Format	Numerator Field	Counter Value	Counter Minimal Length	Reset Counter to 1
http://vmmps2007:8080/demosite/Shared Documents	DOC: YEAR - MONTH : COUNTER	Reference	3	0	Each month
http://vmmps2007:8080/demosite/	YEAR - MONTH - DAY : COUNTER	Reference	2	5	Each day
http://vmmps2007:8080/	COUNTER	Reference	1	5	Never
http://vmmps2007:8080/demosite/Shared Documents/Quotes	Q- YEAR - COUNTER	Reference	1	5	Never

3. Configuration fields:



Document Identification Number

This page allows you to configure Websio Auto Reference for different sites, libraries and lists.

URL * Type the Site/Library/List/Folder URL. [Test URL](#)

Format * Not Set | Not Set | Not Set | Not Set | Not Set | Not Set | Not Set | Not Set

Field * Type List URL from which you want to select the field. [Choose Field](#)

Counter * 1

Counter Minimal Length * 0

Reset Counter to 1 * Never

[Save](#) [Cancel](#)

3.1. **URL** – contains full or partial URL of site collection, site, list, document library or folder. The Feature looks for the URL in the configuration list which is "closest match" to the current URL.

For example, we have top-level site "Main" (URL: <http://vmmps2007:8080>)

) and the next site-collection structure:



To configure Document Identification Number for entire site collection, it is enough to add one configuration record with URL of top-level site. In our case: <http://vmmps2007:8080>.

If you want to have one Identification Number format for the entire site collection and another for Demo Site, you have to add additional record with URL of this site. The same is true for Lists and Document Libraries. For example, on the picture below Document Identification Number is configured to create different Identification Number formats for entire site collection, Demo Site, Shared Document library and folder "Quotes".

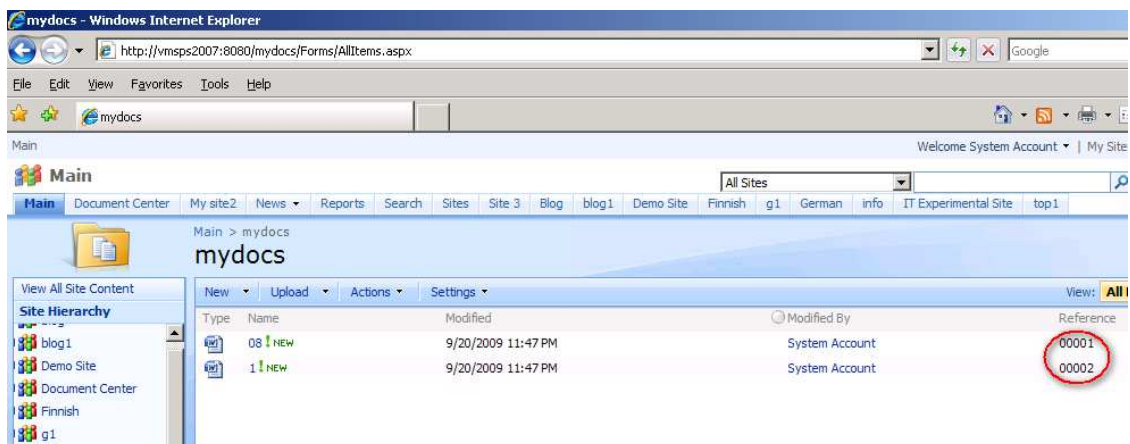
Document Identification Number Configuration

This page allows you to configure Websio Auto Reference for different sites, libraries and lists.

New						
URL	Numerator Format	Numerator Field	Counter Value	Counter Minimal Length	Reset Counter to 1	
Edit http://vmmps2007:8080/demosite/Shared Documents	DOC: YEAR - MONTH : COUNTER	Reference	3	0	Each month	
Edit http://vmmps2007:8080/demosite/	YEAR - MONTH - DAY : COUNTER	Reference	2	5	Each day	
Edit http://vmmps2007:8080/	COUNTER	Reference	1	5	Never	
Edit http://vmmps2007:8080/demosite/Shared Documents/Quotes	Q- YEAR - COUNTER	Reference	1	5	Never	

Results of this configuration:

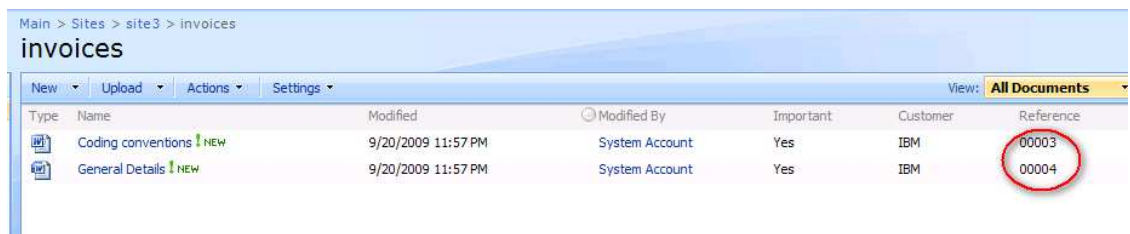
- Document Library "mydocs" on the top-level site:



The Feature takes configuration data from third row in the configuration list: settings for entire site collection.

- Document Library "Invoices" on the site "Site 3". URL:

<http://vmmps2007:8080/SiteDirectory/site3/invoices>



The same as in the previous example. No special configuration record



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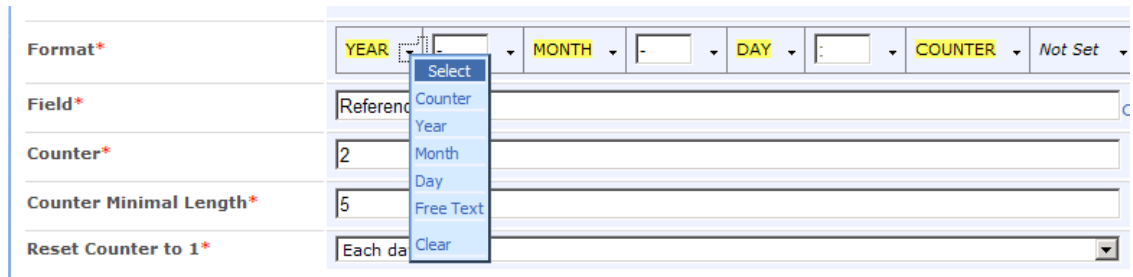
was found.

- Document Library "Test Documents" on the site "Demo Site". URL:
<http://vmSPS2007:8080/demosite/Test%20Documents>

Main > Demo Site > Test Documents				
Test Documents				
New	Upload	Actions	Settings	view: All Documents
Type	Name	Modified	Modified By	Reference
	BizTalk Questions Full NEW	9/21/2009 12:05 AM	System Account	2009-09-21:00001
	BizTalk Questions NEW	9/21/2009 12:05 AM	System Account	2009-09-21:00001

Different Identification Number format. The format was taken from the second row in the configuration list (for <http://vmSPS2007:8080/demosite>)

3.2. **Format** – format of the Identification Number. The Identification Number may be combined from up to 8 parts.



Possible part values:

3.2.1. Counter.

Counter receives value defined in the field "Counter". Its value is incremented when an item is added to defined list or document library.

The length of the counter value depends on the value of "Counter Minimal Length". For example:

Current Counter Value	Counter Minimal Length	Result
5	0	5
5	1	5
5	3	005
1528	3	1528
1528	5	01528

3.2.2. Year.

Four digits current year value.

3.2.3. Month.

Two digits current month value

3.2.4. Day.

Two digits current day value.

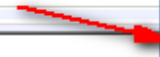
3.2.5. Free Text.

String constant. Will be included 'as is' in the Identification Number value

To clear any part select option "Clear" in the dropdown menu:

Format*	Not Set ▾ Not Set ▾ MONTH ▾ DAY ▾
Field*	Reference
Counter*	2
Counter Minimal Length*	5
Reset Counter to 1*	Each day

Select
 Counter
 Year
 Month
 Day
 Free Text
 Clear





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Format Examples:

Current Counter value is 5; Counter Minimal Length is equal to 3.

Format*	COUNTER	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
---------	---------	---------	---------	---------	---------	---------	---------	---------

Result: 005

Format*	DOC:	COUNTER	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
---------	------	---------	---------	---------	---------	---------	---------	---------

Result: DOC:005

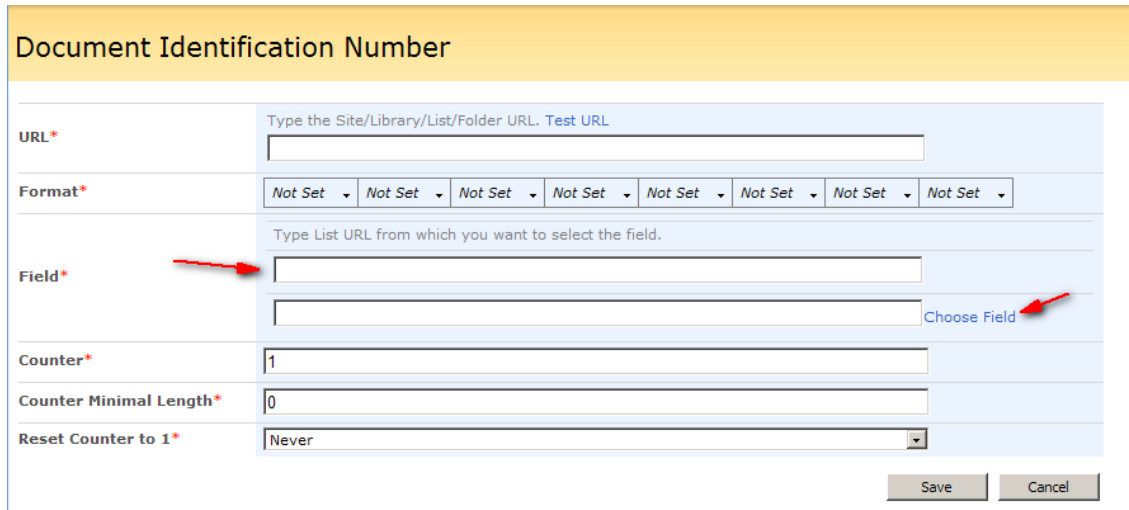
Format*	Q:	YEAR	-	MONTH	:	COUNTER	Not Set	Not Set
---------	----	------	---	-------	---	---------	---------	---------

Result: Q:2009-09:005

3.3. **Field** – Name of the property in the list or document library where the Identification Number will be stored. The property must be of the type "Single line of text".

Important!

You can set value of this field using Field Picker only. Copy List or Document Library URL to the first field and click "Choose field".



3.4. **Counter** – Current counter value. Its value is incremented when an item is added to the list or document library. You can change its value manually.



3.5. **Counter Minimal Length** - The length of the counter value depends on the value of "Counter Minimal Length". For example:

Current Counter Value	Counter Minimal Length	Result
5	0	5
5	1	5
5	3	005
1528	3	1528
1528	5	01528

3.6. **Reset Counter to 1** – When you use in the Identification Number format Year, Month or Day it may be useful to reset counter to 1 each year, month or day. Possible values:

3.6.1. Never – Counter never will be reset

3.6.2. Each day – Counter will be reset to 1 at the beginning of each day

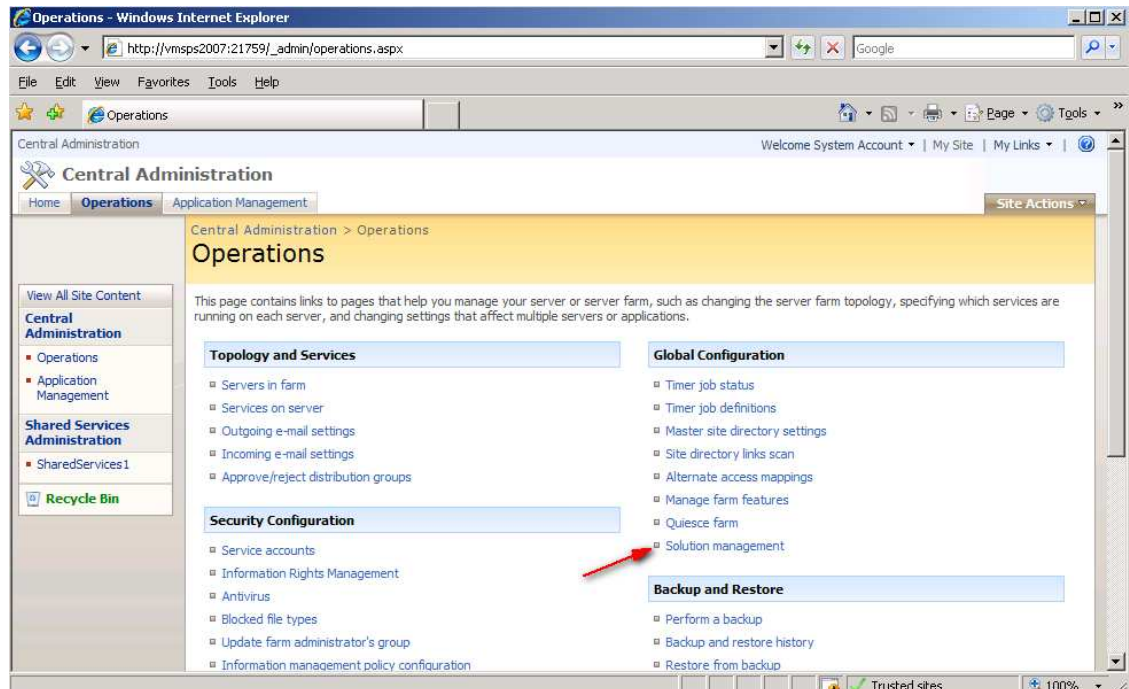
3.6.3. Each month – Counter will be reset to 1 at the beginning of each month

3.6.4. Each year – Counter will be reset to 1 at the beginning of each year

Troubleshooting

Option "Document Identification Number Configurator" doesn't appear in the Site Collection settings or option "Document Identification Number" doesn't appear in the Site features.

1. Open "SharePoint 3.0 Central Administration", select "Operations" and click on "Solution Management":



2. In the Solution Management window check that websioscanpackage.wsp has status "Deployed".



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Central Administration > Operations > Solution Management

Solution Management

This page has a list of the Solutions in the farm.

Name	Status	Deployed To
autorefpkg.wsp	Deployed	http://vmmps2007:2222/...
blogcab.cab	Deployed	http://vmmps2007:8100/...
calendarcab.cab	Deployed	http://vmmps2007:2222/...
cct_fa.q.wsp	Deployed	Globally deployed.
copypackage.wsp	Deployed	Globally deployed.
faq_wp.wsp	Deployed	http://vmmps2007:2007/
faqcab.cab	Deployed	http://vmmps2007:2222/...
gallerycab.cab	Deployed	http://vmmps2007:2222/...

3. If the package has another status, click on the package name and redeploy it.

Document Identification Number value doesn't appear in the selected field

1. Open current Site settings -> Site features and check that "**Document Identification Number**" is activated.

Still have a problem? Ask to our support: support@websio.com