



Batch Check In 3.0

User Guide

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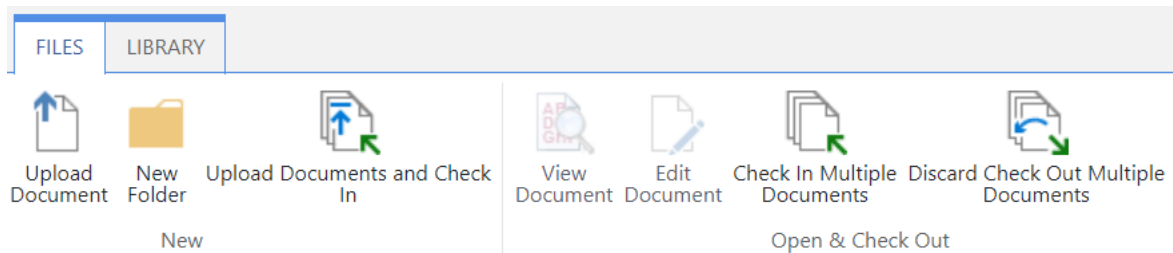
Our web site: <https://www.boostsolutions.com>

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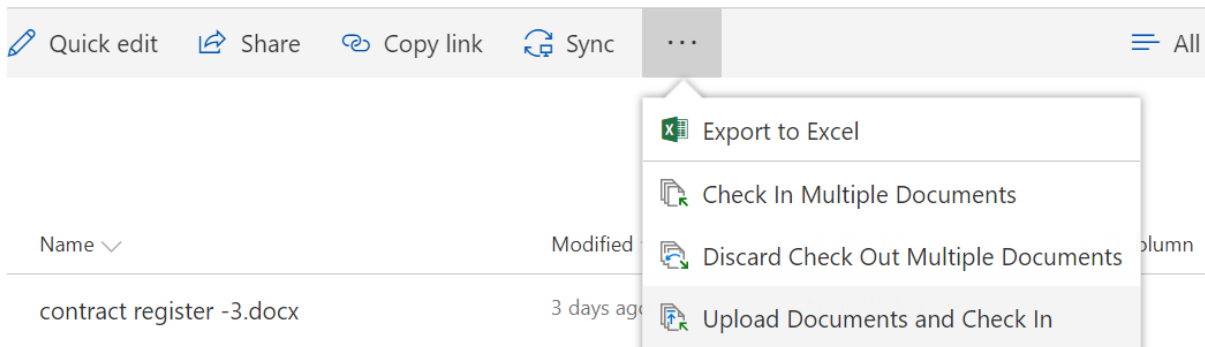
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1. Settings for Batch Check In

This User Guide will provide detailed instructions on how to utilize the Batch Check In feature on the SharePoint Server. Upon installation of the Batch Check In feature, three options will be added to your Ribbon.



For a more contemporary experience, these options can be found on the library command bar. They are:



- **Check In Multiple Documents**

This allows you to check in several files that have been checked out all at once.

- **Discard Check Out Multiple Documents**

This feature allows you to discard the check out of multiple documents without manually editing each item.

- **Upload Documents and Check In**

This feature facilitates the uploading and simultaneous checking in of multiple new documents all at once.

1.1 Custom Document Library Settings

Batch Check In supports the SharePoint default document library types by default. If you deploy a new custom library type, Batch Check In also supports it, but you need to go to the settings page to select the library type. Follow these steps:

- a. Go to the Root site, click **Settings > Site Settings**.
- b. On the Site Settings page, under **Site Collection Administration**, click **Batch Check In settings**.

[Suggested Content Browser Locations](#)

[Help settings](#)

[HTML Field Security](#)

[Batch Check In settings \(Powered by BoostSolutions\)](#)

[SharePoint Designer Settings](#)

[Site collection health checks](#)

[Site collection upgrade](#)

- c. You will be redirected to the **Select Library Templates** page where you have the opportunity to determine which library templates to activate for 'Batch Check In'.


Select the new document library type, and the 'Batch Check In' function will be enabled for this new library type.

Site Settings ▸ Batch Check In Settings ⓘ

Library Templates

Specify which library template to activate Batch Check In on it's list instance.

Select library template

	Name	Template ID
<input checked="" type="checkbox"/>	Document Library	101
<input checked="" type="checkbox"/>	Form Library	115
<input checked="" type="checkbox"/>	Wiki Page Library	119
<input checked="" type="checkbox"/>	Picture Library	109
<input checked="" type="checkbox"/>	Asset Library	851
<input checked="" type="checkbox"/>	Data Connection Library	130
<input checked="" type="checkbox"/>	Report Library	433
<input type="checkbox"/>	Access App	3100
<input checked="" type="checkbox"/>	Web Template Gallery	111
<input checked="" type="checkbox"/>	List Template Gallery	114
<input checked="" type="checkbox"/>	Web Part Gallery	113
<input checked="" type="checkbox"/>	Master Page Gallery	116
<input checked="" type="checkbox"/>	Theme Gallery	123

1.2 Batch Check In Settings

Should you choose not to utilize the 'Batch Check In' feature in specific document libraries, you have the flexibility to disable this feature in those libraries.

The **Batch Check In Settings** can be located within the **Library Settings** under the **Permissions and Management** section. Navigating here will direct you to the **Batch Check In Settings** page.

Permissions and Management

- [Delete this document library](#)
- [Save document library as template](#)
- [Permissions for this document library](#)
- [Manage files which have no checked in version](#)
- [Workflow Settings](#)
- [Enterprise Metadata and Keywords Settings](#)
- [Generate file plan report](#)
- [Information management policy settings](#)
- [Batch Check In settings \(Powered by BoostSolutions\)](#)

General Settings

Within the **General Settings** section, you have the ability to determine whether to activate the 'Batch Check In' functions in the current library.

Depending on your requirements, you can decide whether to separately display the **Check In Multiple Documents** button, the **Discard Check Out Multiple Documents** button, and the **Upload Documents and Check In** menu.

General Settings

Specify whether to activate the function of Batch Check In on this list.

Do you want to activate the function of Batch Check In on this list?

Yes No

- Enable "Check In Multiple Documents" menu
- Enable "Discard Check Out Multiple Documents" menu
- Enable "Upload Documents and Check In" menu

Edit Document Properties Settings

Edit Document Properties Settings

Specify whether to edit document properties when checking in.

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

▪ **Enable edit document properties**

Tick this box if you wish to display the **Edit Document Properties** section on the **Check In Multiple Documents** page. This feature allows you to modify properties while checking in documents.

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

Enabling this function results in automatic checking of required properties, and you will not have the option to deselect them on the **Check In Multiple Documents** page under the **Edit Document Properties** section.

If you fail to provide values for the required properties, you will be unable to check in the documents. In such instances, a prompt will appear, requesting you to fill in the value.

- **Hide "Title" column**

Activating this feature will hide the title column on the **Check In Multiple Documents** page under the **Edit Document Properties** section.

This can be particularly useful if your library has the SharePoint Auto Title function enabled, as 'Batch Check In' will not interfere with the auto title's ability to automatically change the title.

1.3 Configuration for Check In

The **Check In Multiple Documents** page offers five configurable sections: **Version**, **Retain Check Out**, **Documents**, **Comments**, and **Edit Document Properties**.

1.3.1 Version

The **Version** section corresponds to the default SharePoint check in button settings utilized when checking in a single document. You can dictate the type of version to check in.

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

Note: The **Version** settings will only be visible if you activate the **Version** function for the document library where Batch Check In operates (navigate to **Library Settings** > **Version Settings** to enable **Version**).

1.3.2 Retain Check Out

The **Retain Check Out** setting matches the SharePoint default **Check In** button setting used when checking in a single document. You can opt for this if you want the documents to still appear as checked out post-checking in.

Retain Check Out

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

Retain your check out after checking in?

Yes No

1.3.3 Documents

▪ Select Documents

Select Documents lists the documents checked out by you with the default content type. You can decide which documents to check in by selecting the checkbox next to the document name. Select the multiple checkbox icon at the top of all selection checkboxes to select all documents.

Documents

Select the documents you want to check in.

Please select documents you want to check in:

Include subfolders

<input checked="" type="checkbox"/>	Document Name	Content Type	Folder	Checked Out By
<input checked="" type="checkbox"/>	BoostSolutions Plus.pptx	Document	Shared Documents	System Account
<input checked="" type="checkbox"/>	Support Changed.docx	Document	Shared Documents	Annette Young

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


▪ Include subfolders

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

Upon activation of this function, all documents that are checked out by you in the current folder and its subfolders will be displayed. If you wish to ascertain the specific folder in which a document is located, select the folder name, and click on it. This will allow you to view the actual folder that houses the document.

Please select documents you want to check in:

Include subfolders

 Document Name	Content Type	Folder	Checked Out By
<input checked="" type="checkbox"/> BoostSolutions Plus.pptx	Document	Shared Documents	System Account
<input checked="" type="checkbox"/> Support Changed.docx	Document	Shared Documents	Annette Young
<input type="checkbox"/> Choice Indicator_Tutorial.docx	Document	Shared Documents/Sales Docs	Annette Young

1.3.4 Comments

In the **Comments** section, you can add comments detailing the changes made. This is optional but recommended for best practice. These comments will appear in the **Check In Comment** column post-checking in.

Comments

Type comments describing what has changed in this version.











Comments:

1.3.5 Edit Document Properties

In the **Edit Document Properties** section, you can configure the properties of the selected documents. This automatically modifies the column's value as documents are checked in.

- Replace all document properties for selected items
- Fill in empty document properties for selected items

Select content type and only those columns you wish to change when the documents are checked in:

	Column Name	Column Value
<input checked="" type="checkbox"/>	Content Type	Document  Create a new document.
<input type="checkbox"/>	Title	<input type="text"/>
<input checked="" type="checkbox"/>	Document Type	Brochure 
<input checked="" type="checkbox"/>	Key words	<input type="text"/> 
<input checked="" type="checkbox"/>	Author	Tony Wong  
<input checked="" type="checkbox"/>	Business Lines	<input type="text"/> 
<input checked="" type="checkbox"/>	Countries	<input type="text"/> 
<input checked="" type="checkbox"/>	Languages	English 
<input checked="" type="checkbox"/>	Category	<input type="text"/> 

Replace or Fill in Empty Values of Columns

This function provides the ability to either replace existing column values or fill in empty properties during the check-in process. By default, the **Replace all document properties for selected items** option is selected.

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

If this option is chosen, the original values of the selected columns will be overwritten when the documents are checked in.

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

If this option is chosen, any empty document properties will be filled in when the selected documents are checked in.

Change Content Type

This function allows you to alter the content type of the documents during the check-in process. The **Content Type** can be enabled by navigating to **Library Settings > Advanced Settings > Allow management of content types**.

If you decide to change the document's content type, a confirmation message will appear. By clicking **OK**, the content type will be changed.

Note: If you choose **Cancel** in the confirmation message box, only documents that share the same content type you selected in the 'Content type' dropdown list will be selected in the 'Documents' section. This ensures consistency in case some content types in selected documents differ from the content type in 'Edit Documents Properties'.

Edit Column Values

You can modify document properties by ticking the checkbox adjacent to the column name and entering a value in the 'Column Value' text box. The default behavior is to populate column values according to the preset value defined in the column.

If you do not wish to alter the value of the properties, refrain from checking the checkbox next to the 'Column Name'. If the checkbox is ticked but no value is entered in the field and **Replace all document properties for selected items** is selected, it will result in the properties being cleared rather than maintaining the original value.

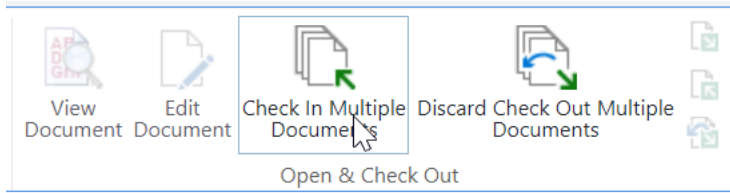
Note

- The 'Edit document properties' function supports all SharePoint editable column types. These include: Single Line of Text, Multiple Lines of Text, Choice, Number, Currency, Date and Time, Lookup, Yes/No, Person or Group, Hyperlink or Picture, External Data, Managed Metadata, BoostSolutions Cascaded Lookup, and Cross-Site Lookup.
- 'Batch Check In' also accommodates your custom column type, provided it follows the SharePoint Custom Column Standard.
- The unique value column is no longer visible in the 'Batch Edit Property' module.

2. Check In Multiple Documents

To check in multiple documents, it is necessary to have the Contribute permission level for the library or to be a member of the Default SharePoint Members group.

- a. Navigate to the library where your document is located.
- b. On the Ribbon, click the **Documents** tab, then select **Check In Multiple Documents** in the **Open & Check Out** group.



- c. This will bring you to the **Check In Multiple Documents** page. Here, you can:
 - Select the version you want to check in under the **Version** section.
 - Decide if you want to keep your check out after checking in.
 - Choose the documents you wish to check in under the Documents section.
 - Add any relevant comments in the Comments section.
 - Adjust the column properties in the Edit Document Properties section.
- d. Click **OK** to complete the check in process for the documents or **Cancel** if you decide not to proceed. Once the selected documents are checked back in, the green arrow disappears from the document icon.

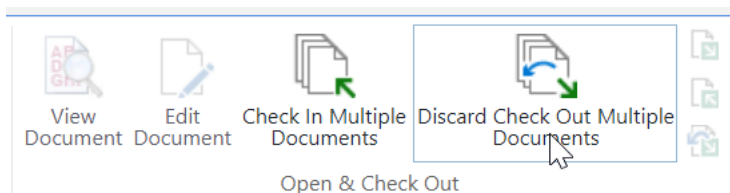
Please note, if the documents have been checked out to a local draft folder, a confirmation dialog box will appear when you check in items. Click **Yes** to continue with the process.

3. Discard Check Out for Multiple Documents

In instances where you have checked out documents but have not made any modifications, you have the option to discard the check out. This prevents the creation of new versions when no changes have been made to the file.

To discard the check out for multiple documents, it is necessary to have the Contribute permission level for the library or to be a member of the Default SharePoint Members group.

- a. Navigate to the library where your document is located.
- b. On the Ribbon, click the **Documents** tab, then select **Discard Check Out Multiple Documents** in the **Open & Check Out** group.

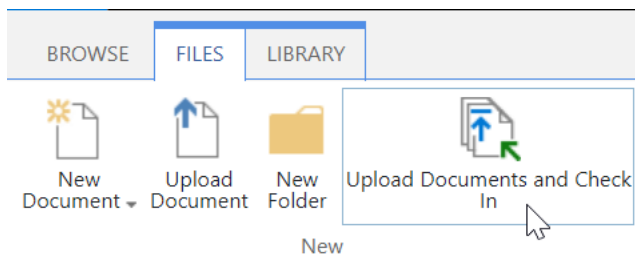


- c. This will bring you to the **Discard Check Out Multiple Documents** page.
- d. Select the documents for which you want to discard the check out.
- e. Click **OK** to finalize the discarding of the check out for the selected documents.

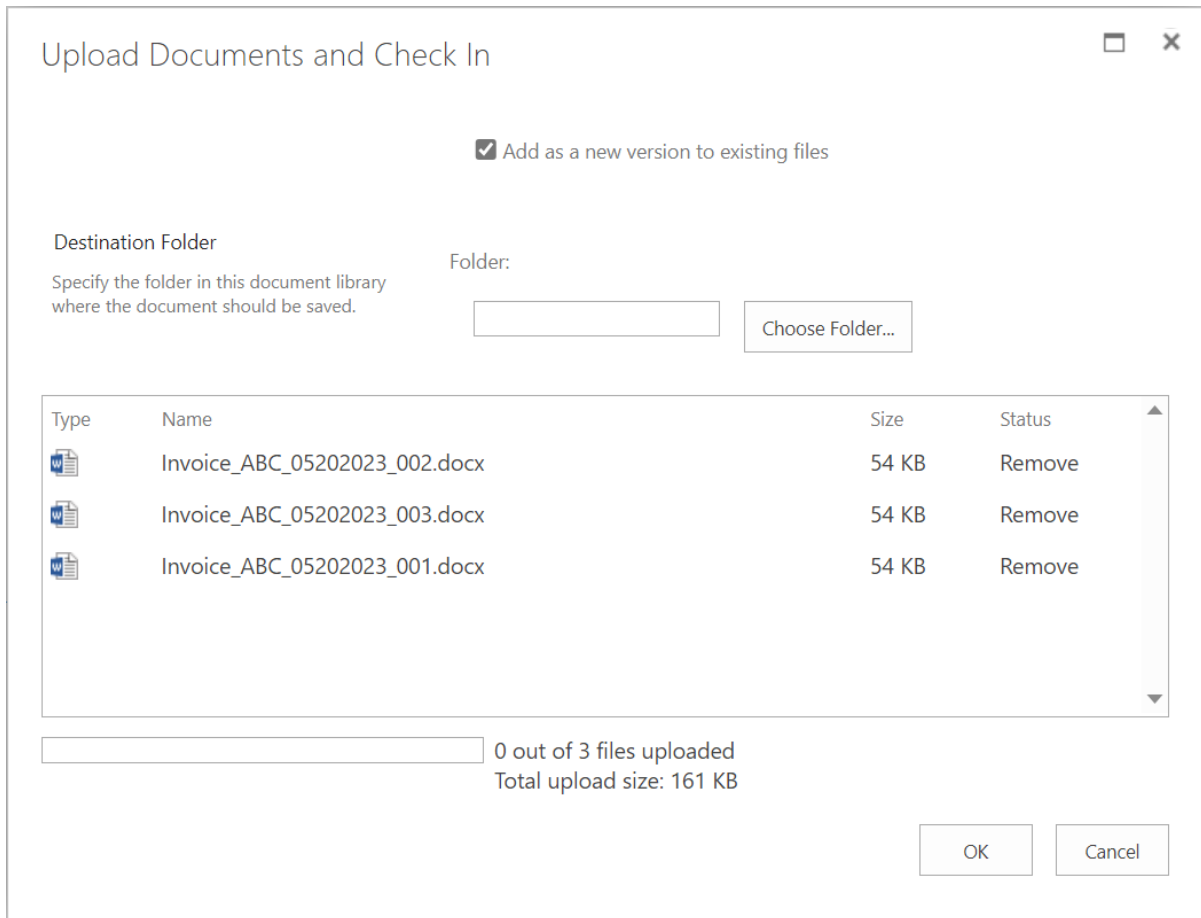
4. Upload and Check In Multiple Documents

To upload and check in multiple documents simultaneously, it is essential that you possess the Contribute permission level for the library or are a member of the Default SharePoint Members group.

- a. Navigate to the library where you wish to upload documents.
- b. Click on the **Documents** tab on the Ribbon, then select **Upload Documents and Check In** from the **Upload Document** dropdown menu.



- c. The **Upload Documents and Check In** dialog box will appear. Here, you can choose the documents you wish to upload and specify a folder to house these documents. If not specified, the documents will be uploaded to the folder you are currently accessing.



- d. Click **OK** to upload the selected documents.
- e. Upon clicking **Done**, you will be directed to the **Check In Multiple Documents** page. Here, you can:
 - Select the version you want to check in under the **Version** section.
 - Decide if you want to keep your check out after checking in.
 - Choose the documents you wish to check in under the **Documents** section.
 - Add any relevant comments in the **Comments** section.
 - Adjust the column properties in the **Edit Document Properties** section.
- f. Click **OK** to complete the check in process for the documents or **Cancel** if you decide not to proceed.

Please note, if the documents have been checked out to a local draft folder, a confirmation dialog box will appear when you check in items. Click **'Yes'** to continue with the process.

5. Troubleshooting & Support

In the event of encountering any difficulties or issues, we recommend referring to our comprehensive troubleshooting Frequently Asked Questions (FAQ) section at:

<https://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

For further detailed assistance, feel free to connect with us through the following channels:

- For any inquiries related to our products and licensing, contact us at:

sales@boostsolutions.com

- For basic technical support, our team of experts is ready to assist at:

support@boostsolutions.com

- To request a new product or feature, please address your suggestions to:

feature_request@boostsolutions.com

Your feedback and satisfaction are our priority, and we are always ready to provide you with the necessary support.

Appendix 1: License Management

Batch Check In allows you a trial period of 30 days from the first usage without the need for a license code.

Post the expiration of this period, it is mandatory to purchase and register a license to continue using the product.

Locating License Information

- Access the **BoostSolutions Software Management** segment in Central Administration and click on the **License Management Center** link.
- Click **Download License Information**, opt for your desired license type and download the essential details (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>

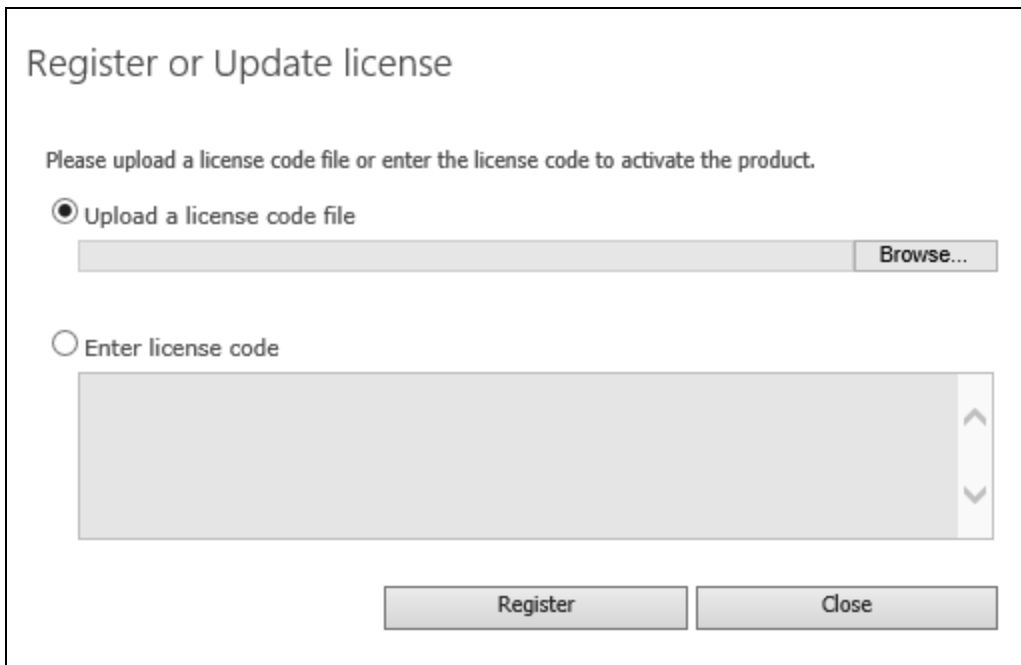
Download Close

To generate a license, BoostSolutions requires your SharePoint environment identifier. Please note that different license types require different information: a server license requires a server code; a farm license requires a farm ID; and a site collection license necessitates a site collection ID.

- Forward the aforementioned details to us at (sales@boostsolutions.com) for the generation of a license code.

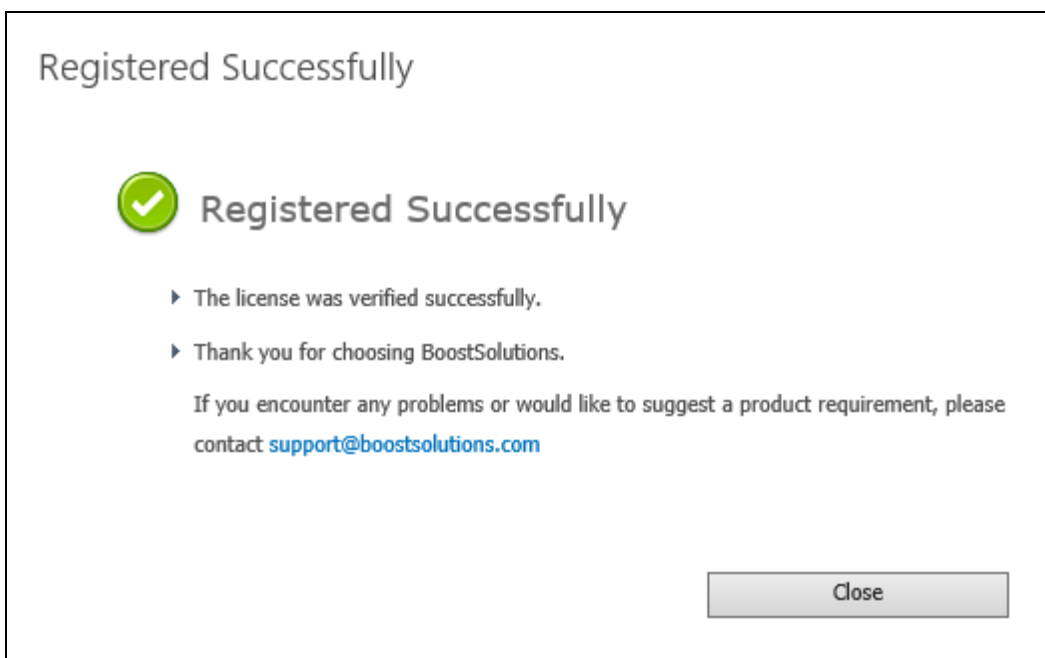
License Registration

- Upon receiving your product license code, navigate to the **License Management Center** page.
- Click on **Register** on the license page, which will open a **Register or Update license** window.



The screenshot shows a dialog box titled "Register or Update license". Below the title is the instruction: "Please upload a license code file or enter the license code to activate the product." There are two radio button options: "Upload a license code file" (which is selected) and "Enter license code". Under the selected option is a file input field with a "Browse..." button. Under the unselected option is a large text input area. At the bottom of the dialog are two buttons: "Register" and "Close".

- Upload the license file or input the license code and click **Register**. You will receive a confirmation indicating the validation of your license.



The screenshot shows a confirmation dialog box titled "Registered Successfully". It features a green checkmark icon. Below the icon, the text reads: "Registered Successfully". There are two bullet points: "▶ The license was verified successfully." and "▶ Thank you for choosing BoostSolutions." Below these is a message: "If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com". At the bottom right of the dialog is a "Close" button.

For an in-depth understanding of license management, we recommend referring to the [BoostSolutions Foundation](#).