

Infowise Document Link Field

User Guide

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Introduction

Infowise Document Link Field is a custom field that enables adding links to existing document in document libraries in the site collection or uploading and linking new documents.

Installation

Note: as the product is installed as a SharePoint Solution, you need to install it only once, regardless of the number of your front-end servers.

Run the installation package from one of your front-end server machine and follow the on-screen instructions. You do not have to change the default settings.

Registration

If you have purchased the product, use the *Infowise Capability Dashboard* management page accessible through the *Central Administration* site. Enter the License Key under the corresponding product. If no License Key is entered, the version is time-limited to 30 days. Both full and time-limited versions contain the same functionality.

Usage

The following instruction guides you step-by-step through the process of setting up a sample Infowise Document Link Field implementation.

1. Adding Document Link Field

1. Enter column creation page
2. Select *Infowise Document Link*
3. Provide column name

	<input type="radio"/> Infowise Color Choice <input type="radio"/> Infowise Indicator <input type="radio"/> Master-detail lookup (Infowise Connected Field) <input checked="" type="radio"/> Infowise Document Link <input type="radio"/> Infowise user property <input type="radio"/> Infowise Voting <input type="radio"/> Infowise Item Copier Field <input type="radio"/> Infowise LOB item link <input type="radio"/> Infowise Signature <input type="radio"/> Managed Metadata <input type="radio"/> Extended Hyperlink or Picture (Infowise URL Plus)
Additional Column Settings Specify detailed options for the type of information you selected.	Description: <input type="text"/> Require that this column contains information: <input type="radio"/> Yes <input checked="" type="radio"/> No Select a document library: <input type="text" value="Shared Documents"/>

Provide the following settings:

Select a document library:

Or specify name in column:

Allow uploading documents

Minimum

Maximum

Allowed extensions

- Document library name – select a document library into which documents will be uploaded, or, if upload is not allowed, which will be the first to be displayed in the file picker.
- Name in column (optional) – specify text, choice or lookup column, which will contain the document library name on the form. It allows you to specify upload target (or, when upload is not allowed, default picker location), based on the data users enter/select. Note that this settings overrides the document library name in the previous section.

- Allow uploading document – users can upload new document into the document library specified in one of the previous settings. When disabled, users can only select existing files.
- Minimum – minimum number of links to be added to the column. You cannot save the item until the specified number of links is added.
- Maximum – maximum number of links to be added to the column. You cannot save the item when the number of links exceeds the maximum.
- Allowed extensions – specify allowed file extension, separated by commas. When left blank, all files are permitted. Note that you still won't be able to upload file types blocked by SharePoint itself.

2. Add Links to Existing Documents

1. Add new item to the current list or edit an existing one
2. Clicking on “Add Link” will allow display a document picker pop-up window, which allows selecting any of the existing documents in the site collection
3. Navigate to the desired document and click to select
4. Click OK to add the link
5. Repeat steps 2-4 to add additional links as required
6. Save the item

3. Upload New Document

1. Add new item to the current list or edit an existing one
2. Click *Browse* and select a file from your computer or the network
3. Click Upload
4. Repeat steps 2-3 to upload additional documents as required
5. Save the item

Note: uploaded documents are stored in uniquely named folders, so it is possible to upload a document with the same name multiple times without re-writing the existing document.

4. Delete Links

1. Enter to item edit form
2. Select a link from the field list box for deletion
3. Click on “Delete Link”
4. Save the item

Note: the process only deletes the link to the document, without affecting the document itself.

Instructions	<input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="Upload"/>
	Debit Card Loans Get Instant Money Against Your Debit Card.doc Finders Fee Agreement Letter		
	Add Link	Delete Link	
Regulations	<input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="Upload"/>
	daycare contract.doc		
	Add Link	Delete Link	

5. List/Site Templates

The document library for uploads is linked to the columns by the means of both the ID and the title. By default the ID is used, so you can rename the document library. Once you save the list/site as template and create a new copy, IDs get change and the column will switch to locating the library by title. Unless you enter and re-save the column settings in the newly created list, refrain from renaming the document library in the new location.