



SharePoint Classifier

User Guide

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Our web site: <http://www.boostsolutions.com>

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1. Product Introduction

SharePoint Classifier is a complete document management system built within the SharePoint interface, which helps end users to identify, classify, control and share all documents in their organization.

SharePoint Classifier consists of seven features, which are distributed into five functional groups: Organize Information; Share and Send; Find Information; Audit; and Foundation.

Organize Information

SharePoint Classifier provides SharePoint users with the capability to organize, index, classify and identify enterprise information easily. With SharePoint Classifier, you can improve the quality of putability and findability of information.

The Organize Information group contains the following 3 features:

[*Bulk Properties Editor*](#): Enable SharePoint users to edit, tag and approve/reject multiple documents or list items.

[*Document Number Generator*](#): Enable SharePoint users to create document numbering schemes to uniquely identify and classify a document, making it easier for users to retrieve the right information.

[*List Transfer*](#): Copy & move documents or items from one list to another list directly within SharePoint.

Share and Send

Through the [*Bulk Zip & Unzip*](#) module, SharePoint users can zip & unzip documents and download multiple documents. Users can also send documents as an email attachment.

Find information

With [*List Advanced Filter*](#), SharePoint users can quickly and easily find the information they need in SharePoint list or document library.

Audit

Based on audit services provided by SharePoint, [*Item Audit Log*](#) enables users to review detailed access history for SharePoint documents and list items.

Foundation

ECM Framework: This is the fundamental feature for SharePoint Classifier.

This user guide is intended to assist you in how to use SharePoint Classifier in your SharePoint farm.

For latest version of this copy or other user 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 Classifier 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.
SharePoint Classifier_ User Guide.pdf	User guide for Classifier 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.
Library\6.0\Setup.exe	The product installer for .Net Framework 4.6.
Library\6.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundation\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019.

Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.Basic\ BoostSolutions.SharePointClassifier.Platform14.2.wsp	A SharePoint solution package containing Classifier fundamental files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.Basic\ BoostSolutions.SharePointClassifier.Platform15.2.wsp	A SharePoint solution package containing Classifier fundamental files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.Basic\ BoostSolutions.SharePointClassifier.Platform16.2.wsp	A SharePoint solution package containing Classifier fundamental files and resources for SharePoint 2016/2019.
Solutions\Classifier.Basic\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.AutoNumber\ BoostSolutions.DocumentNumberGenerator14.2.wsp	A SharePoint solution package containing Document Number Generator files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.AutoNumber\ BoostSolutions.DocumentNumberGenerator15.2.wsp	A SharePoint solution package containing Document Number Generator files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.AutoNumber\ BoostSolutions.DocumentNumberGenerator16.2.wsp	A SharePoint solution package containing Document Number Generator files and resources for SharePoint 2016/2019.
Solutions\Classifier.AutoNumber\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.BulkPropertiesEditor\ BoostSolutions.BulkPropertiesEditor14.3.wsp	A SharePoint solution package containing Bulk Properties Editor files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.BulkPropertiesEditor\ BoostSolutions.BulkPropertiesEditor15.3.wsp	A SharePoint solution package containing Bulk Properties Editor files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.BulkPropertiesEditor\ BoostSolutions.BulkPropertiesEditor16.3.wsp	A SharePoint solution package containing Bulk Properties Editor files and resources for SharePoint 2016/2019.

Solutions\Classifier.BulkPropertiesEditor\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.BulkZipAndUnzip\BoostSolutions.BulkZipAndUnzip14.2.wsp	A SharePoint solution package containing Bulk Zip & Unzip files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.BulkZipAndUnzip\BoostSolutions.BulkZipAndUnzip15.2.wsp	A SharePoint solution package containing Bulk Zip & Unzip files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.BulkZipAndUnzip\BoostSolutions.BulkZipAndUnzip16.2.wsp	A SharePoint solution package containing Bulk Zip & Unzip files and resources for SharePoint 2016/2019.
Solutions\Classifier.BulkZipAndUnzip\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.ItemAuditLog\BoostSolutions.ItemAuditLog14.2.wsp	A SharePoint solution package containing Item Audit Log files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.ItemAuditLog\BoostSolutions.ItemAuditLog15.2.wsp	A SharePoint solution package containing Item Audit Log files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.ItemAuditLog\BoostSolutions.ItemAuditLog16.2.wsp	A SharePoint solution package containing Item Audit Log files and resources for SharePoint 2016/2019.
Solutions\Classifier.ItemAuditLog\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.ListAdvancedFilter\BoostSolutions.ListAdvancedFilter14.2.wsp	A SharePoint solution package containing List Advanced Filter files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.ListAdvancedFilter\BoostSolutions.ListAdvancedFilter15.2.wsp	A SharePoint solution package containing List Advanced Filter files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.ListAdvancedFilter\BoostSolutions.ListAdvancedFilter16.2.wsp	A SharePoint solution package containing List Advanced Filter files and resources for SharePoint 2016/2019.

Solutions\Classifier.ListAdvancedFilter\ Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.ListTransfer\ BoostSolutions.ListTransfer14.2.wsp	A SharePoint solution package containing List Transfer files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Classifier.ListTransfer\ BoostSolutions.ListTransfer15.2.wsp	A SharePoint solution package containing List Transfer files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Classifier.ListTransfer\ BoostSolutions.ListTransfer16.2.wsp	A SharePoint solution package containing List Transfer files and resources for SharePoint 2016/2019.
Solutions\Classifier.ListTransfer\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Classifier, ensure your system meets the following requirements:

SharePoint 2019

Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 and above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 10 and above Microsoft Edge Mozilla Firefox Google Chrome

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 above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2010

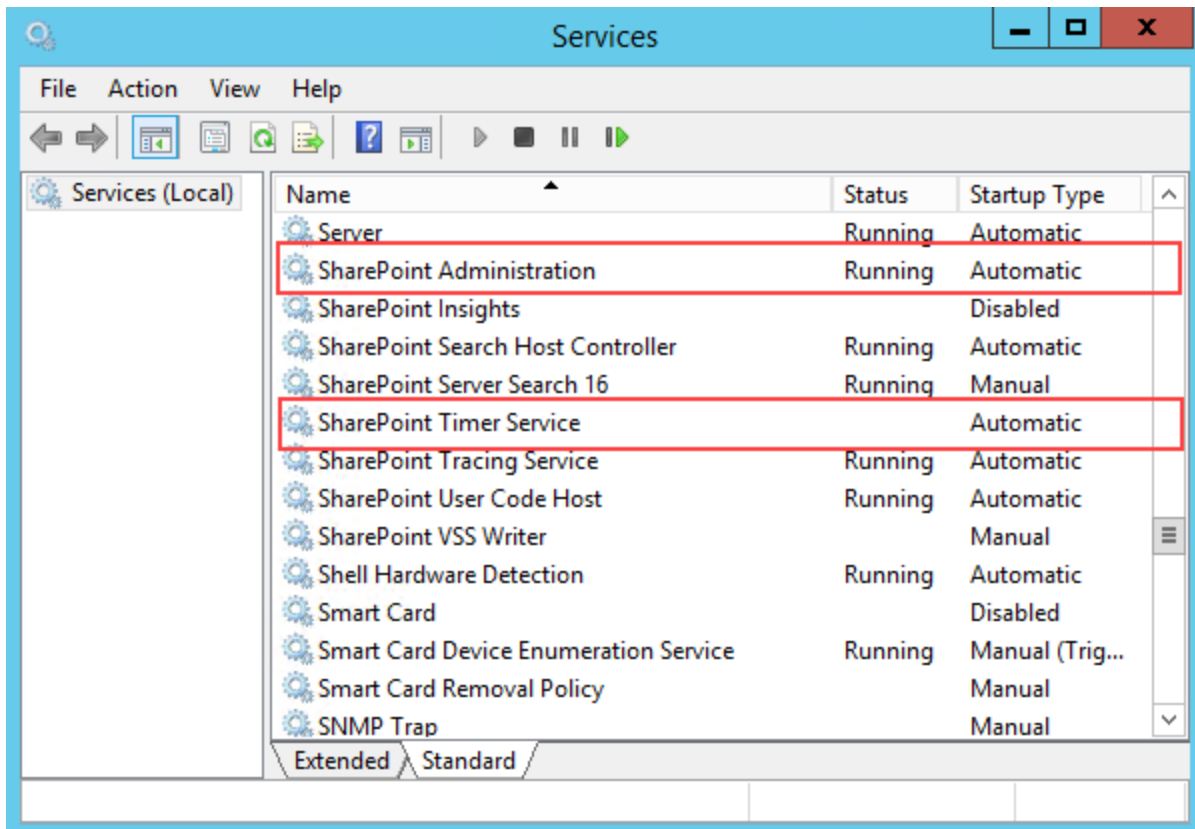
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft SharePoint Foundation 2010 SP1 or Microsoft SharePoint Server 2010 SP1 Microsoft .NET Framework 3.5
Browser	Microsoft Internet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

2.3 Installation

Follow these steps to install Classifier 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 Service**.



Classifier 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 Classifier 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.
- g. Click **Close** to finish the installation.

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 Classifier in **SharePoint 2013** 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 Classifier to SharePoint servers.

If you have installed BoostSolutions products before, please skip the steps of BoostSolutions 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 2013**

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

- **SharePoint 2016**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\16\BIN

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

```
stsadm -o addsolution -filename <full path\>BoostSolutions.SharePointClassifier.Platform15.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.DocumentNumberGenerator15.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.BulkPropertiesEditor15.3.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.BulkZipAndUnzip15.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.ItemAuditLog15.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.ListAdvancedFilter15.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.ListTransfer15.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.FoundationSetup15.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.SharePointClassifier.Platform15.2.wsp -
allowgacdeployment -url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.DocumentNumberGenerator15.2.wsp -
allowgacdeployment -url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.BulkPropertiesEditor15.3.wsp -
allowgacdeployment -url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.BulkZipAndUnzip15.2.wsp -allowgacdeployment -
url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.ItemAuditLog15.2.wsp -allowgacdeployment -url
[virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.ListAdvancedFilter15.2.wsp -allowgacdeployment -
url [virtual server url] -immediate

stsadm -o deploysolution -name BoostSolutions.ListTransfer15.2.wsp -allowgacdeployment -url
[virtual server url] -immediate
```

```
stsadm -o deploysolution -name BoostSolutions.FoundationSetup15.1.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.SharePointClassifier.Platform15.2.wsp
stsadm -o displaysolution -name BoostSolutions.DocumentNumberGenerator15.2.wsp
stsadm -o displaysolution -name BoostSolutions.BulkPropertiesEditor15.3.wsp
stsadm -o displaysolution -name BoostSolutions.BulkZipAndUnzip15.2.wsp
stsadm -o displaysolution -name BoostSolutions.ItemAuditLog15.2.wsp
stsadm -o displaysolution -name BoostSolutions.ListAdvancedFilter15.2.wsp
stsadm -o displaysolution -name BoostSolutions.ListTransfer15.2.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup15.1.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.ListManagement -url [site collection url] -force
stsadm -o activatefeature -name SharePointBoost.ListManagement.AutoNumber -url [site collection url] -force
stsadm -o activatefeature -name SharePointBoost.ListManagement.BatchEdit -url [site collection url] -force
stsadm -o activatefeature -name SharePointBoost.ListManagement.DocShare -url [site collection url] -force
stsadm -o activatefeature -name SharepointBoost.ListManagement.Audit -url [site collection url] -force
stsadm -o activatefeature -name SharePointBoost.ListManagement.AdvancedFilter -url [site collection url] -force
stsadm -o activatefeature -name SharePointBoost.ListSync -url [site collection url] -force
```

To remove Classifier from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.SharePointClassifier.Platform15.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.DocumentNumberGenerator15.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.BulkPropertiesEditor15.3.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.BulkZipAndUnzip15.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.ItemAuditLog15.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.ListAdvancedFilter15.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.ListTransfer15.2.wsp -immediate -url [virtual server url]
```

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup15.1.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.SharePointClassifier.Platform15.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.DocumentNumberGenerator15.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.BulkPropertiesEditor15.3.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.BulkZipAndUnzip15.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.ItemAuditLog15.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.ListAdvancedFilter15.2.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.ListTransfer15.2.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.SharePointClassifier.Platform15.2.wsp
```

```
stsadm -o deletesolution -name BoostSolutions.DocumentNumberGenerator15.2.wsp
```

```
stsadm -o deletesolution -name BoostSolutions.BulkPropertiesEditor15.3.wsp
```

```
stsadm -o deletesolution -name BoostSolutions.BulkZipAndUnzip15.2.wsp
```

```
stsadm -o deletesolution -name BoostSolutions.ItemAuditLog15.2.wsp
```

```
stsadm -o deletesolution -name BoostSolutions.ListAdvancedFilter15.2.wsp
```



```
stsadm -o deletesolution -name BoostSolutions.ListTransfer15.2.wsp
```

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.FoundationSetup15.1.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.FoundationSetup15.1.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.FoundationSetup15.1.wsp
```

2.7 Feature Activation

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

- a. Go to > **Site Settings** > **Site Collection Administration** > **Site collection features**.
- b. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

Name	Status
 BoostSolutions Bulk Properties Editor 3.6.705.0 Enable SharePoint users to index, tag and approve/reject multiple documents or list items. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 BoostSolutions Bulk Zip & Unzip 2.9.1212.0 Enable SharePoint users to email documents, zip & unzip documents, and download multiple documents at a time directly in SharePoint document library. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 BoostSolutions Document Number Generator 2.7.929.0 Enable SharePoint users to create document numbering schemes to uniquely identifies and classifies a document, making it easier for users to retrieve the right information. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 BoostSolutions ECM Framework 2.10.916.0 This is the fundamental feature for BoostSolutions ECM solution. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 BoostSolutions Item Audit Log 2.8.928.0 Audit and display detailed access history for SharePoint documents and list items. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 BoostSolutions List Advanced Filter 2.12.927.0 Enable SharePoint users to create custom filter to find information in SharePoint list or document library. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>
 BoostSolutions List Transfer 2.12.922.0 Copy & move documents or items from one list to another list directly within SharePoint. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/> <input checked="" type="button" value="Active"/>

3. Organize Information

Note

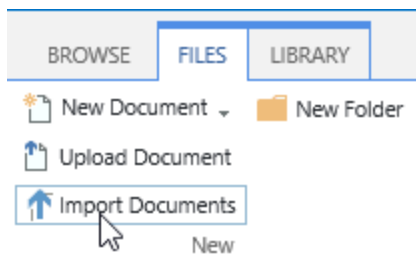
Users need at least **Contribute** permission level to access Bulk Properties Editor.

3.1 Bulk Edit Properties

3.1.1 Import Documents

This function allows you to import multiple documents into the SharePoint document library and index them by entering metadata information.

- a. Click **Import Documents** on the ribbon.




- b. You will see the following dialog window:

Import Documents ✕

Add as a new version to existing files

Destination Folder
Specify the folder in this document library where the document should be saved.

Folder:












Drag Files and Folders Here

[Browse for files instead](#)

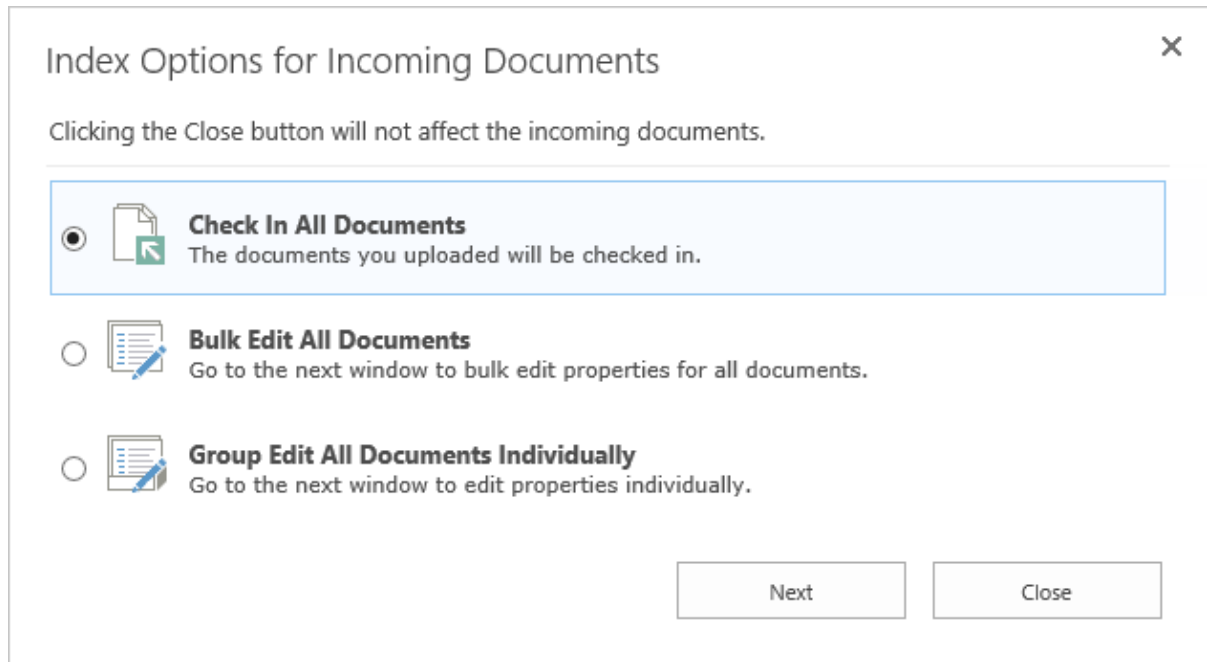
0 out of 0 files uploaded
Total upload size: 0 KB

- c. You can browse files on your computer or drag and drop files directly into this window. Click OK and files will be ready to upload.

Type	Name	Size	Status
	PIMS_2214_CLME_PRODROC_PDF_B.pdf	250 KB	 Done (File checke...
	PIMS_2215_CLME_PRODROC_PDF_A.pdf	122 KB	 Done (File checke...
	PIMS_2215_CLME_PRODROC_PDF_B.pdf	122 KB	 Done (File checke...
	PIMS_2216_CLME_PRODROC_PDF_B.pdf	122 KB	 Uploading...
	PIMS_2223_CLME_PRODROC_PDF_A.pdf	122 KB	

3 out of 5 files uploaded
Total upload size: 737 KB

- d. Once the files are uploaded you will be redirected to a new window:



There are 3 options you can use for the documents which you have just uploaded:

- **Check In All Documents:** This option will navigate you to the document check in page where you are able to check in all document in bulk. See section [3.1.3](#) for details.
- **Bulk Edit All Documents:** This option will navigate you to the bulk edit documents properties page. See section [3.1.2](#) for details.
- **Group Edit All documents Individually:** This option will navigate you to the Group Edit page. See section [3.1.2](#) for details.

Note

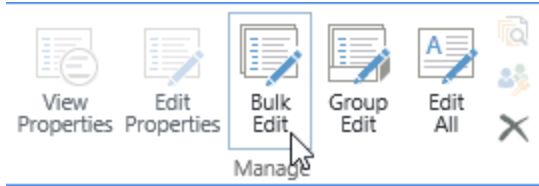
The Import Documents function is currently compatible with Internet Explorer only. In all other browsers this button will be grayed.

3.1.2 Index Multiple Documents

- **Bulk Edit**

This function allows you to bulk edit documents properties so documents can be quickly indexed.

- a. Select the desired documents and click the **Bulk Edit** button in the Documents tab.



b. A dialog box will appear as follows:

Bulk Edit X

EDIT

Save Cancel

Tags & Notes
 Index

Commit

Select All

<input checked="" type="checkbox"/> Title	<input type="text"/>	
<input checked="" type="checkbox"/> Categories *	<input type="text"/>	
<input checked="" type="checkbox"/> Owner *	<input type="text"/>	
<input checked="" type="checkbox"/> Project Number	<input type="text"/>	
<input checked="" type="checkbox"/> Due Date	<input type="text"/>	
<input checked="" type="checkbox"/> Business Lines *	<input type="text"/>	
	<input type="checkbox"/> Append changes to existing value	
<input checked="" type="checkbox"/> Countries *	<input type="text"/>	
<input checked="" type="checkbox"/> Languages *	<input type="text"/>	
	<input type="checkbox"/> Append changes to existing value	
<input checked="" type="checkbox"/> Enterprise Keywords	<input type="text"/>	
	<input type="checkbox"/> Preserve Authors and Timestamps	
	<input type="checkbox"/> Check In after Save	

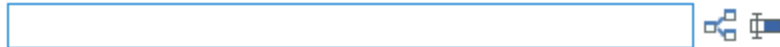
5 Document(s)


OKCancel

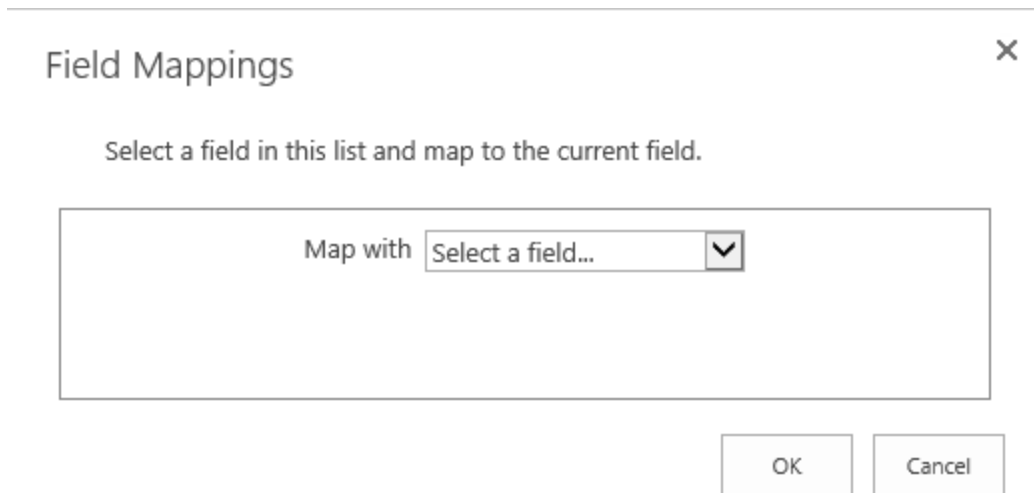
There is a checkbox along the left side of each field. The * (asterisk) indicates that this field is required and cannot be left empty once it is checked.

You can retain the existing value by unselect the checkbox.

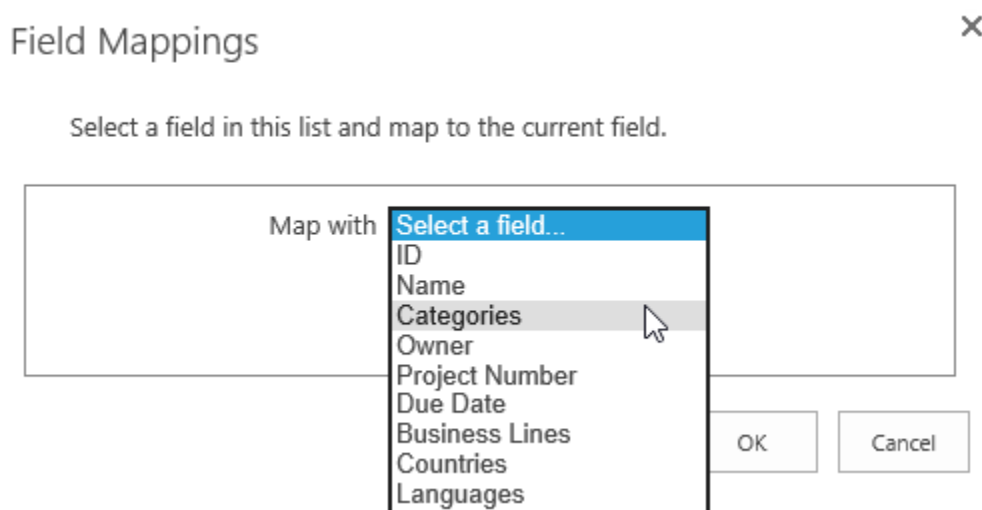
The  icon on the right side of each field indicates the **Field Mapping** function:



Field Mapping is used to dynamically map and assign another field to the current field. When you click this  icon you will bring up the Field Mapping window.





In the **Map with** dropdown menu you can select any available field. Please note that the availability of fields will vary.




Select a field you want to use and click **OK**. The **Field Mappings** window will close and a new  icon will appear on the right side of the field.

Mapped with <Name> 



The  icon indicates the custom value that you set. If you click on this  icon, the field mapping will be lost and the field will revert back to its original state.





Select the  icon to fill or replace all fields for the selected documents or items. This function will fill fields if they are empty or replace old values with new ones.

Select the  icon to only fill empty fields for the selected documents or items.

Append changes to existing value: Check this option if you want to append changes to an existing value for a respective field.

Business Lines *






Append changes to existing value

Note
This option is only available for multiple-value fields, [Person and group] and [Managed Metadata].

Preserve Authors and Timestamps: Preserve the value for system reserved fields (Modified & Modified by)

Preserve Authors and Timestamps 

Check In after Save: The selected documents will be checked in after saving.

Preserve Authors and Timestamps 

Check In after Save

Version

What kind of version would you like to check in?

- Minor version (draft)
- Major version (publish)
- Overwrite the current minor version

Retain Check Out

Retain your check out after checking in?

- Yes No

Comments

Comments:

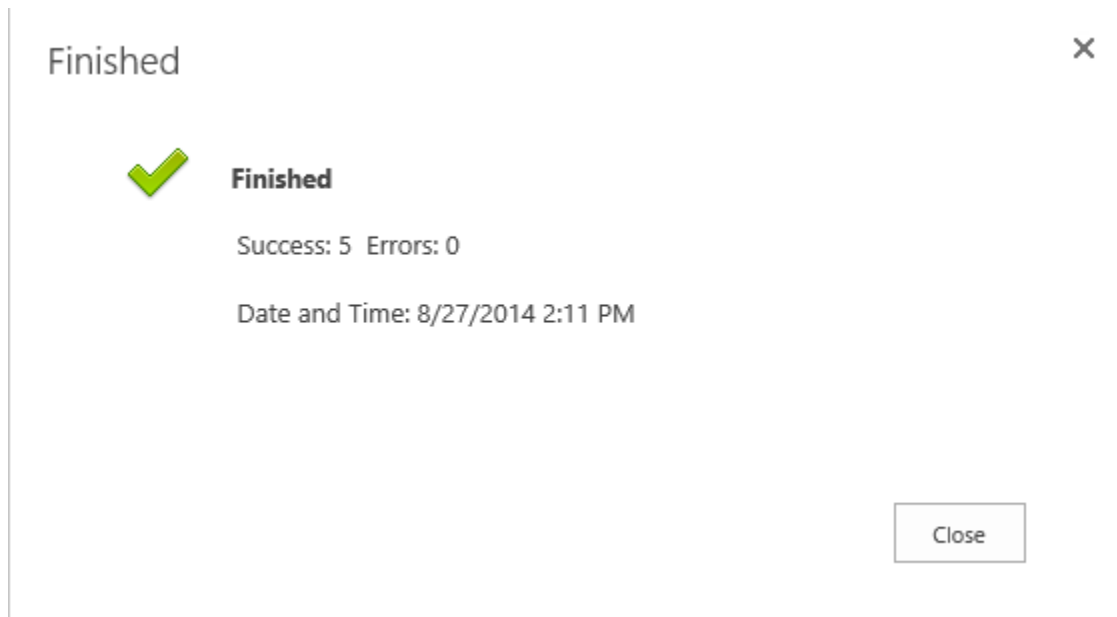
Change Content Type

If you enabled **Allow management of content types** in the Library Settings, and have different content types for a library, there is a **Content Type** option at top of all of the columns.

You can opt to change the content type according to your needs.



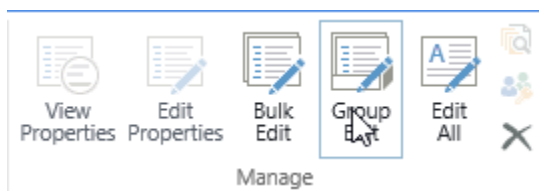
- c. Fill in these columns and click **OK**. When the bulk edit operation is finished, a window will pop-up as follows:



- **Group Edit**

This function gives you the ability to edit multiple documents individually.


- a. Click the **Group Edit** button on the ribbon menu to open the **Group Edit** window.





- b. A dialog box will appear as follows:


Group Edit - PIMS_2214_CLME_PRODUC_PDF_B.pdf
✕


EDIT



Save & Next
Commit


Cancel



Previous



Next



Preview



Tags & Notes
Index


Content Type Document ▼
Create a new document.



Name * .pdf 


Title 


Categories * 


Owner * 


Project Number 


Due Date  

Business Lines * 

Countries * 

Languages * 

Enterprise Keywords 

Preserve Authors and Timestamps 


Check In after Save











This document was checked out to i:0#.w|br\annette.

<
1 of 5
>

Save & Next

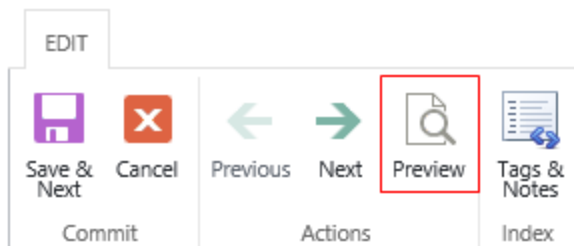
Cancel

The  icon on the right side of the field is set as a default value for the next document/list item. When clicked the icon will change to a green checkmark as shown below:

Title	<input type="text" value="PIMS_2214_CLME_PRODUC_PDF_B"/>	 
Categories *	<input type="text" value="FuenceKM"/>	 
Owner *	<input type="text" value="Annette Young"/>	   
Project Number	<input type="text" value="PDF-PIMS-5/15/2014"/>	 

The respective field value will be kept for next document or list item until you manually modify it. This can save you a lot of time, especially if most fields are exactly the same or similar and when only a few items need to be changed.

If you need to preview the document when entering metadata, simply click the Preview button on the ribbon menu and a new window will open.

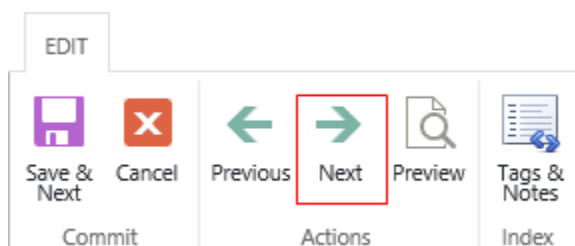



Note

Currently only PDF documents and Images are supported. Click the (x) on the upper right-hand corner of the window to close the document preview window.

If you have installed Document Viewer, more document types are available. For more details, please refer to [Compatibility with Document Viewer](#).

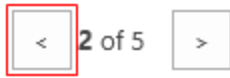
If no fields need to be changed in the current document, simply click the Next button on the ribbon menu and it will skip the current document or list item.



To navigate back to the previous document, click the  button on the lower left corner of the Group Edit window.

Check In after Save

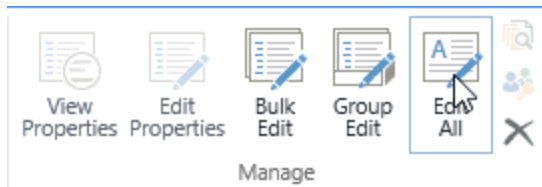
This document was checked out!



- **Edit All**

This function gives you an easy way to edit all documents in a library or list.

- a. Click the **Edit All** ribbon button in the Documents tab.

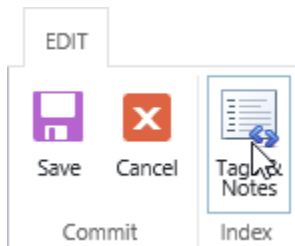


- b. When the dialog box appears, follow the steps (starting with step 2) found in Section [3.1.1](#).

- **Bulk Tag & Notes**

This function allows you to add **tags & notes** for multiple documents or list items in bulk.

- a. Click the **Tags & Notes** button on the Bulk Edit ribbon.



- b. A dialog window will open as follows:

Bulk Add Tags & Note



Tags

Note Board

My Tags

 Private: Other people cannot see that you tagged this item. The tag text is public.

 Append changes to existing tags.

Save

There are no tags on this page. You can use tags to classify and remember pages, documents, or even external sites. The tags you create appear here and [under your profile](#) for easy retrieval.

[Right click or drag and drop this link to your browser's favorites or bookmarks toolbar to tag external sites.](#)

In the text field, you are able to enter tags. Click **Save** and the changes will be save to the selected documents or list items.

Private: With this option selected, other people cannot see that you tagged this item, but the tag text is public.

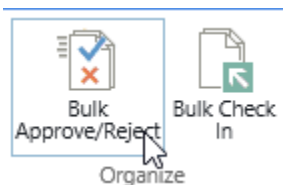
Appending changes to existing tags: With this option enabled, the original tags will not be overwritten when you click Save and all tags entered in this field will be appended to existing values.

3.1.3 Organize Documents

- **Bulk Approve/Reject**

Native SharePoint **Approve/Reject** function does not allow you to approve or reject multiple documents/list items in bulk. However, with **Bulk Properties Editor** this is possible.

- Select the desired documents or list items which have published. For example, Approval Status is Pending. Then click the **Bulk Approve/Reject** button in the Documents tab.



- You will see the following dialog window:

Approve/Reject



Approval Status

Approve or reject list items.

- Approved.** These items will become visible to all users.
- Rejected.** These items will be returned to its creator and only be visible to its creator and all users who can see draft items.
- Pending.** These items will remain visible to its creator and all users who can see draft items.

Comment

Use this field to enter any comments about why these items were approved or rejected.

c. On the **Approve/Reject** page:

- Select the **Approval Status** in the first selection.
- Enter any comments in the text box below, and then click **OK**.
- The Approval Status for the selected documents or list items will be changed.

Note

You have to select at least one previously published document before you click the **Bulk Approve/Reject** button or it will display a notice in notification bar similar to the following.

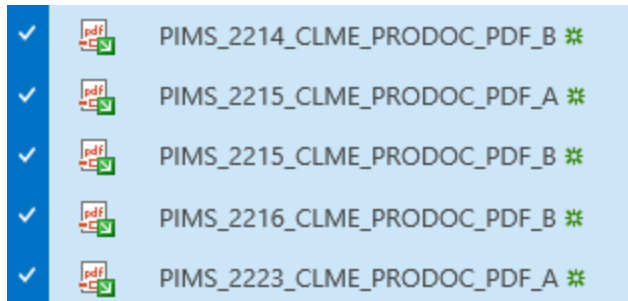
No valid items have been selected for the current operation.

- **Bulk Check In**

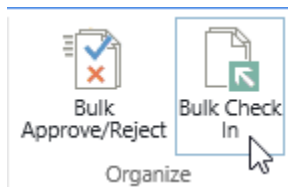
This function helps users to mass check in documents in a document library.

To check in multiple documents at a time, you need to:

- a. Select the documents that you want to check in.



- b. Click the **Bulk Check In** button on the ribbon.



Note

You have to select at least one check-out document or the **Bulk Check In** button will be grayed and not available to click. Furthermore, all documents that are checked out inside folders that you select will be checked in.

- c. On the check in page:

- Select the type of version you want to check in.
- Next select whether you want to retain your check out to continue editing.
- Enter any comments in the text box and then click **OK**.

Check in Multiple Documents ×

Version

Select the type of version you would like to check in.

What kind of version would you like to check in?

- Minor version (draft)
 Major version (publish)
 Overwrite the current minor version

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

Comments

Enter comments describing what has changed in this version.

Comments

OK

Cancel

Note

Check In options depend on the versioning settings in your current document library. If no versioning is chosen in the Versioning Settings page then there will not be version selection option in the Check In Multiple Documents window.

3.1.4 Manage Bulk Properties Editor Settings

Manage Settings on Site

This product provides a settings page to configure and edit options when indexing multiple documents or list items. You can manage settings on a site or site collection level.

After the settings are configured on a site, the sub sites or contained lists can inherit or customize (stop inheriting) settings.

Follow these steps to enter the Bulk Properties Editor Settings page:

- a. Go to > **Site Settings** > **BoostSolutions Software** > **Bulk Properties Editor Settings**.

If you want to manage settings in a root site, under **Site Collection Administration**, click **Go to top level site settings**.

- b. In the settings page, you can configure the following options:

If you enter the settings page from a sub site, you can choose to inherit or stop inheriting settings from a parent site.

Inherit settings Stop inheriting settings

To customize the settings for a site, select **Stop inheriting settings** and then configure each section.

General Settings

General Settings

Specify edit options when users index multiple documents or list items in this list.

- Force input if list contains required fields
In the bulk edit page, checkboxes for required fields will always be checked by default.
- Fill in empty metadata fields only
In the bulk edit page, only empty fields can be replaced with values that users enter.
- Expand the **Check In After Save** option
Users will always see this option expanded whenever they are in metadata bulk edit page.
- Mark all fields as checked by default
In the bulk edit page, the checkboxes for all fields will be checked by default.

- **Force input if list contains required fields:** In the bulk edit page, checkboxes for required fields will always be checked by default.

If this option is selected, users must fill all the required fields and cannot unselect the checkboxes of required fields.

- **Fill in empty metadata fields only:** In the bulk edit page, only empty fields are replaced with a value that users have entered
- **Expand the Check In After Save option:** Users will always see this option expanded in the metadata bulk edit page.
- **Mark all fields as checked by default:** In the bulk edit page, the checkboxes for all fields will be checked by default.

Enable Edit All

In this section, you can specify if the **Edit All** command is available and decide who can access this function in the document library or list.

Enable Edit All

Specify whether you want to enable the Edit All function and which users can use this function.

Make the Edit All command available on the ribbon

Yes No

Specify users who can use this function:

Allow all users
 Allow specified users
 Block specified users

To make the Edit All command available on the ribbon, click **Yes**; otherwise, click **No**. Once you select No, the Edit All command will not appear on the ribbon.

Specify which users can access this feature:

- **Allow all users**

All users can use this feature in this document library or list.

- **Allow specified users**

Only specified users can access this feature in this document library or list. You can input any user, SharePoint groups and/or domain group.

Allow specified users

Design Center Members



- **Block specified users**

All users except the specified users can access this feature in this document library or list. You can input any user, SharePoint groups and/or domain group.

Block specified users

BR\document team



Preserve Options

In this section, you can specify if the **Preserve Authors and Timestamps** function is available and decide who can access this function in document library or list.

Preserve Options

Specify who can use this option when editing documents.

Make the option **Preserve Authors and Timestamps** available.

Yes No

Specify users who can use this function:

Allow all users
 Allow specified users
 Block specified users

To make the **Preserve Authors and Timestamps** function available on the Edit Properties window, click **Yes**; otherwise, click **No**. Once you select No, the **Preserve Authors and Timestamps** function will not appear on the Edit properties window.

Specify which users can access this feature:

- **Allow all users**

All users can use this feature in this document library or list.

- **Allow specified users**

Only specified users can access this feature in this document library or list. You can input any user, SharePoint groups and/or domain group.

- Allow specified users**

Design Center Members



- **Block specified users**

All users except specified users can access this feature in this document library or list. You can input any user, SharePoint groups and/or domain group.

- Block specified users**

BR\document team



c. Click OK to save settings.

Manage Settings on List

Besides managing settings on a site level, you can configure the above settings for an individual list or library.

- a. To access this page, go to: **Library Settings – Bulk Properties Editor Settings**.

General Settings

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Column default value settings](#)
- [Document Number Generator Settings \(Powered by BoostSolutions\)](#)
- [Rating settings](#)
- [Audience targeting settings](#)
- [Bulk Properties Editor Settings \(Powered by BoostSolutions\)](#)
- [Advanced Filter Settings \(Powered by BoostSolutions\)](#)
- [Auto Complete Settings \(Powered by BoostSolutions\)](#)
- [List Transfer Settings \(Powered by BoostSolutions\)](#)
- [Form settings](#)

- b. In the Bulk Properties Editor Settings page, click **Stop inheriting settings**, and then configure the unique settings.

Inherit settings Stop inheriting settings

If you want to use settings from a parent site, click Inherit settings.

- c. Configure the following sections: General settings, Enable Edit All and Preserve Options. The steps for configuration are similar to those found in Section [3.1.4](#).

3.1.5 Configure Auto Complete feature

This feature allows you to see the relevant records as you type when editing SharePoint records.

- a. To access the Auto Complete Settings page, go to the **Library Settings – Auto Complete Settings**.

General Settings

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Column default value settings](#)
- [Document Number Generator Settings \(Powered by BoostSolutions\)](#)
- [Rating settings](#)
- [Audience targeting settings](#)
- [Bulk Properties Editor Settings \(Powered by BoostSolutions\)](#)
- [Advanced Filter Settings \(Powered by BoostSolutions\)](#)
- [Auto Complete Settings \(Powered by BoostSolutions\)](#)
- [List Transfer Settings \(Powered by BoostSolutions\)](#)
- [Form settings](#)

- b. You will see the following settings:

Select the desired column you want to see the relevant records when editing properties.

Auto Complete

Select Fields





Select the fields which you want to enable Auto Complete function. Once the function is enabled, there will be suggestions when you are typing in specific fields.

- Select All**
- Title
- Project Number
- Enterprise Keywords

Note

The Auto Complete function currently supports column type as a **Single line of text ONLY**.

- c. When you edit the selected properties in the bulk edit page, it will auto display the relevant records in drop-down list.

Name *	<input type="text" value="PIMS_2215_CLME_PRODUC_PDF_B"/> .pdf
Title	<input type="text" value="PIMS_2215_CLME_PRODUC_PDF_B"/>
Categories *	<input type="text" value="FuenceKM"/> 
Owner *	<input type="text" value="Annette Young x"/>
Project Number	<input type="text" value="P"/> 
Due Date	<input type="text" value="PDF-PIMS-5/15/2014"/>  <input type="text" value="PDF-PIMS-5/16/2014"/>
Business Lines *	<input type="text"/> 

Note

Auto display will display at most 30 relevant records from the current library or list.

3.2 Generate Document Number

3.2.1 Access Document Number Generator

Enter the **Document Library Settings** page and click the **Document Number Generator Settings** link under the **General Settings** tab.

General Settings

- [List name, description and navigation](#)
- [Versioning settings](#)
- [Advanced settings](#)
- [Validation settings](#)
- [Column default value settings](#)
- [Document Number Generator Settings \(Powered by BoostSolutions\)](#)
- [Rating settings](#)
- [Audience targeting settings](#)
- [Bulk Properties Editor Settings \(Powered by BoostSolutions\)](#)

Click **Add New Scheme**.

Click **Add New Scheme** to add a new document numbering scheme.

Whenever a scheme is created, it will be displayed under its respective content type. Use icon buttons on each line to manage schemes.

 **Add New Scheme**

3.2.2 Add a Scheme

Click **Add New Scheme** to add a new document numbering scheme. You will see a new dialog window.

Scheme Name: Enter a name for this scheme.

Create Document Numbering Scheme

×

Scheme Name *

Enter a name for this scheme.

Content Type *

Specify which document type in this document library should use the scheme.

Select a content type:

Document ▼

Which field should use the scheme:

Name ▼

Content Type: Specify which field should use this scheme. Note, you need to select content type first to determine the specific field.

All content types attached in the document library can be selected.

Content Type *

Specify which document type in this document library should use the scheme.

Select a content type:

Document
 Form
 Picture

the scheme:

Select one field to apply the scheme, only single line of text column is supported.

Which field should use the scheme:

Name
 Title
 Project Number
 Enterprise Keywords

Note

1. Name is a specific column and cannot contain these characters: \ / : * ? " < > |.
If you insert SharePoint columns in the formula and apply it to a Name column with these characters, then the new name cannot be generated.
2. Multiple schemes cannot be applied to one column in one Content Type.

Formula: In this section you can use **Add element** to add a combination of variables and separators and use **Remove element** to remove them.

Formula *

Use **Add element** to add a combination of variable and separator and use **Remove element** to remove it.

[ID]-[Created]-[Created By]-[Version]

ID	▼	-	▼	Created	▼	-	▼
Created By	▼	-	▼	Version	▼		▼

 Add element

 Remove element

Columns	<p>Almost SharePoint columns can be inserted in the formula, include: Single line of text, Choice, Number, Currency, Date and Time, People or Group, Managed Metadata.</p> <p>Also, you can insert following SharePoint metadata in formula, include: [Document ID Value], [Content Type], [Version], etc.</p>
Functions	<p>Document Number Generator allows inserting following functions in the formula.</p> <p>[Today]: Get the current date of today. [Now]: Get the current date and time. [Year]: Get the year of current year. Example: 2013 [Parent Folder Name]: Get the folder name which the document located. [Parent Library Name]: Get the library name which the document located. [Document Type]: Get the document type, e.g., docx, pdf ... [Original File Name]: Get the file name.</p>
Customized	<p>Custom Text: You can select Custom Text and enter anything you want. If any invalid characters are detected then the background color of this field will be changed to indicate if that there are errors.</p>
Separators	<p>When you add multiple elements in a formula, you can specify the separator to conjoin these elements.</p> <p>The connectors include: - _ / \ (The / \ separators cannot be used in the Name column.)</p>

Date Format: In this section you can specify which date format you want to use.

Date Format

Specify a date format.

Regenerate

Specify if numbers are regenerated when documents are updated.

ever document
(in)

OK Cancel

Note

1. To avoid invalid characters, yyyy/mm/dd and dd/mm/yy formats should not be specified for the Name column.
2. This option is useful only when you add at least one [Date and Time] type column in the Formula.

Regenerate: This option determines whether you want to regenerate the document numbering scheme when the specific document is edited, saved or checked in.

Regenerate

Specify if numbers are regenerated when documents are updated.

Regenerate document number (whenever document properties are edited, saved and checked in)


Note: When this option is enabled, the column value user entered in the SharePoint item edit form will be overwritten automatically.




3.2.3 Manage Schemes

Once a document numbering scheme is successfully created, the specific scheme will be shown under its respective content type.


Click **Add New Scheme** to add a new document numbering scheme.


Whenever a scheme is created, it will be displayed under its respective content type. Use icon buttons on each line to manage schemes.


 **Document** (1 scheme for this Content Type)

Scheme Name	Used For Field Formula	Modified	Modified By	Edit	Delete	Apply	
Report Naming	Name	[ID]-[Created]-[Created By]-[Version]	8/27/2014 6:23 PM	Annette Young			

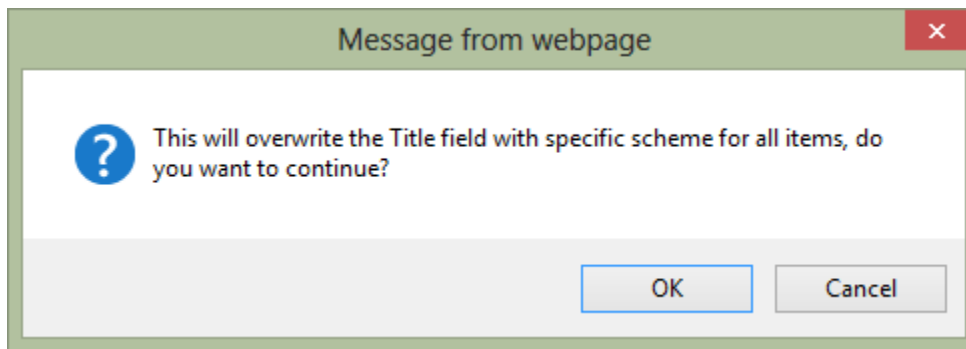
 **Add New Scheme**

Use the icon  to edit the scheme.

Use the icon  to delete the scheme.

Use the icon  to apply this scheme to all documents stored in the current document library.

Note: This action is dangerous because the value of a specific field for **ALL** documents will be overwritten.



Click **OK** to confirm and continue.

There will be an icon that shows the scheme is currently running. Once it is done, it will display an icon indicating the results.

After scheme configured, the unique number will be assigned to the incoming documents as follows.

✓		Name ↓	Version	Modified By
		45-08-28-Annette Young-0.1 	... 0.1	<input type="checkbox"/> Annette Young
		44-08-28-Annette Young-0.1 	... 0.1	<input type="checkbox"/> Annette Young
		43-08-28-Annette Young-0.1 	... 0.1	<input type="checkbox"/> Annette Young
		42-08-28-Annette Young-0.1 	... 0.1	<input type="checkbox"/> Annette Young
		41-08-28-Annette Young-0.1 	... 0.1	<input type="checkbox"/> Annette Young
		40-08-27-Annette Young-0.2	... 0.2	<input type="checkbox"/> Annette Young

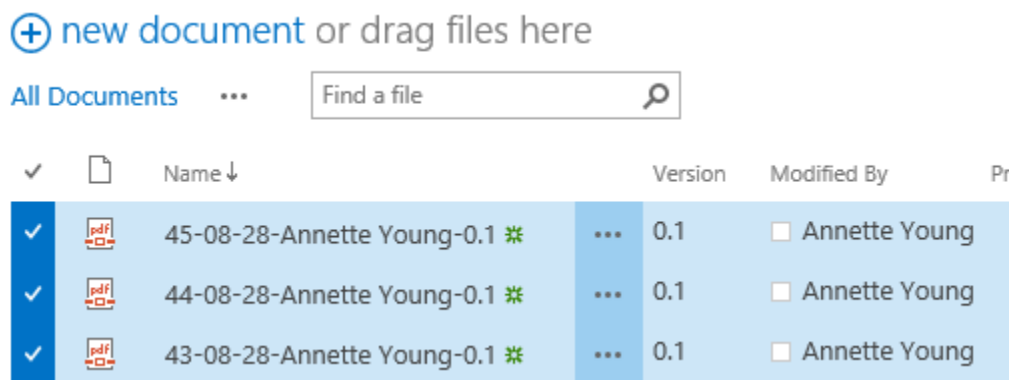
3.3 Copy & Move Documents

List Transfer can copy and move SharePoint documents or list items between lists, libraries or sites freely to help SharePoint end users easily transfer document and list items in SharePoint.

3.3.1 Copy Documents

Copy Documents enable users to duplicate documents or files between folders, document libraries/lists, and different sites/site collections.

- a. In the document library or list users can select documents or items which need to be copied. Batch documents are supported.



- b. After selected documents, click the **Copy Documents** button. It will show the following window:

Copy Documents ✕

Target
Specify which target list or folder you want to copy selected items to.

Specify destination:

[Enter destination URL...](#)

Overwrite existing files

Preserve Information
Select which information you want to preserve for items in the destination.

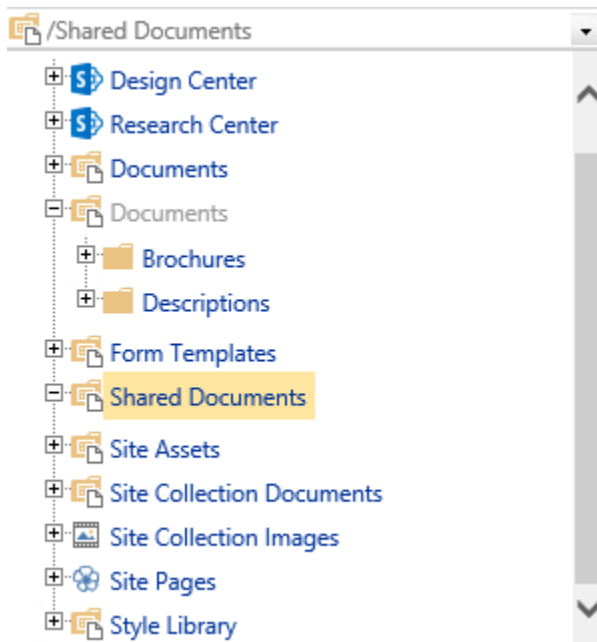
Item Permissions
 Version History
 Erase target version history
 Authors and Timestamps

Column Mapping
Map columns between source list and target list.

Map columns automatically
(Only copy values with same column name and type)

Map columns manually

- c. In the **Target** section users can browse and select the target list or folder to copy selected documents to.

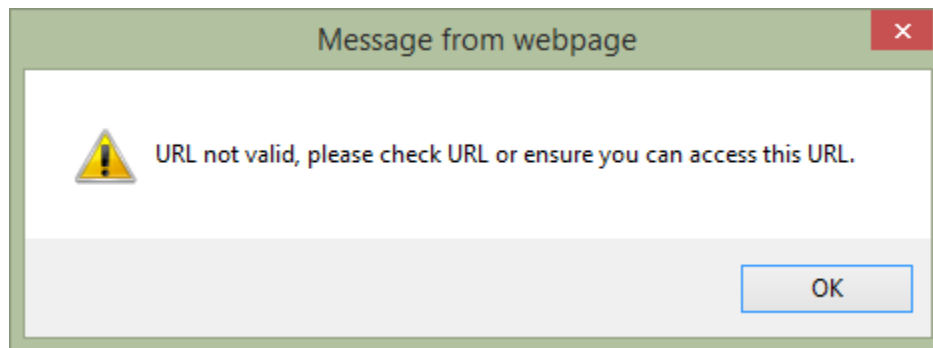


The option **Overwrite existing files** determines whether the original documents in the target should be overwritten by the selected documents.

Overwrite existing files

The option [Enter destination URL...](#) is used to specify the target location within another site collection. Click the link and you will see a text field where you can enter a list or folder URL:

Enter a valid URL and hit Check. An error message will be displayed if this application failed to connect to a specific target location.



If everything is OK then the URL will be replaced by an underlined address.

- d. In the **Preserve Information** section, there are three options available for you to decide whether to preserve specific information.

Preserve Information

Select which information you want to preserve for items in the destination.

- Item Permissions
 Version History
 Erase target version history
 Authors and Timestamps

Item Permissions: To preserve individual item permissions.

Version History: To preserve version history.

Erase target version history: When you move or copy a same document to the same library, you can select this option to remove the previous version history.

Authors and Timestamps: To preserve the creation and modification information (created, created by, modified and modified by)

This option requires user have full control permission on the target list. Otherwise, the option will be disabled.

- e. In the **Column Mapping** section there are two options to map columns when migrating documents:

Map columns automatically

Column Mapping

Map columns between source list and target list.

- Map columns automatically
(Only copy values with same column name and type)
- Map columns manually

Map column manually

By default, the columns with the same column name and type will be mapped automatically. However, you can still map columns manually by selecting the **Map columns manually** option.

- Map columns manually

Columns in Source List

- Approval Status *
- Business Lines *
- Categories *
- Comments
- Countries *
- Date Picture Taken
- Due Date
- Enterprise Keywords
- Keywords
- Languages *
- Name *
- Owner *
- Preview Image URL
- Project Number
- Title

Columns in Target List

Select a field...	▼
Select a field...	▼
Select a field...	▼
Comments	▼
Select a field...	▼
Date Picture Taken	▼
Select a field...	▼
Select a field...	▼
Keywords	▼
Select a field...	▼
Name	▼
Select a field...	▼
Preview Image URL	▼
Select a field...	▼
Title	▼

3.3.2 Move Documents

This function allows you to move documents or list items to another location. Click the **Move Documents** button to open the following dialog window.

Move Documents ✕

Target
Specify which target list or folder you want to move selected items to.

Specify destination:

[Enter destination URL...](#)

Overwrite existing files

Preserve Information
Select which information you want to preserve for items in the destination.

Item Permissions
 Version History
 Erase target version history
 Authors and Timestamps

Column Mapping
Map columns between source list and target list.

Map columns automatically
(Only copy values with same column name and type)

Map columns manually

The options are exactly the same as those found in the **Copy Documents** page.

FAQ

Sometimes, I find that the source document was not deleted when I moved a document.

1. A source document may not be removed when the following conditions exist:

- The source document contains major versions
- The "Authors and Timestamps" option is selected

Moving a document consists of two steps:

- a. Copying a document and its information to the target library
- b. Removing the source document

In SharePoint, the "Author and Timestamp" of major versions cannot be copied to the target document. In order to preserve this information, the source document will not be deleted after copying.

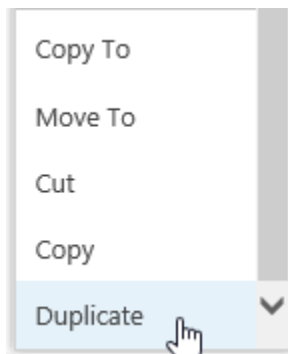
If you want to remove the source document, unselect the "Authors and Timestamps" option.

2. The second reason that causes this issue is insufficient permissions. "Delete item" permission is needed in the source list or library so that you can delete the source document.

3.3.3 Duplicate Document

You can quickly create a new document by duplicating a document through the **Duplicate** function. You can access this function by clicking **Duplicate** under the context menu.

- a. In the list, select one document which you want to duplicate, and click the **Duplicate** command on the context menu.



- b. A copy of the document will be created and all metadata will be automatically filled in the same as the selected document.

[+ new document](#) or drag files here

All Documents ... Find a file

✓		Name	...	Modified	Modified By	Categories
		CDC_UP_Product_Design_Template	...	3 days ago	<input type="checkbox"/> Annette Young	FuenceKM
		Export and Import - Copy ✱	...	A few seconds ago	<input type="checkbox"/> Annette Young	FuenceKM
		Export and Import	...	3 days ago	<input type="checkbox"/> Annette Young	FuenceKM
		PIMS_2214_CLME_PRODUC_PDF_B	...	3 days ago	<input type="checkbox"/> Annette Young	FuenceKM

3.3.4 Virtual Clipboards

You can also copy or move documents using the **virtual clipboard** function. The **source fields** and the **destination fields** will be mapped automatically.

The following shortcuts are supported:

Ctrl + Shift + X: Cut files to Clipboard

Ctrl + Shift + C: Copy files to Clipboard

Ctrl + Shift + V: Paste files

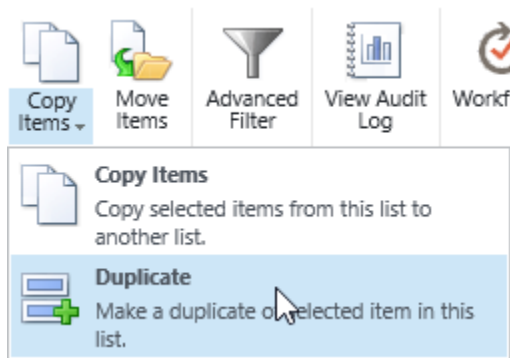
The following notification will appear at the top right of your browser.



3.3.5 Duplicate Item

You can quickly create a new item by duplicating an item through the **Duplicate Item** function. You can access this function by clicking **Duplicate** under the **Copy Items** menu.

- In the list, select an item which you want to duplicate, and click the **Duplicate** command on the ribbon.



- A new item will be created and all fields will be automatically filled in the same as the selected item.

List Transfer - Copy ✱	...	2.0	\$699.00	1	Yes	8/12/2014	HOGN
List Transfer	...	2.0	\$699.00	1	Yes	8/12/2014	HOGN

- You only need to modify the fields which are different, then click **Save**.

3.3.6 List Transfer Settings

Go to **Site Settings - BoostSolutions Software – List Transfer Settings**.

Here you can configure the default options for Copy and Move functions and logs on a specific site. Once you configure the options in this page, then all list and library in this site will obey the rules.

- Default Settings**

List Transfer Settings

Default Options

Specify the default options for Copy and Move transactions. Users can change the options for each transaction in the target selection dialog.

Default copy options:

- Preserve Item Permissions
- Preserve Attachments (for items only)
- Preserve Version History (for documents only)
- Preserve Authors and Timestamps (Created By, Modified By, Created, and Modified)

Default move options:

- Preserve Item Permissions
- Preserve Attachments (for items only)
- Preserve Version History (for documents only)
- Preserve Authors and Timestamps (Created By, Modified By, Created, and Modified)
- Preserve Document ID (for documents only)

Enable Logging

Specify whether you want to enable logging functionality. Log files will be saved to SharePoint log directory.

Enable Logging

Preserve Item Permissions: Keep permissions while copying or moving documents or items.

Preserve Attachments (for items only): Keep attachments while copying or moving items. This option is only available for copying or moving items.

Preserve Version History (for documents only): Keep the version history while copying or moving documents.

Preserve Authors and Timestamps: Keep Created By, Modified By, Created and Modified values while copying or moving documents or items.

Preserve Document ID: Keep document ID while moving document to another location. Once you select this option, the document ID will be forced kept while moving documents.

- **Logging**

This section allows you to set the log options.

Enable Logging

Specify whether you want to enable logging functionality. Log files will be saved to SharePoint log directory.

Enable Logging

After enable the option, the error and warning message will be recorded in the SharePoint logs under this location:

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

Open one log, and find List Transfer in Category field, then you can view the details.

- **Function Restriction**

This setting allow you to specify if the product feature available on the list or library, and who can use copy or move features.

Function Restriction

Specify which users will be able to access the copy and move functions in this document library or list.

Do you want to enable this restriction?

Yes No

Specify users who can use this function:

Allow all users
 Allow specified users
 Block specified users

To enable the product restriction on the list or library, select **Yes**; otherwise, select **No**.

There are 3 options to help you to decide which users can use product:

Allow all users: all user with sufficient permissions can use product in list or library.

Allow specified users: only the specified users can use product. For other users, the Copy/Move commands cannot be access on ribbon.

Allow specified users



You can input users, sharepoint group and domain group.

Block specified users: All users except the specified ones can use product. For the specified users, the Copy/Move commands cannot be access on ribbon.

Block specified users



You can input users, sharepoint group and domain group.

4. Save & Send

Note

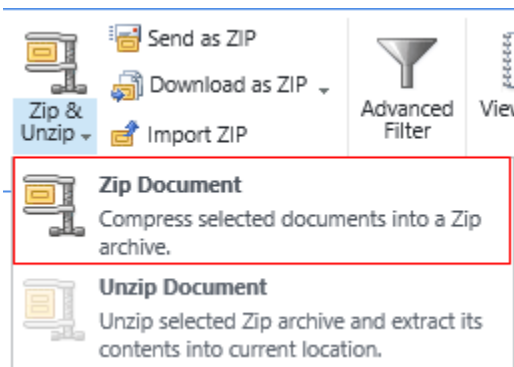
To use the zip and unzip features, users must have Contribute permission levels.

4.1 Zip or Unzip Documents

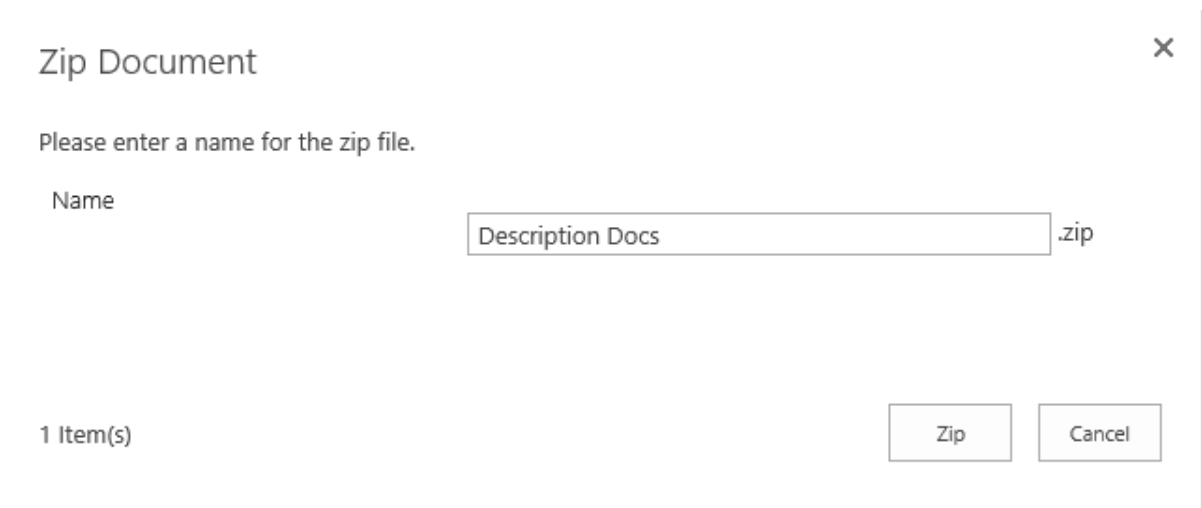
4.1.1 Zip Documents

This function enables users to compress documents as a zip file in the document library.

- Enter a document library, select the desired documents and click **Zip Document** under the **Files** tab.



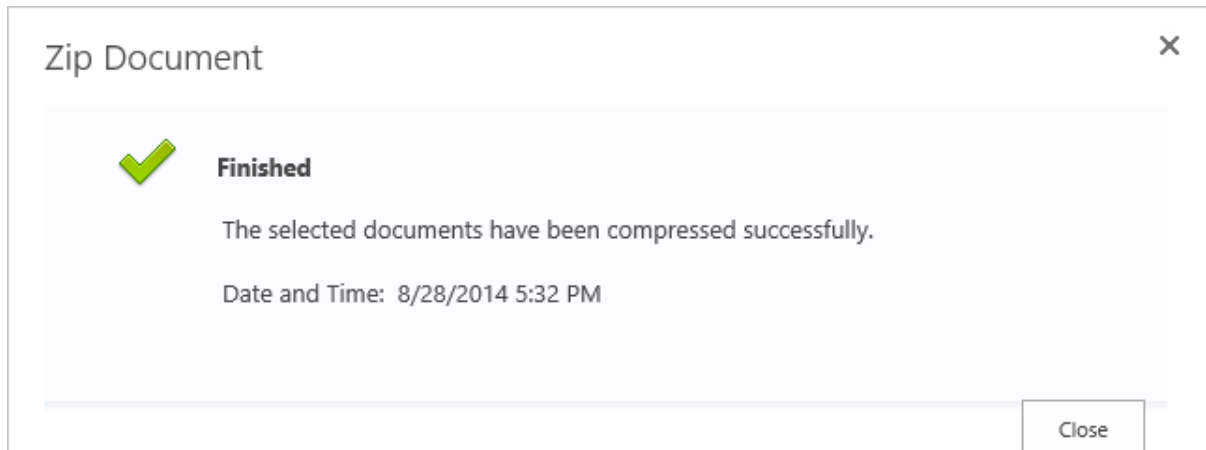
- A dialog window will appear as follows:



Note

If you select only one file, then the value in the name field will be the same as the source file by default.

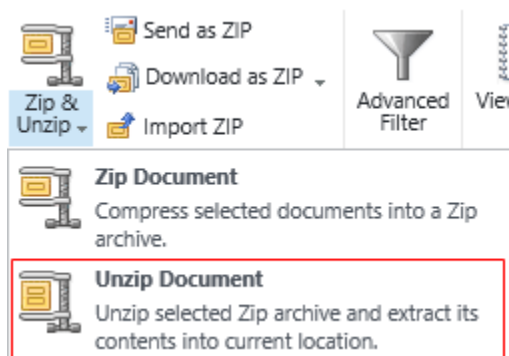
- c. Enter a name for the zip file and click the **Zip** button.
- d. Wait for the operation to complete. You will see the following message:



4.1.2 Unzip Documents

Extract any document or file from the zip file directly in the SharePoint document library.

- a. Select a Zip file from your document library and click **Unzip Document**.



- b. A dialog window will appear as follows:

Unzip Description Docs



The selected zip archive will be unzipped.

Options

Specify overwrite option and whether to extract to new folder.

Overwrite existing files

Remove ZIP file after extraction

Extract to new folder

Folder Name:

Unzip

Cancel

Overwrite existing files: Overwrite existing files in the current location.

Remove ZIP file after extraction: Delete the source Zip file after the extraction is successfully finished.

Extract to new folder: Extract all contents in the zip file to a new folder. The new folder name is the same as the zip file name by default and can be modified.

Note

If you select both **Overwrite existing files** and **Extract to new folder** and the Folder name you entered already exists in the library, then the new folder will overwrite the existing folder.

- c. Click the **Unzip** button. Wait until the operation is complete. You will see the following message:

Finished



Finished

The selected Zip archive has been extracted successfully.

Date and Time: 8/28/2014 5:38 PM

Close

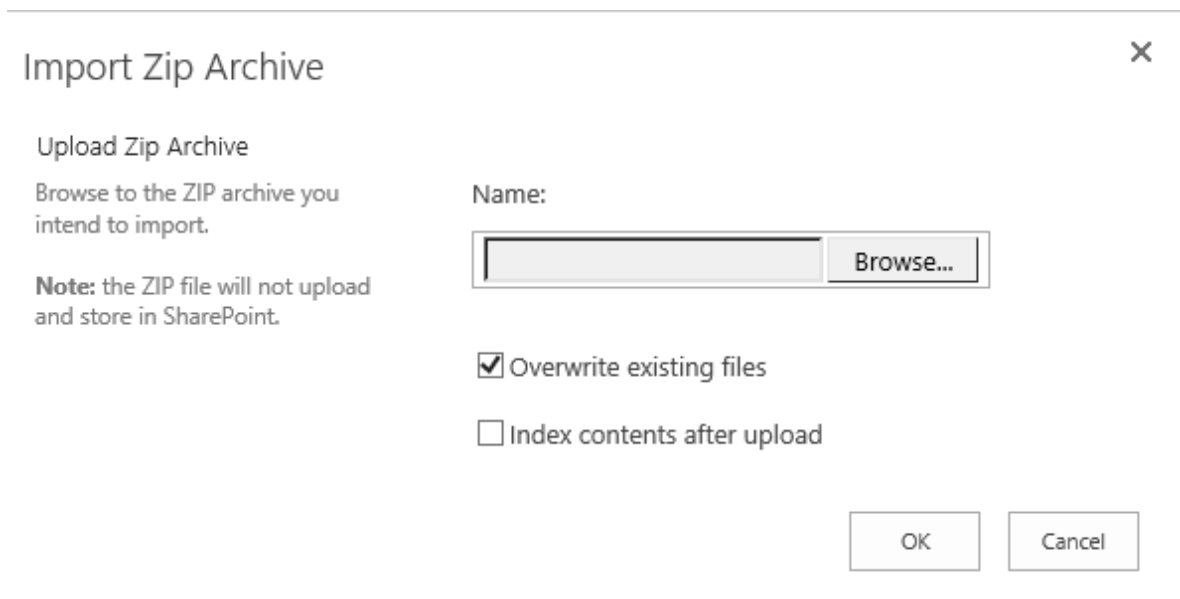
Note

The **Unzip Document** button is only available when you select a Zip file in the SharePoint document library. This button will be disabled when multiple documents are selected or if there is no zip file.

4.2 Import ZIP files

This function helps users to upload documents or files from a zip file to a document library.

- a. Click the **Import ZIP** button in the ribbon and a dialog window will appear as follows:



Import Zip Archive

Upload Zip Archive

Browse to the ZIP archive you intend to import.

Note: the ZIP file will not upload and store in SharePoint.

Name:

Browse...

Overwrite existing files

Index contents after upload

OK Cancel

Overwrite existing files: Overwrite existing files in the current location.

Index content after upload: Edit document properties for the documents after they have uploaded successfully. This option will redirect you to the bulk edit page.

Note

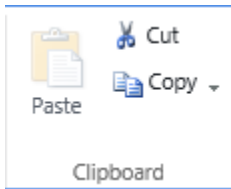
The **Index contents after upload** feature is only available when the **Bulk Properties Editor** product is installed on your SharePoint.

- b. Select a zip file from your local computer and click **OK**.
- c. Wait for the operation to finish; your documents will be uploaded into the document library.

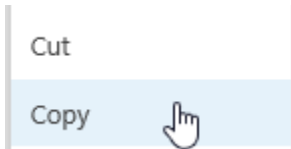
4.3 Paste Files to Zip

This function enable users to paste documents to a zip file.

- a. Enter a document library, select the desired documents and click **Copy** or **Cut** on the Ribbon under the Files tab.



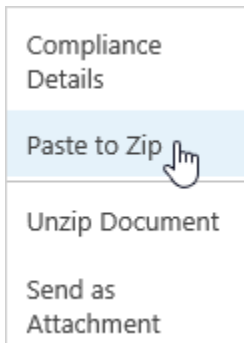
Or, select a desired document, click **Copy** or **Cut** in the item context menu.



- b. Select a zip file you want to paste the documents to.



- c. In the context menu, click **Paste to Zip** option.



- d. Then the documents you selected will be pasted into the zip file.

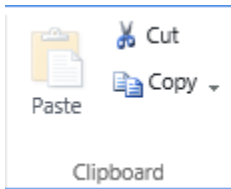
Note

Paste to Zip function allows you to cross site collection to copy documents and paste them to zip.

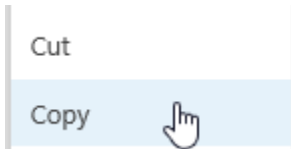
4.4 Paste Files as attachments

This function enable users to paste documents as the item's attachments.

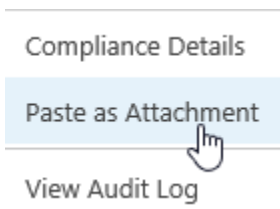
- a. Enter a document library, select the desired documents and click **Copy** or **Cut** on the Ribbon under the Files tab.



Or, select a desired document, click **Copy** or **Cut** in the item edit menu.



- b. Enter a list, and select an item which you want to attach the files.
- c. In the item edit menu, click **Paste as Attachment** option.



- d. Then the documents you selected will be pasted as item attachments.

4.5 Send as an Attachment

Enable users to send documents or zip files as an email attachment.

Note

This feature currently **ONLY** works in Internet Explorer. You must also enable the “**Initialize and script ActiveX controls not marked as safe for scripting**” feature.

4.5.1 Send documents as an attachment

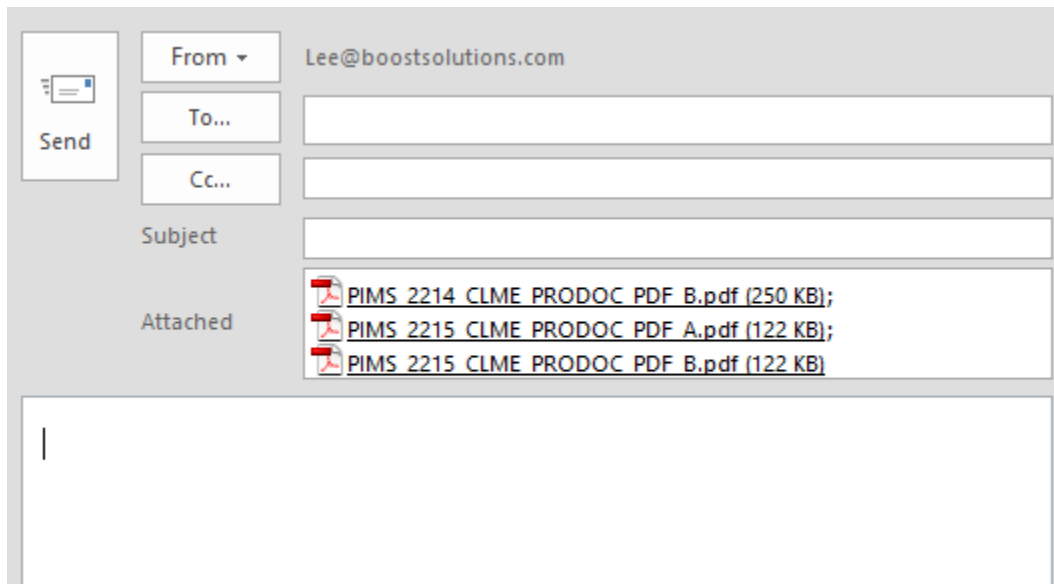
To send documents as an email attachment, follow the following steps:

- a. Select the documents in a document library and click the **Send as Attachment** button.



- b. The document will be attached in an email.

If you encounter the “Failed to Load Outlook” error message, please [read this](#).

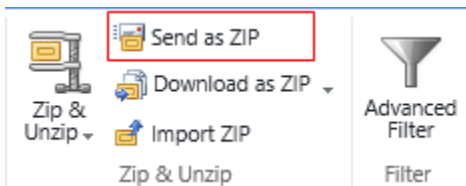


- c. Compose your email and send it.

4.5.2 Send as a zip

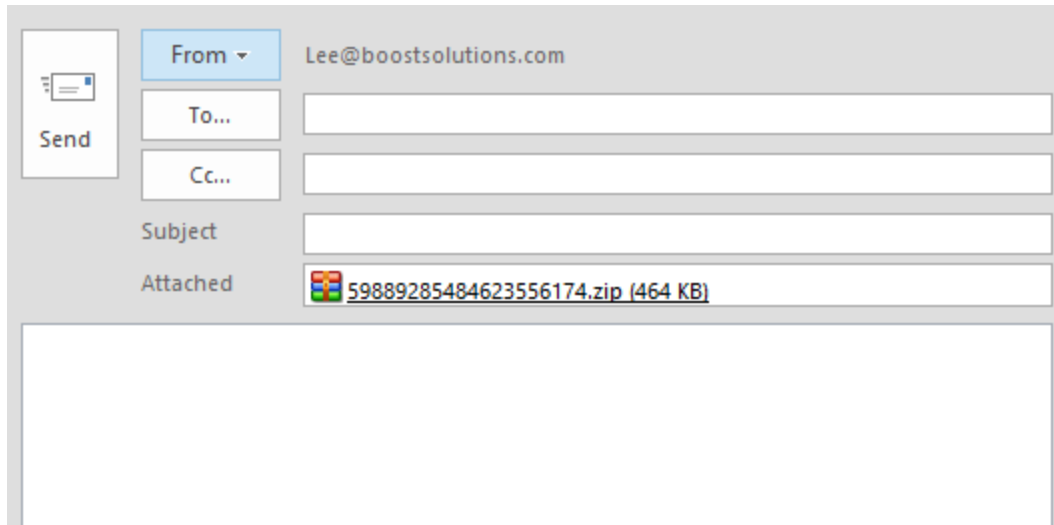
This feature will compress your documents as a zip file and then attach it to an e-mail.

- a. Select your documents in the document library and click the **Send as ZIP** button.



- b. The zip file will be attached in an email.

If you encounter the “Failed to Load Outlook” error message, please [read this](#).




From Lee@boostsolutions.com

To...

Cc...

Subject

Attached  59889285484623556174.zip (464 KB)

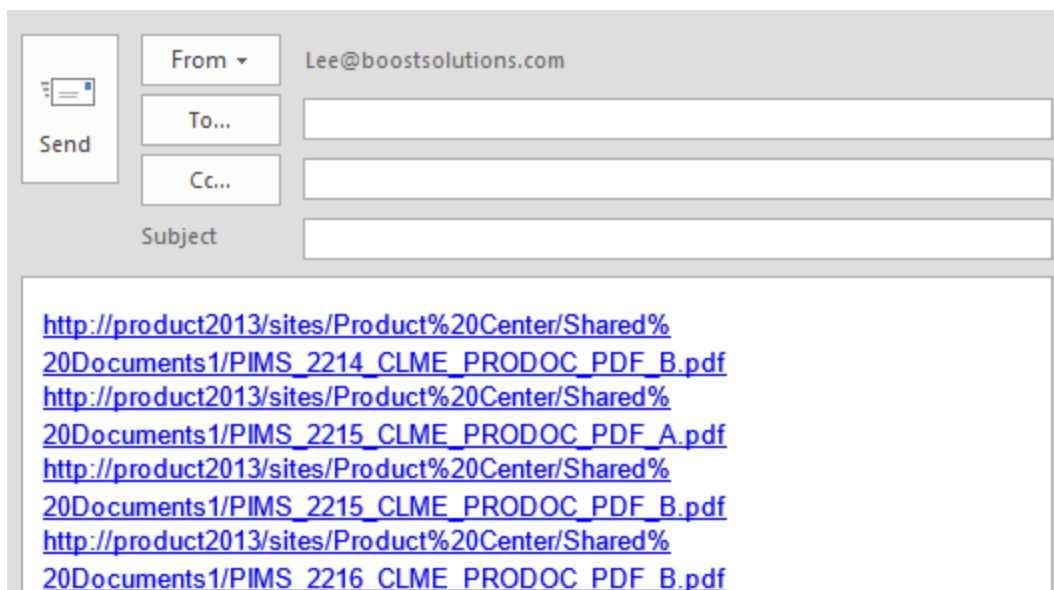
4.5.3 Send as Links

With this function, it is easy to share any document with your colleagues or customers.

- Select your documents in the document library and then click the **Send Links** button in the **Files** tab.



- An email message window will pop-up with all your documents links in the body of the message.



From Lee@boostsolutions.com

To...

Cc...

Subject

http://product2013/sites/Product%20Center/Shared%20Documents/1/PIMS_2214_CLME_PRODUC_PDF_B.pdf
http://product2013/sites/Product%20Center/Shared%20Documents/1/PIMS_2215_CLME_PRODUC_PDF_A.pdf
http://product2013/sites/Product%20Center/Shared%20Documents/1/PIMS_2215_CLME_PRODUC_PDF_B.pdf
http://product2013/sites/Product%20Center/Shared%20Documents/1/PIMS_2216_CLME_PRODUC_PDF_B.pdf

- c. Compose the email and send it.

Note

Unlike the native SharePoint **Email a Link** function, this feature works with multiple files as well.

4.5.4 Fix the “Failed to Load Outlook” issue

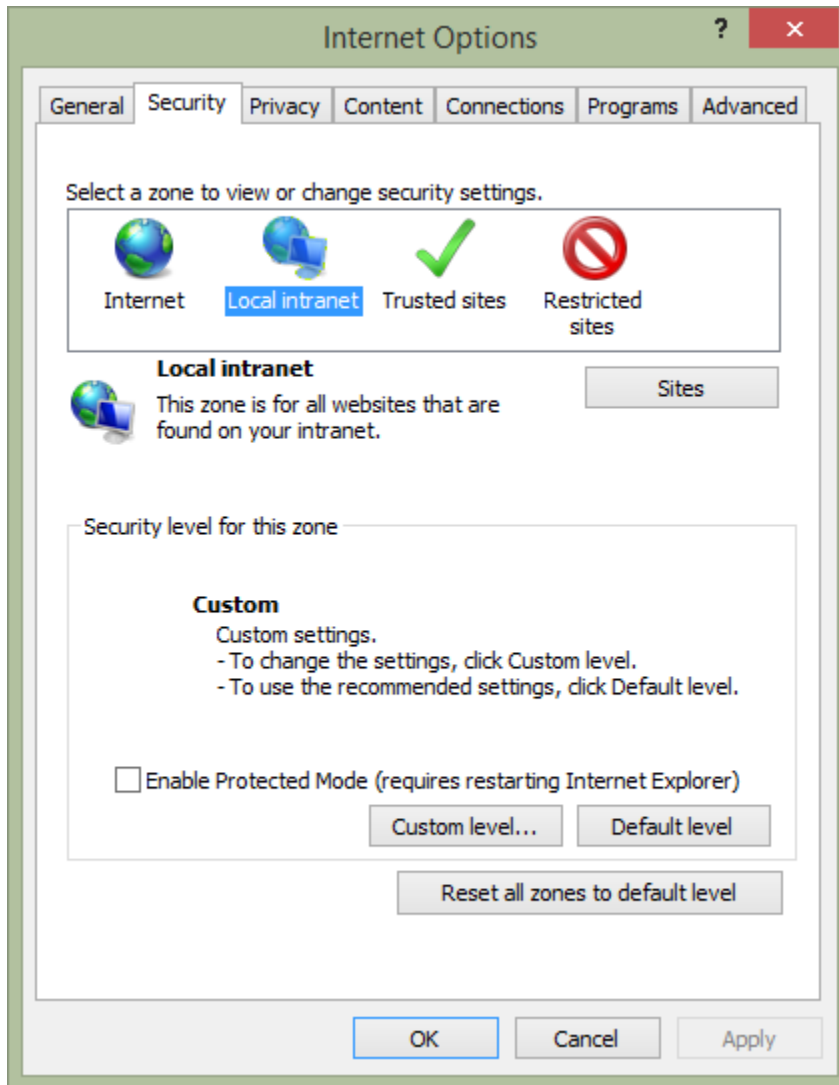
While sending documents as an attachment, you may encounter the “Fail to Load Outlook” error message.

This issue may be caused by the following:

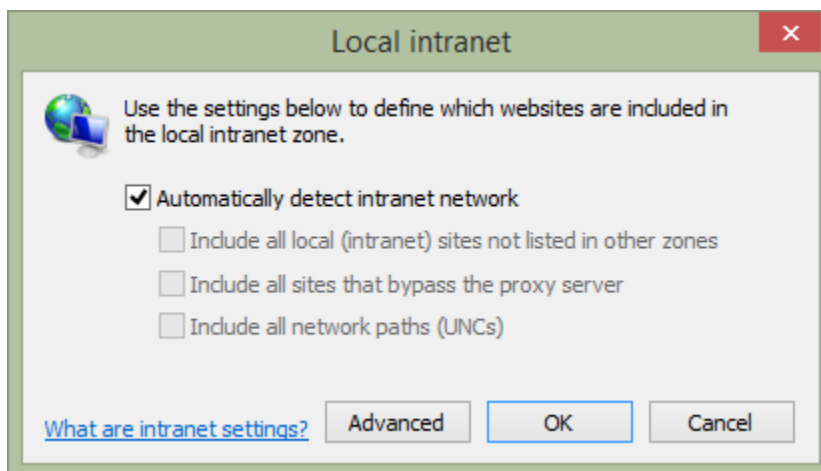
- *Microsoft Outlook not installed.*
- *Internet Explorer Security Settings not properly configured.*

Follow these steps to configure your Internet Explorer Security Settings:

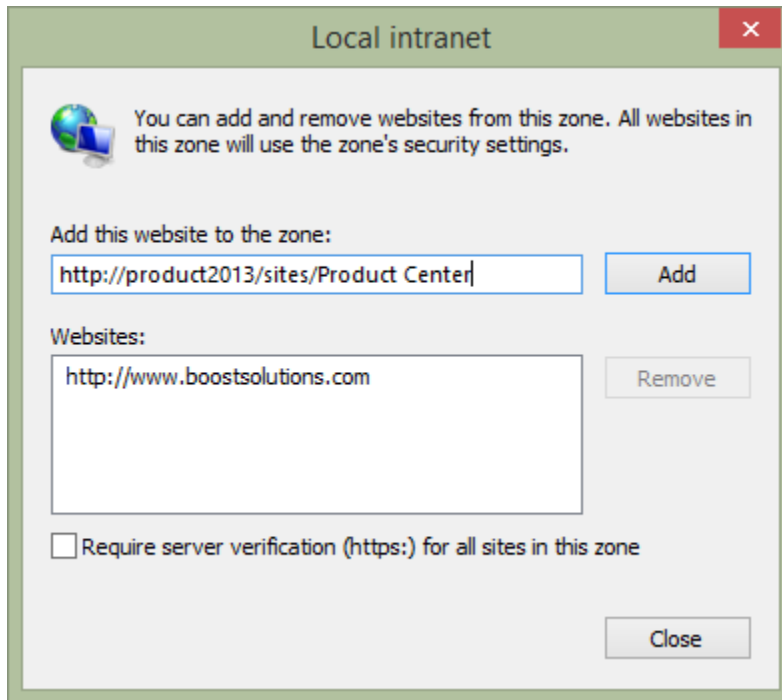
- a. Open your SharePoint site in Internet Explorer and then open the **Internet Options | Security** dialog.



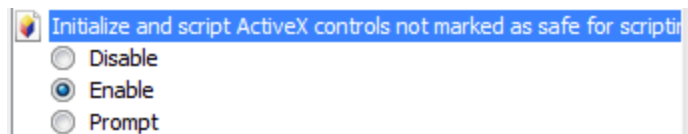
- b. Select **Local intranet** and click the **Sites** button.
- c. In the **Local intranet** dialog, click the **Advanced** button.



- d. Click the **Add** button to add the current SharePoint site to a Local intranet zone and then close the dialog to save all the changes you have made.



- e. Next, in the **Internet Options | Security** dialog, click the **Custom Level...** button.
- f. In the **Security Settings – Local Intranet Zone** dialog, locate the **Initialize and script ActiveX controls not marked as safe for scripting** and select **Enable**.



- g. Click **OK** to save all changes and close the Internet Options dialog.
- h. Select a document and click **Send as Attachment** again.

Note: If you still encounter the “Failed to Load Outlook” error message, then follow the steps below.

This issue is caused by you having insufficient permissions on your local computer. To solve this issue you need to add a windows credential onto your local computer.

- Open **Control Panel | Credential Manager**.
- Click **Add a Windows credential**. A window will appear as follows:

Type the address of the website or network location and your credentials

Make sure that the user name and password that you type can be used to access the location.

Internet or network address
(e.g. myserver, server.company.com):

User name:

Password:

- c. Fill in the user credentials and click OK to save the settings.

Type the address of the website or network location and your credentials

Make sure that the user name and password that you type can be used to access the location.

Internet or network address
(e.g. myserver, server.company.com):

User name:

Password:

Internet or network address: Type the SharePoint server name or IP address.

User Name: Type the user login name.

Password: Type the password.

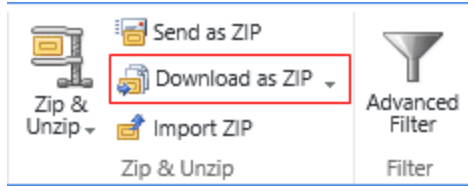
- d. Click **OK** to save the settings.
- e. Enter your document library and select a document. Click **Send as Attachment**. The document will be added as an email attachment.

4.6 Download as a ZIP file

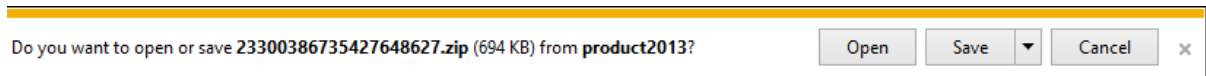
Bulk download documents as a ZIP file.

4.6.1 Download as a ZIP file

- a. Select documents in the Document Library. Click the **Download as ZIP** button.



- b. A dialog box will appear as follows:



- c. Click the **Save** button to download the zip file to your local computer.

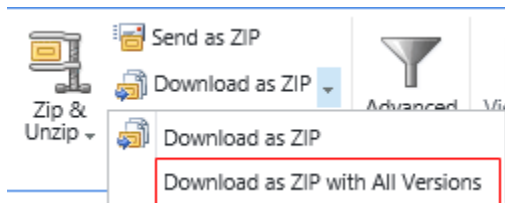
Note

The Zip file name is generated randomly each time.

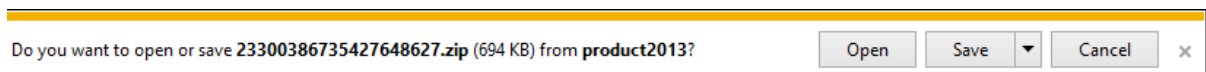
4.6.2 Download as Zip with All Versions

This feature will download the document and older versions as a ZIP file.

- a. Select the documents in the document library and click **Download as ZIP with All Versions**.



- b. A dialog box will appear as follows:





- c. Click **Save** to save the zip file to your local computer. Open the file to view your documents.

The new folder is created using the same name as the original file name. If a file doesn't have any versions, then no folder will be created.

<input type="checkbox"/> Name	Date modified	Type
PIMS_2214_CLME_PRODUC_PDF_B.pdf	8/28/2014 6:29 PM	File folder
PIMS_2215_CLME_PRODUC_PDF_A.pdf	8/28/2014 6:29 PM	File folder
PIMS_2215_CLME_PRODUC_PDF_B -v1.1.pdf	8/28/2014 6:28 PM	Adobe Acrobat D...
PIMS_2216_CLME_PRODUC_PDF_B -v1.1.pdf	8/28/2014 6:28 PM	Adobe Acrobat D...
PIMS_2223_CLME_PRODUC_PDF_A -v1.1.pdf	8/28/2014 6:28 PM	Adobe Acrobat D...

d. Open the folder; the versions are sorted by version number.

<input type="checkbox"/> Name	Date modified	Type
 PIMS_2214_CLME_PRODUC_PDF_B -v1.1.pdf	8/28/2014 6:28 PM	Adobe Acrobat Do...
 PIMS_2214_CLME_PRODUC_PDF_B -v1.2.pdf	8/28/2014 6:28 PM	Adobe Acrobat Do...

5. Find Information

5.1 Filter Panel Configuration

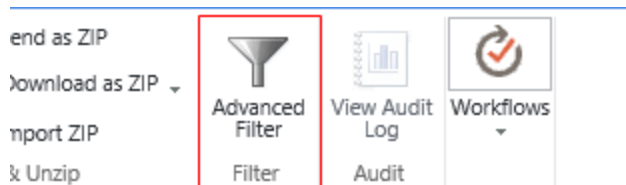
List Advanced Filter provides an entry for administrator to set up default filter settings for end users on the List Settings page, and for convenience, end users are also allowed to customize their own filter settings right on the list view page.

5.1.1 Set Up Filter Panel

List Advanced Filter allows each user to set up the filter panel in the list or document library, instead of adding the web part and connecting to the list or document library one by one.


The filter panel on the Advanced Filter Settings page and the list view page are same. Follow these steps to set up the filter panel.

- a. Access the list or document library from which you want to filter information.
- b. Click **Advanced Filter** under the Items or Files tab.



For administrator, you can enter the **List Settings**, under the General Settings section, click **Advanced Filter Settings** to open the Configure Filter Panel page.

- c. If you are using List Advanced Filter for the first time, then a **Configure Filter Panel** window will open.

If the administrator has already set up a default filter settings, end users can click  in the filter panel to open the **Configure Filter Panel** window.

Criteria Settings: Specify from which fields or columns you want to use to filter on the list or document library. You can specify the field position by selecting a number.

Configure Filter Panel □ ×

Criteria Settings *

Specify which fields you want to use as criteria to filter data on this list. After configuration, you can customize the display name for fields at the same time.

Fields in List	Display Name	Position
<input type="checkbox"/> Approval Status	Approval Status	1 ▼
<input type="checkbox"/> Approver Comments	Approver Comments	2 ▼
<input type="checkbox"/> Business Lines	Business Lines	3 ▼
<input type="checkbox"/> Categories	Categories	4 ▼
<input type="checkbox"/> Checked Out To	Checked Out To	5 ▼
<input type="checkbox"/> Comments	Comments	6 ▼
<input type="checkbox"/> Content Type	Content Type	7 ▼
<input type="checkbox"/> Copy Source	Copy Source	8 ▼
<input type="checkbox"/> Countries	Countries	9 ▼
<input type="checkbox"/> Created	Created	10 ▼
<input type="checkbox"/> Created By	Created By	11 ▼
<input type="checkbox"/> Date Picture Taken	Date Picture Taken	12 ▼
<input type="checkbox"/> Due Date	Due Date	13 ▼
<input type="checkbox"/> Enterprise Keywords	Enterprise Keywords	14 ▼
<input type="checkbox"/> File Type	File Type	15 ▼
<input type="checkbox"/> Folder Child Count	Folder Child Count	16 ▼

Match Rules: Specify the match rules for selected criteria.

Match Rules

Specify the match rule for selected criteria.

Match rules

- **Any:** Filter information if any criteria scheme matches.
- **All:** Filter information only if all criteria schemes matches.

Filter Panel Status: Specify if the filter panel is always kept expanded when the user enters the list or document library.

Filter Panel Status

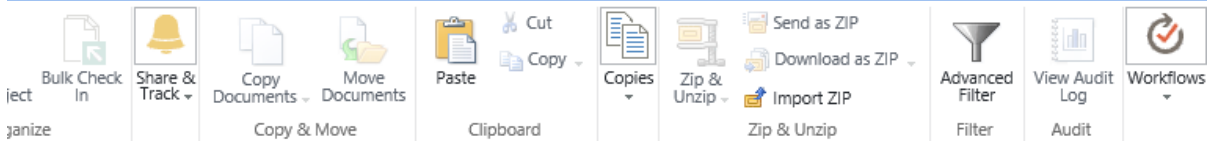
If checked, the filter panel will keep expanded when the page is load.

Always keep filter panel expanded

- After configuring the above settings, click the **Save** button.

5.1.2 Manage Filter Panel

Once the filter panel is successfully set up, the ribbon panel will appear as follows.



Advanced Filter

Approval Status = Categories [Countries [

Due Date D Languages =

[new document](#) or drag files here

All Documents Approve/reject Items My submissions ...

<input checked="" type="checkbox"/>		Name	Modified	Modified By	Categories	Owner	P
<input checked="" type="checkbox"/>		PIMS_2214_CLME_PRODUC_PDF_B 	Yesterday at 5:55 PM	<input type="checkbox"/> Annette Young	FuenceKM	<input type="checkbox"/> Annette Young	F

To modify the filter panel, click the icon.




To show or hide the filter panel, click the command on the ribbon.



5.2 Filter Information

After setting up the filter panel, users can find any information by assigning filters.

- a. Enter the list or document library and expand the Filter panel.
- b. Depending on how the filter is configured, select the comparison operator and type a value for each criterion.

Advanced Filter 

Approval Status = pending = Categories = FuenceKM = Countries = France *

Due Date = Last 7 days  Languages = Not Empty 

For **Single line of text** column, List Advanced Filter provides you an **Auto Complete** feature, this feature allows you to see the relevant records as you type.

Countries

x *

France

- c. Click the **Filter** button or press the Enter key and the results will be shown in the list or document library.

- d. To clear the filters click the button.

Note

List Advanced Filter can filter items contained in folders or subfolders, and display all results in a flat view.

5.3 Comparison Operators

The following chart describes the comparison operators and the columns it applies too.

Comparison Operator	Description
= Equal to	Column value equals to the specified value. Columns: Single line of text, Hyperlink or Picture, Person or Group, Number, Currency, Yes/No, Managed Metadata and Lookup
≠ Not equal to	Column value does not equal to the specified value. Columns: Single line of text, Hyperlink or Picture, Person or Group, Number, Currency, Yes/No, Managed Metadata and Lookup

[Begins with	Begins with a specified character.
	Columns: Single line of text, Multiple lines of text, Hyperlink or Picture and Managed Metadata, Person or Group
* Contains	Contains specific characters anywhere in the text.
	Columns: Single line of text, Multiple lines of text, Hyperlink or Picture, Managed Metadata, Person or Group
○ Empty	Column value is empty or null.
	Columns: Single line of text, Hyperlink or Picture, Person or Group, Date and Time, Number, Currency, Managed Metadata and Lookup
∅ Not Empty	Column value is not empty or null.
	Columns: Hyperlink or Picture, Person or Group, Date and Time, Number, Currency, Managed Metadata and Lookup
D Custom date	Column value equals to a specified date.
	Columns: Date and Time
D Custom date range	Column value within a custom date or time range.
	Columns: Date and Time
Before than	Column value before a specified date.
	Columns: Date and Time
Later than	Column value after a specified date.
	Columns: Date and Time
Last 7 days	Column value within the last 7 days.
	Columns: Date and Time
Last week (Sun-Sat)	Column value within the last week (from Sunday to Saturday).
	Columns: Date and Time
Last 14 days	Column value within the last 14 days.
	Columns: Date and Time
This month	Column value within the current month.
	Columns: Date and Time
Last 30 days	Column value within the last 30 days.
	Columns: Date and Time

Last month	Column value within the last month.
	Columns: Date and Time
N Custom number	Column value equals the specified value.
	Columns: Number and Currency
N Custom number range	Column value within a specified value range.
	Columns: Number, and Currency
Less than	Column value is less than a specified value.
	Columns: Number and Currency
Greater than	Column value is greater than a specified value.
	Columns: Number and Currency

Supported columns

List Advanced Filter can filter data within the following columns:

Single line of text, Multiple lines of text, Choice, Number, Date and time, Currency, People or Group, Lookup, Managed Metadata, Hyperlink or Picture.

6. Audit

The Item Audit Log is based on the SharePoint audit feature, make sure the audit settings is enabled and configured in site.

Configure Audit Settings

Audit Log Trimming

Specify the duration for audit data to retain before it is trimmed and optionally store all of the current audit data in a document library. The schedule for audit log trimming is configured by your server administrator. [Learn more about audit log trimming.](#)

Automatically trim the audit log for this site?

Yes

No

Specify the number of days of audit log data to retain. The maximum retention period in the audit database is 90 days.

If you'd like to keep audit data for longer than this, please specify a document library where we can store audit reports before trimming occurs:

Browse...

Documents and Items

Specify the events that should be audited for documents and items within this site collection.

Specify the events to audit:

Editing items

Checking out or checking in items

Moving or copying items to another location in the site

Deleting or restoring items

Lists, Libraries, and Sites

Specify the events that should be audited for lists, libraries, and sites within this site collection.

Specify the events to audit:

Editing content types and columns

Searching site content

Editing users and permissions

Note

Item Audit Log does not work on Microsoft SharePoint Foundation 2013.

6.1 View List or Library Audit Log

- Enter the list or library which you want to view the audit logs for.
- Find **View Audit Log** under **List** or **Library** tab.



- c. Click **View Audit Log** command. An audit log window will open as follows:

View Audit Log x

Date: To User: Event (All) v

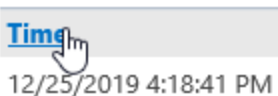
Filter Reset Export as CSV

Time	Event	Document's path	User
12/24/2019 2:47:57 PM	SecRoleBindUpdate	Marketing Docs/Sales-Docs/Sub-folder-2	System Account
12/24/2019 2:47:57 PM	SecRoleBindBreakInh...	Marketing Docs/Sales-Docs/Sub-folder-1/Sub-f...	System Account
12/24/2019 2:47:57 PM	SecRoleBindUpdate	Marketing Docs/Sales-Docs/Sub-folder-1/Sub-f...	System Account
12/24/2019 2:47:56 PM	SecRoleBindBreakInh...	Marketing Docs/Excel Docs	System Account
12/24/2019 2:47:56 PM	SecRoleBindUpdate	Marketing Docs/Excel Docs	System Account
12/24/2019 2:47:53 PM	SchemaChange	Marketing Docs	System Account
12/24/2019 2:46:27 PM	Update	Marketing Docs/Doc-Set-2	System Account
12/24/2019 2:46:26 PM	Update	Marketing Docs/Doc-Set-2	System Account
12/24/2019 2:45:55 PM	Update	Marketing Docs	System Account
12/24/2019 2:45:55 PM	Update	Marketing Docs/Doc-Set-1	System Account
12/24/2019 2:45:54 PM	Update	Marketing Docs/Doc-Set-1	System Account
12/24/2019 2:45:28 PM	ProfileChange	Marketing Docs	System Account
12/24/2019 2:45:25 PM	SchemaChange	Marketing Docs	System Account
12/12/2019 3:26:17 PM	SchemaChange	Marketing Docs	System Account
12/6/2019 5:41:31 PM	Update	Marketing Docs/Forms/cb48dcfb-1443-40db-9...	System Account
12/6/2019 5:41:31 PM	Update	Marketing Docs	System Account
12/6/2019 5:41:30 PM	Update	Marketing Docs/VISO FOR DV.vsd	System Account
12/6/2019 5:41:21 PM	Update	Marketing Docs/VISO FOR DV.vsd	System Account
12/6/2019 5:41:20 PM	Update	Marketing Docs/VISO FOR DV.vsd	System Account

Note

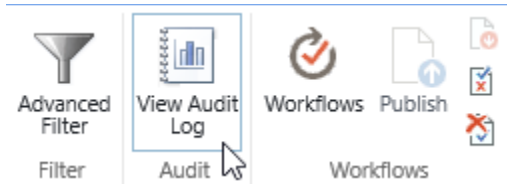
To view list or library audit logs, you must have Manage List permission.

- d. To sort the events based on the occurred time, click header of Time column.

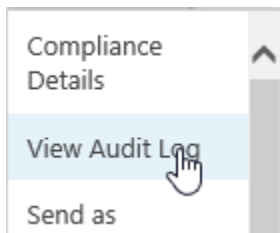


6.2 View Item or Document Audit Log

- Enter the list or library and select an item or document which you want to view audit logs for.
- Find **View Audit Log** under **Items** or **Files** tab.







You can also find **View Audit Log** in the context menu.



- Click **View Audit Log** button. An audit log window will open as follows:

View Audit Log ×

Date:  To  User:  Event: 

Time	Event	Document's path	User
12/24/2019 2:56:50 PM	SecRoleBindBreakInh...	Marketing Docs/Img404474009.jpg	System Account
12/24/2019 2:56:50 PM	SecRoleBindUpdate	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:42:02 PM	Update	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:41:38 PM	Update	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:41:35 PM	Update	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:40:37 PM	Update	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:40:29 PM	Update	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:40:28 PM	Update	Marketing Docs/Img404474009.jpg	System Account
12/6/2019 4:40:28 PM	Update	Marketing Docs	System Account

Total: 9 1-9

Note

To view item or document audit logs, you must have Manage List permission.





6.3 Filter Audit Log

Item Audit Log enables users to locate audit data by filtering. You can filter details by date, user and event type.

- **Filter by date**

To filter logs by date, select the start date and end date from the date picker, then click **Filter** button.

View Audit Log ×





Date:  To  User:  Event 

Time	Event	Document's path	User
12/26/2019 11:15:23 AM	Check Out	Marketing Docs/Cross-Site Lookup_V4_User Gui...	Annie Walker
12/26/2019 11:15:23 AM	Check Out	Marketing Docs/BS Visitors_C_1.1_09-10-2019.pdf	Annie Walker
12/26/2019 11:14:15 AM	Update	Marketing Docs/BoostSolutions Bank Account.jpg	System Account
12/26/2019 11:14:11 AM	Update	Marketing Docs/BoostSolutions Bank Account.jpg	System Account
12/26/2019 11:13:54 AM	SecRoleBindUpdate	Marketing Docs/BoostSolutions Bank Account.jpg	System Account
12/26/2019 11:13:53 AM	SecRoleBindUpdate	Marketing Docs/BoostSolutions Bank Account.jpg	System Account
12/26/2019 11:13:52 AM	SecRoleBindBreakInh...	Marketing Docs/BoostSolutions Bank Account.jpg	System Account
12/26/2019 11:13:42 AM	Check In	Marketing Docs/BoostSolutions Bank Account.jpg	Annie Walker
12/25/2019 4:18:41 PM	Update	Marketing Docs	System Account
12/25/2019 3:33:24 PM	SchemaChange	Marketing Docs	System Account
12/25/2019 3:33:24 PM	Update	Marketing Docs	System Account

- **Filter by user**

To filter logs by user, type the user name in the **User** box, then click **Filter** button.

View Audit Log ×

Date:  To  User:  Event 

Time	Event	Document's path	User
12/26/2019 11:15:23 AM	Check Out	Marketing Docs/Cross-Site Lookup_V4_User Gui...	Annie Walker
12/26/2019 11:15:23 AM	Check Out	Marketing Docs/BS Visitors_C_1.1_09-10-2019.pdf	Annie Walker
12/26/2019 11:13:42 AM	Check In	Marketing Docs/BoostSolutions Bank Account.jpg	Annie Walker

- **Filter by event type**

To filter logs by event type, select one type from the **Event** drop-down list, then click **Filter** button.

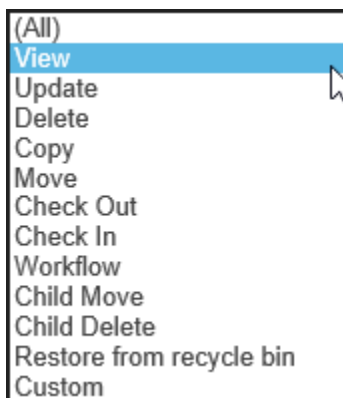
View Audit Log x

Date: To User: Event ^

Time	Event	Document's path	User
12/25/2019 4:18:41 PM	Update	Marketing Docs	System Account
12/25/2019 3:33:24 PM	Update	Marketing Docs	System Account
12/24/2019 2:46:27 PM	Update	Marketing Docs/Doc-Set-2	System Account
12/24/2019 2:46:26 PM	Update	Marketing Docs/Doc-Set-2	System Account
12/24/2019 2:45:55 PM	Update	Marketing Docs	System Account
12/24/2019 2:45:55 PM	Update	Marketing Docs/Doc-Set-1	System Account
12/24/2019 2:45:54 PM	Update	Marketing Docs/Doc-Set-1	System Account
12/6/2019 5:41:31 PM	Update	Marketing Docs/Forms/cb48dcfb-1443-40db-9...	System Account
12/6/2019 5:41:31 PM	Update	Marketing Docs	System Account
12/6/2019 5:41:30 PM	Update	Marketing Docs/VISO FOR DV.vsdX	System Account
12/6/2019 5:41:21 PM	Update	Marketing Docs/VISO FOR DV.vsdX	System Account
12/6/2019 5:41:20 PM	Update	Marketing Docs/VISO FOR DV.vsdX	System Account
12/6/2019 5:41:20 PM	Update	Marketing Docs	System Account
12/6/2019 5:37:37 PM	Update	Marketing Docs/Forms/34624f08-72ec-4830-94...	System Account
12/6/2019 5:37:37 PM	Update	Marketing Docs	System Account
12/6/2019 5:37:37 PM	Update	Marketing Docs/Forms/34624f08-72ec-4830-94...	System Account
12/6/2019 5:37:37 PM	Update	Marketing Docs	System Account
12/6/2019 5:37:37 PM	Update	Marketing Docs/Forms/34624f08-72ec-4830-94...	System Account
12/6/2019 5:37:37 PM	Update	Marketing Docs	System Account

v

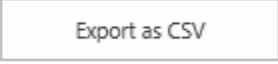
Following event types can be used to filter: View, Update, Delete, Copy, Move, Check Out, Check In, Workflow, Child Move, Child Delete, Restore from recycle bin and custom.



To clear the filters, click **Reset** button.

6.4 Export Audit Logs as CSV

Item Audit Log allows users to export the audit data to a .csv file, so that you can analysis the events further.

- a. To export the audit, click the **Export as CSV**  button.
- b. Then, specify the location to save the CSV file.

7. Compatible with Document Viewer

Document Viewer enables SharePoint users to view Microsoft® Office documents, PDFs, images, web pages, etc. directly within a SharePoint document library.

Bulk Properties Editor is compatible with Document Viewer. You just need to install and activate Document Viewer 2.0, and then Bulk Properties Editor will be able to open and view documents using Document Viewer.

8. Compatibility with Column/View Permission

SharePoint Column/View Permission enables you to control SharePoint column and view permissions and restrict users from accessing sensitive and confidential content.


Bulk Properties Editor is compatible with Column/View Permission. You just need to install and activate Column/View Permission 4.x version.


Case 1:


You can configure column permissions in Column/View Permission. When users edit items using the Bulk Edit or Edit All command, all columns will be available in the Bulk Edit form or Edit All form, but changes cannot be saved to the items.


Bulk Edit ✕


EDIT


Save


Cancel




Tags & Notes




Commit




Index



Select All



Content Type Document ▾
Create a new document.



Title 

Categories * 



Owner * 



Project Number 

Due Date 



Business Lines * 

Append changes to existing value

Countries * 

Languages * 

Append changes to existing value

Enterprise Keywords 

Preserve Authors and Timestamps ⓘ

Check In after Save

14 Document(s)

OKCancel

Case 2:

You can configure column permissions (hidden or read-only) in Column/View Permission. When users edit items using the Group Edit command, the columns will be hidden or set as read-only in the Group Edit form. Users cannot access or modify them.

You can also define conditions to dynamically control column permissions so the column will be hidden or set as read-only based on the condition in the Group Edit form.

Group Edit - CDC_UP_Product_Design_Template.doc

EDIT

Save & Next | Cancel | Previous | Next | Preview | Tags & Notes

Commit | Actions | Index

Content Type: Document

Name: CDC_UP_Product_Design_Template.doc

Title: CDC_UP_Product_Design_Template

Categories: **FuenceKM**

Owner: Henry

Due Date

Business Lines: Drug Safety Research and Development

Countries: Unit States

Languages: English

Enterprise Keywords

Preserve Authors and Timestamps

Check In after Save

This document was not checked out.

< 1 of 14 > Save & Next Cancel

9. Supported Libraries or Lists

Classifier can work on following lists and document libraries.

Libraries: Asset Library, Document Library, Picture Library, Slide Library, Dashboard Library, Form Library, Report Library, Site Pages Library, Data Connection Library, Report Document Library and Record Library

Lists: Announcements, Tasks, Contacts, Custom List, Issue Tracking, Links, Project Task, Agenda, Calendar, Custom list in Datasheet, and Comments

10. 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 Classifier without entering any license code for a period of 30 days from when you first use it.

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

Finding License Information

- Navigate to the BoostSolutions Software Management section in Central Administration. There, click **License Management Center** link.
- Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information ×

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

- Server License
Server Code: 24edc5f10a7f4ca091bbc0fab63d3eaab468c3b17
b5c44ee96d9b8e595000357
- Farm License
Farm ID: {24edc5f1-0a7f-4ca0-91bb-c0fab63d3eaa}
Number of Users: 22 user(s)
- Site Collection License
Site Collection ID: 38d6d052-0dab-43dc-a669-cdd5ad7d7f3d [Change](#)
Site Collection: <http://product2013/sites/Product Center>

Download

Close

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.

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

License Registration

- When you receive a product license code, enter the **License Management Center** page.
- Click **Register** on the license page and a **Register or Update license** window will open.

Register or Update license

Please upload a license code file or enter the license code to activate the product.

Upload a license code file

Browse...

Enter license code

Register Close

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

Registered Successfully



Registered Successfully

- ▶ The license was verified successfully.
- ▶ Thank you for choosing BoostSolutions.

If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com

Close

For more details on license management, see the [BoostSolutions Foundation](#).