SharePoint Classifier

User Guide

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

Contents

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.
Solutions\Foundtion\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundtion\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\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\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\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\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\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\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\ 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\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 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 Mozilla Firefox Google Chrome

SharePoint 2010

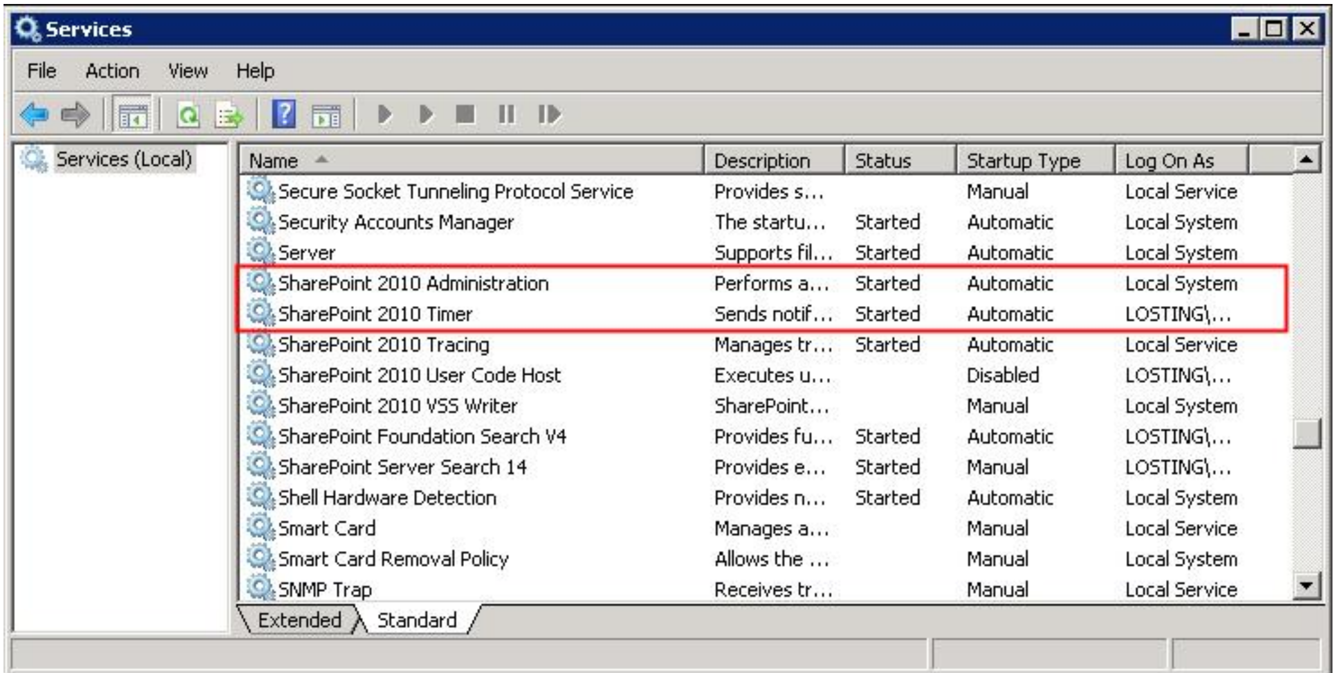
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

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 2010 Administration** and **SharePoint 2010 Timer**.



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 2010** by using the SharePoint STSADM command line tool.

Required permissions

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

To install 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 2010**

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

- **SharePoint 2013**

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

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

```
stsadm -o addsolution -filename <full path\>BoostSolutions.SharePointClassifier.Platform14.2.wsp
stsadm -o addsolution –filename <full path\>BoostSolutions.DocumentNumberGenerator14.2.wsp
stsadm -o addsolution –filename <full path\>BoostSolutions.BulkPropertiesEditor14.3.wsp
stsadm -o addsolution –filename <full path\>BoostSolutions.BulkZipAndUnzip14.2.wsp
stsadm -o addsolution –filename <full path\>BoostSolutions.ItemAuditLog14.2.wsp
stsadm -o addsolution –filename <full path\>BoostSolutions.ListAdvancedFilter14.2.wsp
stsadm -o addsolution –filename <full path\>BoostSolutions.ListTransfer14.2.wsp
stsadm -o addsolution -filename <full path\>BoostSolutions.FoundationSetup14.1.wsp
```

d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.SharePointClassifier.Platform14.2.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.DocumentNumberGenerator14.2.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.BulkPropertiesEditor14.3.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.BulkZipAndUnzip14.2.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.ItemAuditLog14.2.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.ListAdvancedFilter14.2.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.ListTransfer14.2.wsp -allowgacdeployment –url [virtual server url] –immediate
stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.wsp -allowgacdeployment –url [virtual server url] –immediate
```

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

stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform14.2.wsp

stsadm -o displaysolution –name BoostSolutions.DocumentNumberGenerator14.2.wsp

stsadm -o displaysolution –name BoostSolutions.BulkPropertiesEditor14.3.wsp

stsadm -o displaysolution –name BoostSolutions.BulkZipAndUnzip14.2.wsp

stsadm -o displaysolution –name BoostSolutions.ItemAuditLog14.2.wsp

stsadm -o displaysolution –name BoostSolutions.ListAdvancedFilter14.2.wsp

stsadm -o displaysolution -name BoostSolutions.ListTransfer14.2.wsp

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

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

f. In the STSADM tool, activate the features.

stsadm -o activatefeature -name SharePointBoost.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.Platform14.2.wsp -immediate -url [virtual server url]

stsadm -o retractsolution -name BoostSolutions.DocumentNumberGenerator14.2.wsp -immediate -url [virtual server url]

stsadm -o retractsolution -name BoostSolutions.BulkPropertiesEditor14.3.wsp -immediate -url [virtual server url] *stsadm -o retractsolution -name BoostSolutions.BulkZipAndUnzip14.2.wsp -immediate -url [virtual server url]*

stsadm -o retractsolution -name BoostSolutions.ItemAuditLog14.2.wsp -immediate -url [virtual server url]

stsadm -o retractsolution -name BoostSolutions.ListAdvancedFilter14.2.wsp -immediate -url [virtual server url]

stsadm -o retractsolution -name BoostSolutions.ListTransfer14.2.wsp -immediate -url [virtual server url]

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

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

stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform14.2.wsp

stsadm -o displaysolution –name BoostSolutions.DocumentNumberGenerator14.2.wsp

stsadm -o displaysolution –name BoostSolutions.BulkPropertiesEditor14.3.wsp

stsadm -o displaysolution –name BoostSolutions.BulkZipAndUnzip14.2.wsp

stsadm -o displaysolution –name BoostSolutions.ItemAuditLog14.2.wsp

stsadm -o displaysolution –name BoostSolutions.ListAdvancedFilter14.2.wsp

stsadm -o displaysolution -name BoostSolutions.ListTransfer14.2.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.Platform14.2.wsp

stsadm -o deletesolution –name BoostSolutions.DocumentNumberGenerator14.2.wsp

stsadm -o deletesolution –name BoostSolutions.BulkPropertiesEditor14.3.wsp

stsadm -o deletesolution –name BoostSolutions.BulkZipAndUnzip14.2.wsp

stsadm -o deletesolution –name BoostSolutions.ItemAuditLog14.2.wsp

stsadm -o deletesolution –name BoostSolutions.ListAdvancedFilter14.2.wsp

stsadm -o deletesolution –name BoostSolutions.ListTransfer14.2.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.FoundationSetup14.1.wsp –immediate –url [virtual server url]*

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

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

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

c. Remove the solution from the SharePoint solutions storage:

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

2.7 Feature Activation

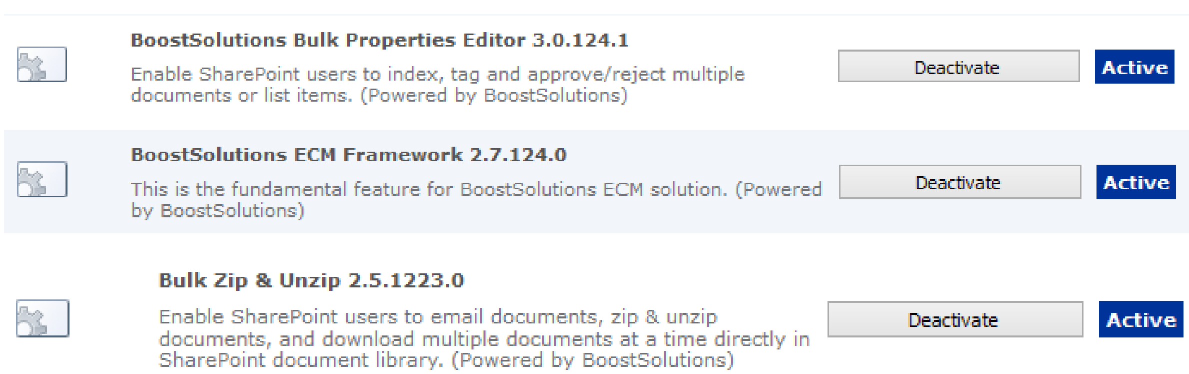
By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

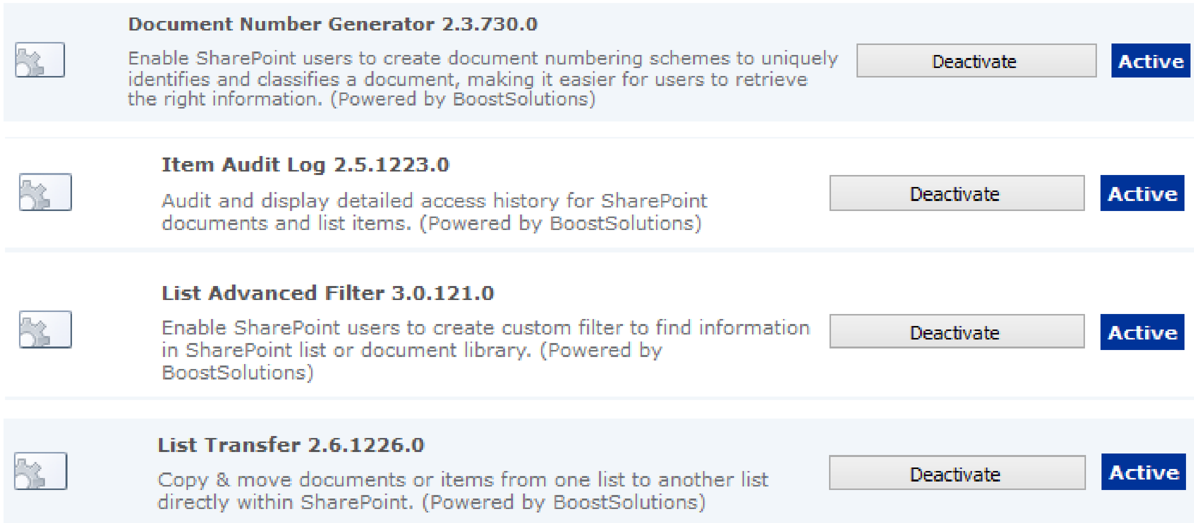
a. On the Site Actions menu 

click **Site Settings**.

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

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




Document Number Generator 2.3.730.0
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)
Deactivate
Active
Item Audit Log 2.5.1223.0
Audit and display detailed access history for SharePoint documents and list items. (Powered by BoostSolutions)
Deactivate
Active
List Advanced Filter 3.0.121.0
Enable SharePoint users to create custom filter to find information in SharePoint list or document library. (Powered by BoostSolutions)
Deactivate
Active
List Transfer 2.6.1226.0
Copy & move documents or items from one list to another list directly within SharePoint. (Powered by BoostSolutions)
Deactivate
Active

3. Organize Information

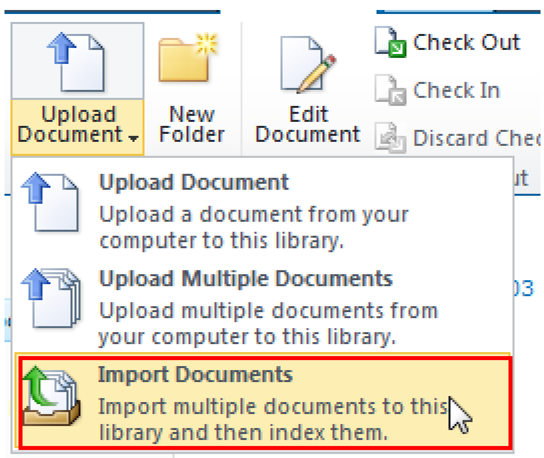
> ***Note***
>
> Users need at least **Contribute** permission level to access Bulk Properties Editor.

3.1 Bulk Properties Editor

3.1.1 Import Documents

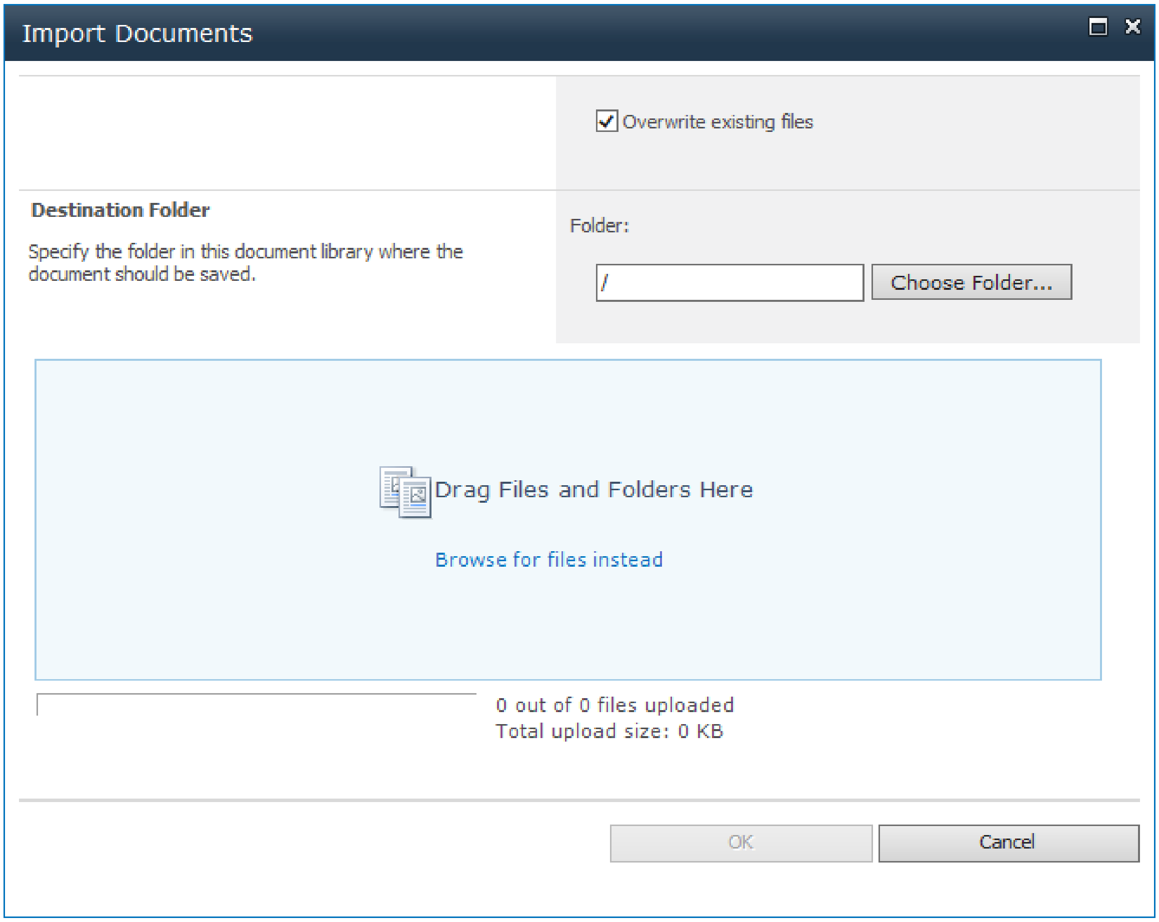
This function allows you to import multiple documents into the SharePoint document library and index them by entering metadata information.

a. Click **Import Documents** in the **Upload Document** menu on the ribbon.

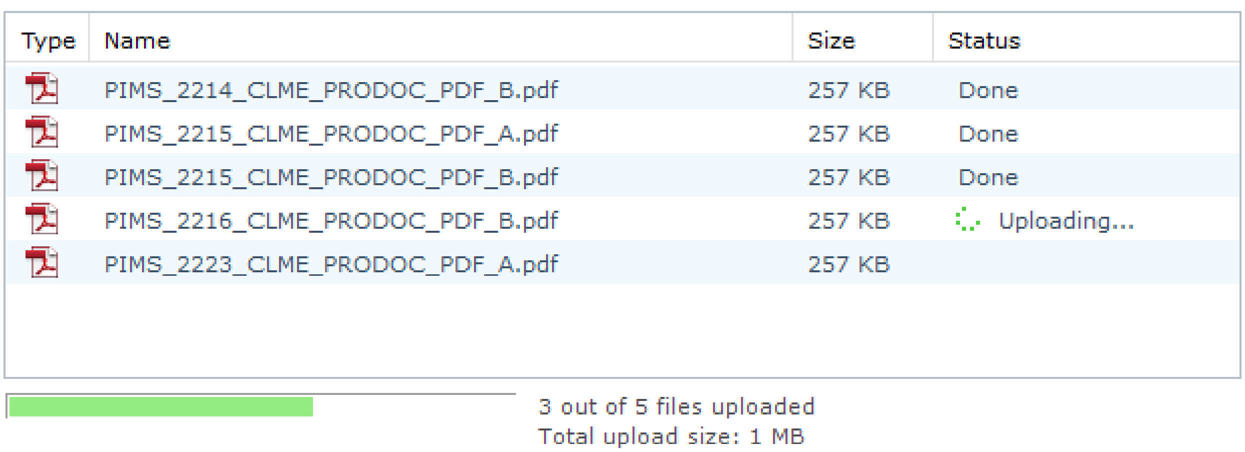


> ***Note***
>
> In SharePoint 2013, there is no **Import Documents** on the ribbon menu.

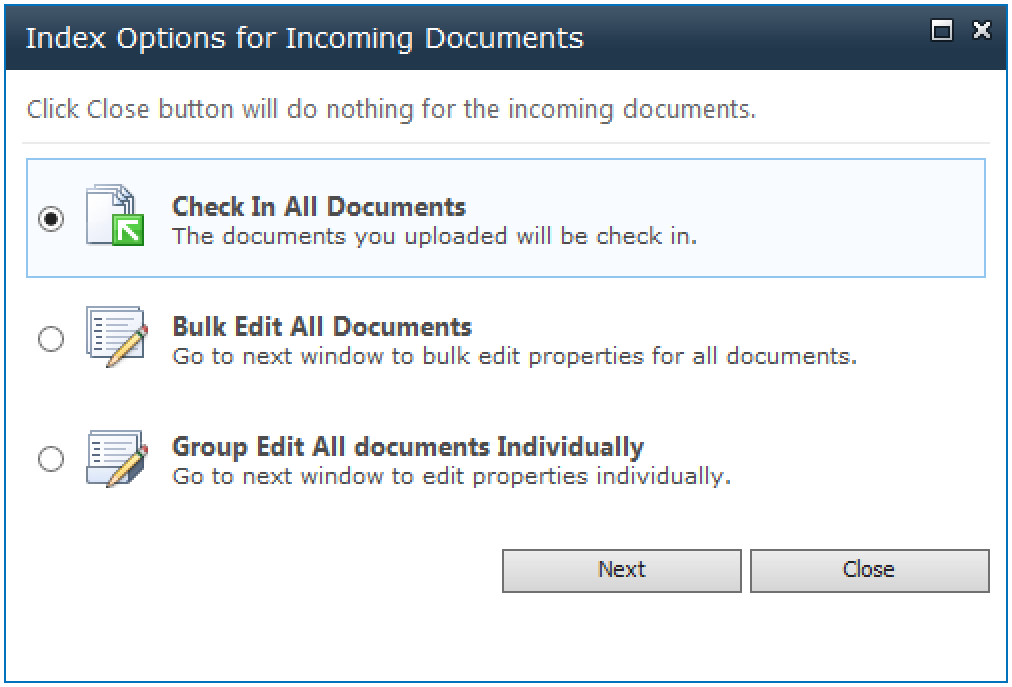
b. You will see the following dialog window:



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.



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.

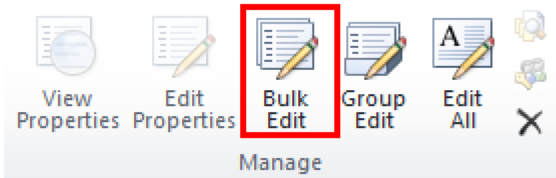
> ***Note***
>
> The Import Documents function is currently compatible with Internet Explorer only. In all other browsers this button will be grayed.

3.1.2 Index Multiple Documents

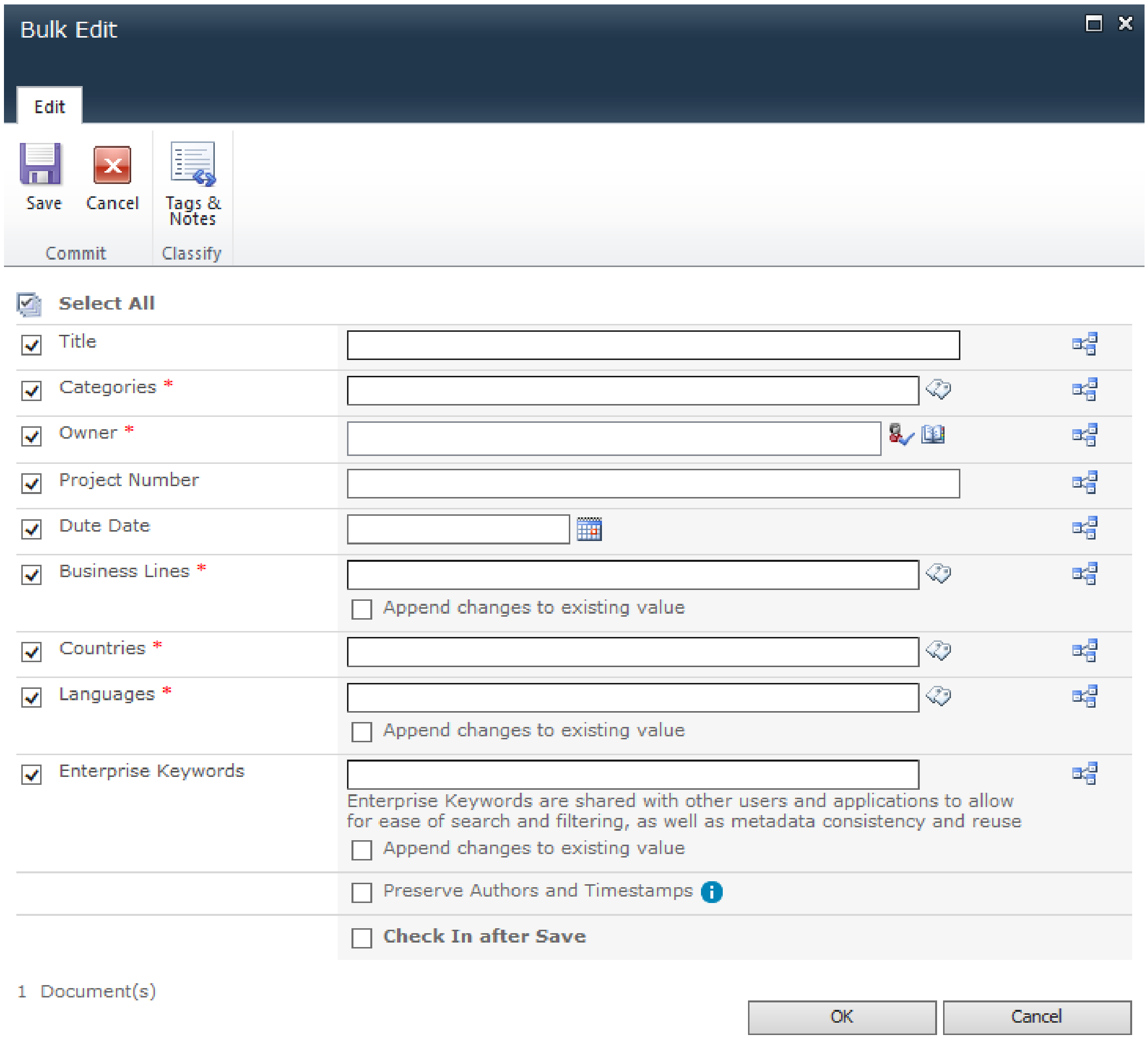
- **Bulk Edit**

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:

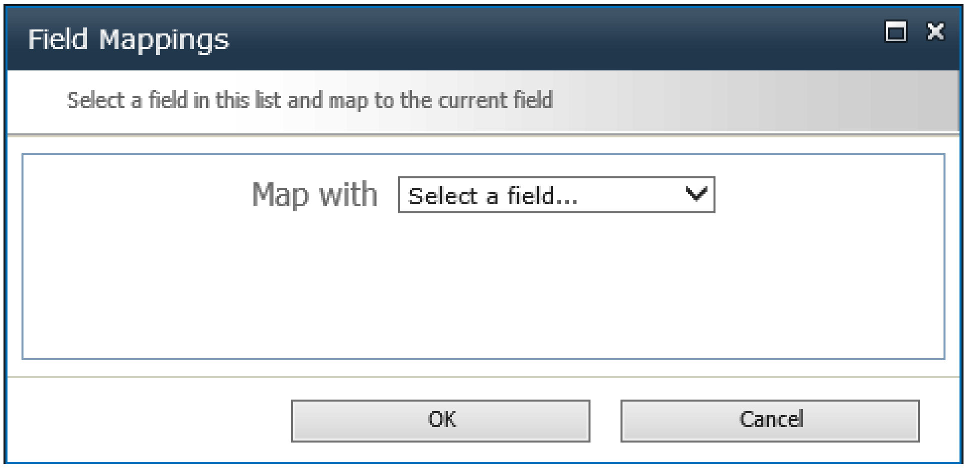


There is a checkbox along the left side of each field. The * (red asterisk) indicates that this field is required and cannot be left empty once it is checked.

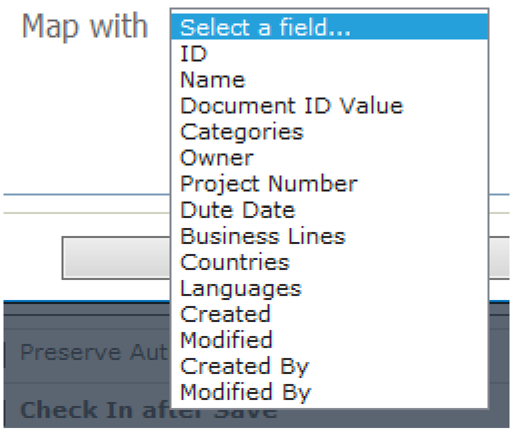
You can retain the existing value by unselect the checkbox.

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

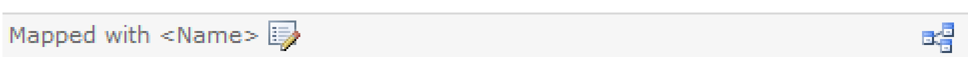
Field Mapping is used to dynamically map and assign another field to the current field. When you click this icon you will bring up the Field Mapping window.



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

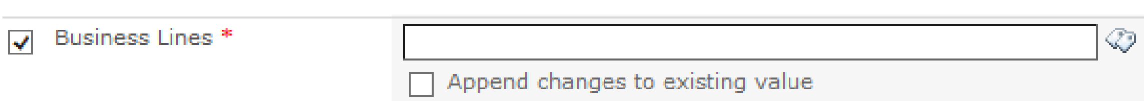


Select a field you want to use and click **OK**. The **Field Mappings** window will close and a new icon will appear on the right side of the field.



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.

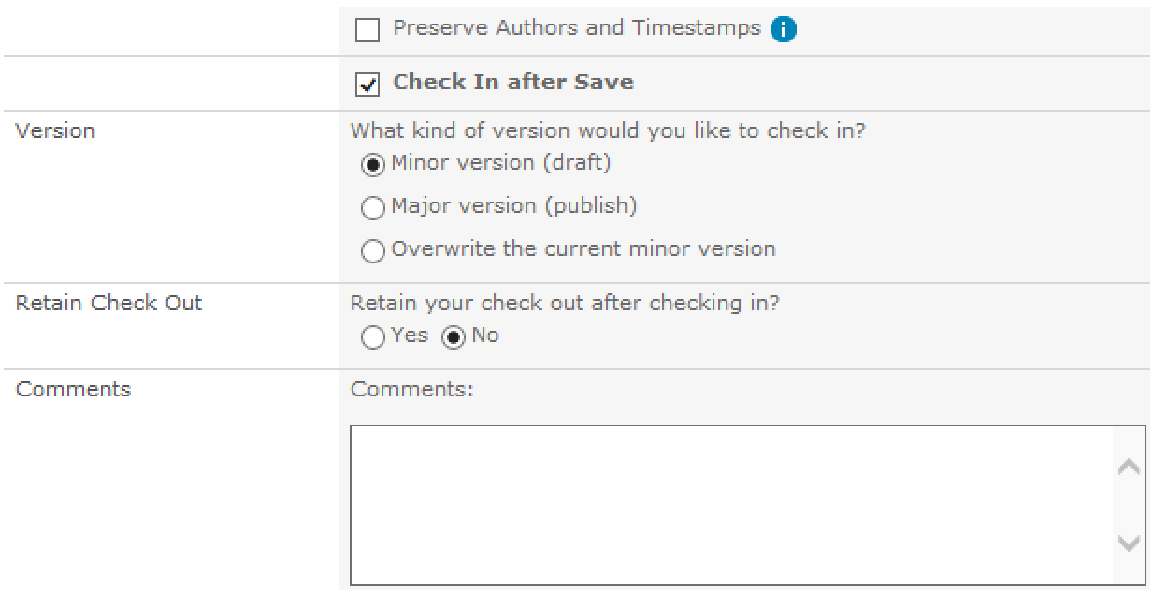
Append changes to existing value: Check this option if you want to append changes to an existing value for a respective field.



> ***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)

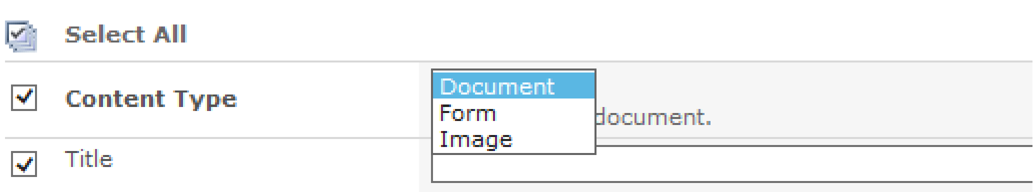
Check In after Save: The selected documents will be checked in after saving.



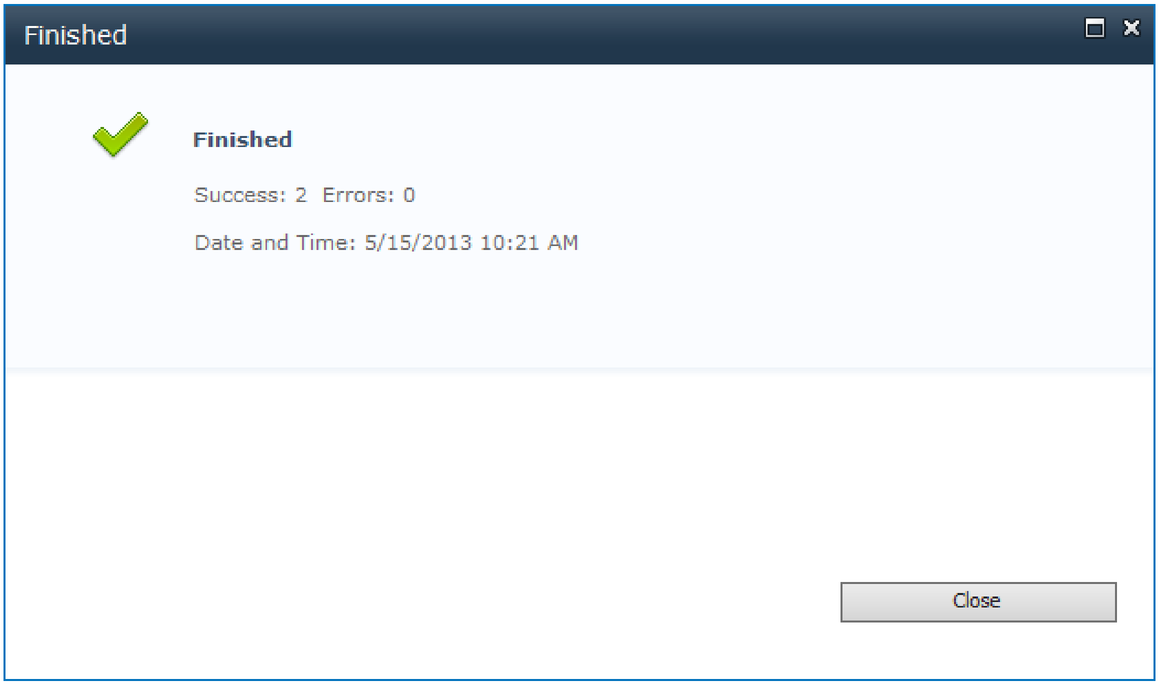
Change Content Type

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.



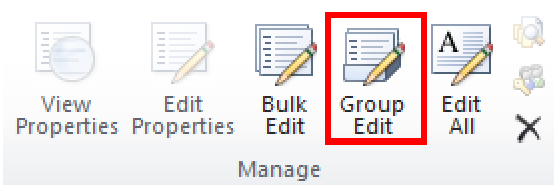
c. Fill in these columns and click **OK.** When the bulk edit operation is finished, a window will pop-up as follows:



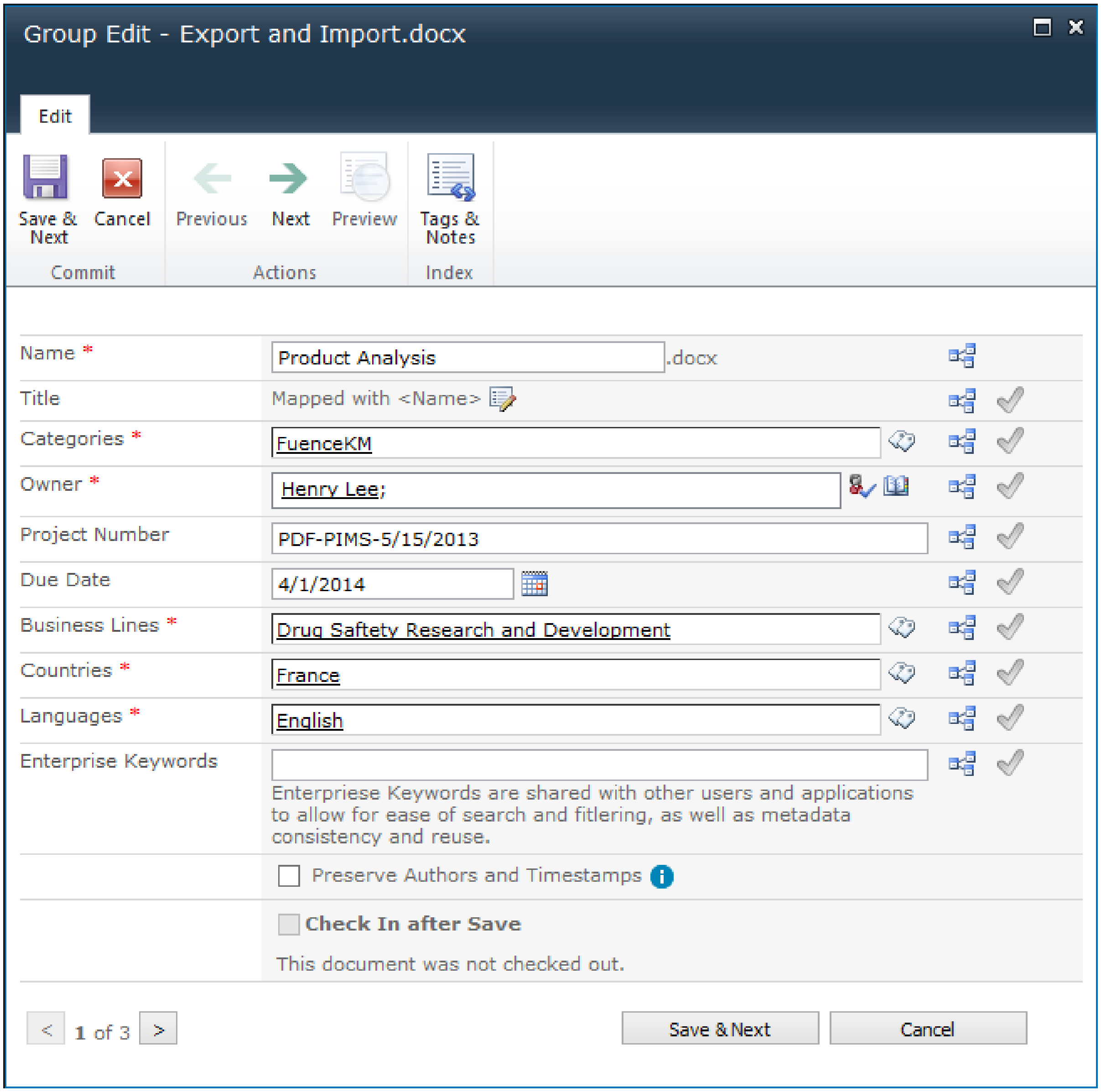
- **Group Edit**

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

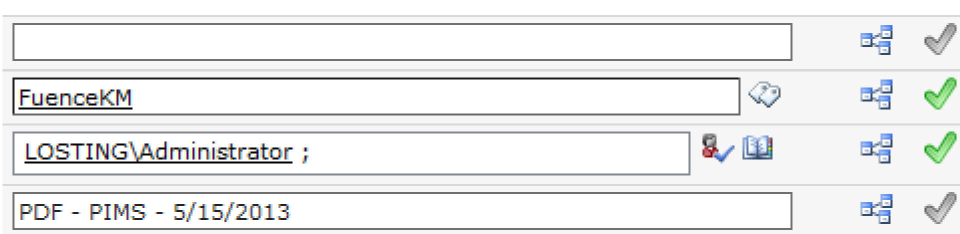
a. Click the **Group Edit** button on the ribbon menu to open the **Group Edit** window.



b. A dialog box will appear as follows:

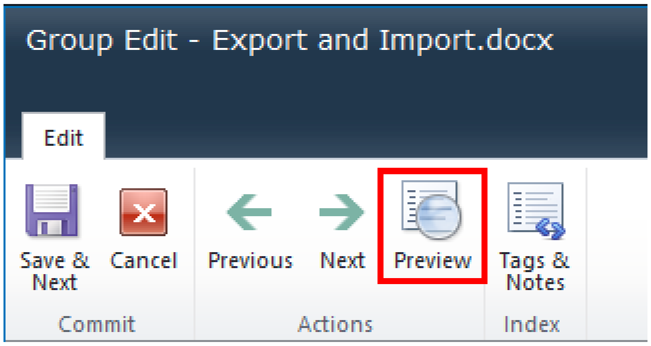


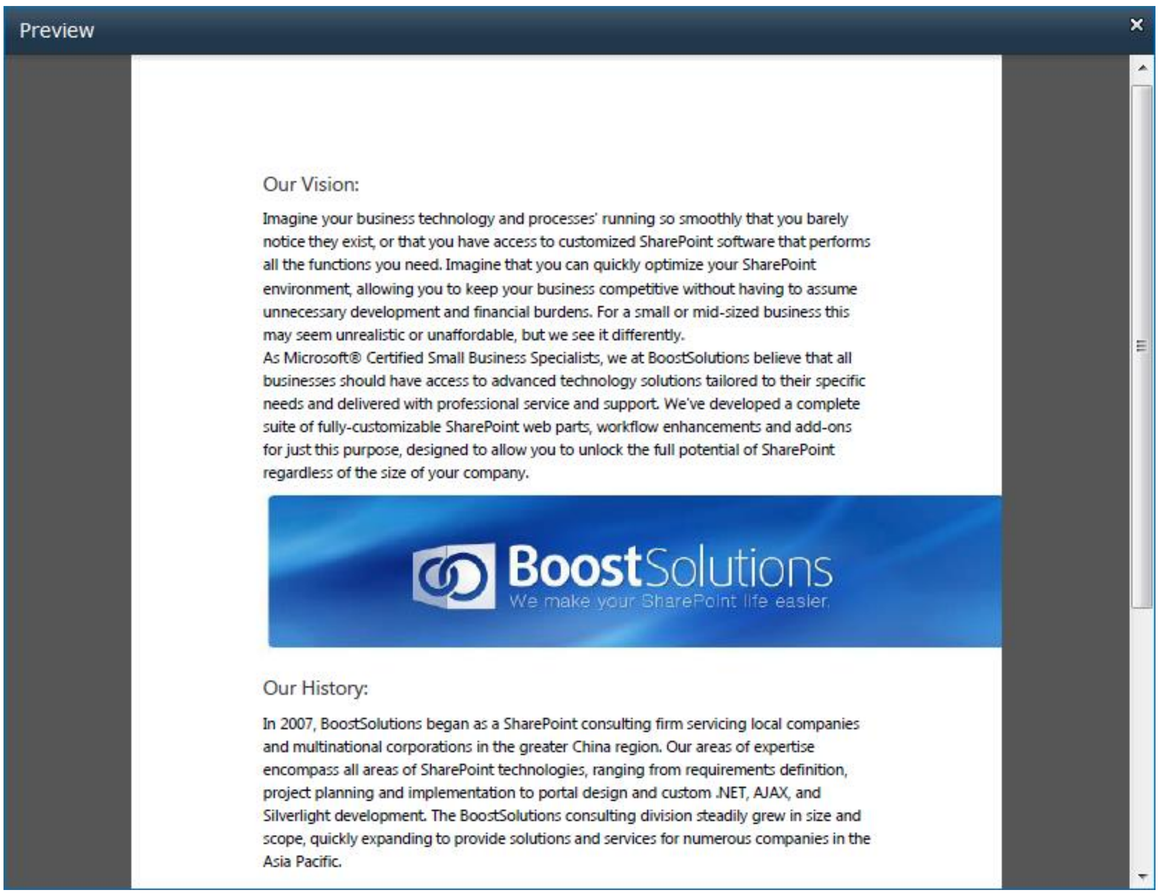
The  icon on the right side of the field is set as a default value for the next document/list item. When clicked the icon will change to a green checkmark as shown below:



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.



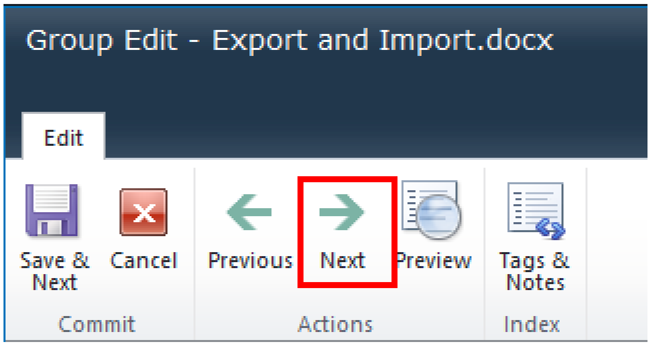


Note

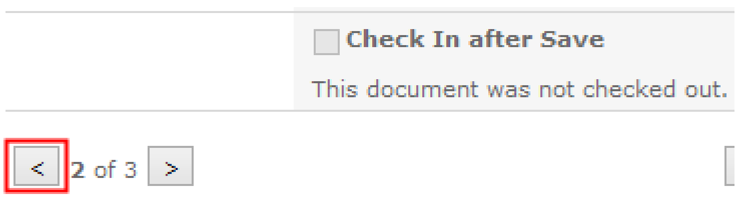
Currently only PDF documents and Images are supported. Click the (x) on the upper right-hand corner of the window to close the document preview window.

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.



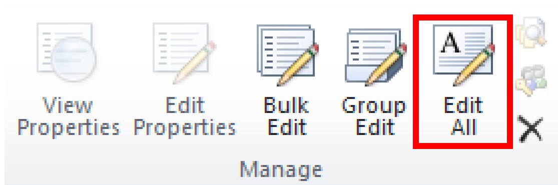
To navigate back to the previous document, click the  button on the lower left corner of the Group Edit window.



- **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.

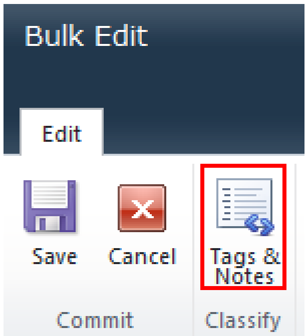


b. When the dialog box appears, follow the steps (starting with step 2) found in Section 3.1.1.

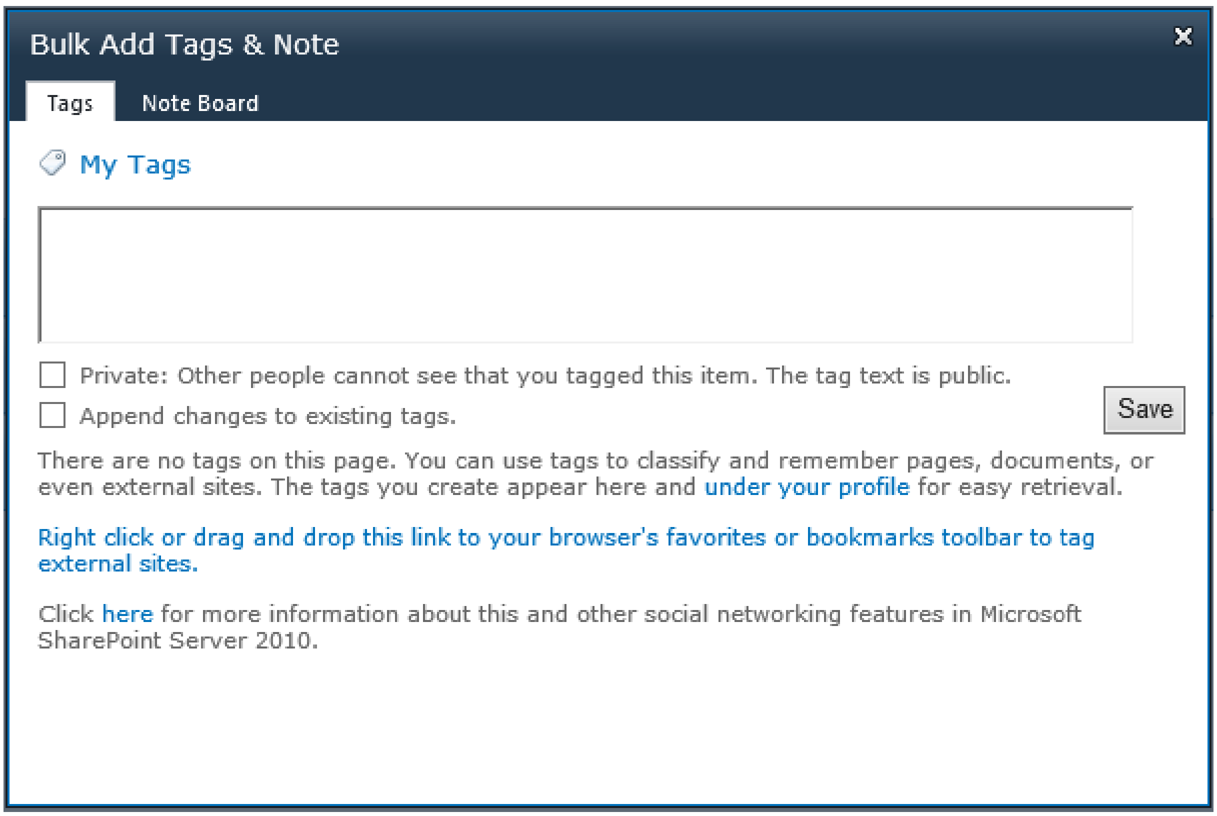
- **Bulk Tag & Notes**

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:



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.

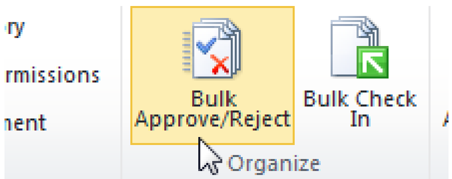
Appending changes to existing tags: With this option enabled, the original tags will not be overwritten when you click Save and all tags entered in this field will be appended to existing values.

3.1.3 Organize Documents

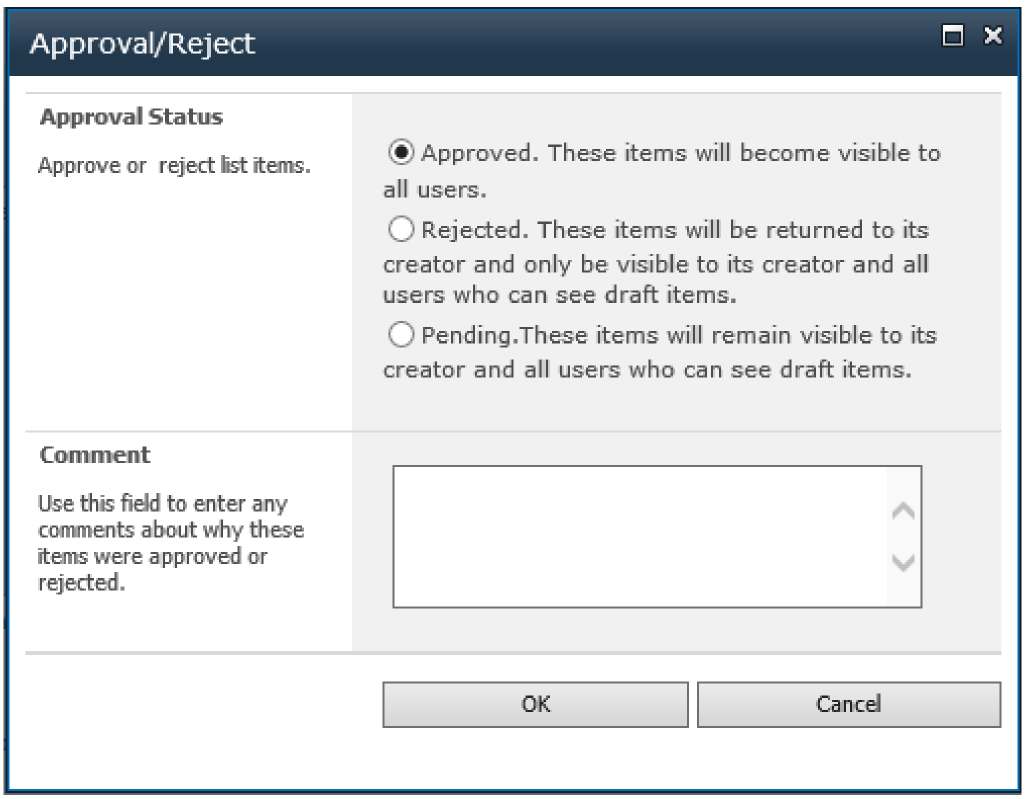
- **Bulk Approve/Reject**

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.

a. 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.



b. You will see the following dialog window:

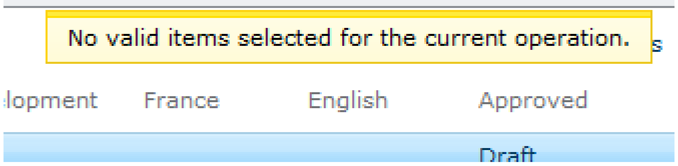


c. On the **Approve/Reject** page:

- 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.

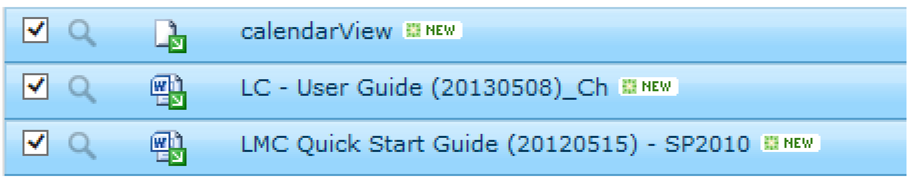


- **Bulk Check In**

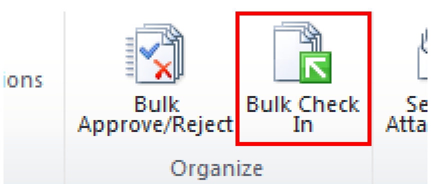
This function helps users to mass check in documents in a document library.

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.

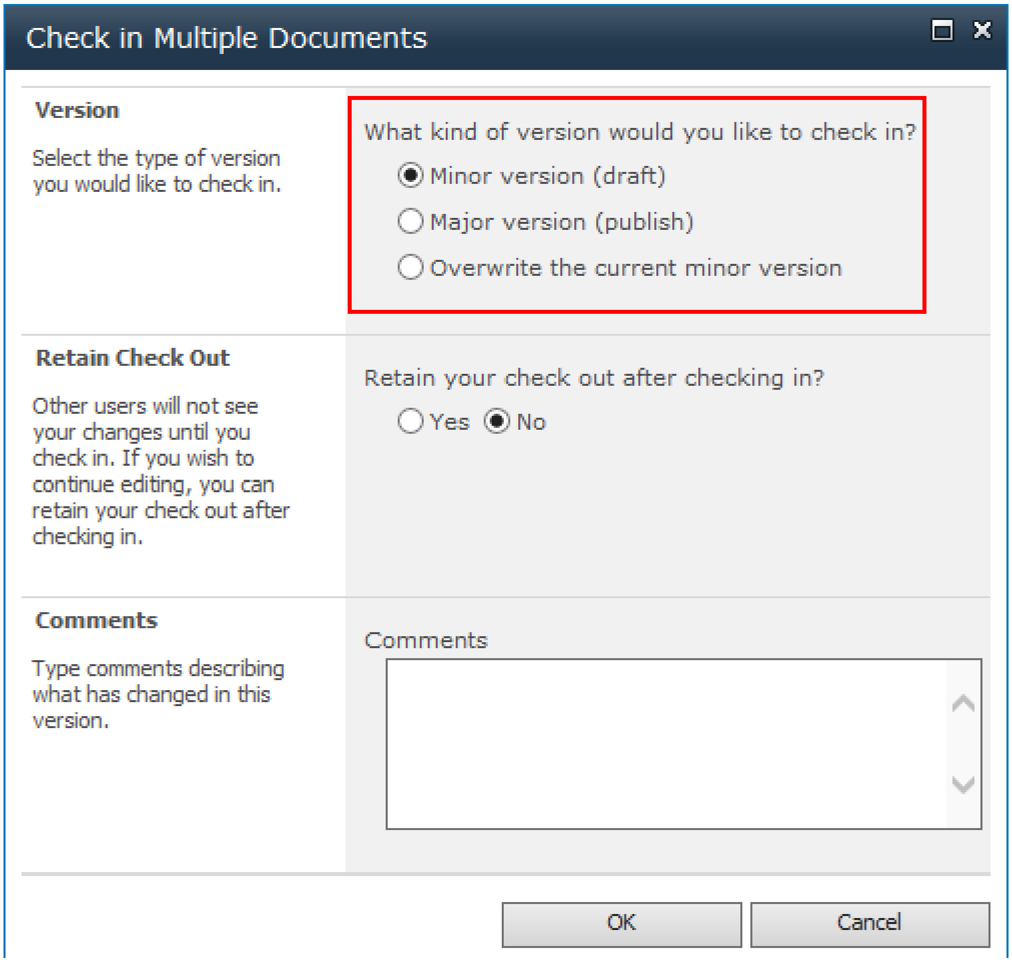


Note

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**.



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. On the **Site Actions** drop-down menu 

, click **Site Settings**.

b. On the Site Settings page, in the **BoostSolutions Software** section, click **Bulk Properties Editor Settings**.

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

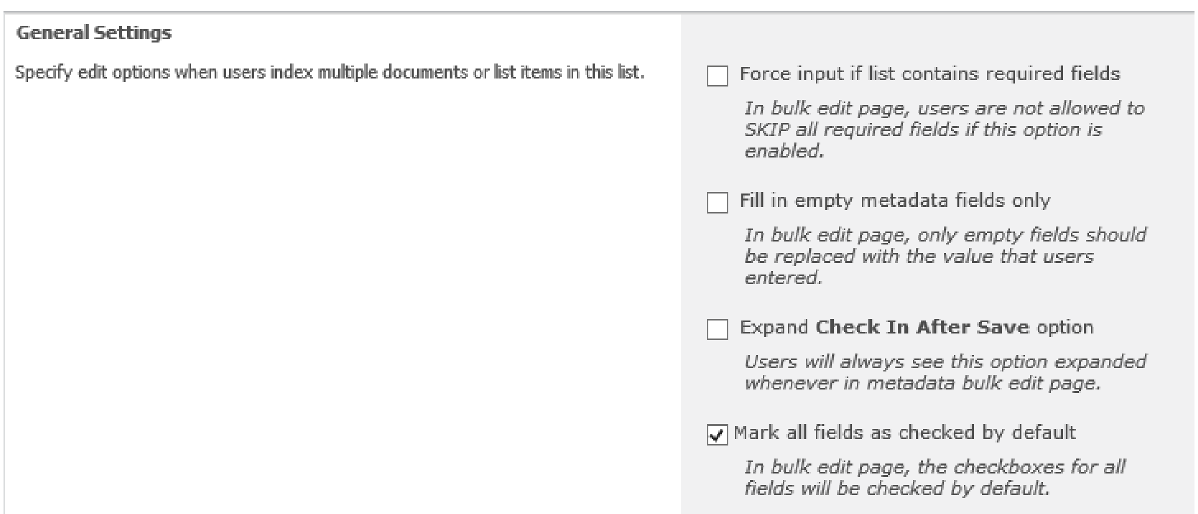
d. On the Site Settings page, in the **BoostSolutions Software** section, click **Bulk Properties Editor Settings**.

e. 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.

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

General Settings



- **Force input if list contains required fields**: In the bulk edit page, users are not allowed to SKIP all required fields if this option is enabled.

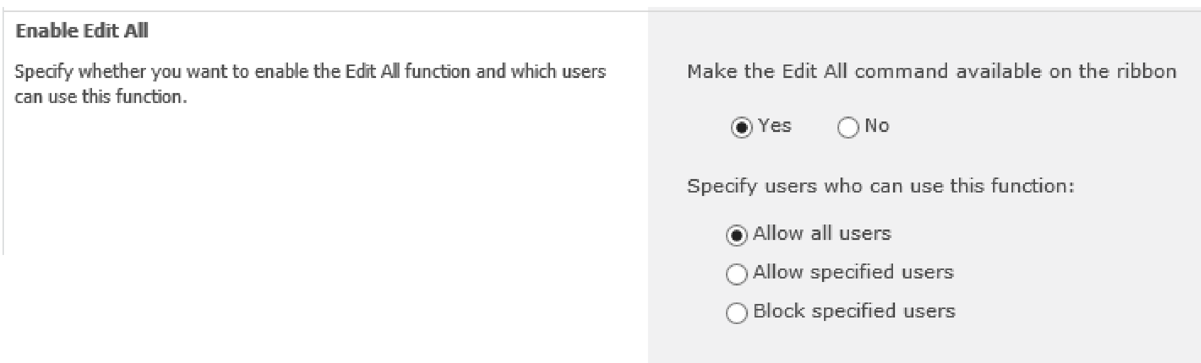
- **Fill in empty metadata fields only**: In the bulk edit page, only empty fields are replaced with a value that users have entered

- **Expand Check In After Save**: Users will always see this option expanded in the metadata bulk edit page.

- **Mark all fields as checked by**: 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.



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

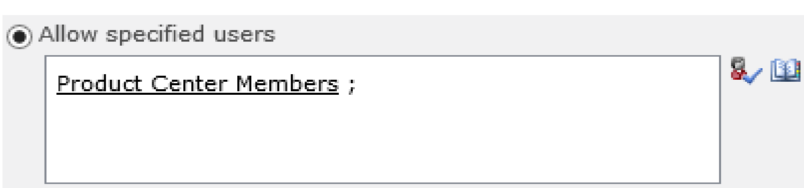
Specify which users can access this feature:

- **Allow all users**

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

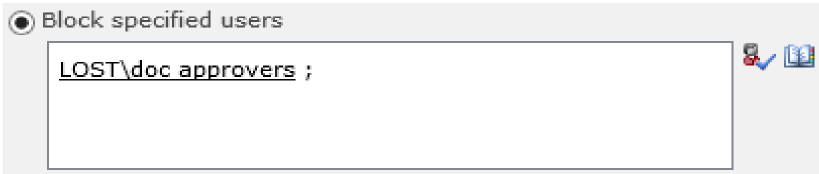
- **Allow specified users**

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



- **Block specified users**

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



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.

To make the **Preserve Authors and Timestamps** function avaliable 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.

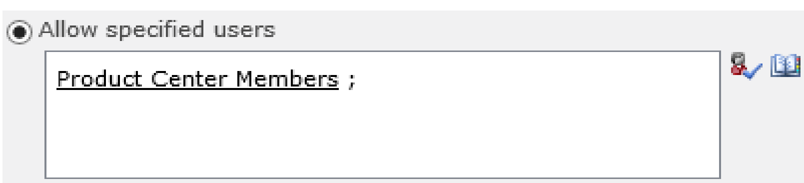
Specify which users can access this feature:

- **Allow all users**

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

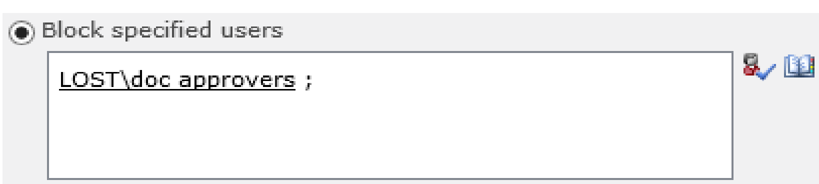
- **Allow specified users**

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



- **Block specified users**

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

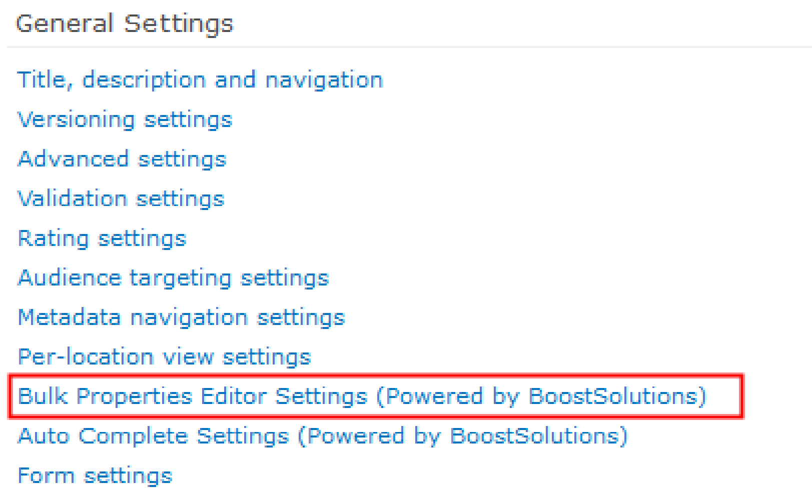


f. Click OK to save settings.

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**.



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

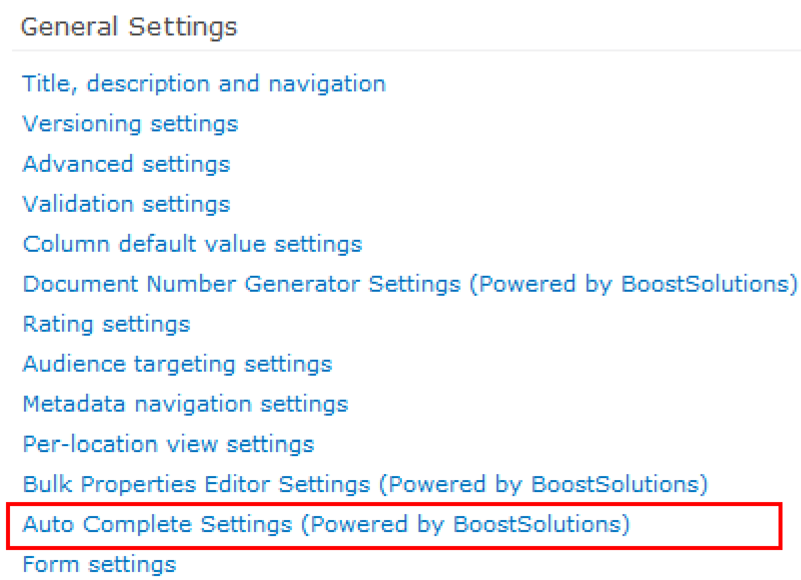
If you want to use settings from a parent site, click Inherit settings.

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

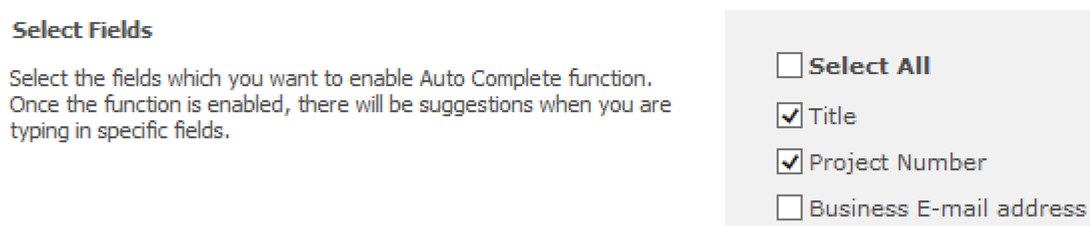
This feature allows you to see the relevant records as you type when editing SharePoint records.

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



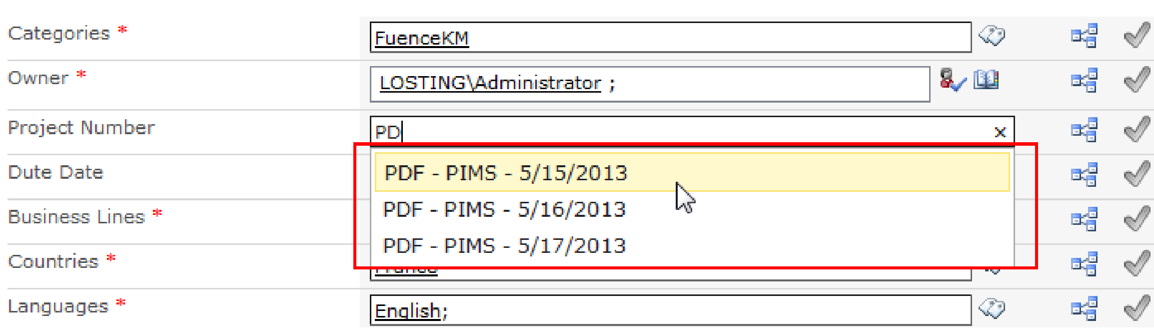
b. You will see the following settings:

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



> ***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.

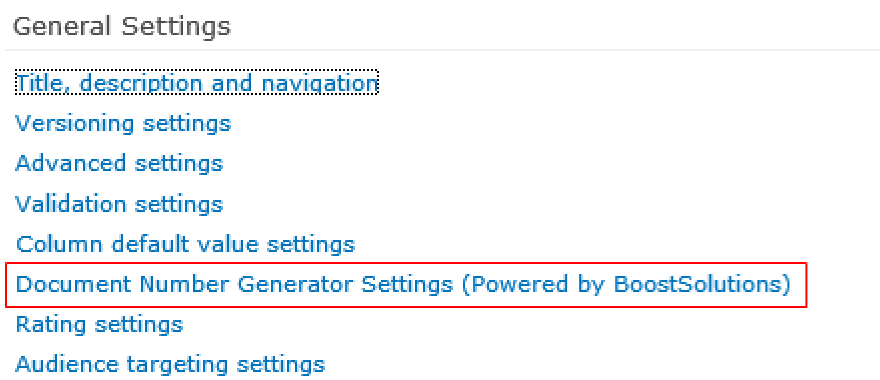


> ***Note***
>
> Auto display will display at most 30 relevant records from the current library or list.

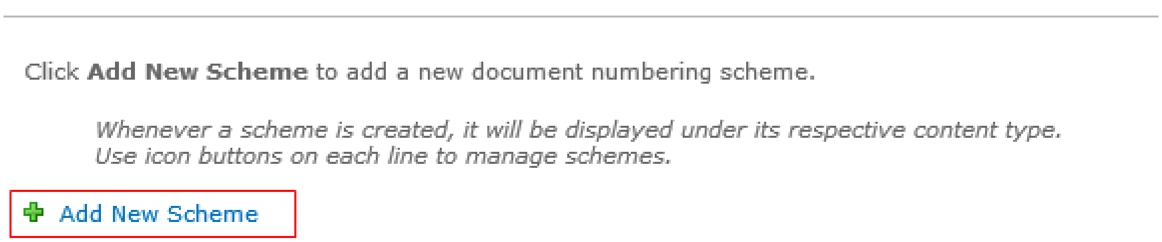
3.2 Generate Document Number

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.



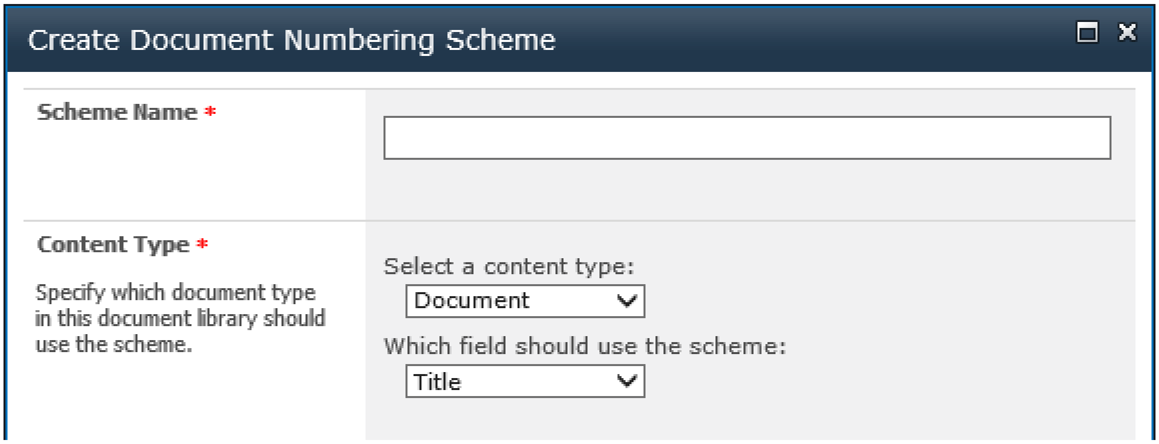
Click **Add New Scheme**.



3.2.2 Add a Scheme

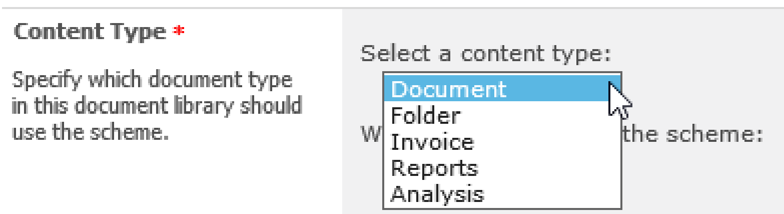
Click **Add New Scheme** to add a new document numbering scheme. You will see a new dialog window.

Scheme Name: Enter a name for this scheme.

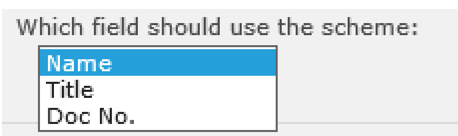


Content Type: Specify which field should use this scheme. Note, you need to select content type first to determine the specific field.

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



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



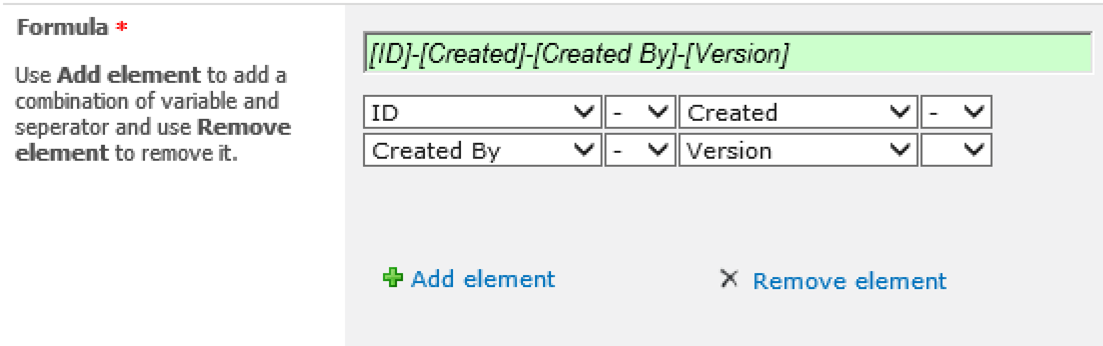
Note

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.

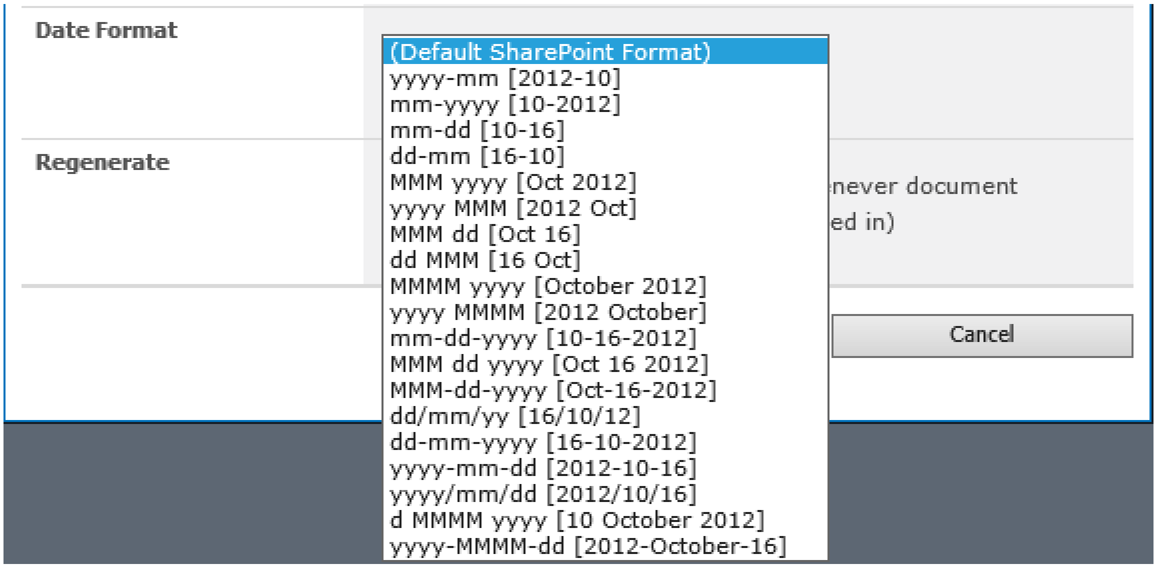
2. Multiple schemes cannot be applied to one column in one Content Type.

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



Columns	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. Also, you can insert following SharePoint metadata in formula, include: [Document ID Value], [Content Type], [Version], etc.
Functions	Document Number Generator allows inserting following functions in the formula. [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.
Customized	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.
Separators	When you add multiple elements in a formula, you can specify the separator to conjoin these elements. The connectors include: - _ . / \ (The / \ separators cannot be used in the Name column.)

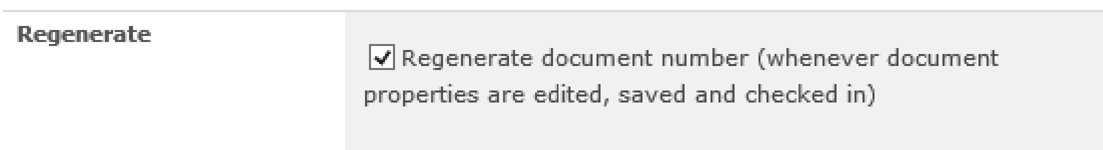
Date Format: In this section you can specify which date format you want to use.



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.

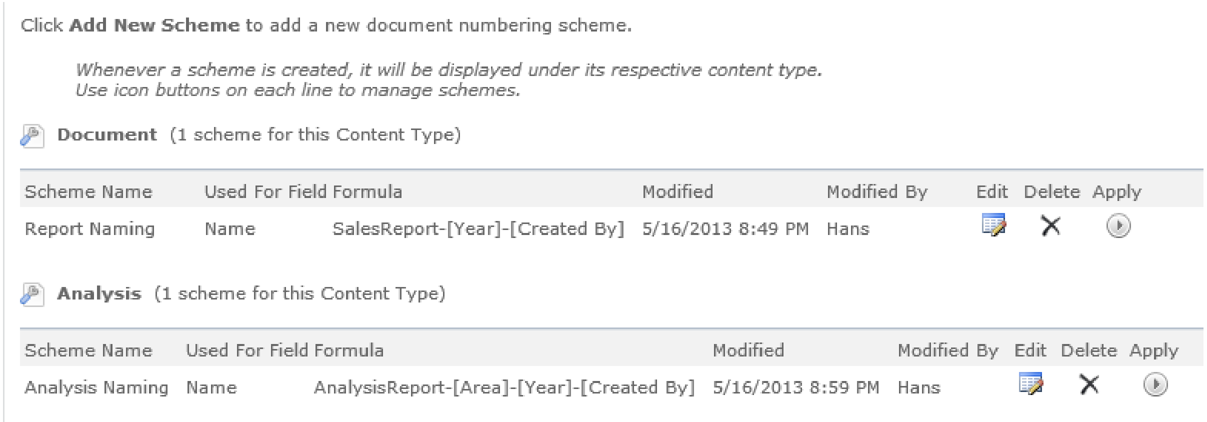
Regenerate: This option determines whether you want to regenerate the document numbering scheme when the specific document is edited, saved or checked in.



Note: When this option is enabled the column valued 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.

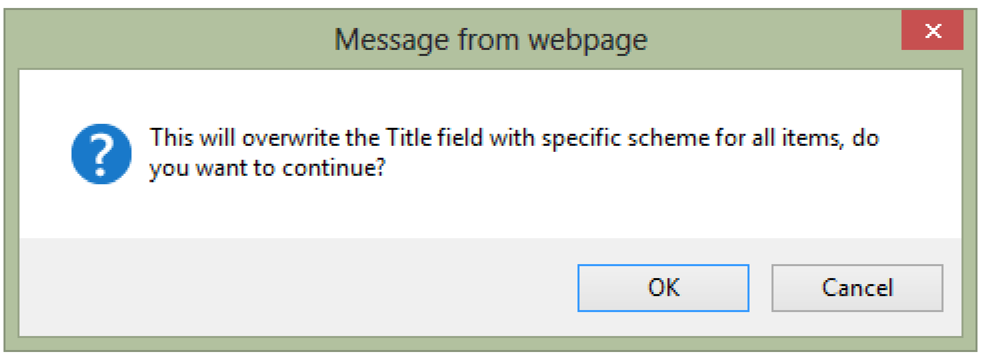


Use the icon to edit the scheme.

Use the icon to delete the scheme.

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

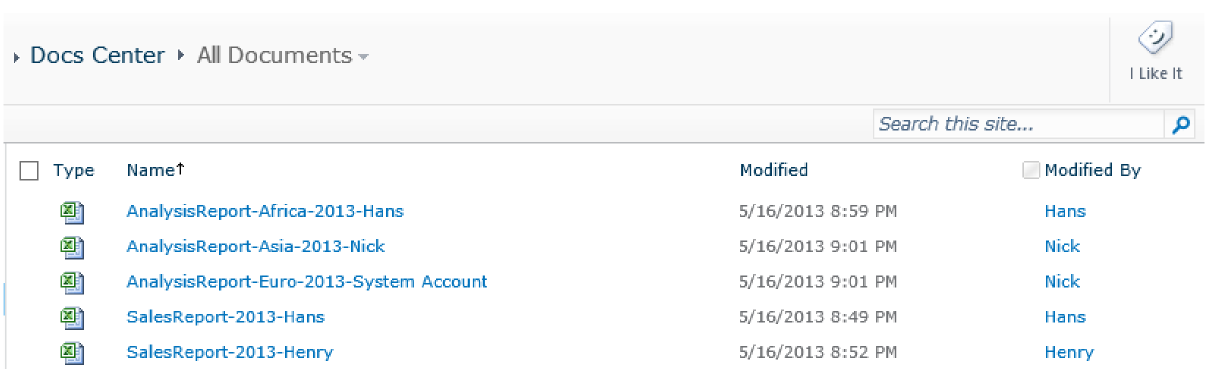
Note: This action is dangerous because the value of a specific field for **ALL** documents will be overwritten.



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.



3.3 Copy & Move Documents

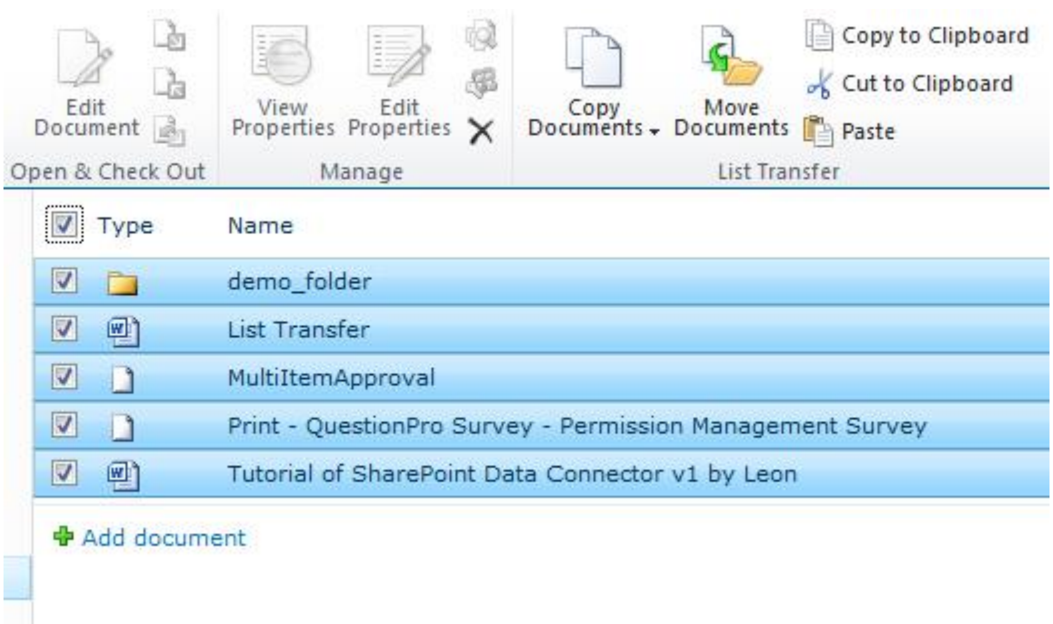
List Transfer can copy and move SharePoint documents or list items between lists, libraries or sites freely to help SharePoint end users easily transfer document and list items in SharePoint.

3.3.1 Copy Documents

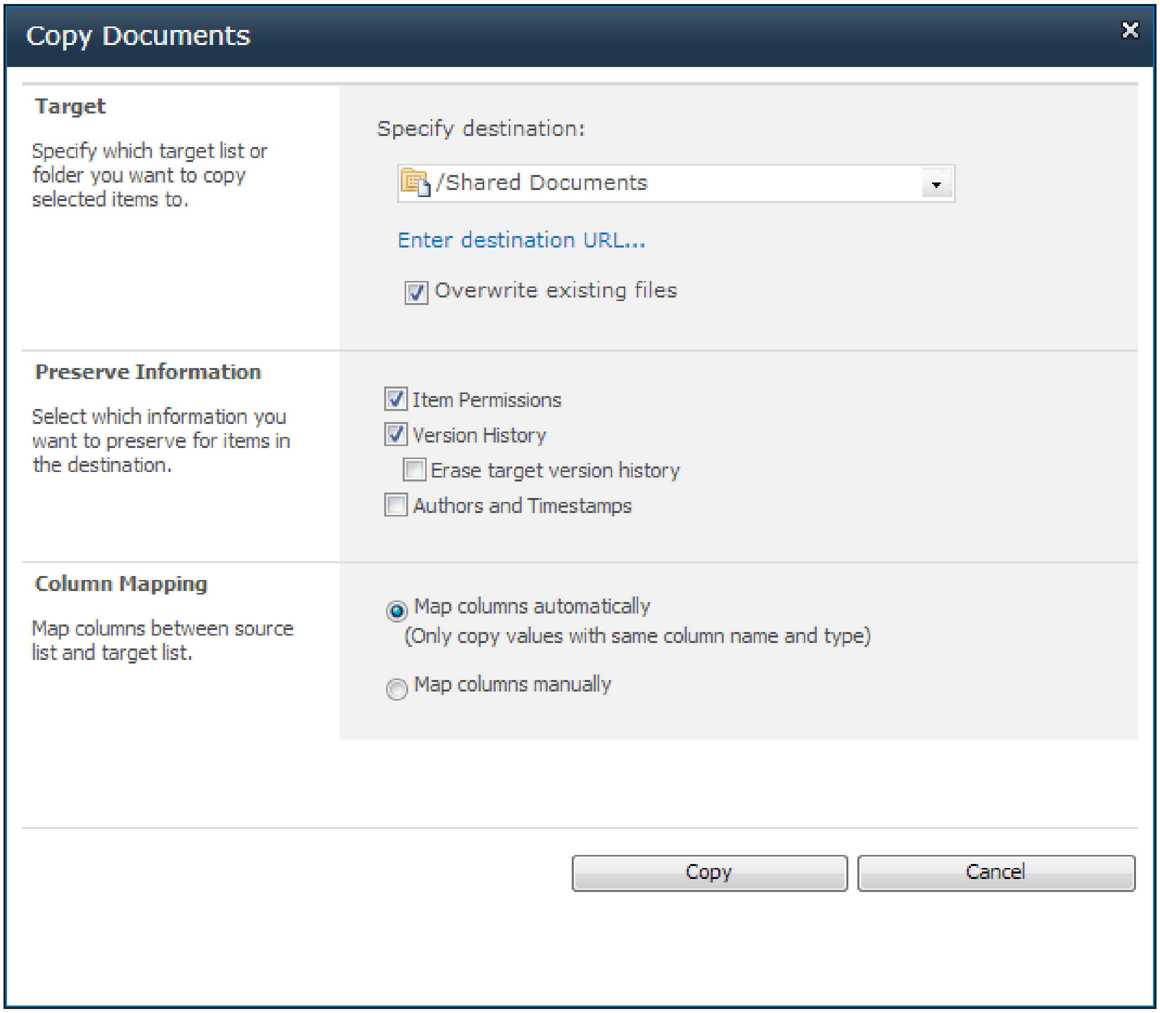
Copy Documents enable users to duplicate documents or files between folders, document libraries/lists, and different sites/site collections.

- **Choose documents**

On the ribbon menu, users can select documents which need to be copied. Batch documents are supported.

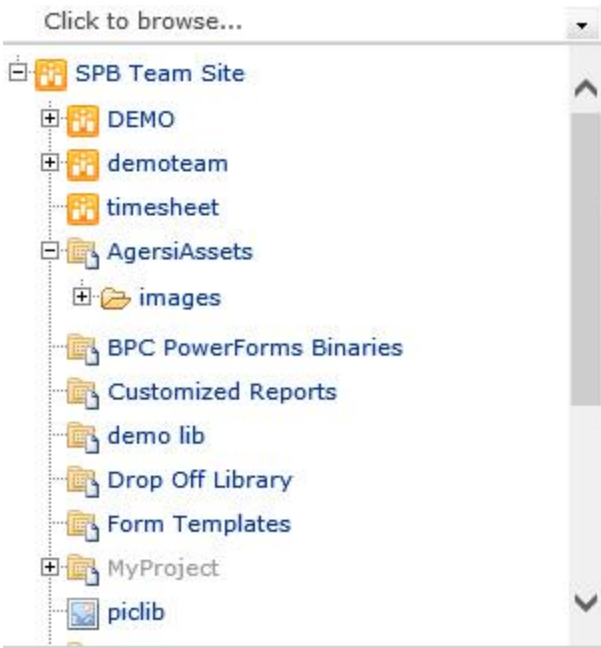


After selected documents, click the **Copy Documents** button. It will show the following window:



- **Specify documents destination**

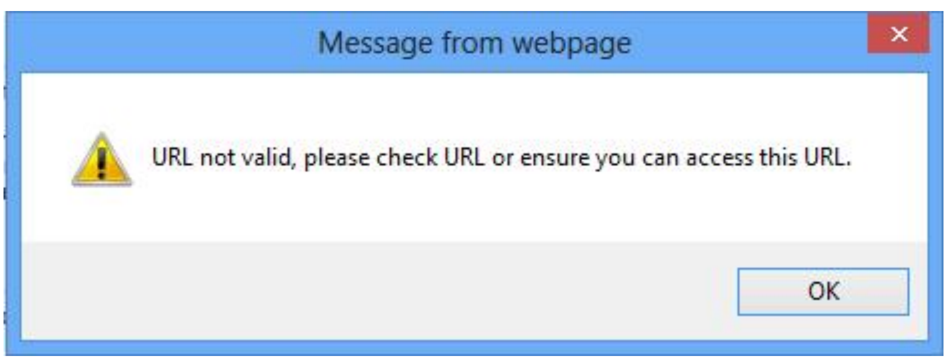
In the **Target** section users can browse and select the target list or folder to copy selected documents to.



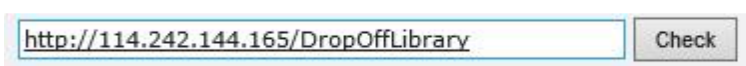
The option **Overwrite existing files** determines whether the original documents in the target should be overwritten by the selected documents.

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.

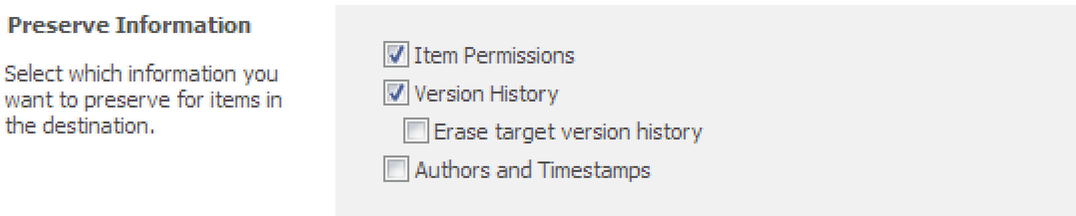


If everything is OK then the URL will be replaced by an underlined address.



- **Preserve Information**

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



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.

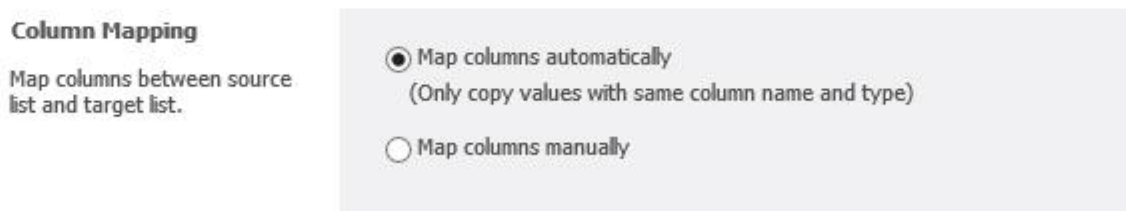
Authors and Timestamps: To preserve the creation and modification information (created, created by, modified and modified by)

- **Column Mapping**

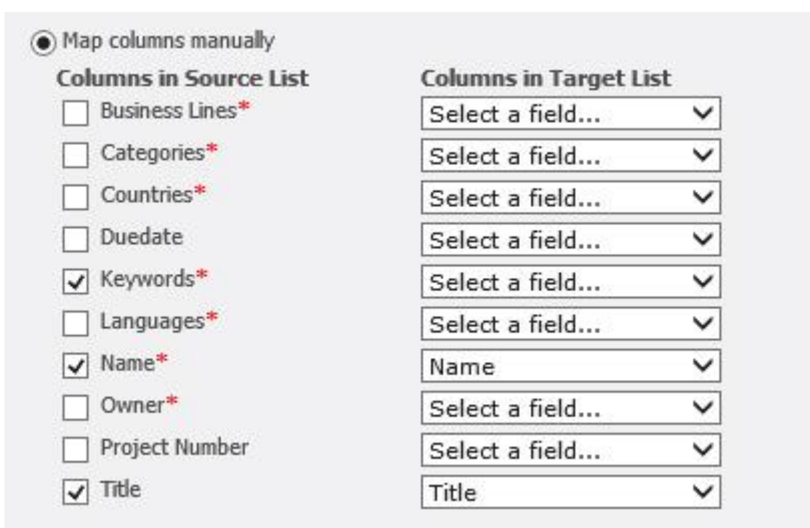
In the **Column Mapping** section there are two options to map columns when migrating documents:

Map columns automatically

Map column manually

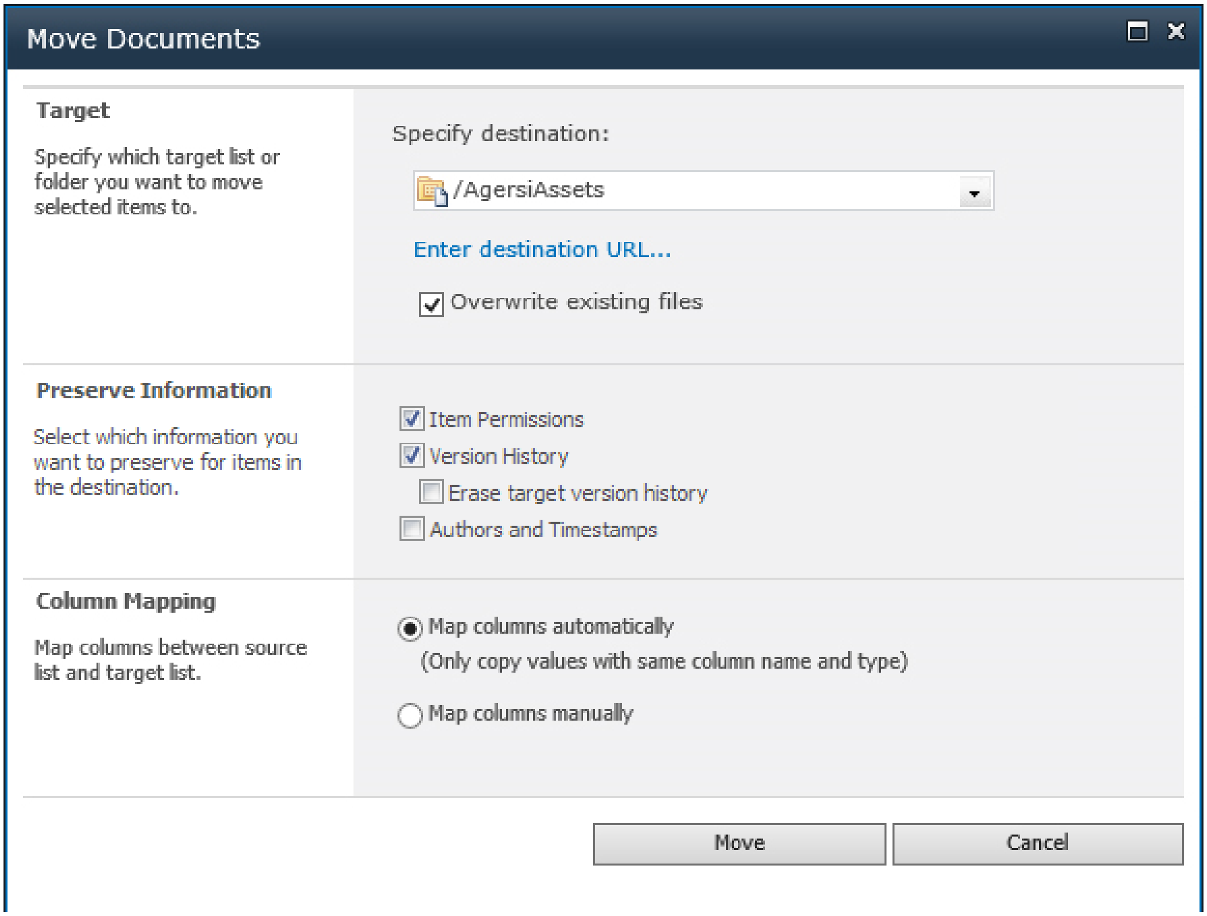


By default, the columns with the same column name and type will be mapped automatically. However, you can still map columns manually by selecting the **Map columns manually** option.



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.



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

3.3.3 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.

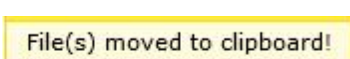
The following shortcuts are supported:

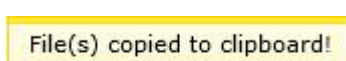
Ctrl + Shift + X: Cut files to Clipboard

Ctrl + Shift + C: Copy files to Clipboard

Ctrl + Shift + V: Paste files

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

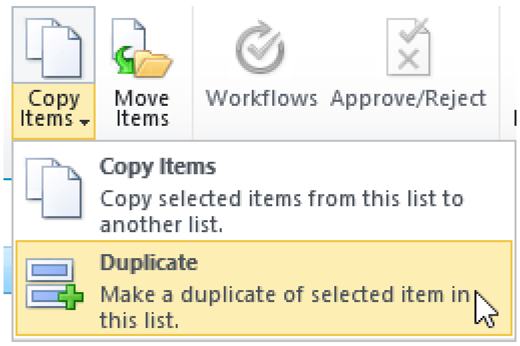


Or


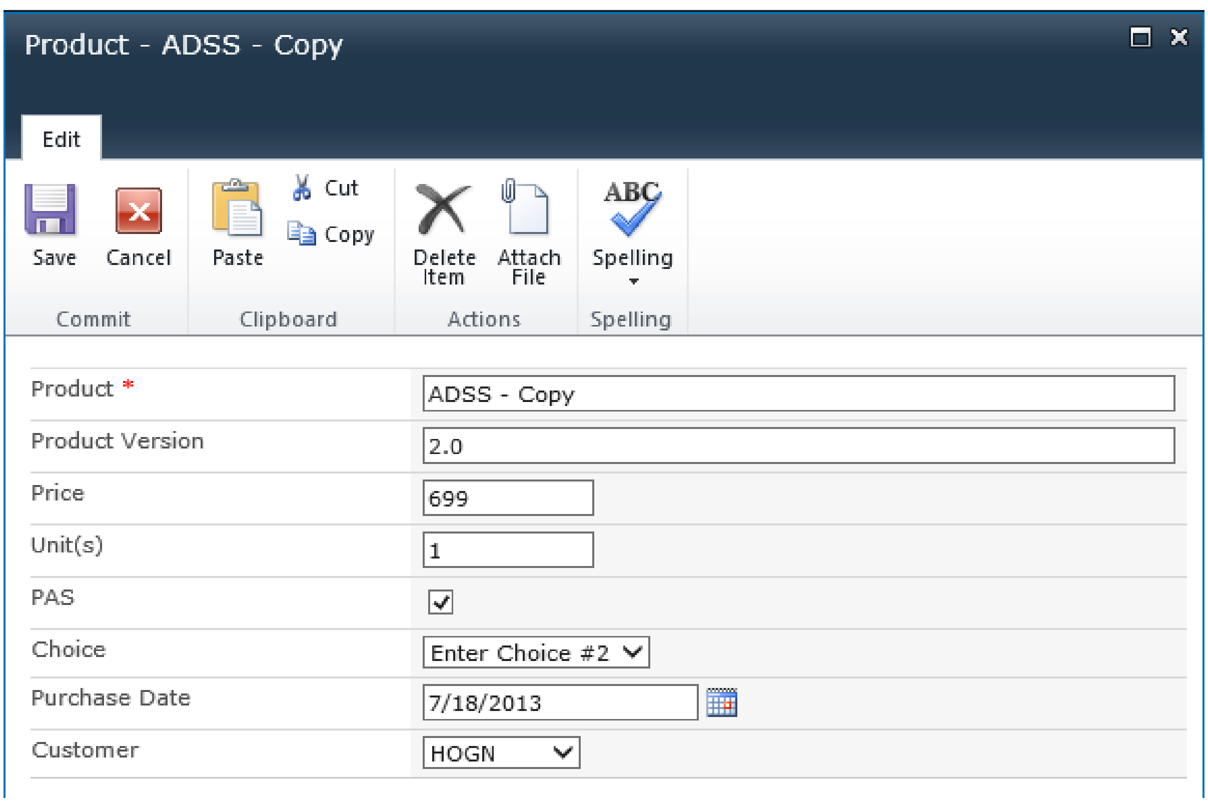
3.3.4 Duplicate Item

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.

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



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



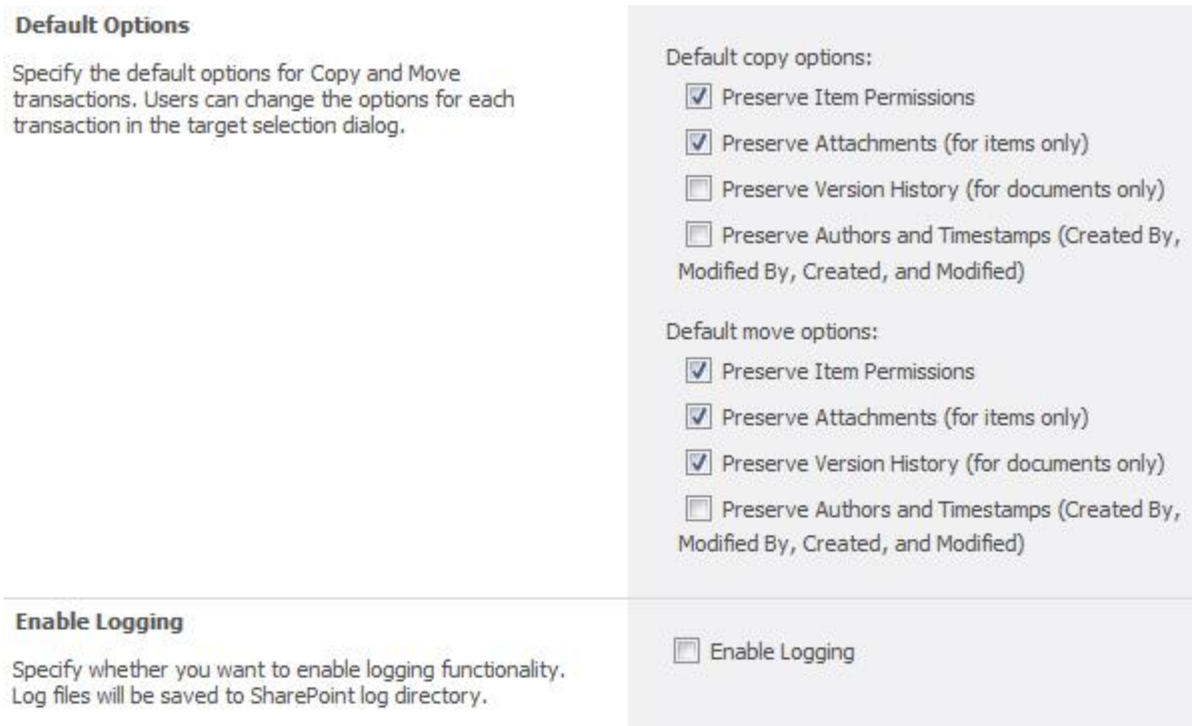
c. You only need to modify the fields which are different, then click **Save**.

3.3.5 List Transfer Settings

Go to **Site Actions** – **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**



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.

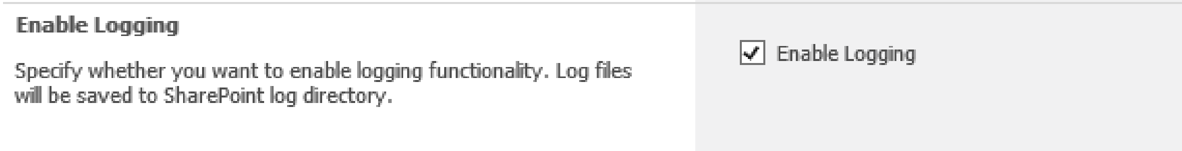
Preserve Version History (for documents only): Keep the version history while copying or moving documents.

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.



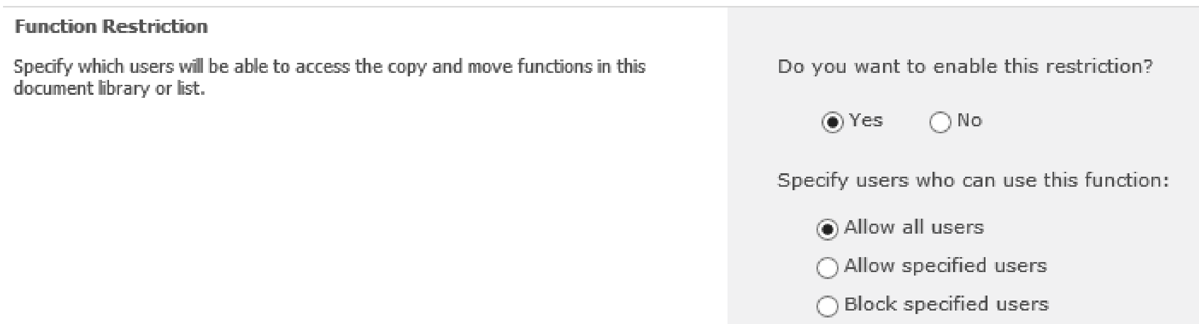
After enable the option, the error and warning message will be recorded in the SharePoint logs under this location:

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

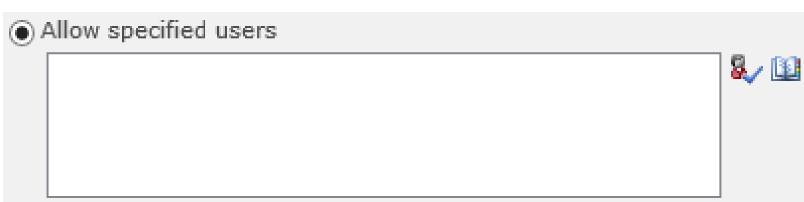


To enable the product restriction on the list or library, select **Yes**; otherwise, select **No**.

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

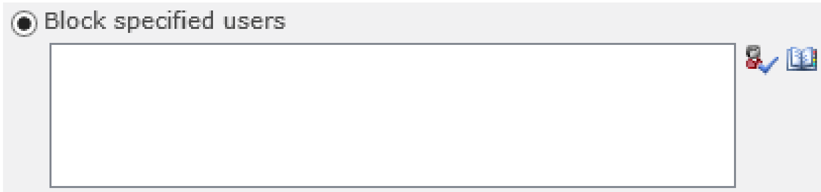
Allow all users: all user with sufficient permissions can use product in list or library.

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



You can inpurt 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.



You can inpurt users, sharepoint group and domain group.

4. Save & Send

Note

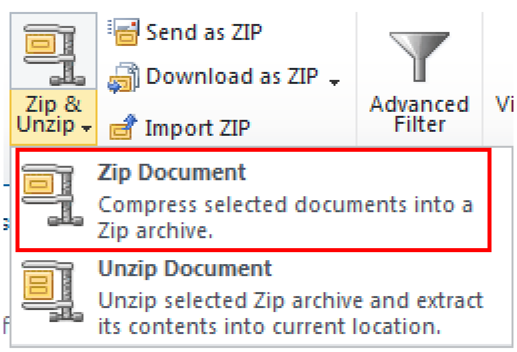
To use the zip and unzip features, users must have Contribute permission levels.

4.1 Zip or Unzip Documents

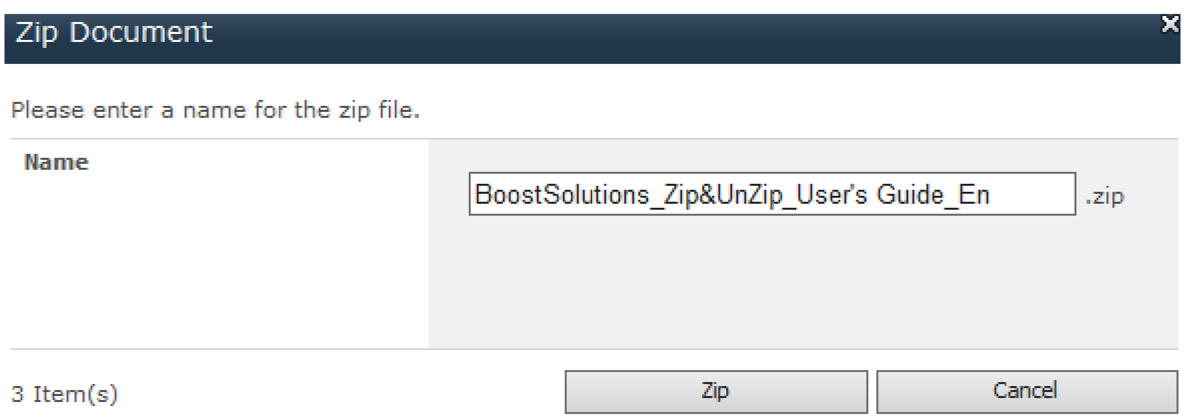
4.1.1 Zip Documents

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

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



b. A dialog window will appear as follows:



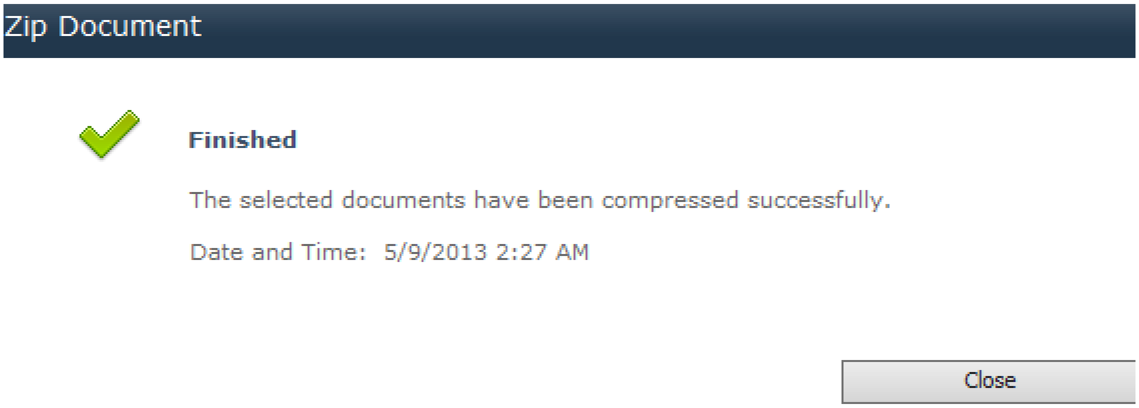
Note

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.

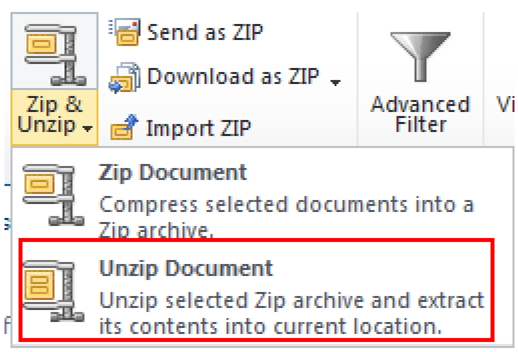
d. Wait for the operation to complete. You will see the following message:



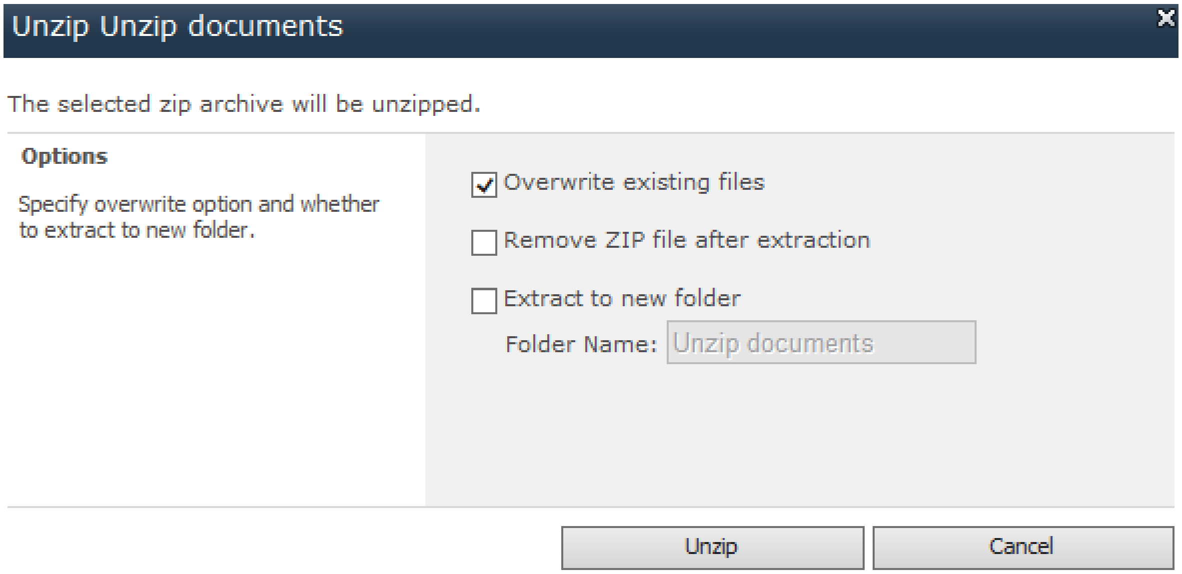
4.1.2 Unzip Documents

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:



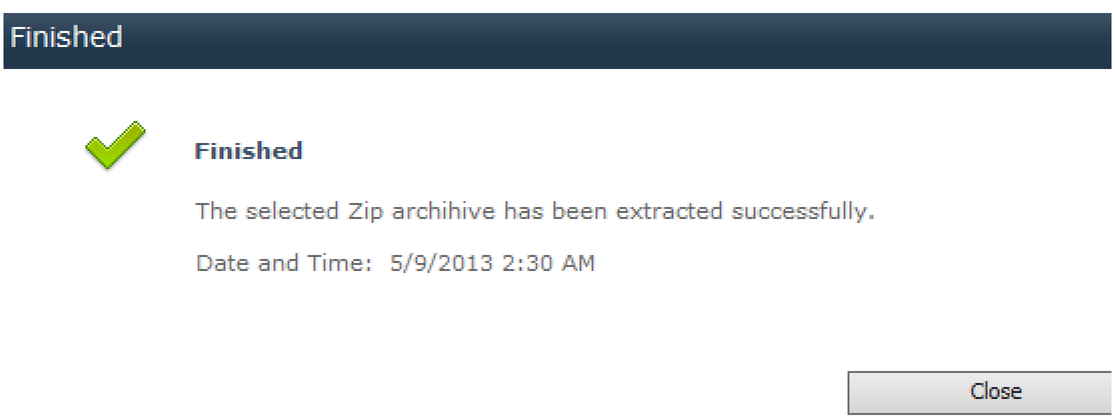
Overwrite existing files: Overwrite existing files in the current location.

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:

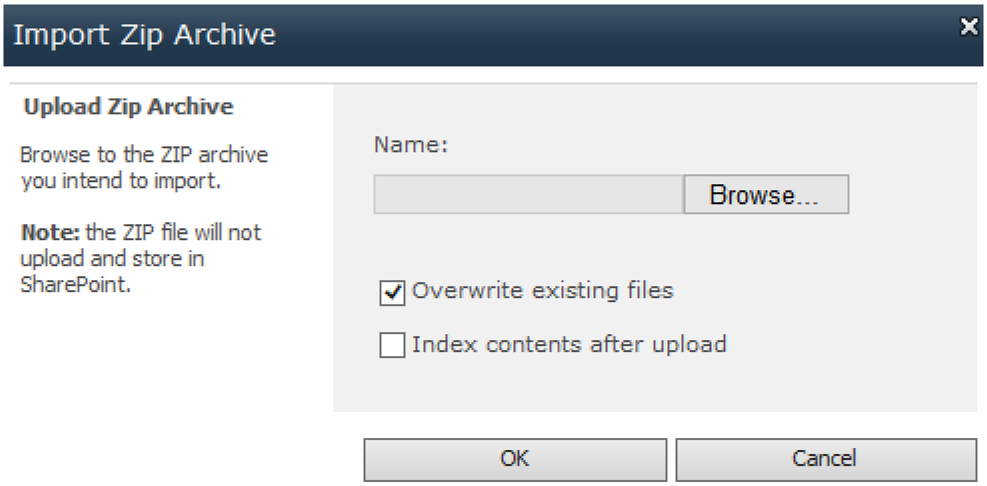


> ***Note***
>
> The **Unzip Document** button is only available when you select a Zip file in the SharePoint document library. This button will be disabled when multiple documents are selected or if there is no zip file.

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:



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.

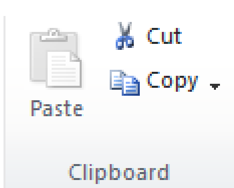
b. Select a zip file from your local computer and click **OK**.

c. Wait for the operation to finish; your documents will be uploaded into the document library.

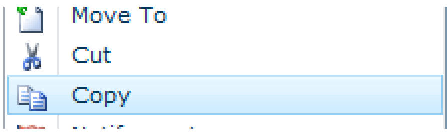
4.3 Paste Files to Zip

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

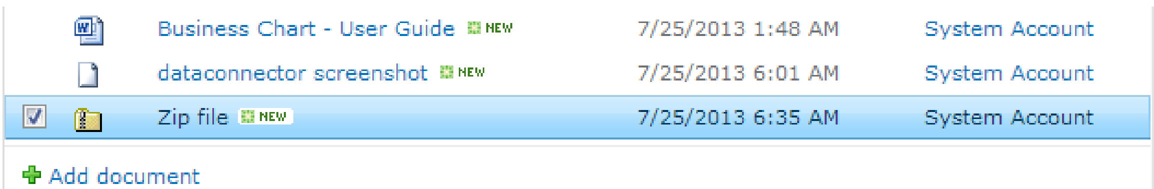
a. Enter a document library, select the desired documents and click **Copy** or **Cut** on the Ribbon under the Documents tab.



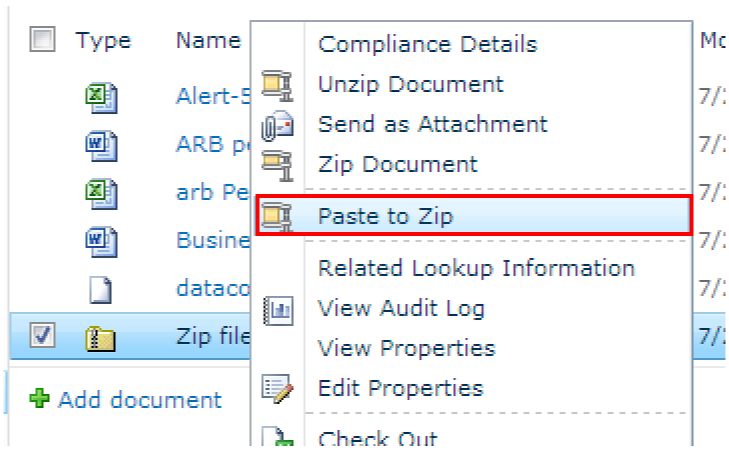
Or, select a desired document, click **Copy** or **Cut** in the item edit menu.



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



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



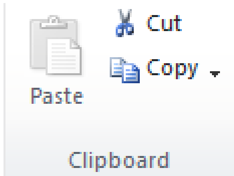
d. Then the documents you selected will be pasted into the zip file.

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

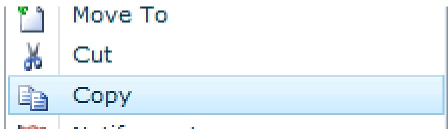
4.4 Paste Files as attachments

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 Documents tab.

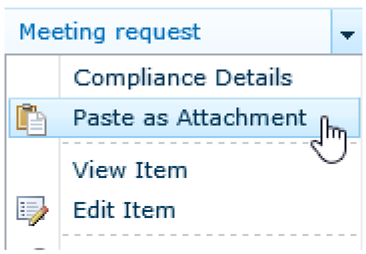


Or, select a desired document, click **Copy** or **Cut** in the item edit menu.



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.

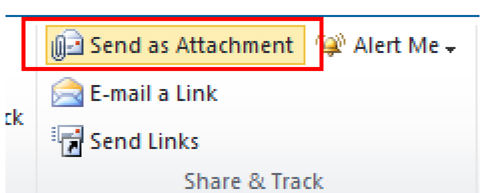
Note

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

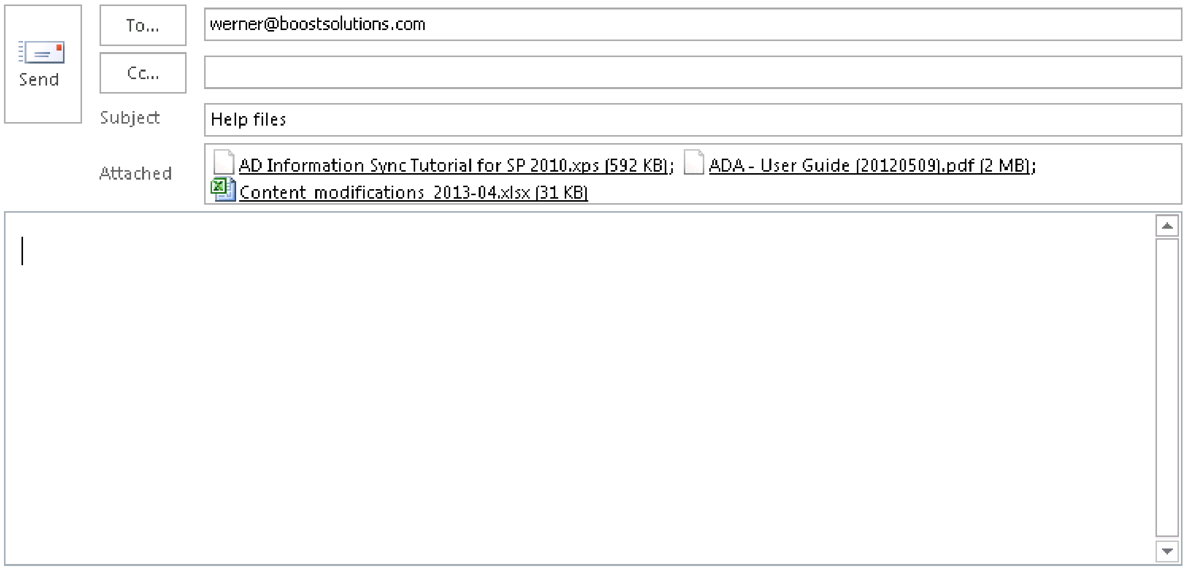
To send documents as an email attachment, follow the following steps:

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.

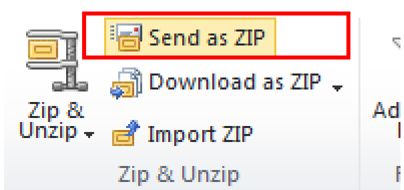


c. Compose your email and send it.

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.



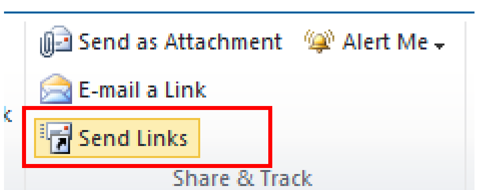
b. The zip file will be attached in an email.

If you encounter the "Failed to Load Outlook" error message, please read this.

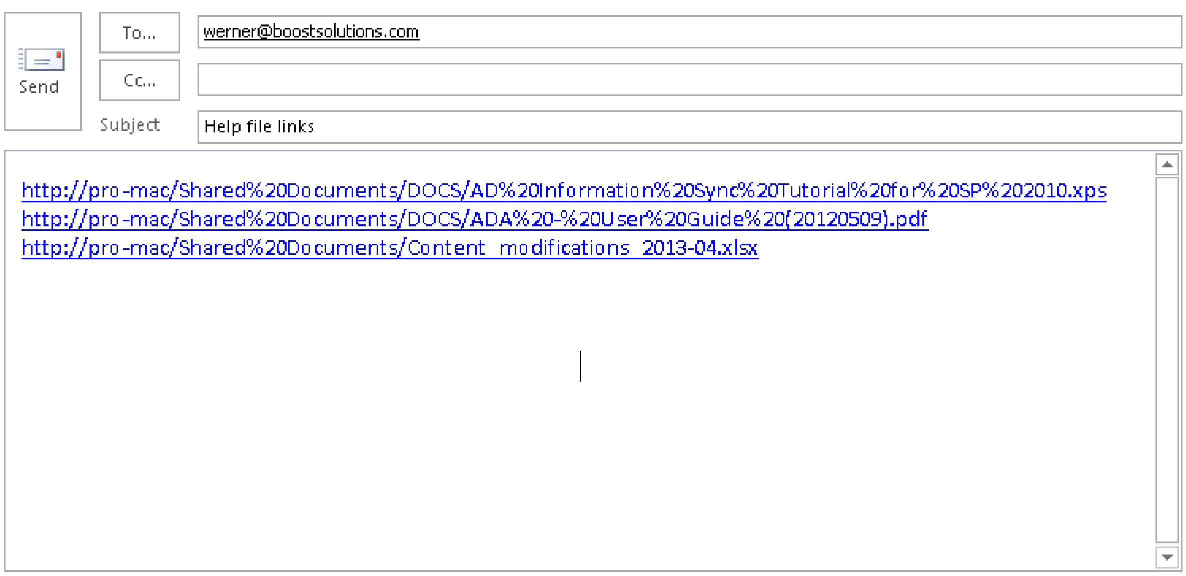
4.5.3 Send as Links

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

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



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

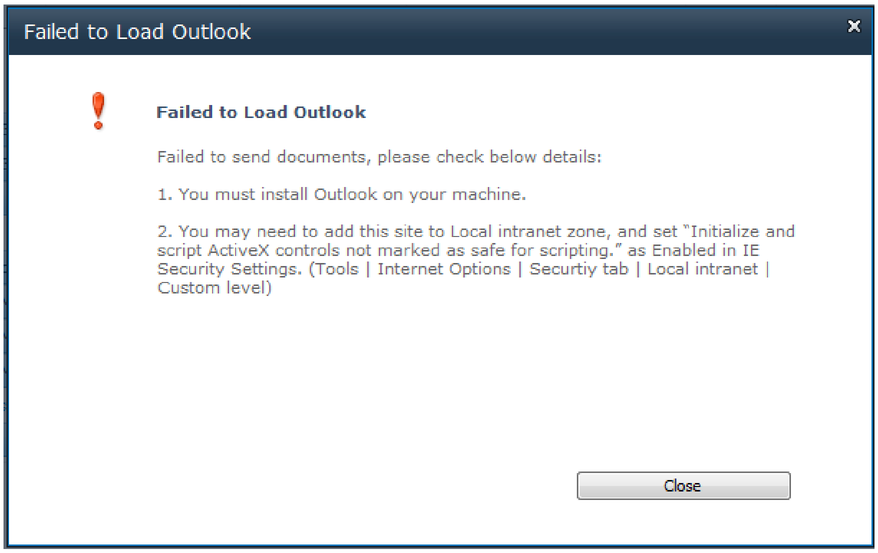


c. Compose the email and send it.

> ***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 as follows:

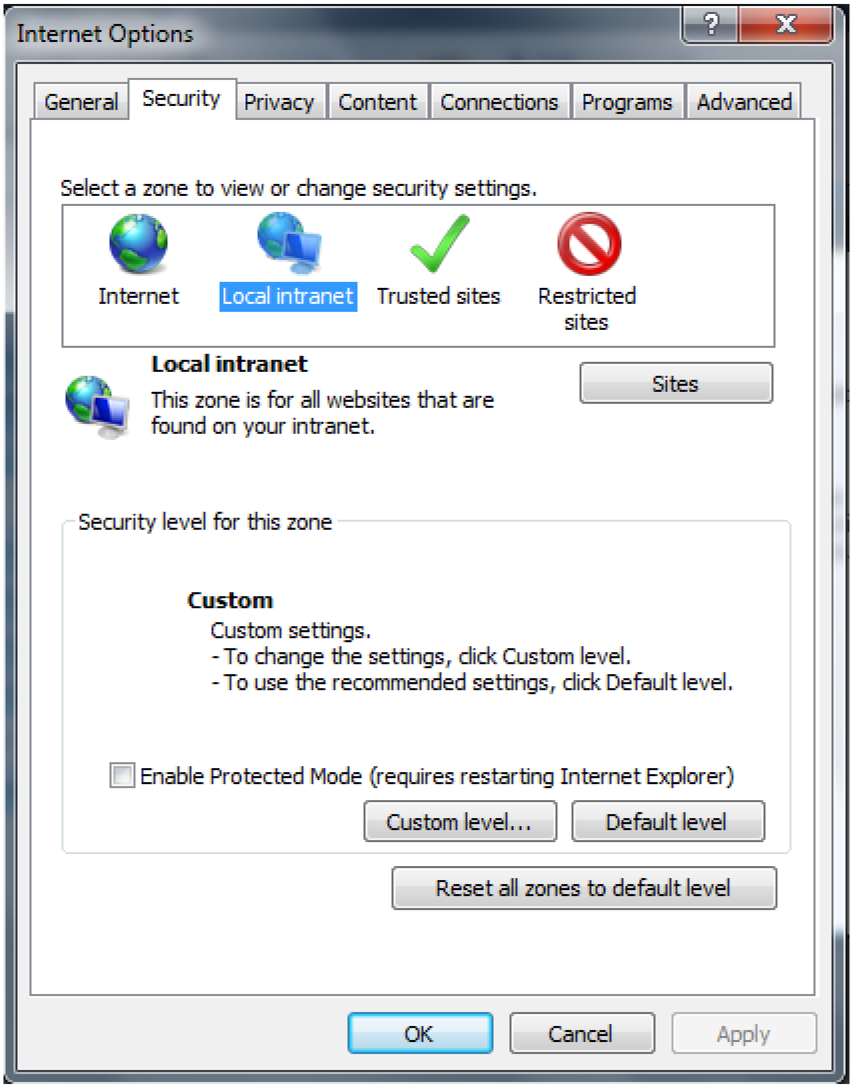


This issue may be caused by the following:

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

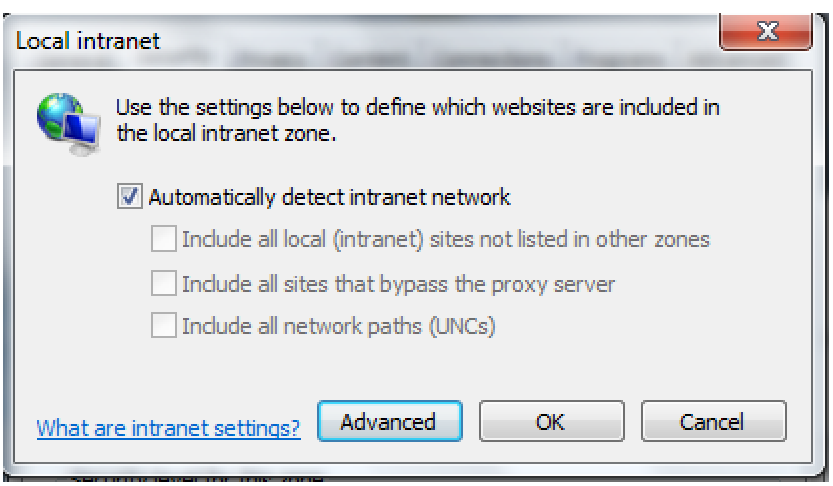
Follow these steps to configure your Internet Explorer Security Settings:

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

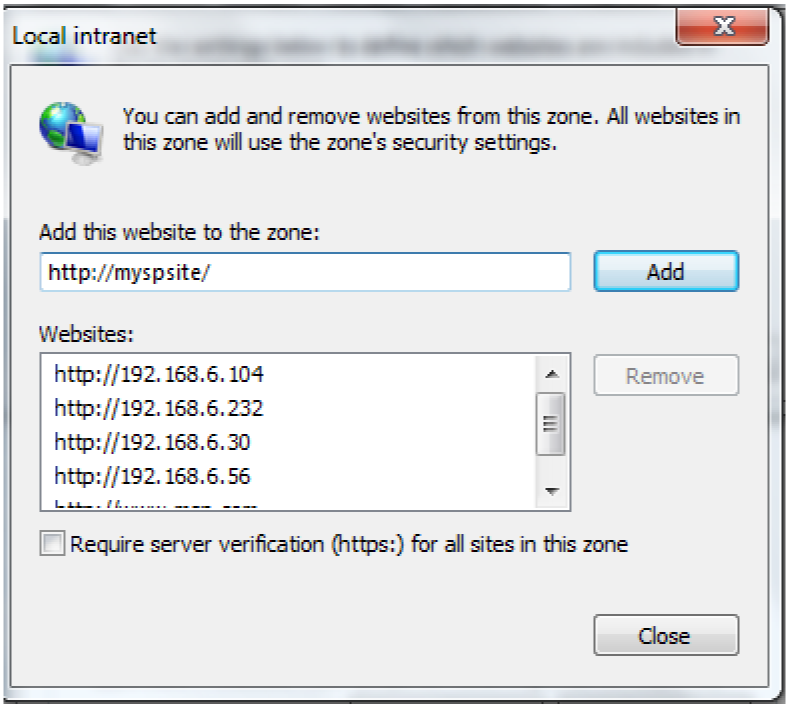


b. Select **Local intranet** and click the **Sites** button.

c. In the **Local intranet** dialog, click the **Advanced** button.

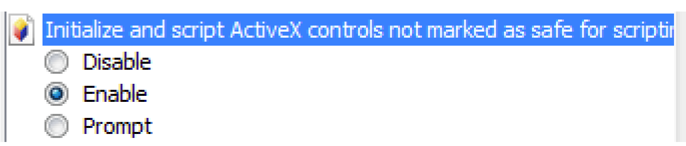


d. Click the **Add** button to add the current SharePoint site to a Local intranet zone and then close the dialog to save all the changes you have made.



e. Next, in the **Internet Options** | **Security** dialog, click the **Custom Level…** button.

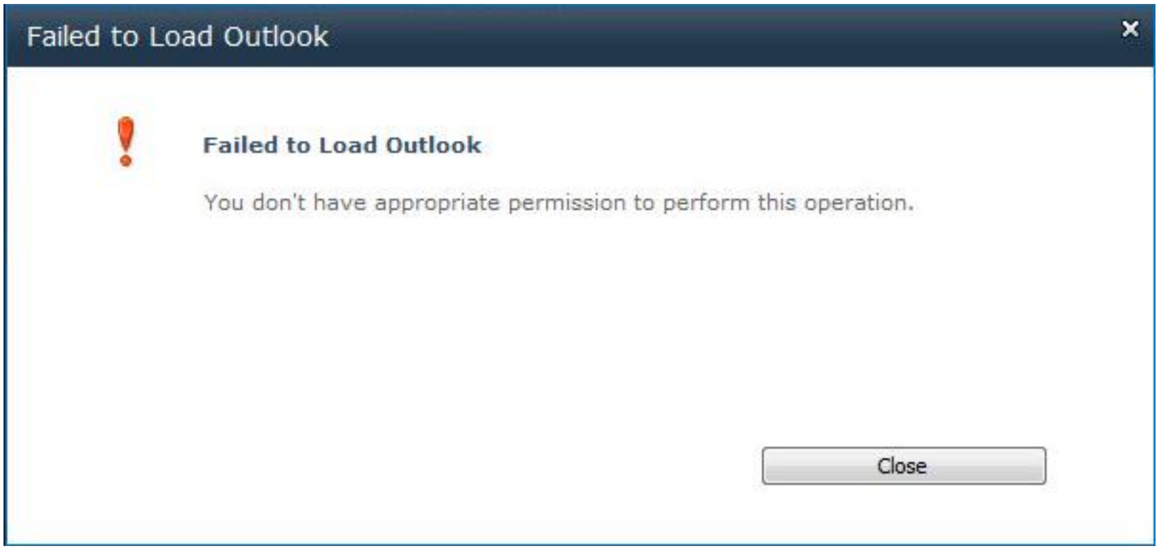
f. In the **Security Settings – Local Intranet Zone** dialog, locate the **Initialize and script ActiveX controls not marked as safe for scripting** and select **Enable**.



g. Click **OK** to save all changes and close the Internet Options dialog.

h. Select a document and click **Send as Attachment** again.

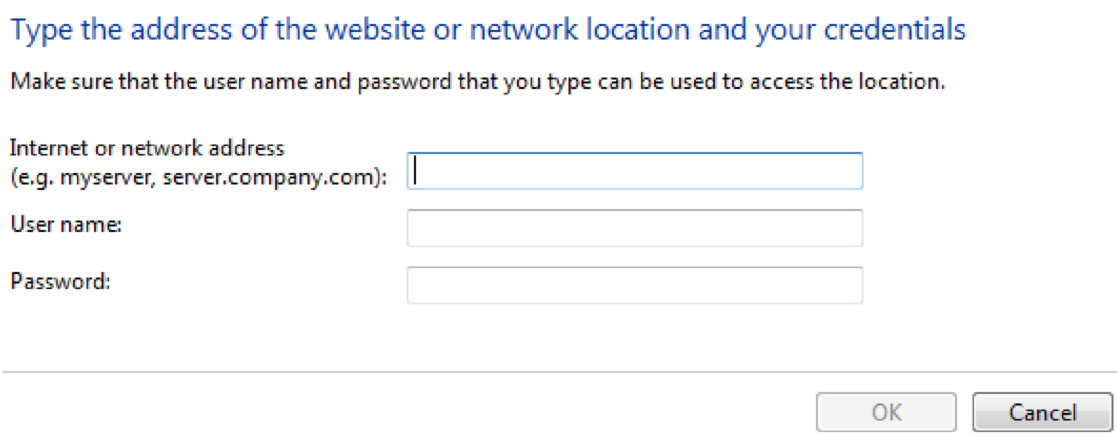
Note: If you still encounter the “Failed to Load Outlook” error message, then follow the steps below.



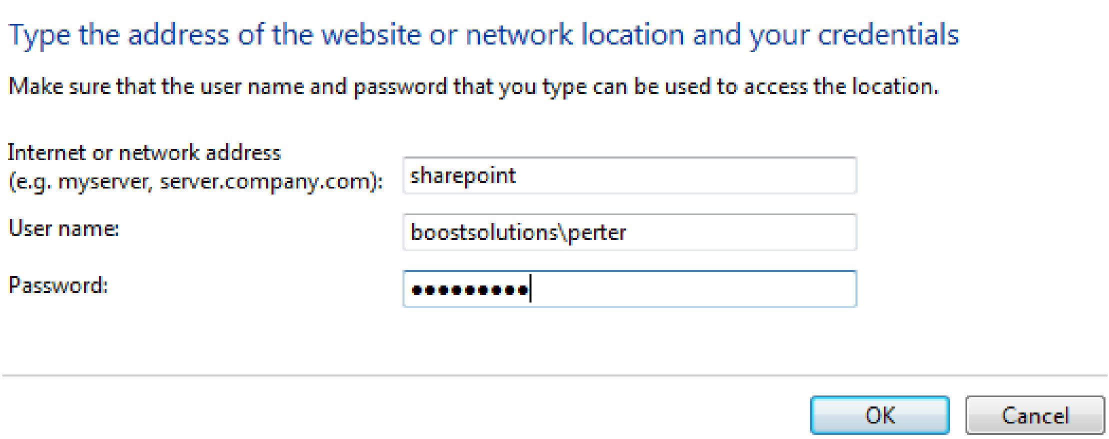
This issue is caused by you having insufficient permissions on your local computer. To solve this issue you need to add a windows credential onto your local computer.

a. Open **Control Panel** | **Credential Manager**.

b. Click **Add a Windows credential**. A window will appear as follows:



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



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.

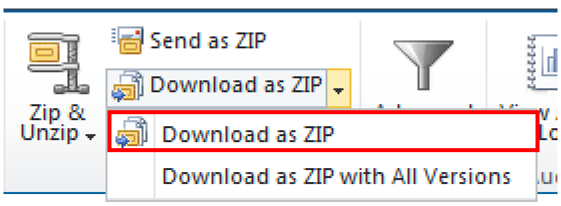
e. Enter your document library and select a document. Click **Send as Attachment**. The document will be added as an email attachment.

4.6 Download as a ZIP file

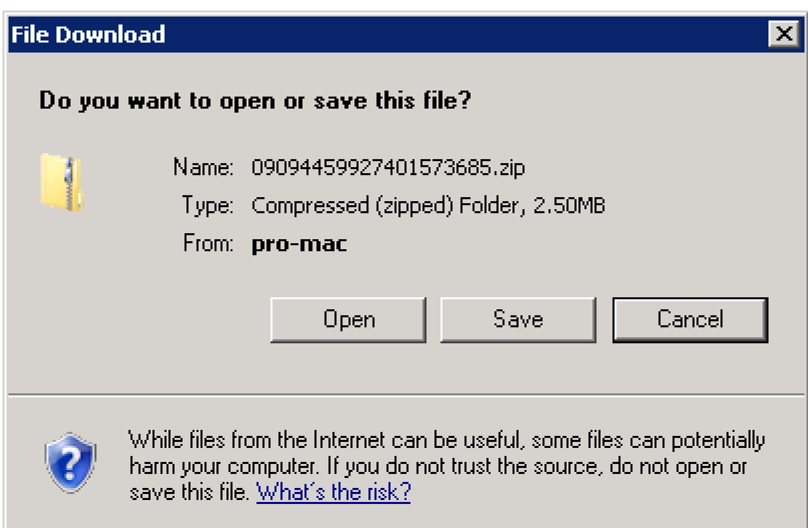
Bulk download documents as a ZIP file.

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:



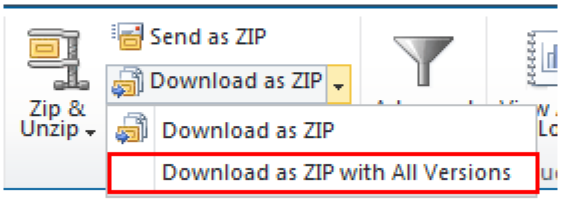
c. Click the **Save** button to download the zip file to your local computer.

> ***Note***
>
> The Zip file name is generated randomly each time.

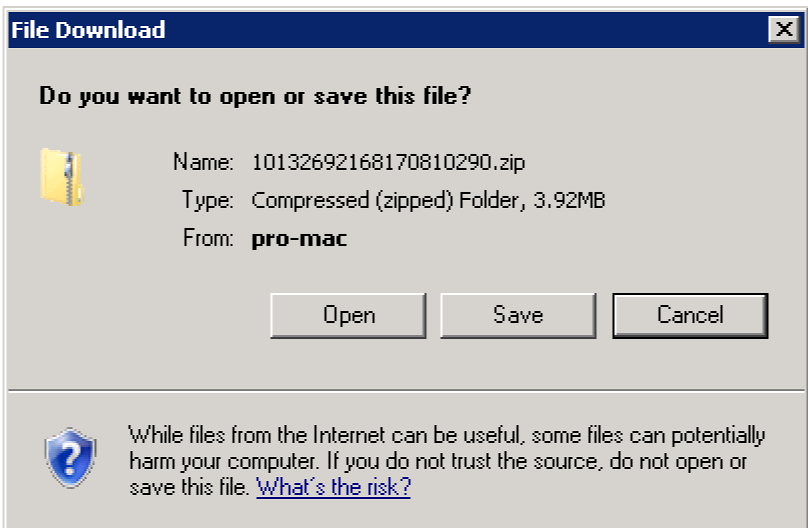
4.6.2 Download as Zip with All Versions

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**.

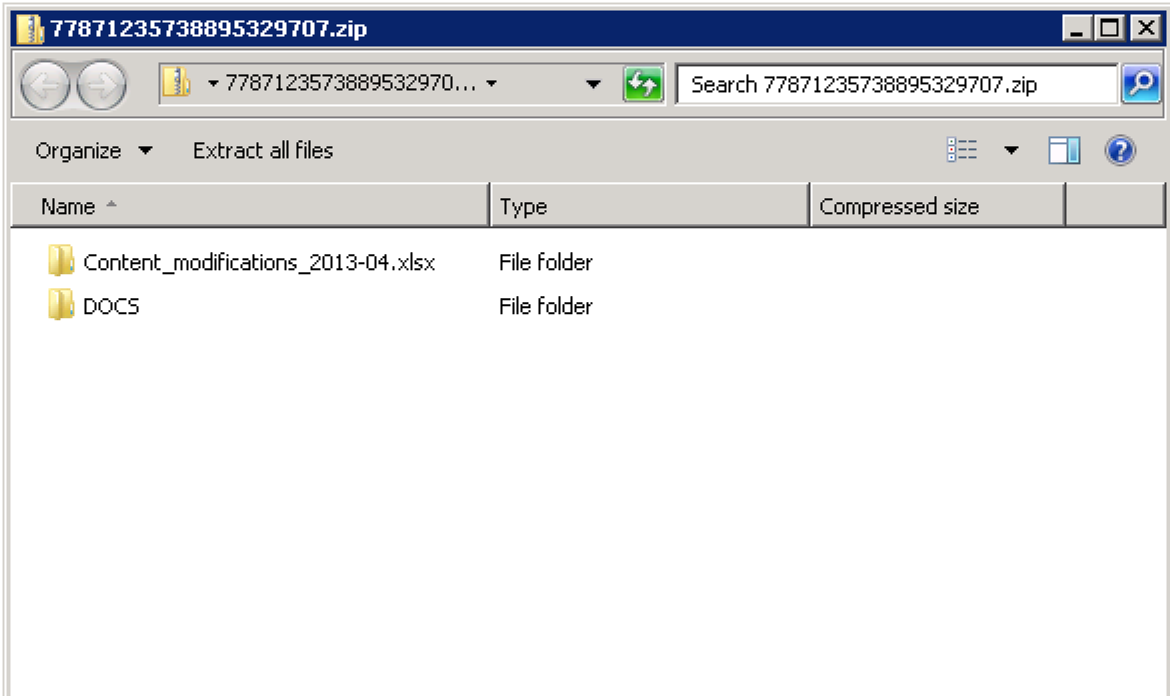


b. A dialog box will appear as follows:

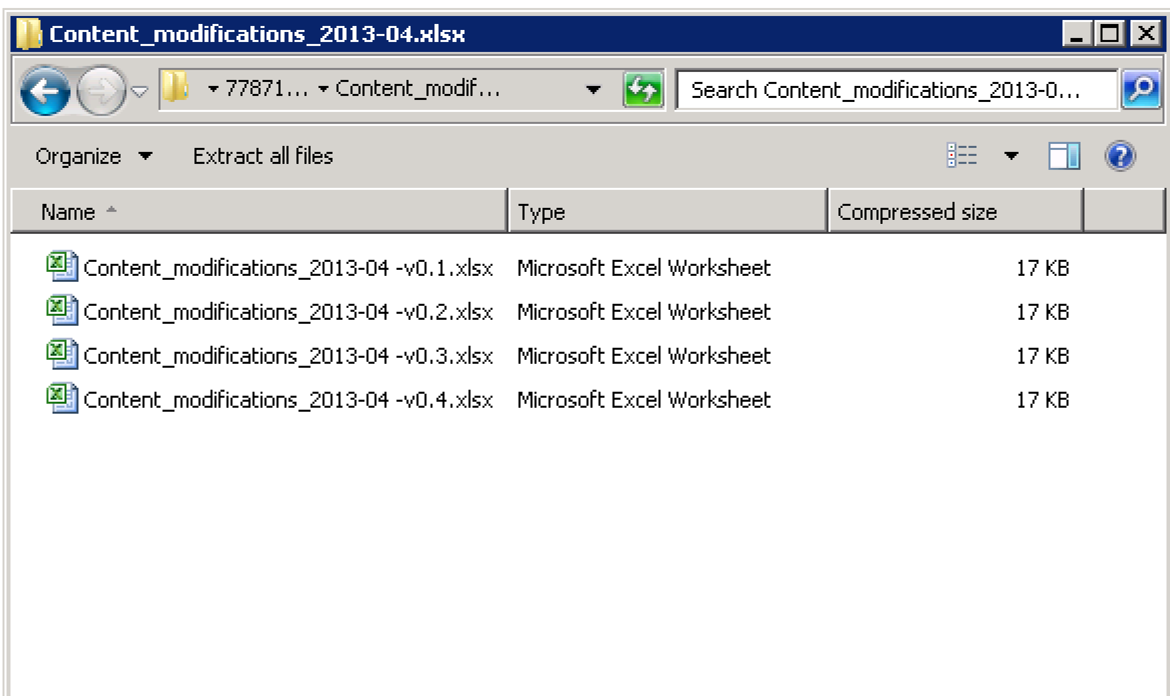


c. Click **Save** to save the zip file to your local computer. Open the file to view your documents.

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.



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



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.

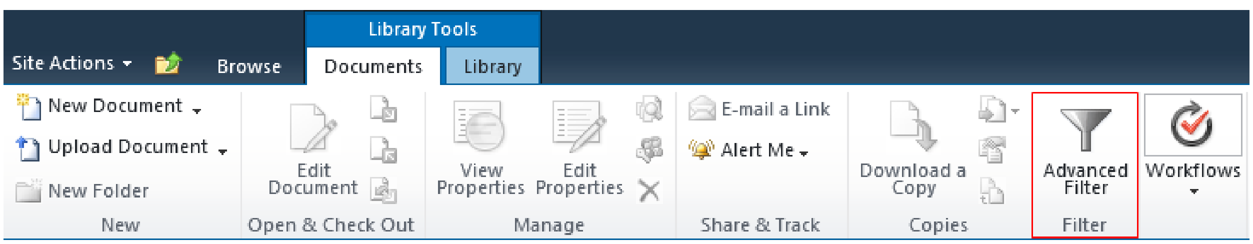
5.1.1 Set Up Filter Panel

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 Documents tab.

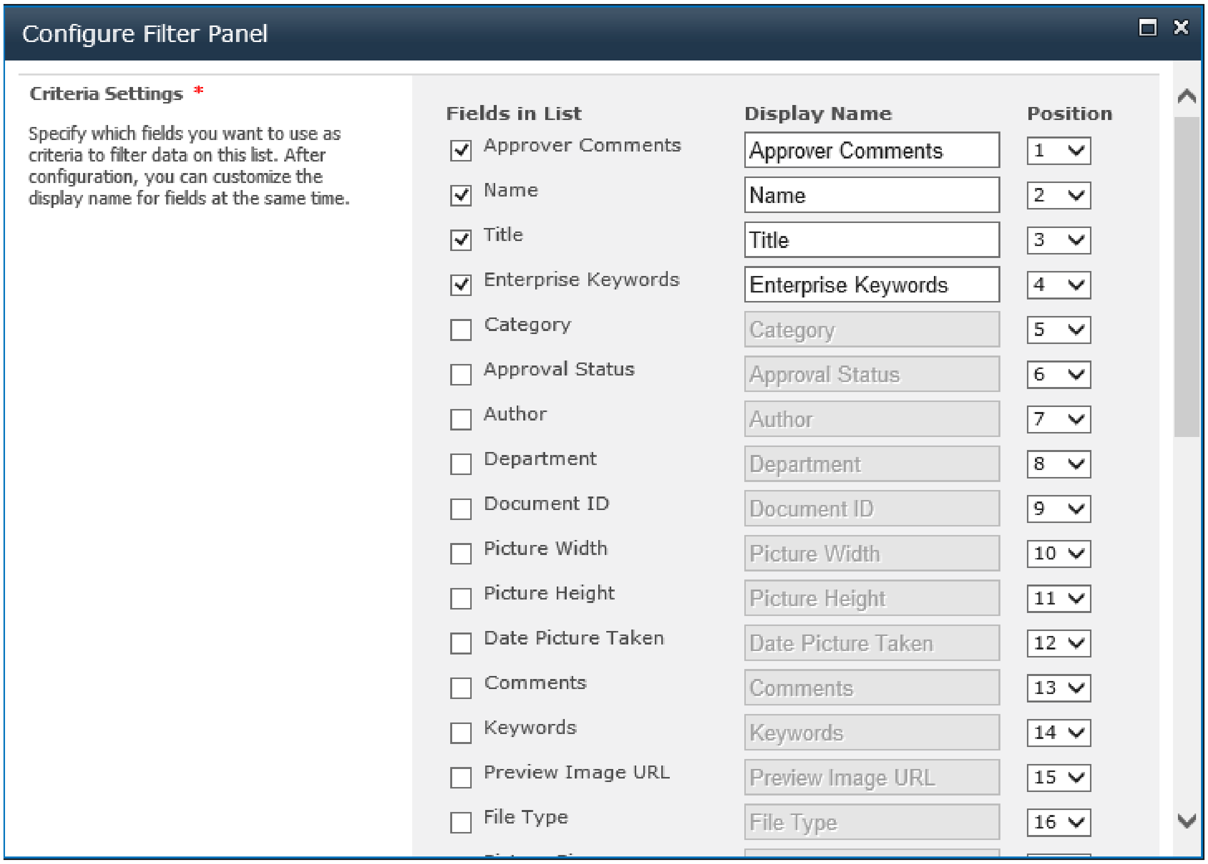


For administrator, you can enter the **List Settings**, under the General Settings section, click **Advanced Filter Settings** to open the Configure Filter Panel page.

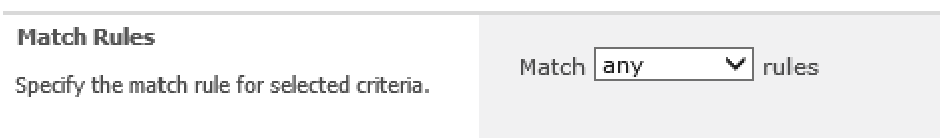
c. If you are using List Advanced Filter for the first time, then a **Configure Filter Panel** window will open.

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.

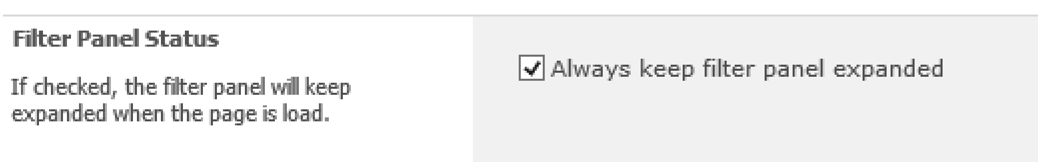


Match Rules: Specify the match rules for selected criteria.



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

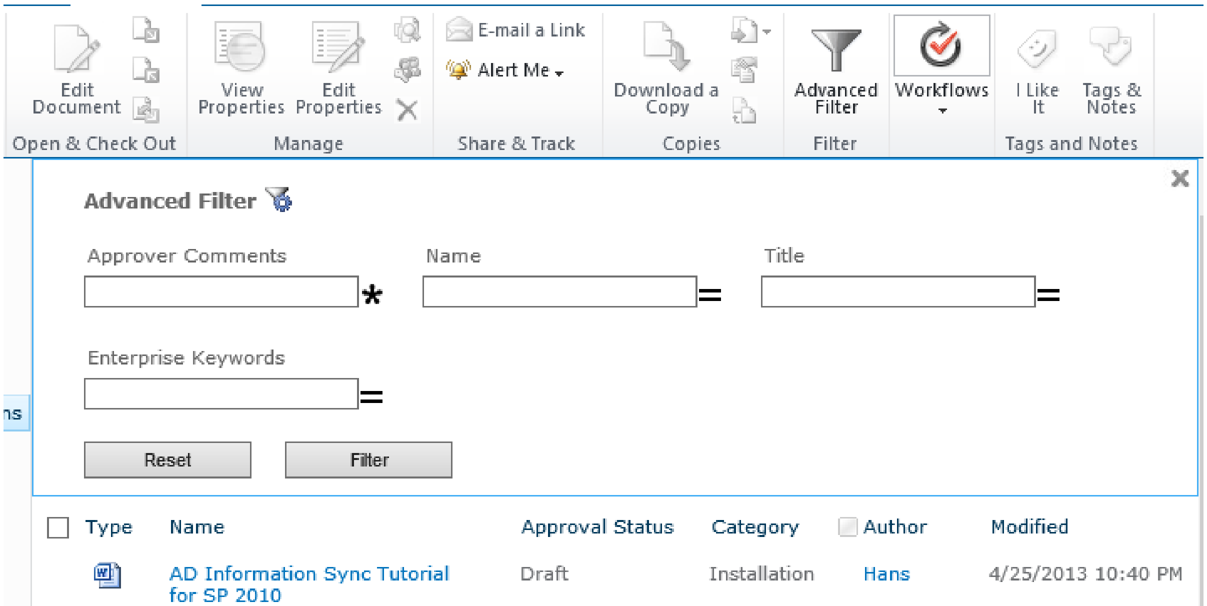
Filter Panel Status: Specify if the filter panel is always kept expanded when the user enters the list or document library.



d. 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.



To modify the filter panel, click the  icon.

To close filter panel, click the  icon.

To show the filter panel, click the 

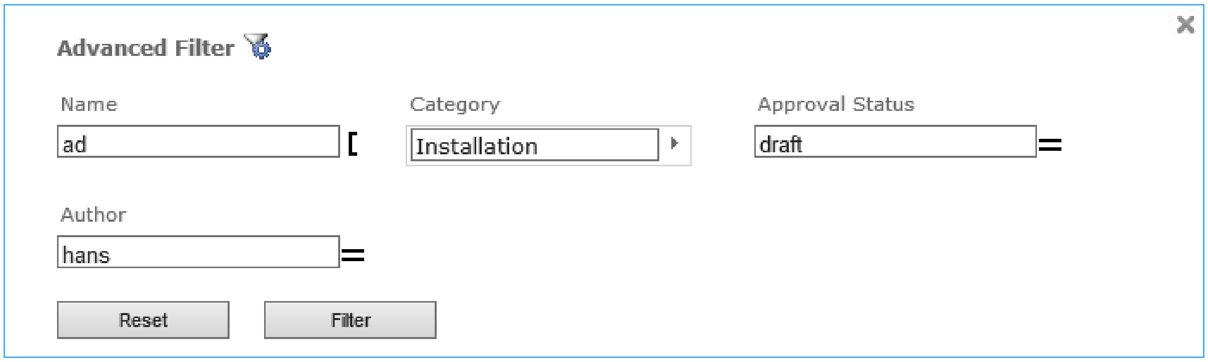
icon on the ribbon.

5.2 Filter Information

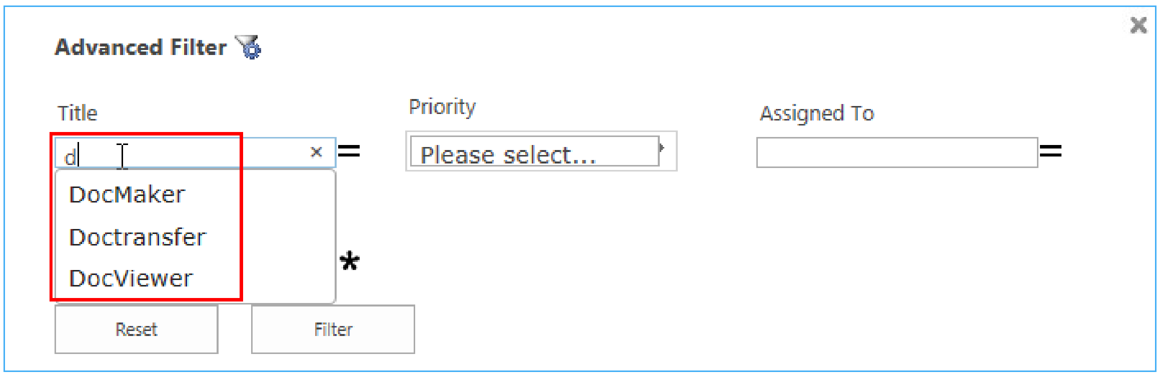
After setting up the filter panel, users can find any information by assigning filters.

a. Enter the list or document library and expand the Filter panel.

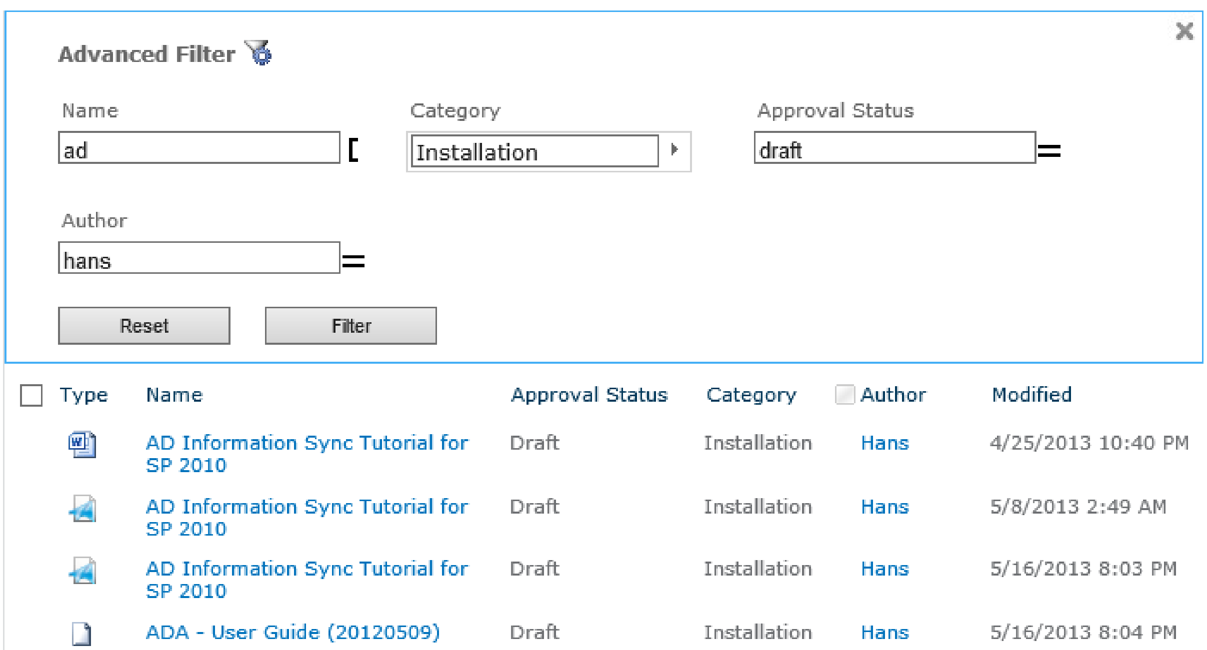
b. Depending on how the filter is configured, select the comparison operator and type a value for each criterion.



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.



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 Reset 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
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
Custom number	Column value equals the specified value.
	Columns: Number and Currency
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

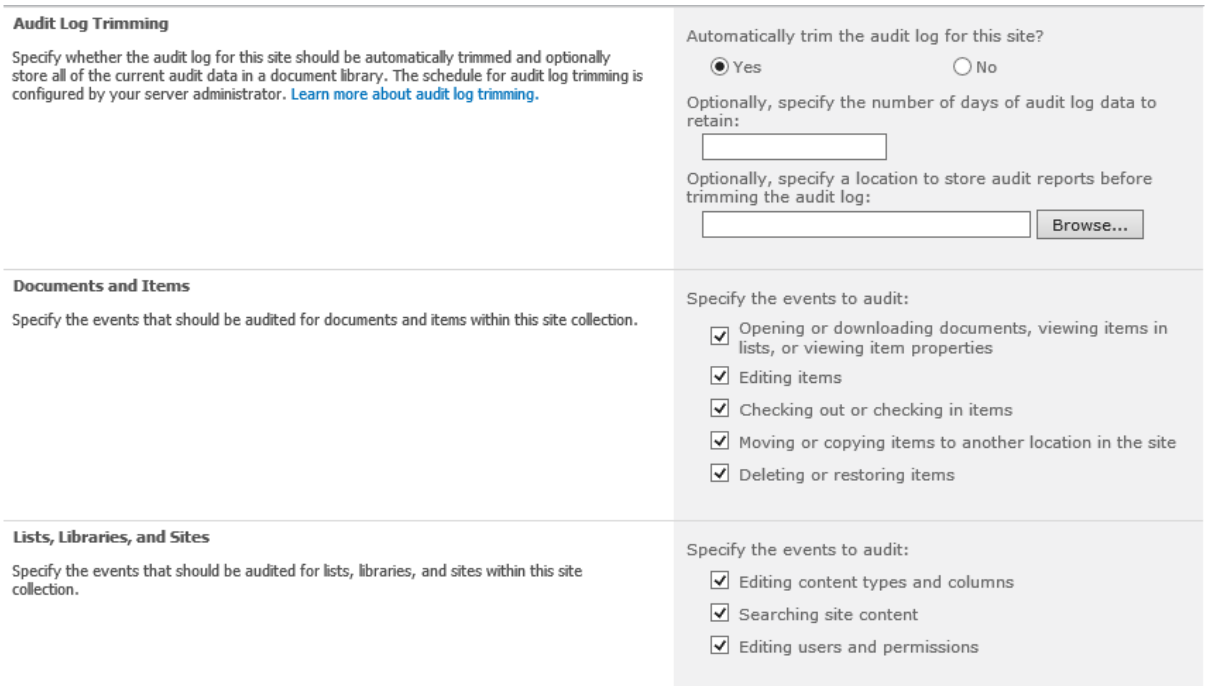
Supported columns

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.

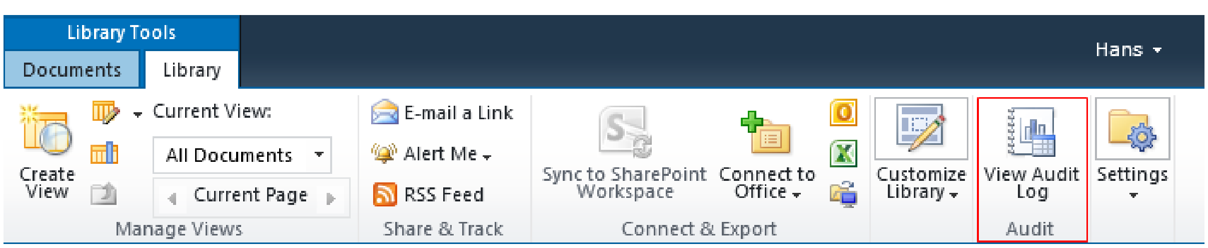


> **Note**
> Item Audit Log does not work on Microsoft SharePoint Foundation 2010

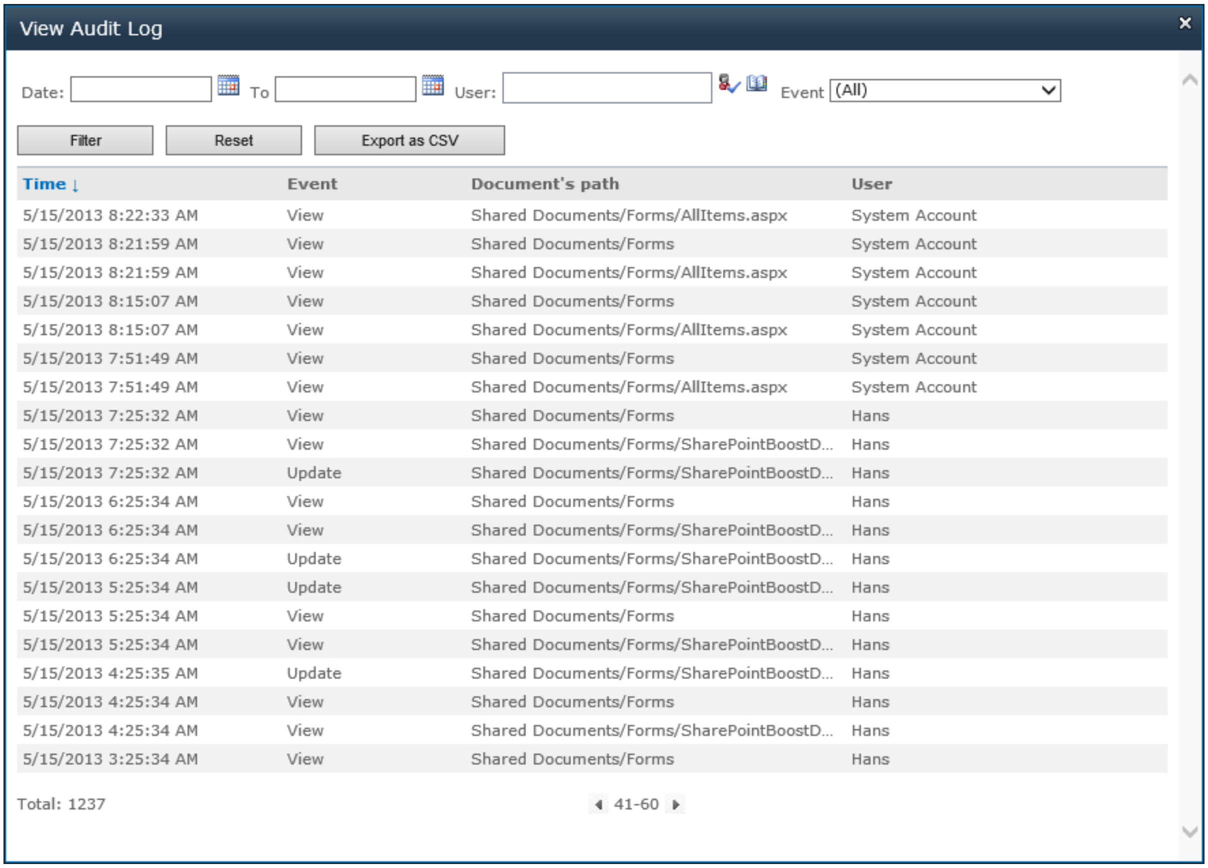
6.1 View List or Library Audit Log

a. Enter the list or library which you want to view the audit logs for.

b. Find **View Audit Log** under **List** or **Library** tab.



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


View Audit Log

Date: To User: Event (All)

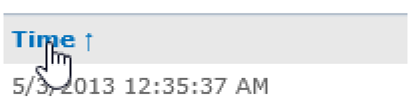
Filter Reset Export as CSV

Time ↓	Event	Document's path	User
5/15/2013 8:22:33 AM	View	Shared Documents/Forms/AllItems.aspx	System Account
5/15/2013 8:21:59 AM	View	Shared Documents/Forms	System Account
5/15/2013 8:21:59 AM	View	Shared Documents/Forms/AllItems.aspx	System Account
5/15/2013 8:15:07 AM	View	Shared Documents/Forms	System Account
5/15/2013 8:15:07 AM	View	Shared Documents/Forms/AllItems.aspx	System Account
5/15/2013 7:51:49 AM	View	Shared Documents/Forms	System Account
5/15/2013 7:51:49 AM	View	Shared Documents/Forms/AllItems.aspx	System Account
5/15/2013 7:25:32 AM	View	Shared Documents/Forms	Hans
5/15/2013 7:25:32 AM	View	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 7:25:32 AM	Update	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 6:25:34 AM	View	Shared Documents/Forms	Hans
5/15/2013 6:25:34 AM	View	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 6:25:34 AM	Update	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 5:25:34 AM	Update	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 5:25:34 AM	View	Shared Documents/Forms	Hans
5/15/2013 5:25:34 AM	View	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 4:25:35 AM	Update	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 4:25:34 AM	View	Shared Documents/Forms	Hans
5/15/2013 4:25:34 AM	View	Shared Documents/Forms/SharePointBoostD...	Hans
5/15/2013 3:25:34 AM	View	Shared Documents/Forms	Hans

Total: 1237 41-60

> ***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.

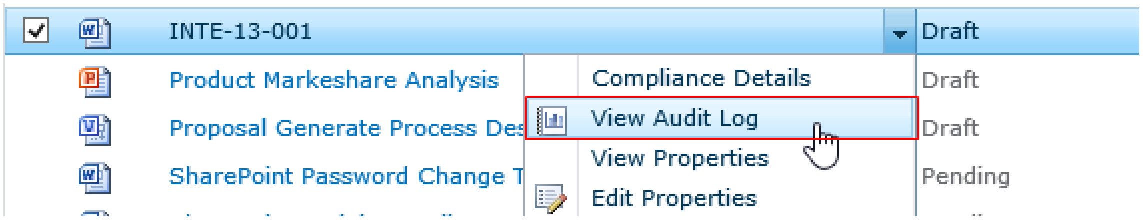


6.2 View Item or Document Audit Log

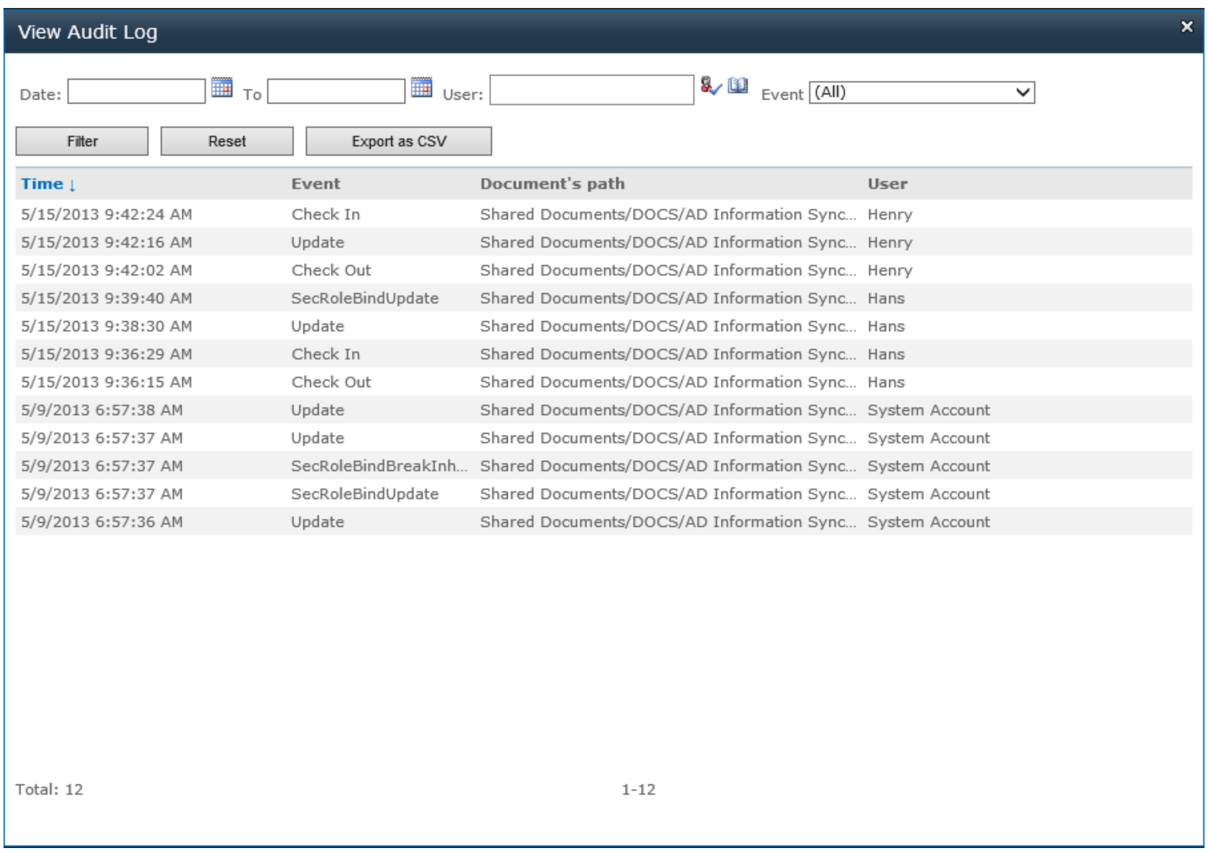
a. Enter the list or library and select an item or document which you want to view audit logs for.

b. Find **View Audit Log** under **Items** or **Documents** tab.

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



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



Time ↓	Event	Document's path	User
5/15/2013 9:42:24 AM	Check In	Shared Documents/DOCS/AD Information Sync...	Henry
5/15/2013 9:42:16 AM	Update	Shared Documents/DOCS/AD Information Sync...	Henry
5/15/2013 9:42:02 AM	Check Out	Shared Documents/DOCS/AD Information Sync...	Henry
5/15/2013 9:39:40 AM	SecRoleBindUpdate	Shared Documents/DOCS/AD Information Sync...	Hans
5/15/2013 9:38:30 AM	Update	Shared Documents/DOCS/AD Information Sync...	Hans
5/15/2013 9:36:29 AM	Check In	Shared Documents/DOCS/AD Information Sync...	Hans
5/15/2013 9:36:15 AM	Check Out	Shared Documents/DOCS/AD Information Sync...	Hans
5/9/2013 6:57:38 AM	Update	Shared Documents/DOCS/AD Information Sync...	System Account
5/9/2013 6:57:37 AM	Update	Shared Documents/DOCS/AD Information Sync...	System Account
5/9/2013 6:57:37 AM	SecRoleBindBreakInh...	Shared Documents/DOCS/AD Information Sync...	System Account
5/9/2013 6:57:37 AM	SecRoleBindUpdate	Shared Documents/DOCS/AD Information Sync...	System Account
5/9/2013 6:57:36 AM	Update	Shared Documents/DOCS/AD Information Sync...	System Account

Note

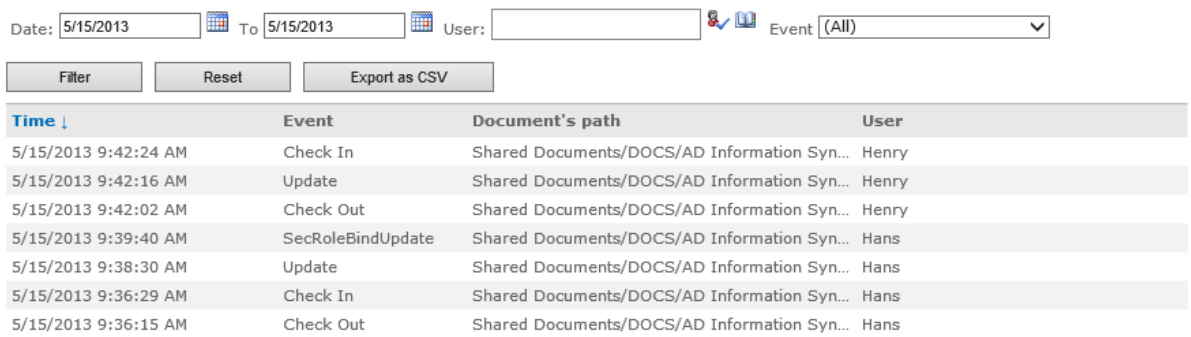
To view item or document audit logs, you must have Manage List permission.

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**

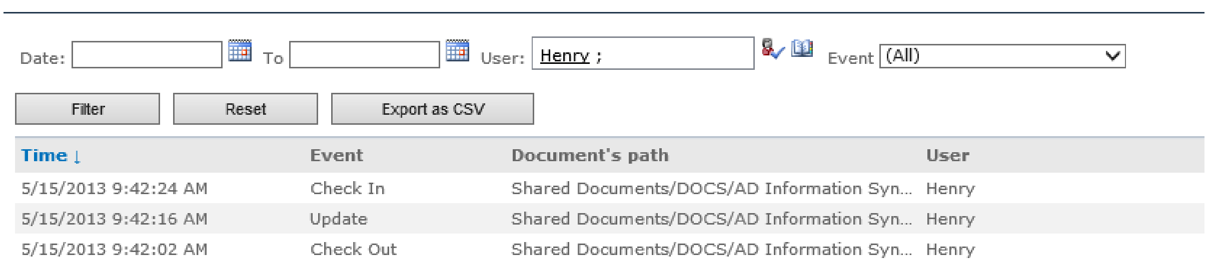
To filter logs by date, select the start date and end date from the date picker, then click **Filter** button.



Time ↓	Event	Document's path	User
5/15/2013 9:42:24 AM	Check In	Shared Documents/DOCS/AD Information Syn...	Henry
5/15/2013 9:42:16 AM	Update	Shared Documents/DOCS/AD Information Syn...	Henry
5/15/2013 9:42:02 AM	Check Out	Shared Documents/DOCS/AD Information Syn...	Henry
5/15/2013 9:39:40 AM	SecRoleBindUpdate	Shared Documents/DOCS/AD Information Syn...	Hans
5/15/2013 9:38:30 AM	Update	Shared Documents/DOCS/AD Information Syn...	Hans
5/15/2013 9:36:29 AM	Check In	Shared Documents/DOCS/AD Information Syn...	Hans
5/15/2013 9:36:15 AM	Check Out	Shared Documents/DOCS/AD Information Syn...	Hans

- **Filter by user**

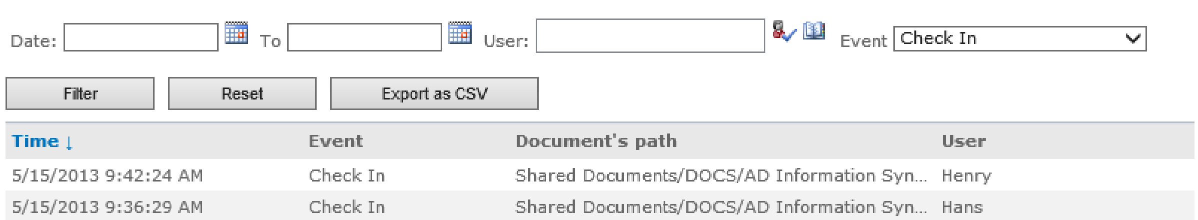
To filter logs by user, type the user name in the **User** box, then click **Filter** button.



Time ↓	Event	Document's path	User
5/15/2013 9:42:24 AM	Check In	Shared Documents/DOCS/AD Information Syn...	Henry
5/15/2013 9:42:16 AM	Update	Shared Documents/DOCS/AD Information Syn...	Henry
5/15/2013 9:42:02 AM	Check Out	Shared Documents/DOCS/AD Information Syn...	Henry

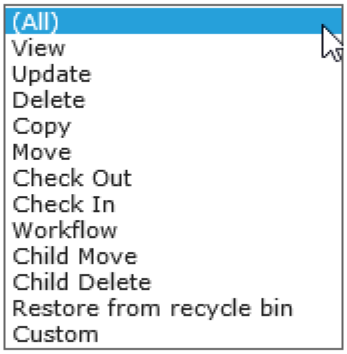
- **Filter by event type**

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



Time ↓	Event	Document's path	User
5/15/2013 9:42:24 AM	Check In	Shared Documents/DOCS/AD Information Syn...	Henry
5/15/2013 9:36:29 AM	Check In	Shared Documents/DOCS/AD Information Syn...	Hans

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.

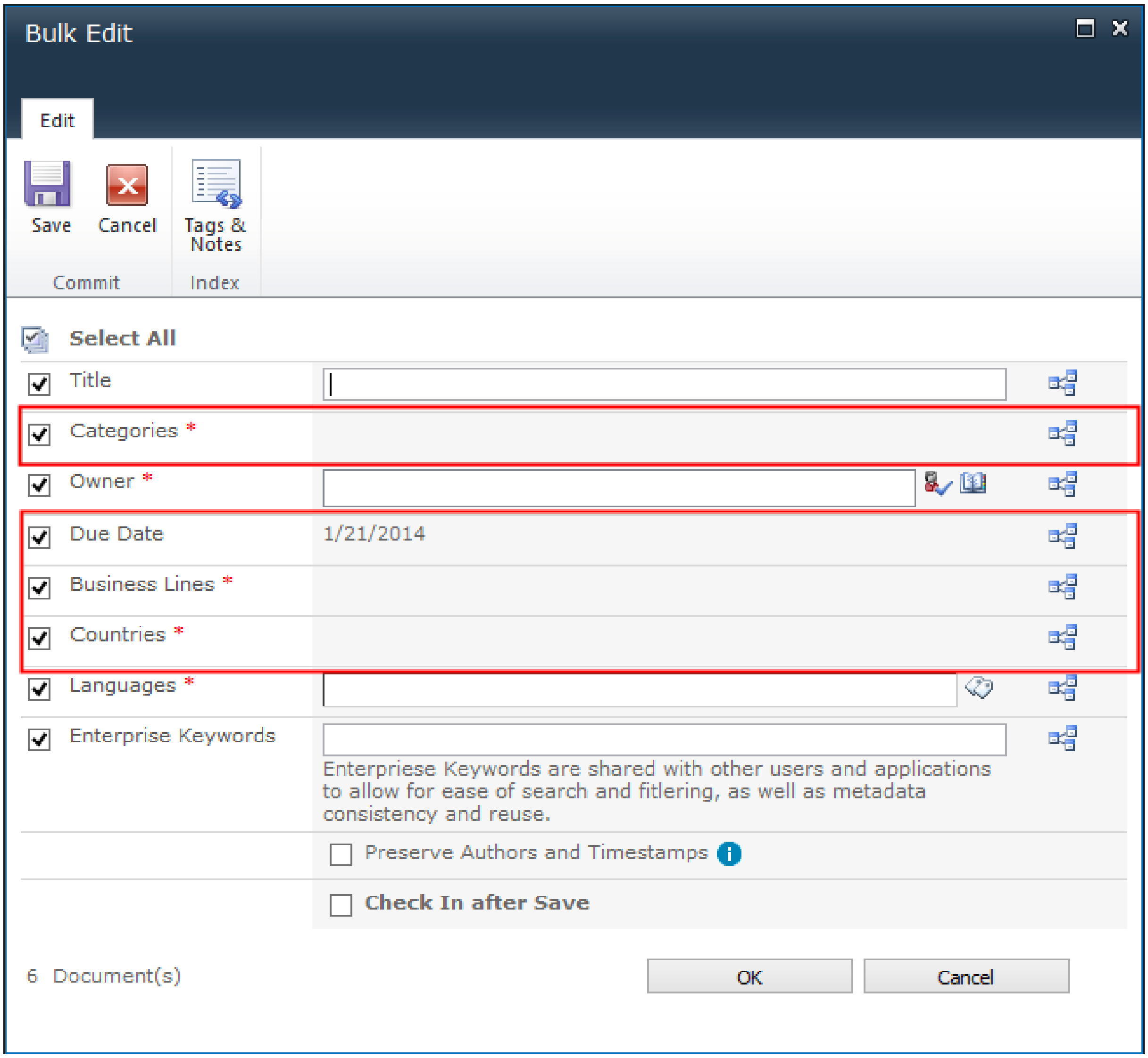
Bulk Properties Editor is compatible with Column/View Permission. You just need to install and activate Column/View Permission, either version 3.x or version 4.x (4.5 or earlier versions).

Note that compatibilities with Bulk Properties Editor are different for Column/View Permission version 3.x and 4.x(4.5 or earlier versions):

For Column/View Permission 3.x

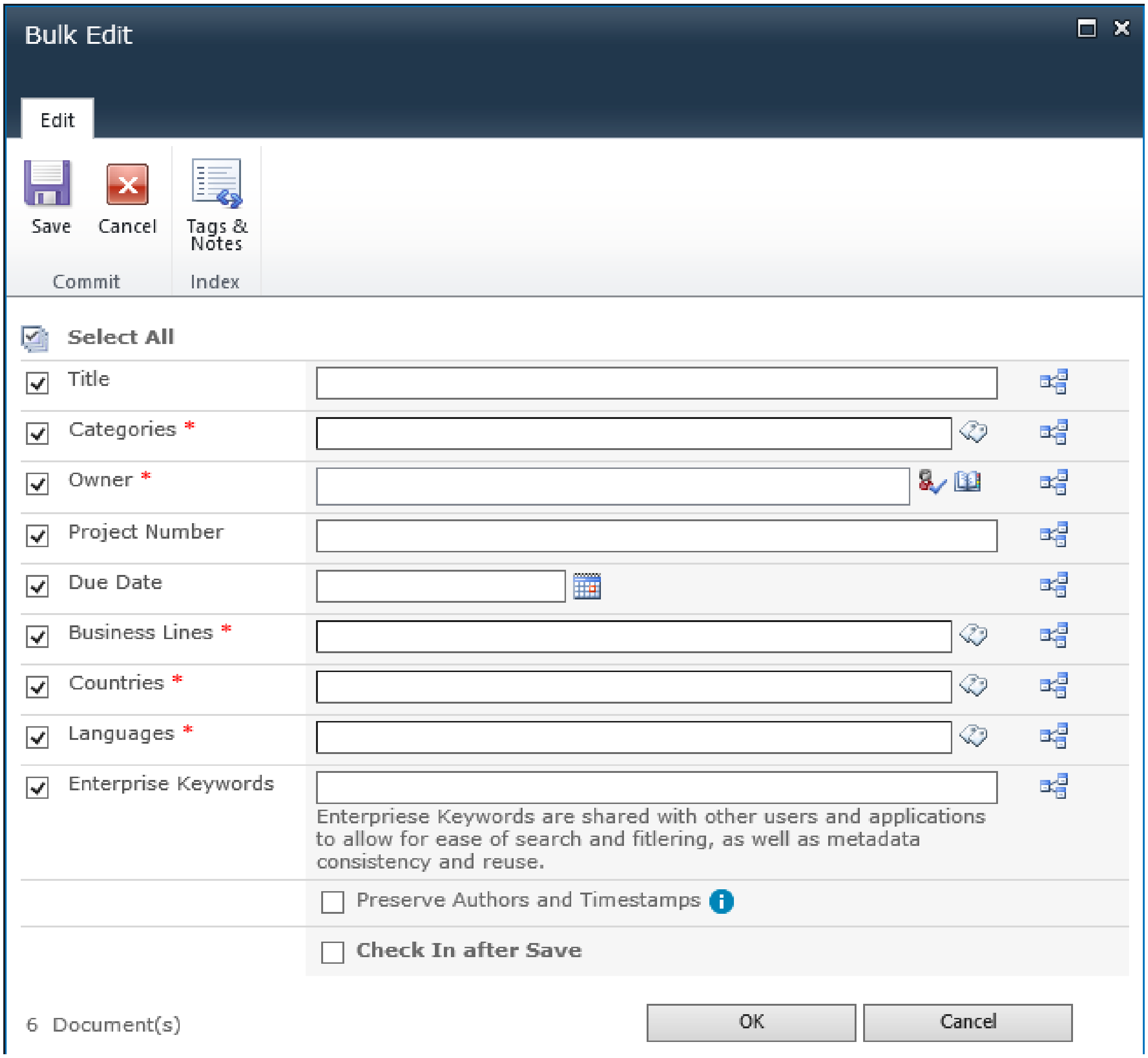
Case 1:

In Column/View Permission 3.x, you can set columns as hidden or read-only and no conditions. When users edit items using the Bulk Edit or Edit All command, those columns will be hidden or read-only in the Bulk Edit form or Edit All form and users cannot access them.



Case 2:

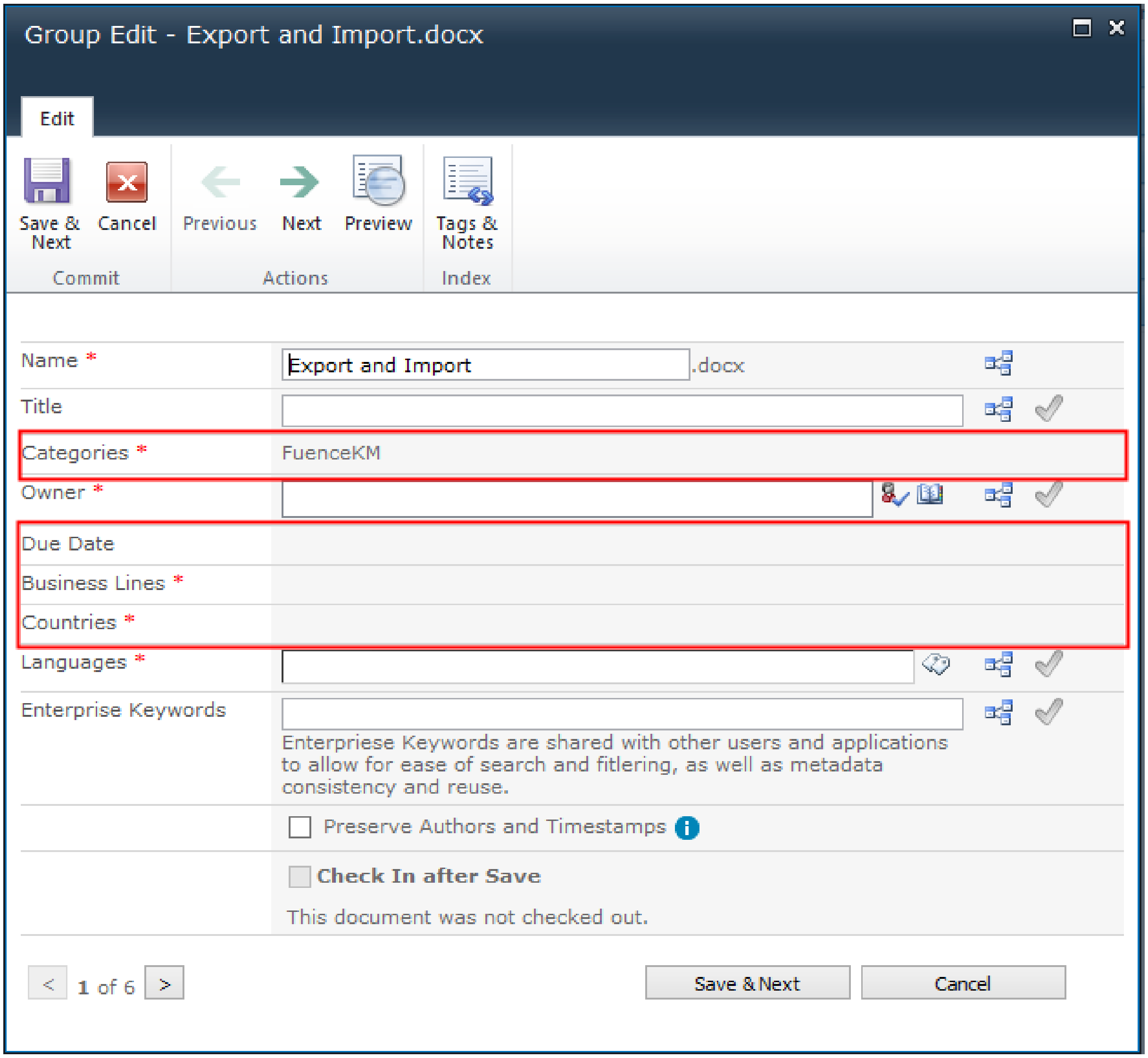
You can define conditions to dynamically control columns as hidden or read-only. When users edit items using the Bulk Edit or Edit All command, those columns will be available in the Bulk Edit form or Edit All form. Users can edit the columns, but changes cannot be saved to items.



Case 3:

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.

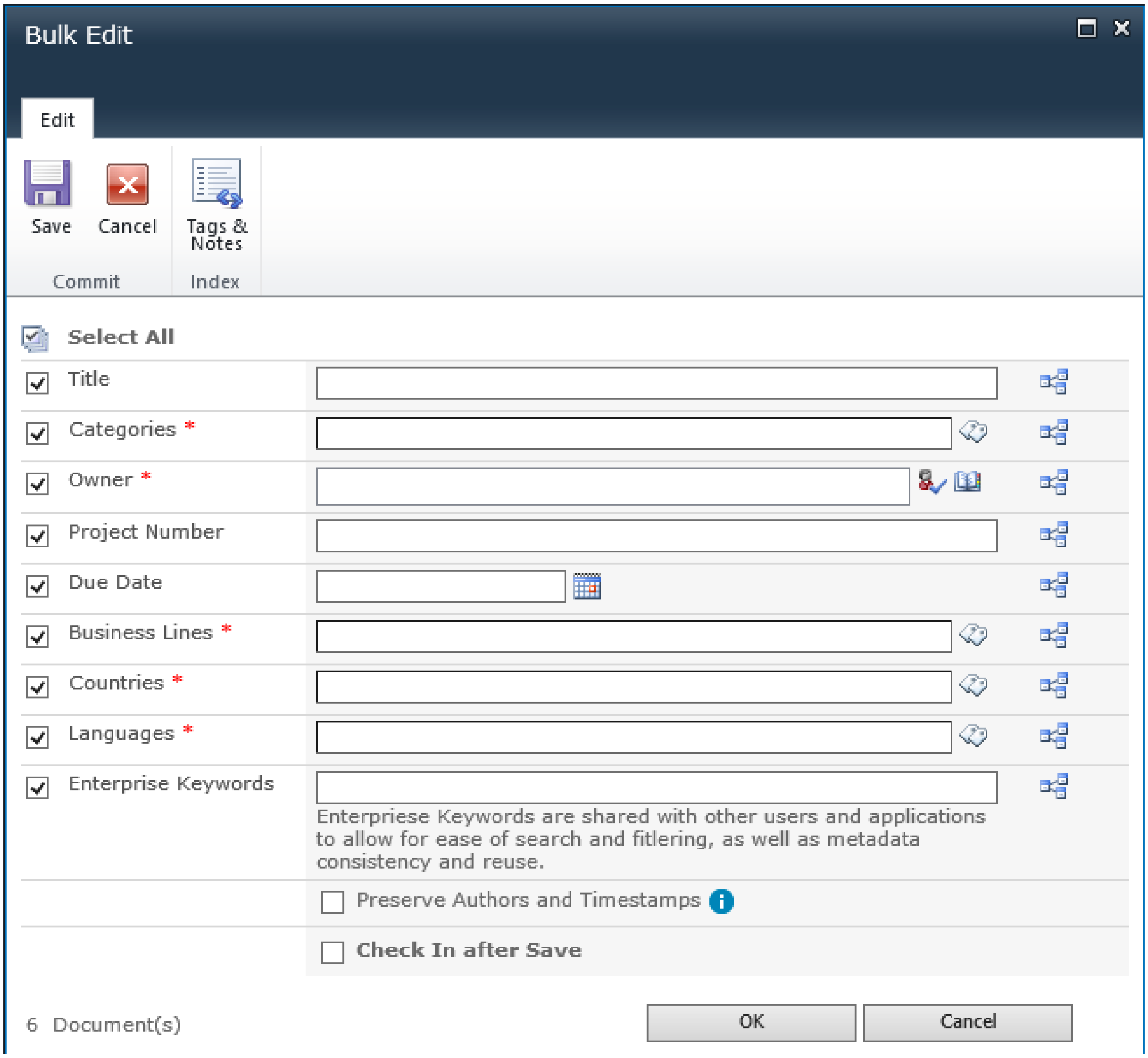
You can also define conditions to dynamically control column permissions so the column will be hidden or set as read-only based on the conditions in the Group Edit form.



For Column/View Permission 4.x (4.5 or earlier versions)

Case 1:

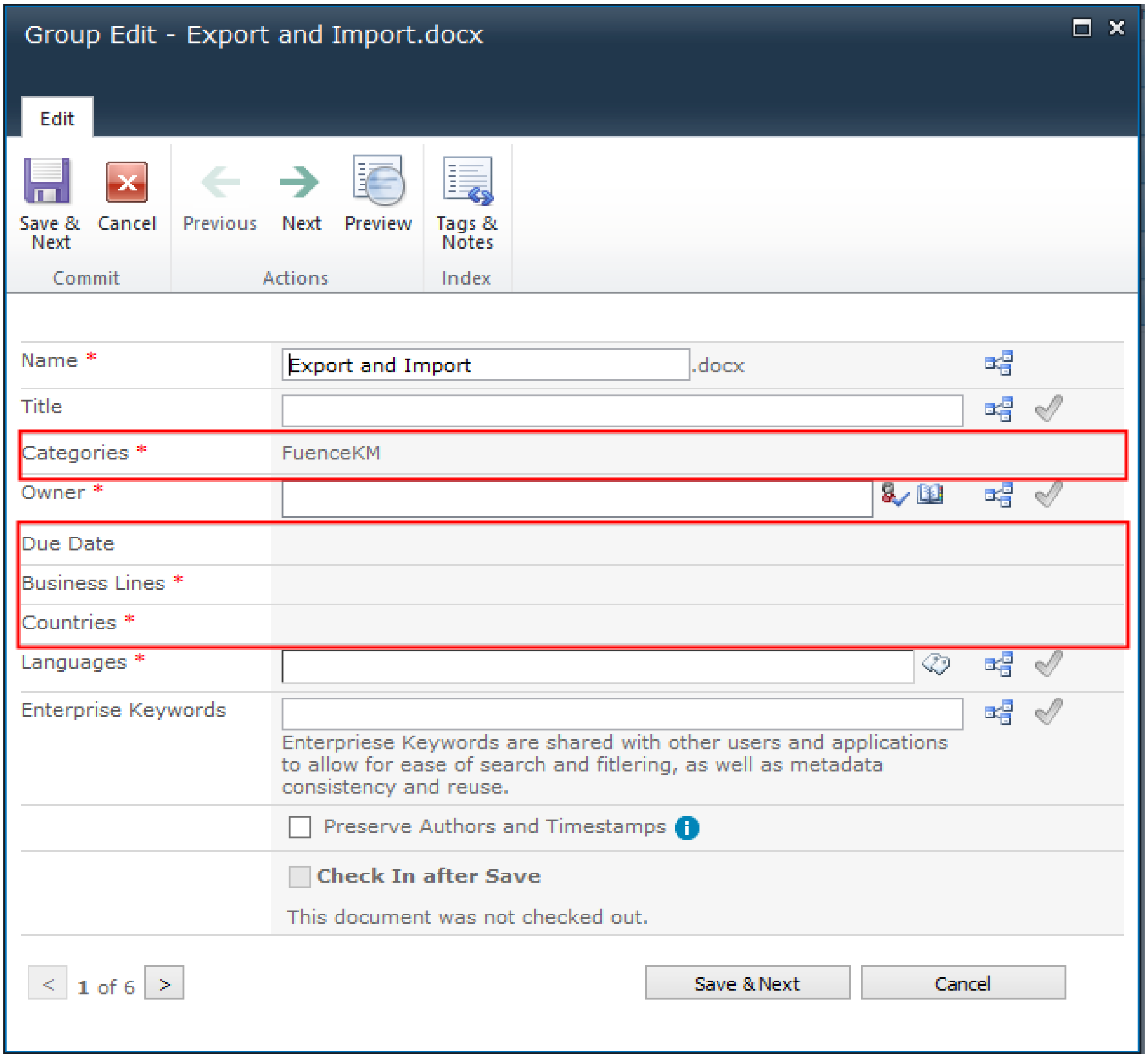
You can configure column permissions in Column/View Permission 4.x (4.5 or earlier versions). When users edit items using the Bulk Edit or Edit All command, all columns will be available in the Bulk Edit form or Edit All form, but changes cannot be saved to the items.



Case 2:

You can configure column permissions (hidden or read-only) in Column/View Permission 4.x (4.5 or earlier versions). 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 - Export and Import.docx
Edit
Save & Next
Cancel
Previous
Next
Preview
Tags & Notes
Commit
Actions
Index
Name *
Export and Import
.docx
Title
Categories *
FuenceKM
Owner *
Due Date
Business Lines *
Countries *
Languages *
Enterprise Keywords
Enterpriese Keywords are shared with other users and applications to allow for ease of search and fitlering, as well as metadata consistency and reuse.
Preserve Authors and Timestamps
Check In after Save
This document was not checked out.
1 of 6
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

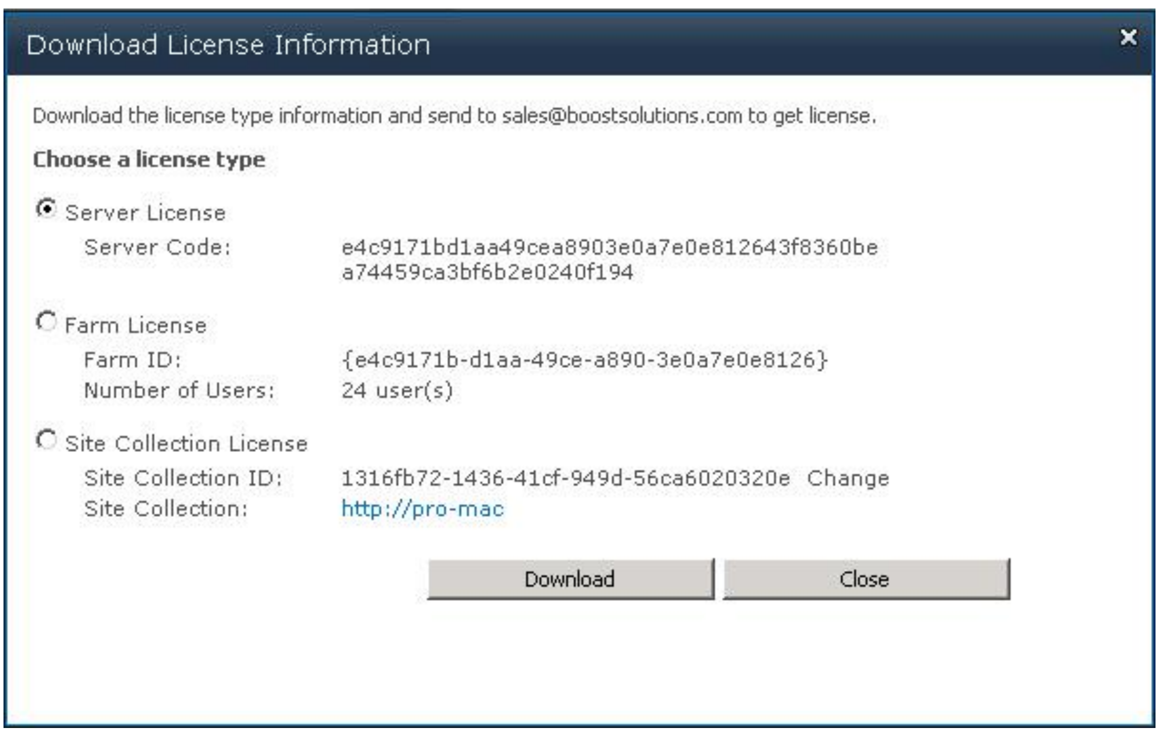
You can use Classifier without entering any license code for a period of 30 days from when you first use it.

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

Finding License Information

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

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



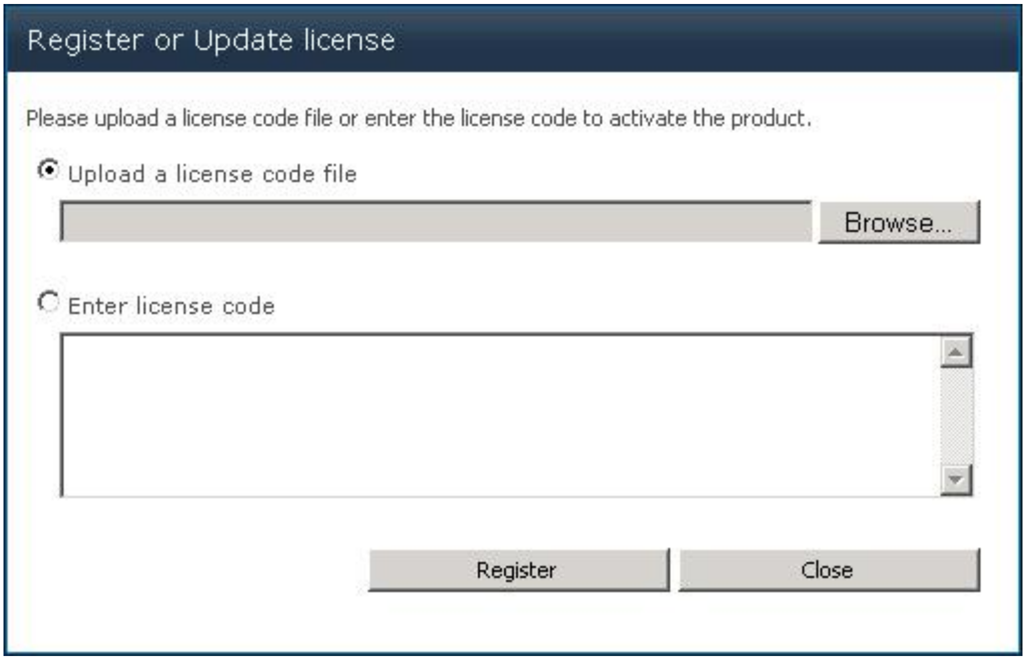
In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

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

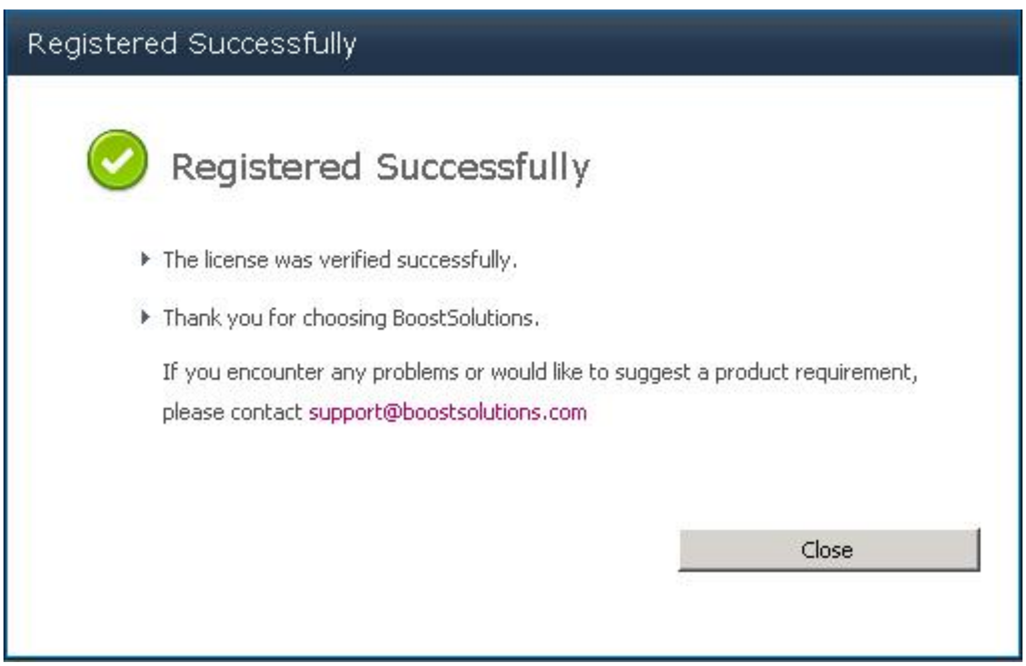
License Registration

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

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



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



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