Batch Check In 2.0

User Guide

Copyright

Contents

1. Introduction

Batch Check In greatly enhances the default SharePoint Check In function, you are allowed to check in multiple documents and bulk edit the documents properties all at one time.

The user guide is used to instruct the users to configure and use the product.

For the latest copy of this and other guides, please visit our document center:

http://www.boostsolutions.com/download-documentation.html

2. Installation

2.1 Product Files

After you download and unzip the Batch Check In zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Batch Check In_V2_User Guide.pdf	User guide of Batch Check In in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundtion\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\BatchAction\ BoostSolutions.BatchCheckInSetup12.2.wsp	A SharePoint solution package containing Batch Check In files and resources for SharePoint 2017 or WSS 3.0.
Solutions\BatchAction\ BoostSolutions.BatchCheckInSetup14.2.wsp	A SharePoint solution package containing Batch Check In files and resources for SharePoint 2010 or

	SharePoint Foundation 2010.
Solutions\BatchAction\ BoostSolutions.BatchCheckInSetup15.2.wsp	A SharePoint solution package containing Batch Check In files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\BatchAction\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Batch Check In, ensure your system meets the following requirements:

SharePoint 2013

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or greater Mozilla Firefox supported Google Chrome supported

SharePoint 2010

Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft SharePoint Foundation 2010 SP1 or Microsoft SharePoint Server 2010 SP1 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or greater Mozilla Firefox Google Chrome

SharePoint 2007

Operating System	Microsoft Windows Server 2003 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2008 R2
Server	Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007 Microsoft Windows SharePoint Services v3 SP2 or Microsoft Office SharePoint

	Server 2007 SP2
	Microsoft .NET Framework 2.0 or 3.0
	Note: This product is not compatible with SPS 2003 and WSS v2
Browser	Microsoft Internet Explorer 6 or greater

2.3 Installation

Follow these steps to install Batch Check In on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.

Batch Check In must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration → System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Batch Check In on SharePoint server.

a. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.

b. Open the created folder and run the **Setup.exe** file.

> *Note* If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.

d. Review and accept the End-User License Agreement and click **Next**.

e. In the Web Application Deployment Targets, select the web applications you are going to install and click **Next**.

> *Note* If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

f. Upon completion of the installation, details are displayed showing which web applications you product has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Batch Check In in **SharePoint 2010** by using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Batch Check In to SharePoint servers.

If you have installed BoostSolutions products before, please skip the steps of Foundation installation.

a.   Extract the files from the product zip pack to a folder on one SharePoint server.

b.   Open a command prompt and make sure your path is set with the SharePoint bin directory.

 ▪ **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

 ▪ **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

 ▪ **SharePoint 2007**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe

c.   Add the solution files to SharePoint in the STSADM command line tool.

> *stsadm -o addsolution -filename BoostSolutions.BatchCheckInSetup14.2.wsp*
>
> *stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp*

d.   Deploy the added solution with the following command:

> *stsadm -o deploysolution -name BoostSolutions.BatchCheckInSetup14.2.wsp -allowgacdeployment –url [virtual server url] –immediate*
>
> *stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.wsp -allowgacdeployment –url [virtual server url] –immediate*

e.   Wait for the deployment to complete. Check the final status of the deployment with this command:

> *stsadm -o displaysolution -name BoostSolutions.BatchCheckInSetup14.2.wsp*
>
> *stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp*

 The result should contain a <Deployed> parameter for which the value is TRUE.

f.   In the STSADM tool, activate the features.

stsadm -o activatefeature -name SharePointBoost.BatchCheckIn –url [site collection url] –force

stsadm -o activatefeature -name SharePointBoost.BatchCheckIn.CA –url [site collection url] –force

Note:

After install product using command line, you can check whether the product is installed and deployed successfully in Central Administration.

a. On the Central Administration Home page, click **System Settings**.

b. In the Farm Management section, click **Manage farm solutions**.

c. On the Solution Management page, check whether the solution "boostsolutions.batchcheckinsetup14.2.wsp" is deployed to the web applications.

d. On the Solution Properties page, click **Deploy Solution**.

e. On the Deploy Solution page, in the Deploy When section, select **Now**.

f. In the Deploy To? section, in the A specific web application list, click either All web applications or select a specific Web application.

g. Click **OK**.

To remove Batch Check In from SharePoint servers.

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.BatchCheckInSetup14.2.wsp -immediate -url [virtual server url]

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.BatchCheckInSetup14.2.wsp

c. The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

d. Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.BatchCheckInSetup14.2.wsp

Note:

After uninstall product using command line, you can check whether the product is removed and successfully in Central Administration.

a.   On the Central Administration Home page, click **System Settings**.

b.   In the Farm Management section, click **Manage farm solutions**.

c.   On the Solution Management page, click "boostsolutions.batchcheckinsetup14.2.wsp".

d.   On the Solution Properties page, click **Retract Solution**.

e.   On the Retract Solution page, in the Deploy When section, select **Now**.

f.   In the Retract From section, in the A specific web application list, click All content web applications.

g.   Click **OK**.

h.   Wait a minute, and refresh the browser until you see "Not Deployed" as the status for boostsolutions.batchcheckinsetup14.2.wsp.

i.   Select "boostsolutions.batchcheckinsetup14.2.wsp".

j.   On the Solution Properties page, click **Remove Solution**.

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is mainly designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, please do not remove Foundation from the servers.

a.   Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.FoundationSetup14.1.wsp –immediate –url [virtual server url]

b.   Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c.   Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp

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Note:

After uninstall product using command line, you can check whether the product is removed and successfully in Central Administration.

a.   On the Central Administration Home page, click **System Settings**.

b.   In the Farm Management section, click **Manage farm solutions**.

c.   On the Solution Management page, click "boostsolutions.foundationsetup14.1.wsp".

d.   On the Solution Properties page, click **Retract Solution**.

e.   On the Retract Solution page, in the Deploy When section, select **Now**.

f.   In the Retract From section, in the A specific web application list, click All content web applications.

g.   Click **OK**.

h.   Wait a minute, and refresh the browser until you see "Not Deployed" as the status for boostsolutions.foundationsetup14.1.wsp.

i.   Select "boostsolutions.foundationsetup14.1.wsp".

j.   On the Solution Properties page, click **Remove Solution**.

2.7 Feature Activation

Activate Batch Check In's features in site collection

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.
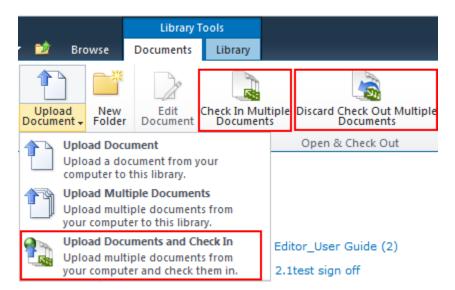
a.   On the Site Actions menu click **Site Settings**.

b.   Under **Site Collection Administration** click **Site collection features**.

c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

BoostSolutions Batch Check In 2.14.1120.1
Check in or discard multiple checked out documents in a document library. (Powered by BoostSolutions)

Deactivate   Active

3. How to Use Batch Check In

After installing Batch Check on the SharePoint Server, three options will be added on to your Ribbon as follows:

- **Check In Multiple Documents**

    Bulk Check In files that are checked-out.

- **Discard Check Out Multiple Documents**

    Discard check out of multiple documents wihtout manually editing each item.
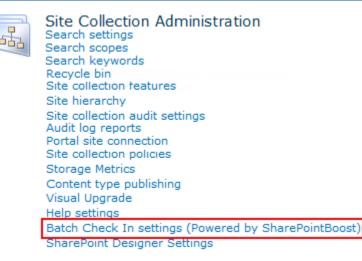
- **Upload Documents and Check In**

    Upload and simultaneously check in multiple new documents all at once.

3.1 Settings for Batch Check In

3.1.1 Custom Document Library Settings

Batch Check In supports custom document libraries.

a.   Go to the Root site, click **Site Actions**. In the Site Actions dropdown menu, click **Site Settings**.

b.   Under the **Site Collection Administration**, click **Batch Check In settings**.

c.   You will enter the **Select Library Templates** page.

On this page, you can specify which library templates to activate for Batch Check In.

By Default, Batch Check In only supports the SharePoint default document library types. If you deploy a new custom library type, it will be displayed on this settings page. If you choose a new document library type, the Batch Check In function will be enabled for the new library type.

3.1.2 Batch Check In Settings

The Batch Check In Settings can be found in the **Library Settings**. Click **Batch Check In Settings** under the **Permissions and Management** section. From there you will enter the **Batch Check In Settings** page.

Permissions and Management
Delete this document library
Save document library as template
Permissions for this document library
Manage files which have no checked in version
Relink documents to this Library
Workflow Settings
Generate file plan report
Enterprise Metadata and Keywords Settings
Information management policy settings
Batch Check In settings (Powered by SharePointBoost)
SharePointBoost Column Permission settings
SharePointBoost View Permission settings

General Settings

In the General Settings section, you can specify whether to activate Batch Check In functions in the current library.

You can choose if the **Check In Multiple Documents** button, **Discard Check Out Multiple Documents** button and **Upload Documents and Check In** menu are displayed separately.

You can also decide if you want to replace the SharePoint default menu **Upload Multiple Documents** with **Upload Documents and Check In**.

Do you want to activate the function of Batch Check In on this list?
◉ Yes   ◯ No
☑ Enable "Check In Multiple Documents" menu
☑ Enable "Discard Check Out Multiple Documents" menu
☑ Enable "Upload Documents and Check In" menu
☐ Replace the SharePoint default "Upload Multiple Documents" menu

Edit Document Properties Settings

☑ Enable edit document properties
☑ Force input if document library contains required fields
☐ Hide "Title" column

- **Enable edit document properties**

  Select this option if you want to display the Edit Document Properties section in the Check In Multiple Documents page.

- **Force input if document library contains required fields**

  If you enable this function, the required properties will be checked automatically and you will not be able to deselect them in the Check In Multiple Documents page under the Edit Document Properties section.

  If you do not enter any value for the required properties, you will not be able to check in the documents. In this case, a message prompting you to fill in the value will appear.

- **Hide "Title" column**

  If you enable this function, the title column will be hidden in the Check In Multiple Documents page under the Edit Document Properties section.

  It will be very useful if your library has enabled the SharePoint Auto Title function, the Batch Check In will not influence the auto title in changing the title automatically.

License Management

In the License Management section, you can click the license link to open the License Management Center page. For more information about the License, please refer to *Appendix 1: License Management*.

3.2 Check In Configuration

In the Check In Multiple Documents page, there are five parts you can configure: Version, Retain Check Out, Documents, Comments and Edit Document Properties.

3.2.1 Version

The Version Settings section is the same as the SharePoint default check in button settings which is used when checking in a single document. You can specify the type of version you would like to check in.

> ***Note*** Version settings will display only when you enable the Version function for the document library in which Batch Check In works (go to **Library Settings > Version Settings** to enable Version).

3.2.2 Retain Check Out

The Retain Check Out setting is the same as the SharePoint default Check In button setting when checking in a single document. You can choose it if a documents' status will still appear to be checked out after checking in.

Retain Check Out

Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.

Retain your check out after checking in?

○ Yes   ◉ No

3.2.3 Documents

▪ **Select Documents**

Select Documents lists the documents that are checked out by you with the default content type. You can choose which documents you want to check in by selecting the checkbox next to the documents name. All documents can be selected by selecting the multiple checkbox icon at the top of all the selection checkboxes.

Please select documents you want to check in:

☐ Include subfolders

	Document Name	Content Type	Folder	Checked Out By
☑	Calendar rollup 2.1test sign off.docx	Document	Shared Documents	System Account
☐	Quick-Start-Guide_for_Microsoft-Dynamics-CRM-2011-for-Outlook.docx	Document	Shared Documents	System Account
☑	DataConnector- User Guide (20130528).docx	Document	Shared Documents	System Account
☑	Bulk Properties Editor_User Guide (2).docx	Document	Shared Documents	System Account

> ***Note*** If you are a site collection administrator, this section will list all documents checked out by any users.

▪ **Include subfolders**

Include subfolders lists the documents in the folder where you can click the Batch Check In button. If you want to check in documents in a subfolder from the current folder, you can select **Include subfolders**.

After enabling this function, all documents which are checked out by you in the current folder and subfolders will be listed. If you want to identify which folder the documents are in, you can select the folder name and then click on it to view the folder that contains the document.

3.2.4 Comments

In the Comments area, you can add comments that describe changes you made. This section is optional but recommended as a best practice. Check-in comments are especially helpful when several people work on a file. After the documents are checked in, comments will appear in the **Check In Comment** column.

3.2.5 Edit Document Properties

In the Edit Document Properties section, you can configure the properties of the documents you selected. This automatically changes the columns value as documents are checked in.

Replace or Fill in Empty Values of Columns

This function enables you to replace original column values or fill in empty properties when checking in. By default, **Replace all document properties for selected items** is selected.

- **Replace all document properties for selected items**

  Choose this option to overwrite the original values of the selected columns when checking in documents.

- **Fill in empty document properties for selected items.**

  Choose this option to fill in empty document properties when you check in selected documents.

Change Content Type

This function enables you to change the documents content type when checking in documents. You can enable the Content Type in the **Library Settings > Advanced Settings > Allow management of content types**.

If you change the documents content type, a confirmation message will appear. Clicking **OK** will change the content type.

> *Note* If you choose **Cancel** in the confirmation message box, only documents with the same content type that you chose in the Content type dropdown list will be selected in the Documents section. This is in case some content type in selected documents is not the same as the content type in Edit Documents Properties.

Edit Column Values

You can edit document properties by selecting the checkbox next to the column name and entering a value in the Column Value text box. By default, column values are entered in accordance with the default value defined in this column.

If you don't want to change the value of the properties, do not check the checkbox next to the Column Name. If you check the checkbox and do not enter any value in the field and select **Replace all document properties for selected items**, it will clear the properties instead of preserving the original value.
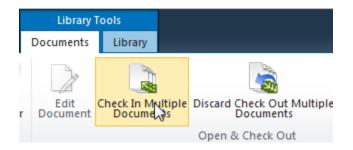

Note

- Edit document properties support all SharePoint editable column types including: Single Line of Text, Multiple Lines of Text, Choice, Number, Currency, Date and Time, Lookup, Yes/No, Person or Group, Hyperlink or Picture, External Data, Managed Metadata, BoostSolutions Cascaded Lookup and Cross-Site Lookup.

- Batch Check In also supports your custom column type if you follow the SharePoint Custom Column Standard.

- The unique value column is no longer displayed in the Batch Edit Property module.

3.3 Check In Multiple Documents

To Check In Multiple Documents, you must have the Contribute permission level for the library or be a member of the Default SharePoint Members group.

To check in multiple documents:

a. Navigate to the library where your file resides.

b. On the Ribbon, click the **Documents** tab and then click **Check In Multiple Documents** in the **Open & Check Out** group.

c. On the **Check In Multiple Documents** page:

- In the Version section, select the version you would like to check in.

- Choose if you want to retain your check out after checking in.

- In the Documents section, select the documents you want to check in.

- Enter your comments in the Comments section.

- Configure the column properties in the Edit Document Properties section.

d. Click **OK** to finish checking in the documents or **Cancel** if you change your mind for some reason. The green arrow disappears from the document icon when the selected documents are checked back in.

> *Note* If the documents have been checked out to a local draft folder, a confirmation dialog box will popup when you check in items; you can click **Yes** to continue.
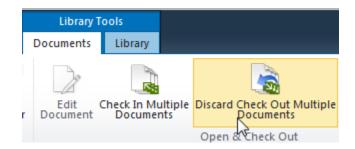
3.4 Discard Check Out Multiple Documents

If you check out documents and make no changes to them, you can simply discard the check out and avoid making new versions when you have not made any changes to the file.

To Discard Check Out Multiple Documents, you must have Contribute permission level for the library or be a member of the Default SharePoint Members group.

To discard check out multiple documents:

a. Navigate to the library where your file resides.

b. On the Ribbon, click the **Documents** tab and then click **Discard Check Out Multiple Documents** in the **Open & Check Out** group.
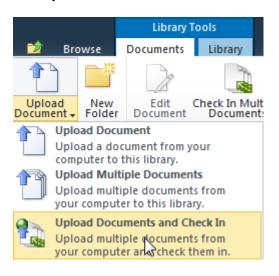

c. You will enter the **Discard Check Out Multiple Documents** page.

d. Select the documents you want to discard the check out for.

e. Click **OK** to finish discarding check out the documents.

3.5 Upload and Check In Multiple Documents

To upload and check in multiple documents, you must have Contribute permission level for the library or be a member of the Default SharePoint Members group.

a. Navigate to the library where you want to upload documents.

b. On the Ribbon, click the **Documents** tab and then in the **Upload Document** dropdown menu, click **Upload Documents and Check In**.

c. An **Upload Multiple Documents** dialog box will open. At this point, you can select the documents you want to upload.

d. Click **OK** to upload the documents.

e. When you click **Done**, you will enter the Check In Multiple Documents page.

- In the Version section, select the version you would like to check in.
- Choose if you want to retain your check out after checking in.
- In the Documents section, select the documents you want to check in.
- Type your comments in the Comments section.
- Configure the column properties in the Edit Document Properties section.

f. Click **OK** to finish checking in the documents or **Cancel** if you change your mind for some reason.

> **Note** If the documents have been checked out to local draft folder, a confirmation dialog box will popup when you check in items; you can click **Yes** to continue

4. Troubleshooting & Support

Troubleshooting FAQ:

http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true

Appendix 1: License Management

You can use Batch Check In without entering any license code for a period of 30 days from when you first use it.

To use product after expiration, you will need to purchase a license and register the product.

Finding License Information

a.   Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.

b.   Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

c.   Send the above information to us (sales@boostsolutions.com) to generate a license code.

License Registration

a.   When you receive a product license code, enter the **License Management Center** page.

b.   Click **Register** on the license page and a **Register or Update license** window will open.

c.   Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.

For more details on license management, see the BoostSolutions Foundation.