Sparqube Document Column

Contents

Overview

Sparqube Document Column is the new addition to Sparqube product family designed to make document management easier than ever thus increasing productivity in SharePoint environment. Document Column allows associating documents from document libraries with any list items adding additional level of data relationship between SharePoint lists. Intuitive UI makes it easy to upload files of any types from the local disk as well as adding link to existing documents placed anywhere within site collection.

Sparqube Document Column field allows linking documents intuitively without any cumbersome operations like typing or copying/pasting URLs. Document Column channels standard document library features intuitively via its UI allowing viewing and managing related documents metadata.

Before document library can be used efficiently, its field layout and file/folder structure needs to be planned ahead of time. With Sparqube Document Column this task becomes secondary giving an ability to jump start working with documents from perspective of SharePoint lists to which documents are linked.

This can be achieved in a couple of simple steps:

1) Add Sparqube Document Column field to the list where documents should be linked
2) Set up document library which will host referenced documents
3) Upload or link existing documents directly from Item Edit form with intuitive UI

One of the outstanding features making Sparqube Document Column ideal for enterprise environments is conversion of Microsoft Word document files to PDF on-the-fly during file upload.

Features

- Linking single or multiple documents to list items
- Browsing UI to select existing documents
- Uploading files from disk
- Cross-site support
- File type icons
- Editing link title and referenced document metadata
- Managing files via intuitive contextual UI (Edit, Delete, Check in, etc.)
- On-the-fly conversion to PDF with Word Automation Services

Features

- Linking single or multiple documents to list items
- Browsing UI to select existing documents

Setup

Requirements

Server:

- SharePoint Foundation 2010/2013 or SharePoint Server 2010/2013/2016
- Windows Server 2008/Windows Server 2008 R2/Windows Server 2012/Windows 7
- .NET Framework 3.5/4.5
- SharePoint Server 2010/2013/2016 required for PDF conversion feature

Installation

Sparqube Document Column requires the following permissions for an account running installation:

- Must be a member of the local server **Administrators** group to install application files.
- Must be a member of the SharePoint **Farm Administrators** group to deploy solutions to the farm.

To install Sparqube Document Column:

1. Run as Administrator self-extracting package **Sparqube.DocumentColumn.exe**
2. In confirmation dialog, click **Yes** to proceed with files unpacking
3. In Welcome screen, click **Next** to begin the installation
4. Verify that the system checks pass successfully. If all requirements are met, click **Next** to proceed.
5. Read and accept the End-User License Agreement
6. Select one or more web applications to which you want to deploy Sparqube Document column
7. Please wait for the setup to deploy the solution. Depending on your farm configuration it can take from 30 seconds up to 15 minutes. Click **Next** to continue
8. Please check the details to see if solution was properly installed. Click **Close** to finish setup

Licensing

You can use Sparqube Document Column for 3 days after installation without license. After that if you want to continue using it, you should request free 30-days trial or buy a license.

Note: After evaluation period is expired, you cannot use the product. This will be indicated by the following warning message: "Evaluation period has expired. Please activate the product". You can purchase Sparqube Document license at any time or you can request extended trial license by contacting sales@sparqube.com.

To activate Sparqube Document Column on your SharePoint farm you need to:

1) Install Sparqube License Manager
2) Activate the license

Installing Sparqube License Manager

Download Sparqube License Manager from Web site: http://www.sparqube.com/SharePoint-Document-Column/Download.aspx and install it to Central Administration Web application.

Licensing and Activation

You can get Full or Development license key via purchase or request Trial license key via product download web page. License key is sent via e-mail and looks the following way A1B2C3D-E4F5G6H-I7J8K9L-M1N2O3P.

License is activated using License Manager:

1) Open SharePoint Central Administration
2) Under **Sparqube Settings** section, click **Sparqube License Manager:**

3) On this page, you can see all installed Sparqube components and its license type and status. Find **Sparqube Document Column** and click it

4) In product detail page, you can see product information and licenses details. To activate license click **Enter new license**

5) If SharePoint server has internet connectivity you can activate online:
   a. In Product Activation dialog, click **Activate online**
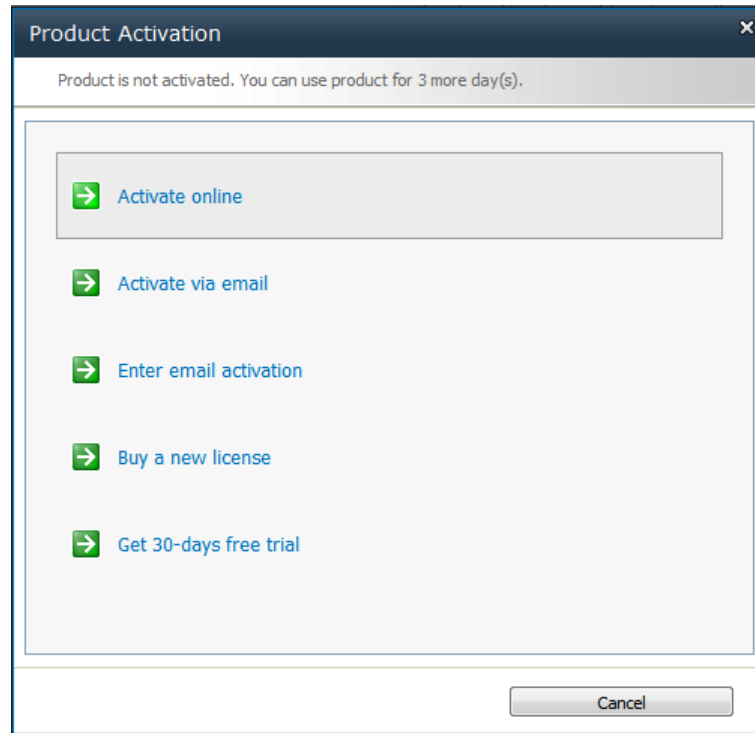   b. Enter license key and click **Activate** button
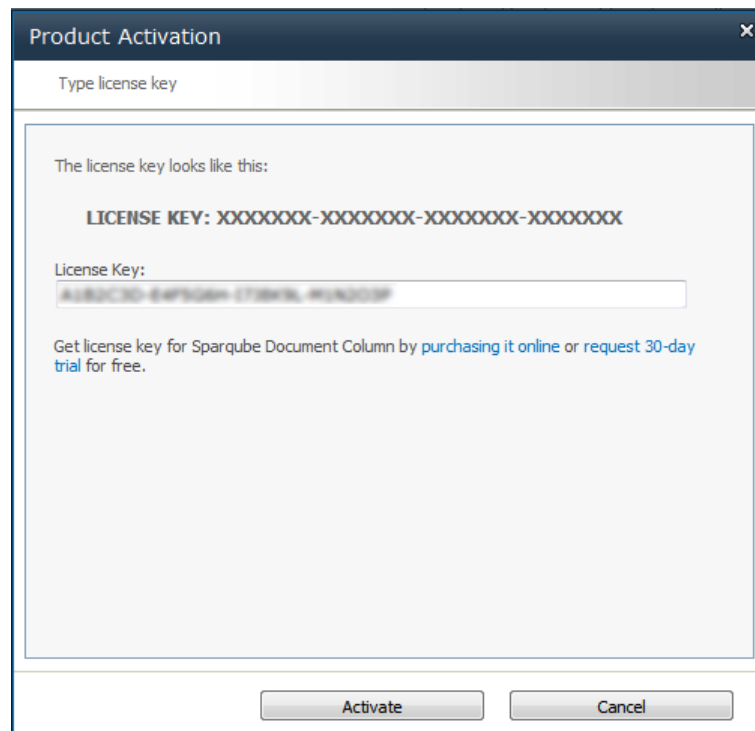
6) You can also activate license via email.
   a. Click **Activate via email**.
   b. In Product Activation dialog, you can see SharePoint Farm ID. Clicking on email address link in this dialog box will open new message window of your installed email client in which you should enter your license key which you'd like to activate. In case you do not have email client installed on your box you can simply copy Farm ID and License Key and send an email from any other suitable machine to this address sales@sparqube.com.
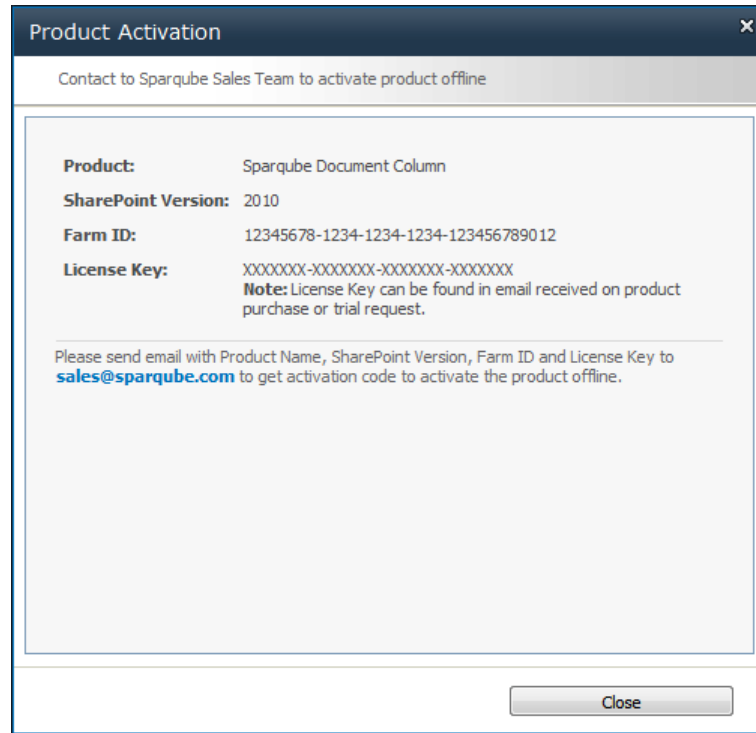
c. After that, you will receive an email with activation code within 48 hours.
d. To enter received activation code please repeat steps 1-4 and click **Enter email activation**.
e. Enter email activation
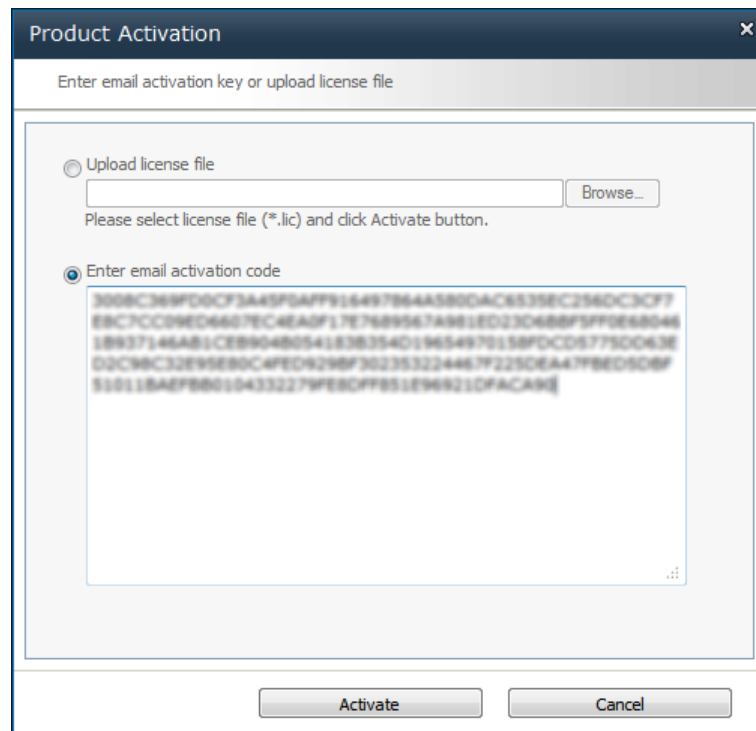
7) After successful activation, you can refer to License Manager page and check license details.

Product	Sparqube Document Column
	version 1.0.1312.2501
	Simplifies uploading and associating documents between SharePoint lists.

Product Activation	**Product is activated.**
	Serial number: ABCZ1301-007A-0000000001
	License type: Full license
	Edition: Standard
	Max. number of WFE servers: 1
	Current number of WFE servers: 1

License Type	Edition	Max. number of WFE servers	Expiration Date	State	
Full license	Standard	1	-	Active	Turn Off

Enter new license

Configuration

Sparqube Document column can be added to SharePoint list, library and content type the same way as any standard SharePoint column. Any number of Sparqube Document columns can be added to the list.

To add Sparqube Document column to SharePoint list:

1) Open existing list and add new column (In the ribbon, select **List Tools** tab → **List** → **Create Column** in Manage Views section)
2) In the **Column Name** box, type a name for the column
3) Under **The type of information in this column is**, click **Sparqube Document:**

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

Attached documents

The type of information in this column is:

○ Single line of text
○ Multiple lines of text
○ Choice (menu to choose from)
○ Number (1, 1.0, 100)
○ Currency ($, ¥, €)
○ Date and Time
○ Lookup (information already on this site)
○ Yes/No (check box)
○ Person or Group
○ Hyperlink or Picture
○ Calculated (calculation based on other columns)
○ External Data
○ Task Outcome
⦿ Sparqube Document
○ Sparqube Lookup Classic (cross-site lookup, cascaded lookup)
○ Sparqube Lookup Extra (cross-site collection data lookup, lookup documents)
○ Sparqube Lookup Tracker (tracking items relationship)
○ Sparqube Picture
○ Sparqube Status Indicator
○ Managed Metadata

Document Selection Scope

Choose site, document library or library folder from which existing documents can be selected.
Documents located outside of selection scope area cannot be selected.

Relative path to site, document library or library folder:*

```
/sales/
```

Document Default Storage

Choose document library or its folder where uploaded documents will be stored by default.
Upload location for each individual file can be changed if "Allow selecting document storage" option is checked.
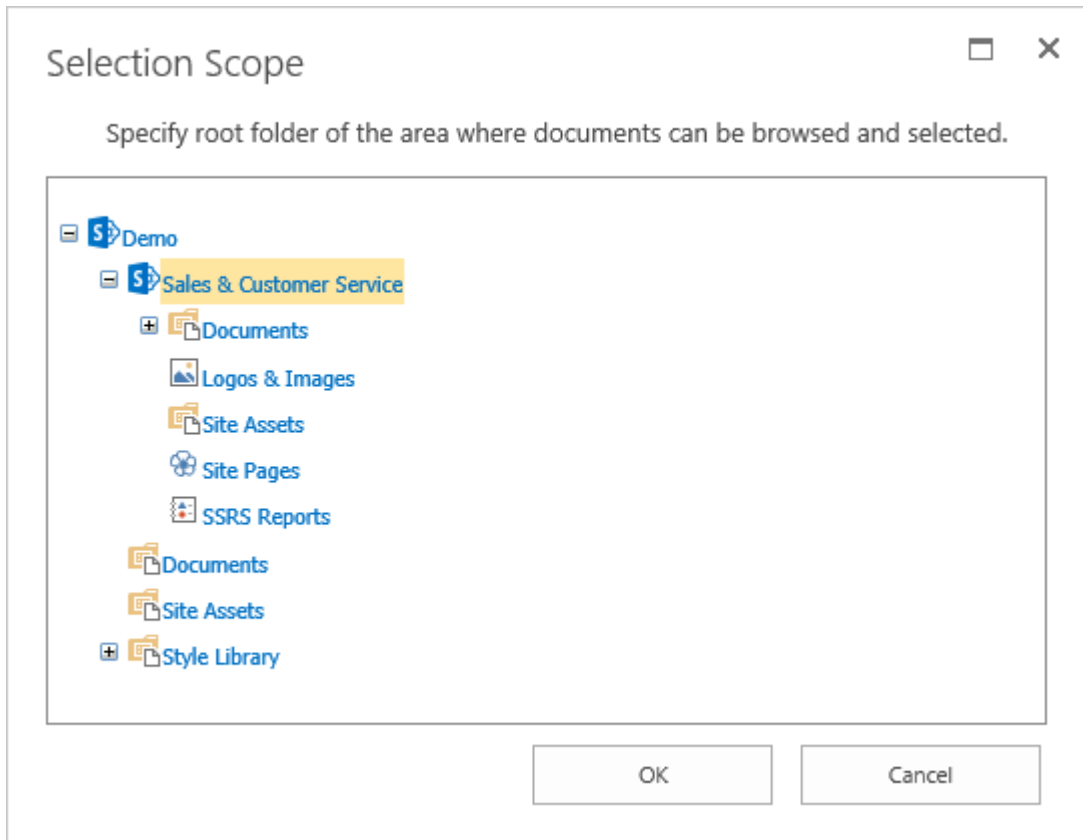
Relative path to document library or its folder:*

```

```

☐ Allow selecting alternative document storage on file upload
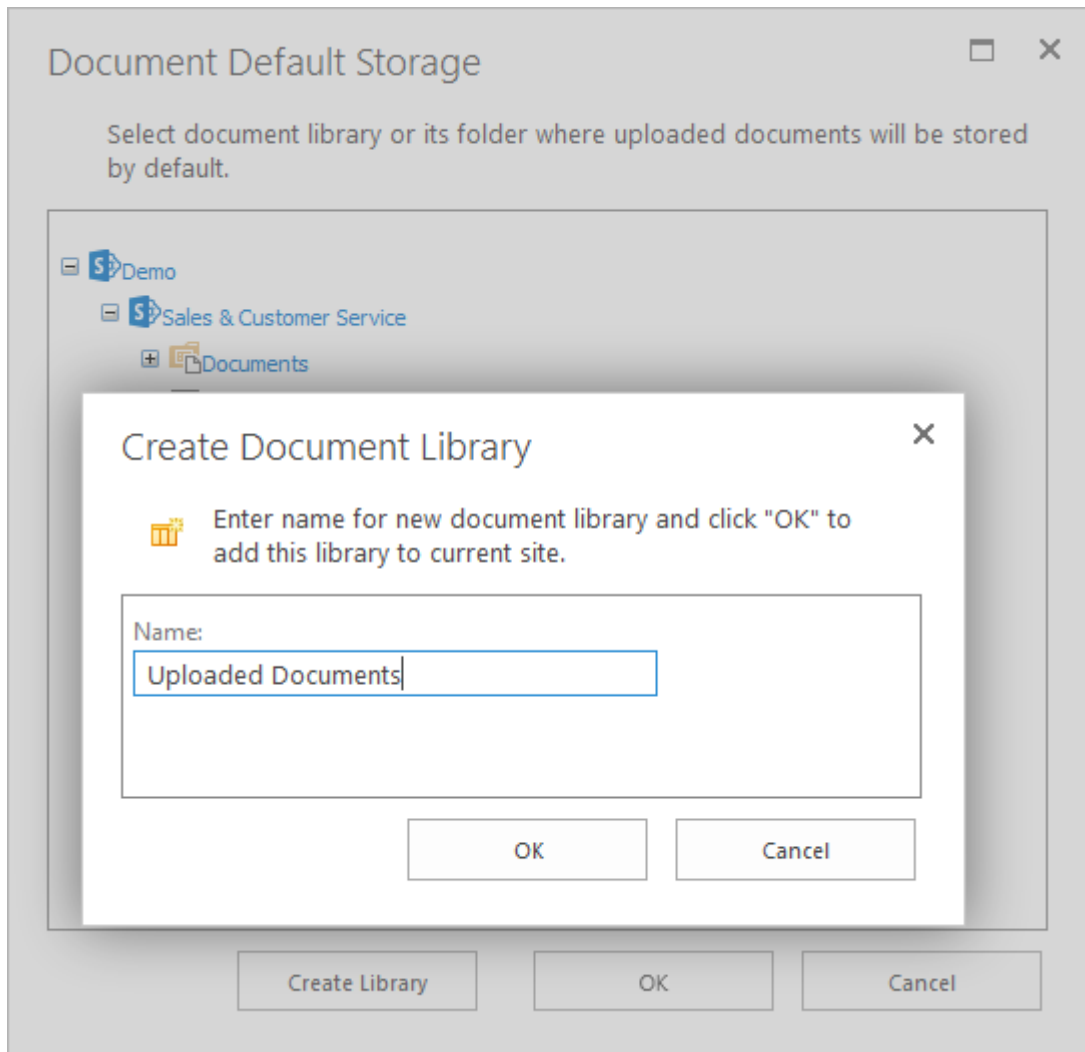
Usability Settings

☑ Show document type icon

☑ Allow editing document link title

☑ Show document link drop-down menu

▷ Conversion to PDF

OK   Cancel

4) In **Document Selection Scope** section, you should choose site, document library or its folder from which documents can be selected. Documents located outside of selection area cannot be selected. Documents can be selected across same site collection.
On the screenshot below, documents outside of **Sales & Customer Service** sub-site will not be shown during document selection and cannot be selected.

Selection Scope ☐ ✕

Specify root folder of the area where documents can be browsed and selected.

- ⊟ 🔷 Demo
  - ⊟ 🔷 Sales & Customer Service
    - ⊞ 📄 Documents
    - 🖼 Logos & Images
    - 📄 Site Assets
    - ✿ Site Pages
    - 📑 SSRS Reports
  - 📄 Documents
  - 📄 Site Assets
  - ⊞ 📄 Style Library

OK   Cancel

5) In **Document Default Storage** section, choose document library or its folder where uploaded files will be stored by default. To create container document library in the root of the topmost site, click **Create Library** button, provide desired name of the document library and click **OK**.

Checking **Allow selecting alternative document storage on file upload** will allow choosing storage location for each individual file during upload process.

6) In **Usability Settings** section, specify the following options:
    a. **Show document type icon** – if checked then file type icons will be shown in front of document links.
    b. **Allow editing document link title** – if checked then link text can be edited; otherwise, original file name will be displayed in the link.
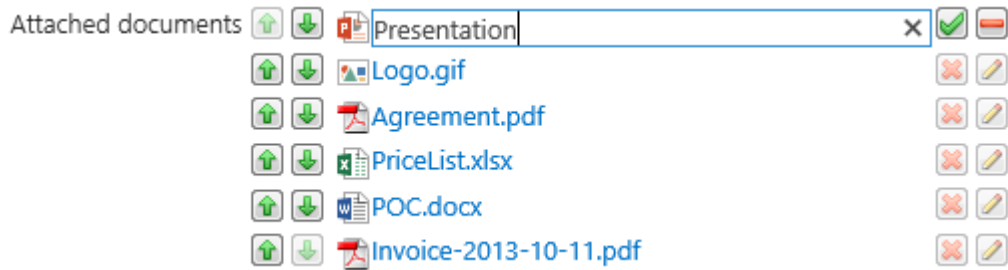
c. **Show document link drop-down menu** – determines whether to display drop-down menu with file actions allowing viewing and editing file properties, opening file location, downloading file, etc. Drop-down menu can be shown only in View and Edit item forms:
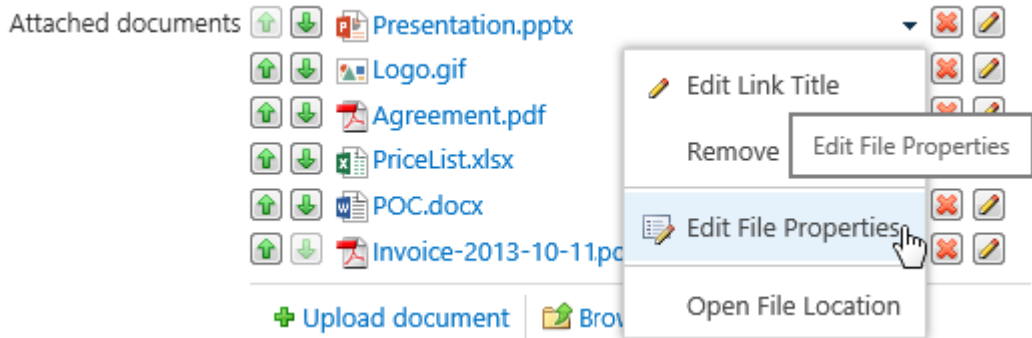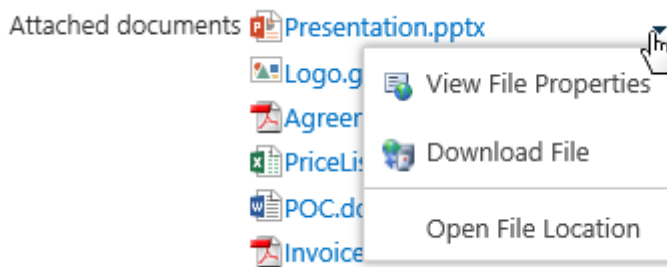

View item form has limited action set in drop-down:

d. **Enable Browse button** – when checked user is allowed to reference existing documents, otherwise Document column can be used only for uploading documents

7) Sparqube Document Column supports converting Microsoft Word document files to PDF automatically during file upload.

In order to enable converting Word documents to PDF, you should check **Enable PDF conversion** in **Conversion to PDF** section and specify whether PDF file should replace original file after conversion or Document Column should store both originally uploaded and newly created PDF files.

Note: SharePoint Server Word Automation Services should be configured and started and connected with target Web Application with Service Connection.

In order to specify which file formats can be converted to PDF you should open **Word Automation Services** settings page (In **Central Administration**, open **Application Management**, then click

Manage service applications under **Service Applications** section, select target **Word Automation Services** and click **Manage** in action ribbon), check necessary file formats in **Supported File Formats** section:

Word Automation Services

Supported File Formats

Specify which file formats can be opened by the service application. If a file type is unchecked, users of this service will receive an error when attempting to open files of that type.

Supported File Formats:
- ☑ Open XML Document (.docx, .docm, .dotx, .dotm)
- ☑ Word 97-2003 Document (.doc, .dot)
- ☑ Rich Text Format (.rtf)
- ☑ Web Page (.htm, .html, .mht, .mhtml)
- ☑ Word 2003 XML Document (.xml)

Configuring SharePoint Server Word Automation Services

SharePoint 2010

Configuring Word Automation Services for Development

http://msdn.microsoft.com/en-us/library/office/ee557330(v=office.14).aspx

SharePoint 2013

What's new in Word Automation Services for developers

http://msdn.microsoft.com/en-us/library/office/jj163073.aspx

Release Notes

Version 1.3

Changes (build 1.3.1609.601):
- Added: Support for SharePoint 2016
- Added: German translation
- Fixed: Field value editing in Lookup Tracker form

Version 1.2

Changes (build 1.2.1506.1101):
- Added: Links sorting and shown links limit in listview
- Added: Limited support for sandboxed solutions
- Fixed: Storage URL was incorrect when used in subsites

Changes (build 1.2.1511.201):
- Fixed: Edit form URL was malformed when storage library site not current
- Fixed: Document checked-out state was not initialized correctly

Changes (build 1.2.1512.1101):
- Added: Allow multiple links per item property

Changes (build 1.2.1604.901):
- Fixed: Field control value was not updated when changed externally

Version 1.1

Changes (build 1.1.1412.1301):
- Added: Backward Links column tracking items referencing documents
- Added: Documents can now be opened with Office Web Apps 2013
- Added: "View in Browser" command for opening documents directly in browser
- Fixed: Controls are now MDS-compliant (Minimal Download Strategy)
- Added: French translation

Changes (build 1.1.1502.2601):
- Changed: Settings for Upload/Browse modes

Changes (build 1.1.1503.1101):
- Changed: Files with the same name are not overwritten by default

Version 1.0

Initial release (build 1.0.1312.2501)

Changes (build 1.0.1403.2201):
- Added: Enhanced document context menu (editing, version control)
- Added: Browse button visibility setting

Changes (build 1.0.1404.2901):
- Fixed: Document title is preserved when editing is not allowed

Changes (build 1.0.1407.2301):
- Added: Document field can now be used with page content types