



Bulk Properties Editor 3.0

User Guide

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1. Introduction

With Bulk Properties Editor, end users can bulk edit properties and check in documents. Additionally, it is possible to bulk approve/reject documents or list items.

This user guide will help you to install and configure Bulk Properties Editor on your SharePoint environment.

For the latest version of this user guide or other user guides, please visit our document center at:

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

2. Installation

2.1 Product Files

After you download and unzip the Bulk Properties Editor 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.
Bulk Properties Editor_V3_User Guide.pdf	The user guide for Bulk Properties Editor 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\Foundation\BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.Basic\BoostSolutions.SharePointClassifier.Platform14.3.wsp	A SharePoint solution package containing product fundamental files and resources for SharePoint 2010 or SharePoint Foundation 2010.

Solutions\Classifier.Basic\ BoostSolutions.SharePointClassifier.Platform15.3.wsp	A SharePoint solution package containing product 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.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.

2.2 Software Requirements

Before you install Bulk Properties Editor, ensure your system meets the following requirements:

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

SharePoint 2013

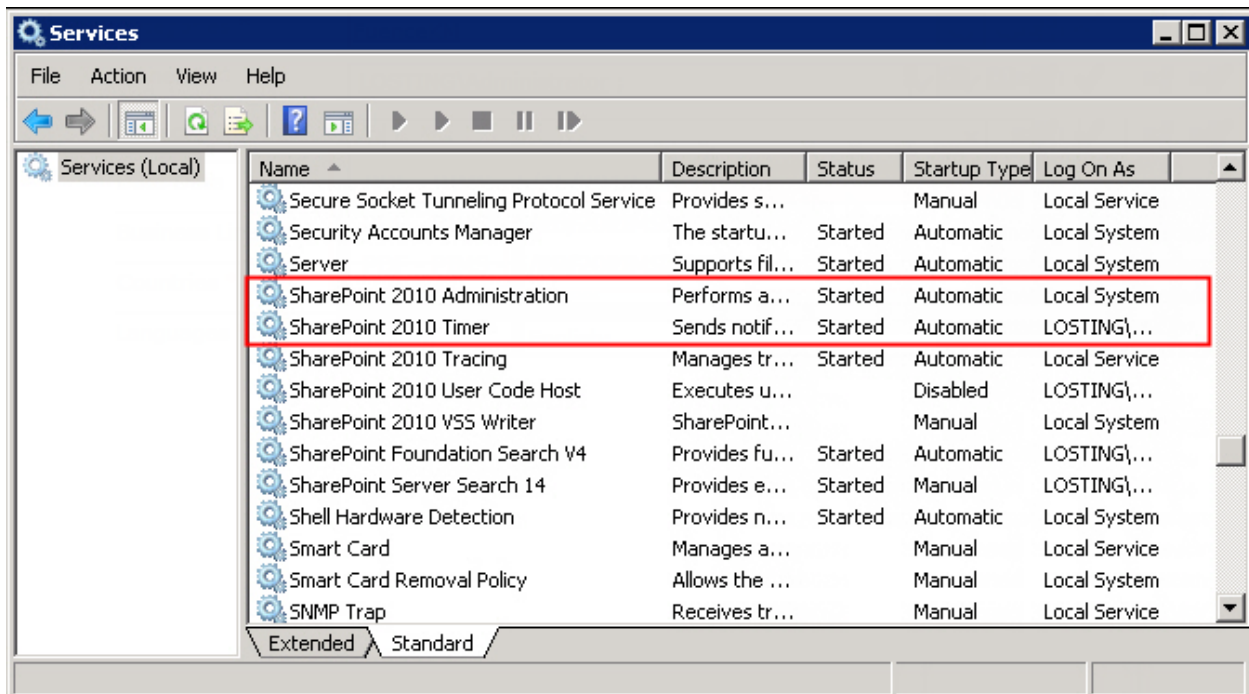
Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

2.3 Installation

Follow these steps to install Bulk Properties Editor on your SharePoint servers.

Installation Preconditions

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



Bulk Properties Editor 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 Bulk Properties Editor 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 your 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**.

Note

If you have installed Classifier 1.0 on your SharePoint servers, to upgrade to Bulk Properties Editor 2.0 or above, you need to:

Download the new version of Classifier (2.0 or above), and upgrade the product.

Or,

Remove Classifier 1.0 from your SharePoint servers, and install Bulk Properties Editor 2.0 or above.

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 Bulk Properties Editor 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 Bulk Properties Editor to SharePoint servers.

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

- a. Extract the files from the product zip pack to a folder on one SharePoint server.
- b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2010**

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

- **SharePoint 2013**

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

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

```
stsadm -o addsolution -filename <full path>\BoostSolutions.FoundationSetup14.1.wsp
stsadm -o addsolution -filename <full path>\BoostSolutions.BulkPropertiesEditor14.3.wsp
stsadm -o addsolution -filename <full path>\BoostSolutions.SharePointClassifier.Platform14.3.wsp
```

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

```
stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.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.SharePointClassifier.Platform14.3.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.FoundationSetup14.1.wsp  
stsadm -o displaysolution -name BoostSolutions.BulkPropertiesEditor14.3.wsp  
stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform14.3.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.BatchEdit -url [site collection url] -force
```

To remove Bulk Properties Editor from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.BulkPropertiesEditor14.3.wsp -immediate -url [virtual server url]  
stsadm -o retractsolution -name BoostSolutions.SharePointClassifier.Platform14.3.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.BulkPropertiesEditor14.3.wsp  
stsadm -o displaysolution -name BoostSolutions.SharePointClassifier.Platform14.3.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.BulkPropertiesEditor14.3.wsp  
stsadm -o deletesolution -name BoostSolutions.SharePointClassifier.Platform14.3.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**.

	BoostSolutions Bulk Properties Editor 3.0.124.1 Enable SharePoint users to index, tag and approve/reject multiple documents or list items. (Powered by BoostSolutions)	Deactivate	Active
	BoostSolutions ECM Framework 2.7.124.0 This is the fundamental feature for BoostSolutions ECM solution. (Powered by BoostSolutions)	Deactivate	Active

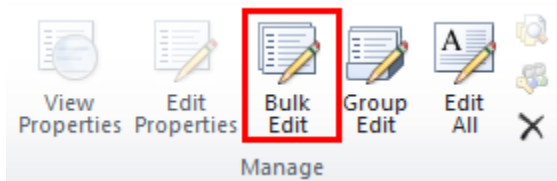
3. How to use the Bulk Properties Editor

3.1 Index Multiple Documents

3.1.1 Bulk Edit Documents Properties

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

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



- b. A dialog box will appear as follows:

Bulk Edit

Edit

Save Cancel Tags & Notes

Commit Index

Select All

<input checked="" type="checkbox"/>	Title	<input type="text"/>	
<input checked="" type="checkbox"/>	Categories *	<input type="text"/>	
<input checked="" type="checkbox"/>	Owner *	<input type="text"/>	
<input checked="" type="checkbox"/>	Project Number	<input type="text"/>	
<input checked="" type="checkbox"/>	Due Date	<input type="text"/>	
<input checked="" type="checkbox"/>	Business Lines *	<input type="text"/>	
<input checked="" type="checkbox"/>	Countries *	<input type="text"/>	
<input checked="" type="checkbox"/>	Languages *	<input type="text"/>	
<input checked="" type="checkbox"/>	Enterprise Keywords	<input type="text"/>	

☐ Check In after Save

3 Document(s)

OK Cancel

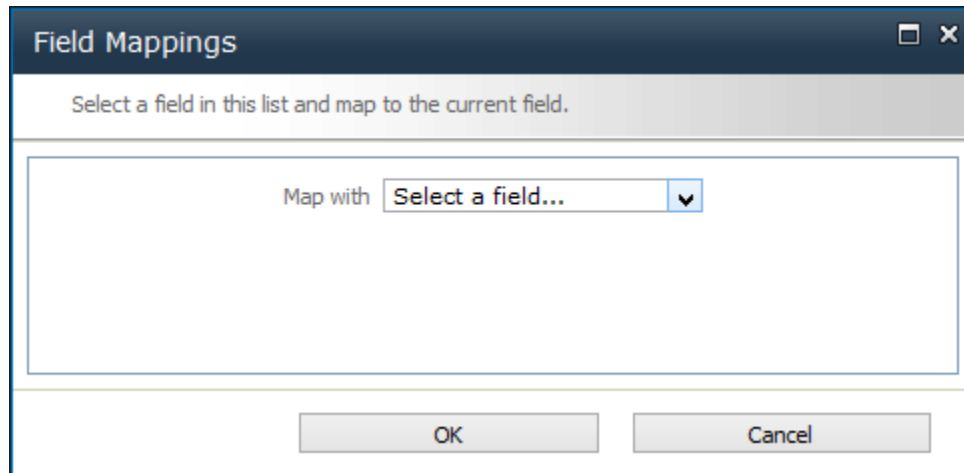
There is a checkbox along the left side of each field. The * (red asterisk) indicates that this field is required and cannot be left empty once it is checked.

You can retain the existing value by unselect the checkbox.

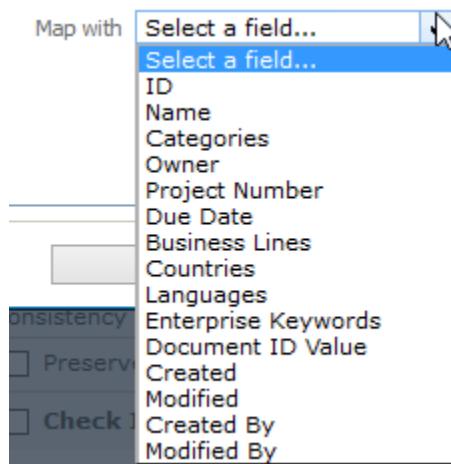
The icon on the right side of each field indicates the **Field Mapping** function:



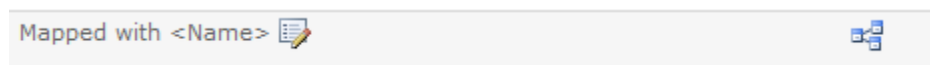
Field Mapping is used to dynamically map and assign another field to the current field. When you click this icon you will bring up the Field Mapping window.





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.



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

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

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

☒ **Business Lines *** 

☐ Append changes to existing value


Note

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

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

☐ Preserve Authors and Timestamps 


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

	<input type="checkbox"/> Preserve Authors and Timestamps 
	<input checked="" type="checkbox"/> Check In after Save
Version	What kind of version would you like to check in? <input checked="" type="radio"/> Minor version (draft) <input type="radio"/> Major version (publish) <input type="radio"/> Overwrite the current minor version
Retain Check Out	Retain your check out after checking in? <input type="radio"/> Yes <input checked="" type="radio"/> No
Comments	Comments: <div style="border: 1px solid #ccc; height: 60px; margin-top: 5px;"></div>

Change Content Type

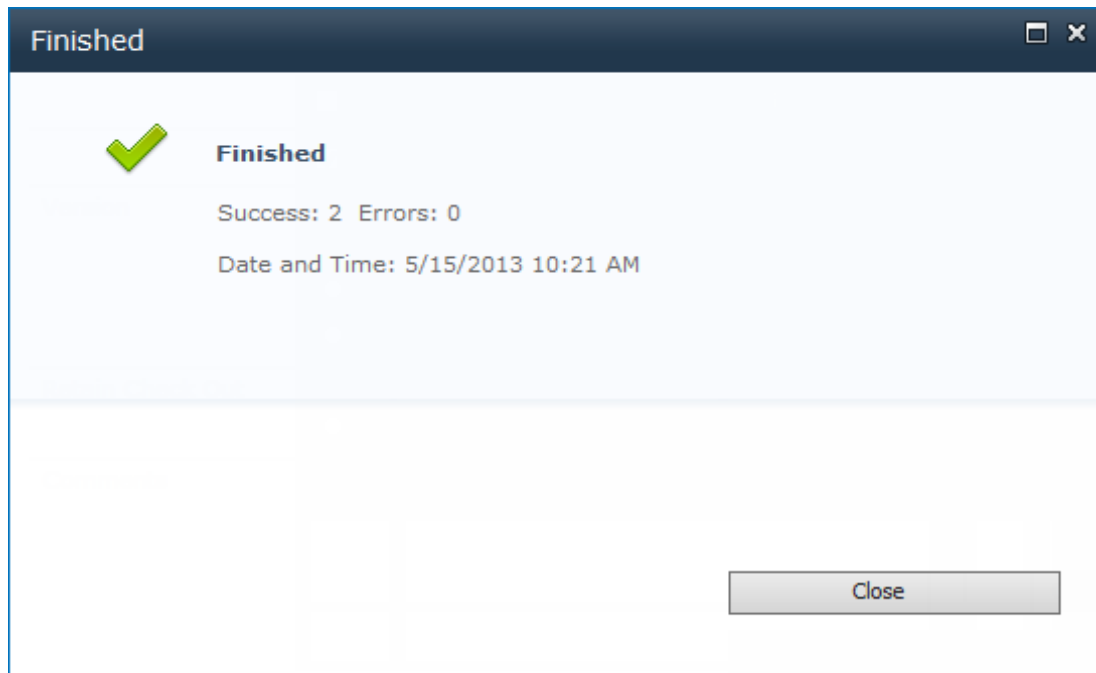
If you enabled **Allow management of content types** in the Library Settings, and have different content types for a library, there is a **Content Type** option at top of all of the columns.

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

 Select All	
<input checked="" type="checkbox"/> Content Type	<div style="border: 1px solid #ccc; padding: 2px;"> Document Form Image </div>
<input checked="" type="checkbox"/> Title	

The checkbox is unselected by default, if you want to enable this function, select the checkbox and there is a dialog window telling you that this option will change the content type. Click **OK** to continue.

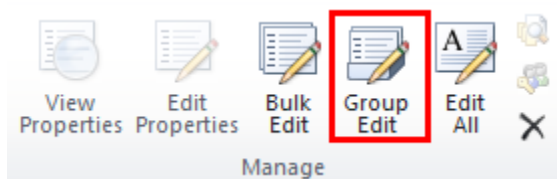
- c. Fill in these columns and click **OK**. When the bulk edit operation is finished, a window will pop-up as follows:



3.1.2 Group Edit Documents Properties

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

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



- b. A dialog box will appear as follows:

Group Edit - Export and Import.docx

Edit


Save & Next Cancel Previous Next Preview Tags & Notes

Commit Actions Index

Name *	Product Analysis.docx		
Title	Mapped with <Name>		✓
Categories *	FuenceKM		✓
Owner *	Henry Lee;		✓
Project Number	PDF-PIMS-5/15/2013		✓
Due Date	4/1/2014		✓
Business Lines *	Drug Safety Research and Development		✓
Countries *	France		✓
Languages *	English		✓
Enterprise Keywords	Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse.		✓
	<input type="checkbox"/> Preserve Authors and Timestamps		
	<input type="checkbox"/> Check In after Save		
	This document was not checked out.		

< 1 of 3 >

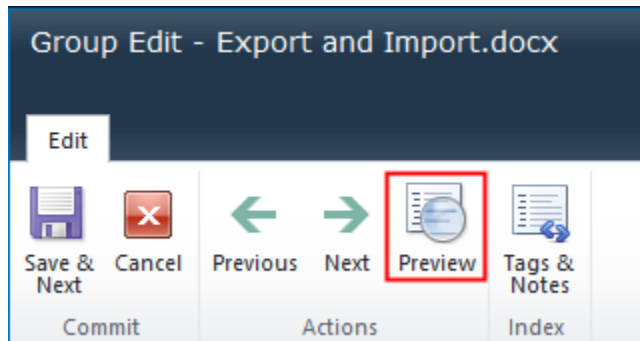
Save & Next Cancel

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

		✓
FuenceKM		✓
LOSTING\Administrator ;		✓
PDF - PIMS - 5/15/2013		✓

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.



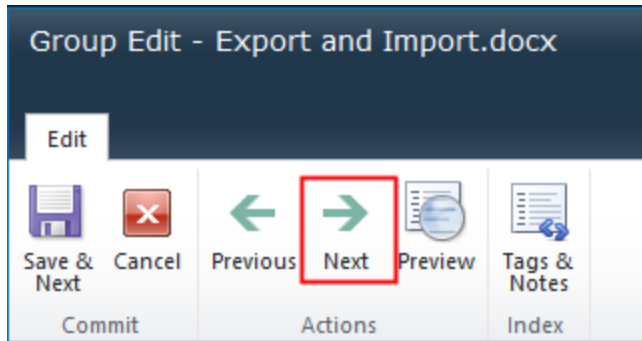
Click the (x) on the upper right-hand corner of the window to close the document preview window.


Note

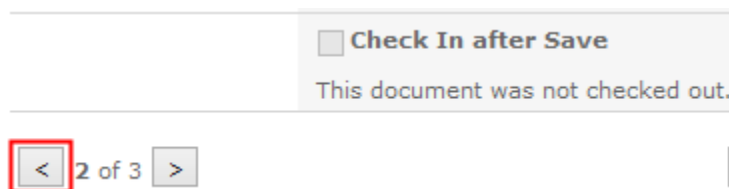
Currently only PDF documents and Images are supported in Bulk Properties Editor.

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.



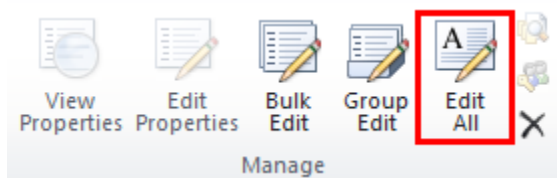
To navigate back to the previous document, click the  button on the lower left corner of the Group Edit window.



3.1.3 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.

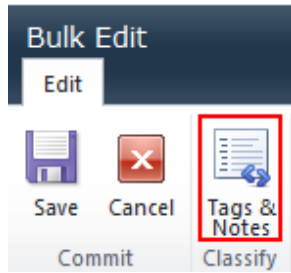


- b. When the dialog box appears, follow the steps (starting with step 2) found in Section [3.1.1](#).

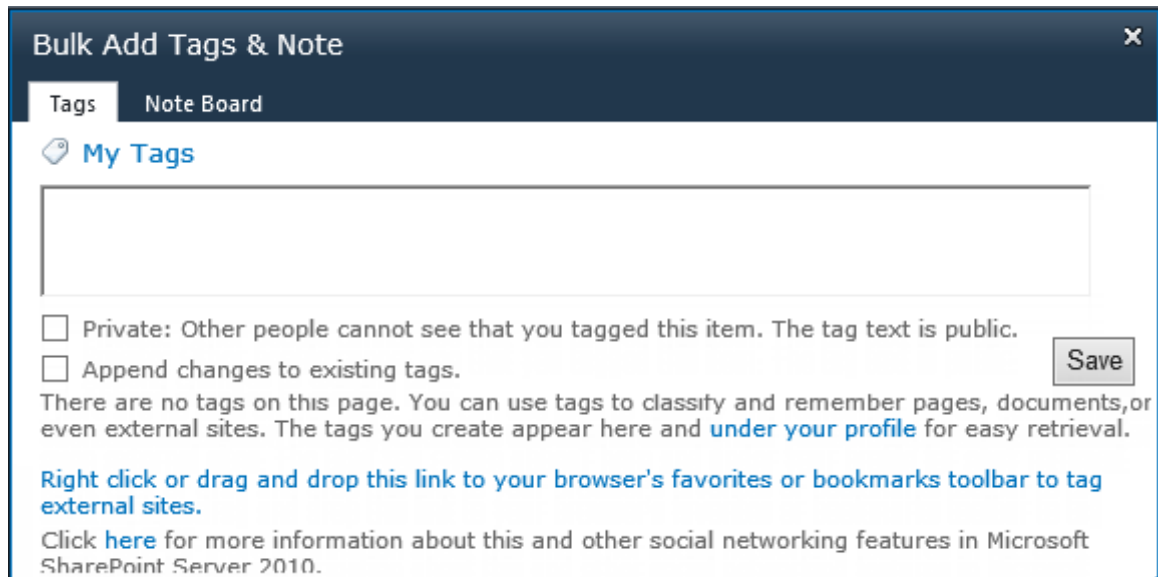
3.1.4 Bulk Tag Documents

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.

3.2 Organize Documents

3.2.1 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:

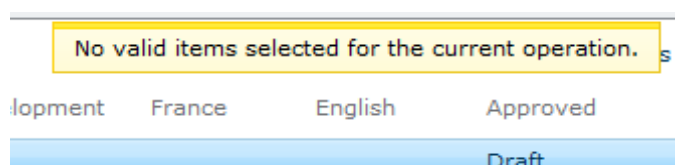
A screenshot of the 'Approval/Reject' dialog window. The window has a dark blue title bar with the text 'Approval/Reject' and standard window controls. The main area is divided into two sections. The top section, titled 'Approval Status', contains the instruction 'Approve or reject list items.' and three radio button options: 'Approved. These items will become visible to all users.' (which is selected), 'Rejected. These items will be returned to its creator and only be visible to its creator and all users who can see draft items.', and 'Pending. These items will remain visible to its creator and all users who can see draft items.'. The bottom section, titled 'Comment', contains the instruction 'Use this field to enter any comments about why these items were approved or rejected.' and a large text input area with vertical scrollbars. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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.

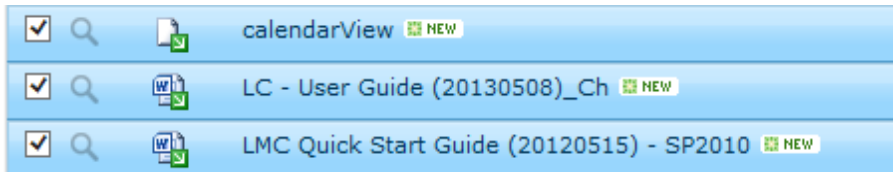


3.2.2 Bulk Check In

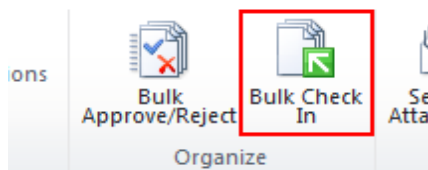
This function helps users to mass check in documents in a document library.

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

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



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



Note

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

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

Check in Multiple Documents

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

What kind of version would you like to check in?

☒ Minor version (draft)

☐ Major version (publish)

☐ Overwrite the current minor version

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

Retain your check out after checking in?

☐ Yes ☒ No

Comments
Type comments describing what has changed in this version.

Comments

OK Cancel

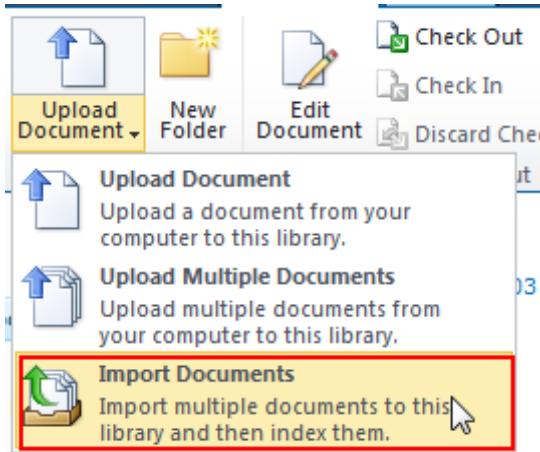
Note

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. 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.

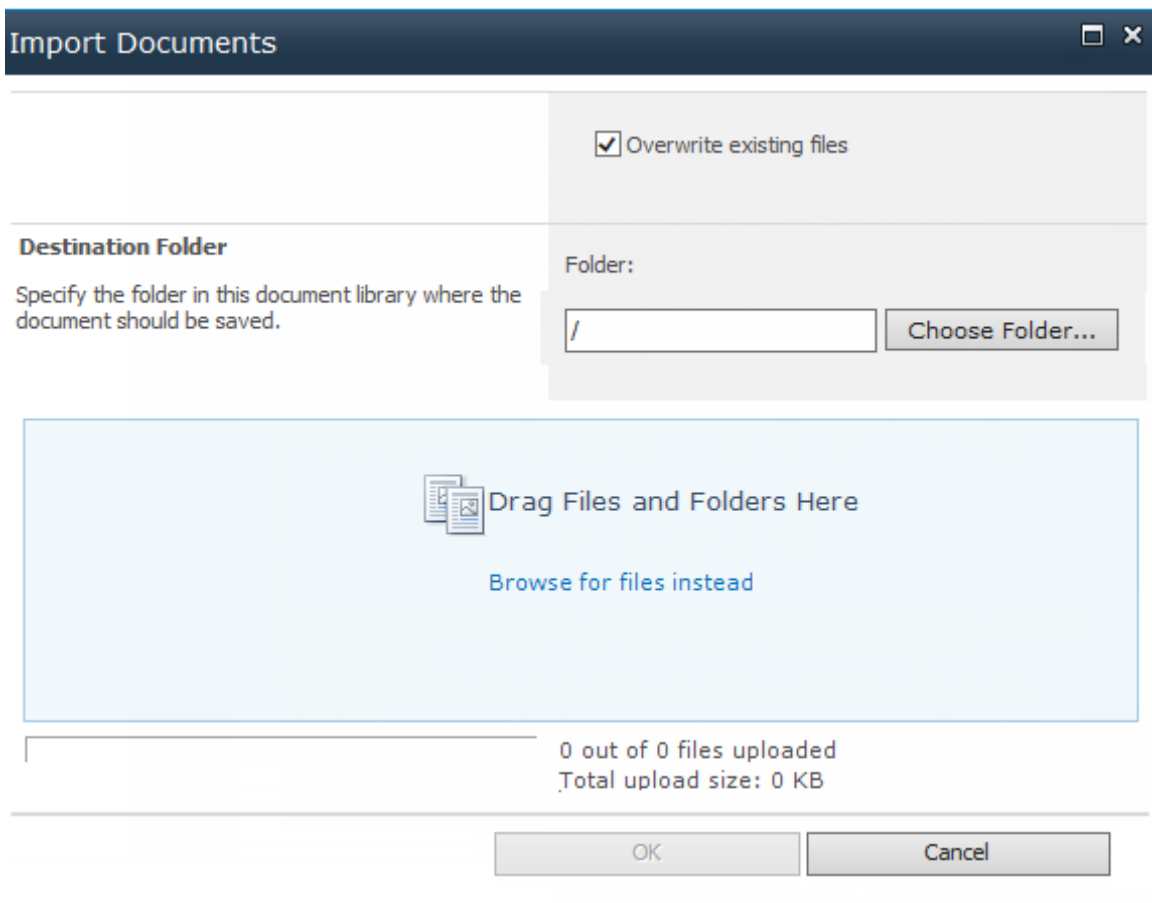
3.3 Import Documents

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.



- 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.


Type	Name	Size	Status
	PIMS_2214_CLME_PRODUC_PDF_B.pdf	257 KB	Done
	PIMS_2215_CLME_PRODUC_PDF_A.pdf	257 KB	Done
	PIMS_2215_CLME_PRODUC_PDF_B.pdf	257 KB	Done
	PIMS_2216_CLME_PRODUC_PDF_B.pdf	257 KB	 Uploading...
	PIMS_2223_CLME_PRODUC_PDF_A.pdf	257 KB	


3 out of 5 files uploaded
Total upload size: 1 MB


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

Index Options for Incoming Documents

Click Close button will do nothing for the incoming documents.

☒  **Check In All Documents**
The documents you uploaded will be check in.

☐  **Bulk Edit All Documents**
Go to next window to bulk edit properties for all documents.

☐  **Group Edit All documents Individually**
Go to next window to edit properties individually.

Next

Close

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 [3.2.2](#) for details.
- **Bulk Edit All Documents:** This option will navigate you to the bulk edit documents properties page. See section [3.1.1](#) 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.

3.4 Manage Bulk Properties Editor Settings

3.4.1 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:

- On the **Site Actions** drop-down menu , click **Site Settings**.
- On the Site Settings page, in the **BoostSolutions Software** section, click **Bulk Properties Editor Settings**.



- If you want to manage settings in a root site, under **Site Collection Administration**, click **Go to top level site settings**.
- On the Site Settings page, in the **BoostSolutions Software** section, click **Bulk Properties Editor Settings**.

In the settings page, you can configure the following options:

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

☒ Inherit settings ☐ Stop inheriting settings

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

General Settings

General Settings	
Specify edit options when users index multiple documents or list items in this list.	<div><input type="checkbox"/> Force input if list contains required fields <i>In the bulk edit page, checkboxes for required fields will always be checked by default.</i></div> <div><input type="checkbox"/> Fill in empty metadata fields only <i>In the bulk edit page, only empty fields can be replaced with values that users enter.</i></div> <div><input type="checkbox"/> Expand the Check In After Save option <i>Users will always see this option expanded whenever they are in metadata bulk edit page.</i></div> <div><input checked="" type="checkbox"/> Mark all fields as checked by default <i>In the bulk edit page, the checkboxes for all fields will be checked by default.</i></div>

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

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

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

Enable Edit All	
Specify whether you want to enable the Edit All function and which users can use this function.	<div>Make the Edit All command available on the ribbon</div> <div><input checked="" type="radio"/> Yes <input type="radio"/> No</div> <div>Specify users who can use this function:</div> <div><input checked="" type="radio"/> Allow all users</div> <div><input type="radio"/> Allow specified users</div> <div><input type="radio"/> Block specified users</div>

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

Specify which users can access this feature:

- **Allow all users**

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

- **Allow specified users**


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



The screenshot shows a configuration window with the title "Allow specified users". Below the title is a text input field containing the text "Product Center Members ;". To the right of the input field are three small icons: a user icon, a checkmark icon, and a document icon.

- **Block specified users**

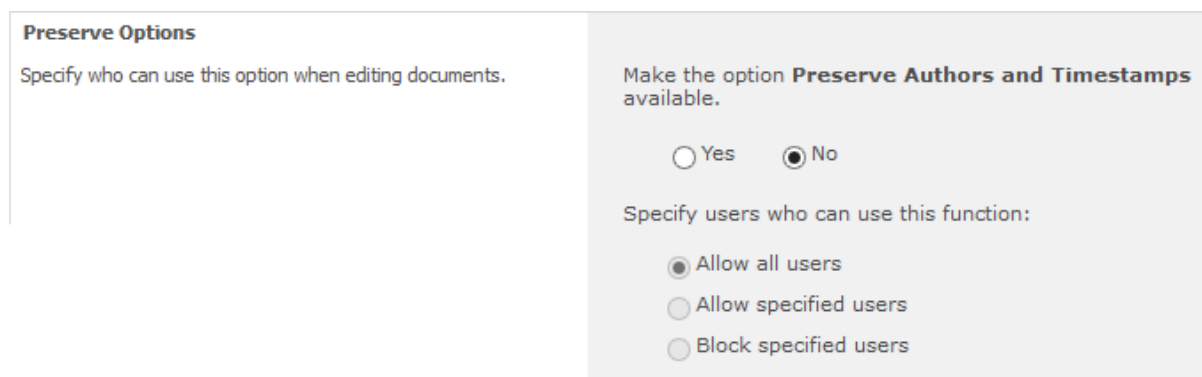
All users except the specified users can access this feature in this document library or list. You can input any user, SharePoint groups and/or domain group.



The screenshot shows a configuration window with the title "Block specified users". Below the title is a text input field containing the text "LOST\doc approvers ;". To the right of the input field are three small icons: a user icon, a checkmark icon, and a document icon.

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.



The screenshot shows a configuration window titled "Preserve Options". On the left, there is a text box with the instruction "Specify who can use this option when editing documents." On the right, there are two sections. The first section is titled "Make the option **Preserve Authors and Timestamps** available." and contains two radio buttons: "Yes" and "No", with "No" selected. The second section is titled "Specify users who can use this function:" and contains three radio buttons: "Allow all users" (selected), "Allow specified users", and "Block specified users".

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

Specify which users can access this feature:

- **Allow all users**

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

- **Allow specified users**

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



- **Block specified users**

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



3.4.2 Manage Settings on List

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

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

General Settings

Title, description and navigation

Versioning settings

Advanced settings

Validation settings

Rating settings

Audience targeting settings

Metadata navigation settings

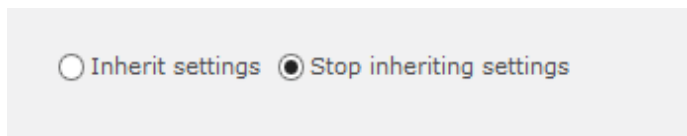
Per-location view settings

Bulk Properties Editor Settings (Powered by BoostSolutions)

Auto Complete Settings (Powered by BoostSolutions)

Form 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 [3.4.1](#).

3.5 Configure Auto Complete feature

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

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

General Settings

[Title, description and navigation](#)

[Versioning settings](#)

[Advanced settings](#)

[Validation settings](#)

[Rating settings](#)

[Audience targeting settings](#)

[Metadata navigation settings](#)

[Per-location view settings](#)

[Bulk Properties Editor Settings \(Powered by BoostSolutions\)](#)

[Auto Complete Settings \(Powered by BoostSolutions\)](#)

[Form settings](#)

- b. You will see the following settings:

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

Select Fields


















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

- ☐ **Select All**
- ☒ Title
- ☒ Project Number
- ☐ Business E-mail address

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.

Categories *	<input type="text" value="FuenceKM"/>	  
Owner *	<input type="text" value="LOSTING\Administrator ;"/>	  
Project Number	<input type="text" value="PD"/>	 
Date Date	<div> <div>PDF - PIMS - 5/15/2013</div> <div>PDF - PIMS - 5/16/2013</div> <div>PDF - PIMS - 5/17/2013</div> </div>	 
Business Lines *		 
Countries *	<input type="text" value="France"/>	 
Languages *	<input type="text" value="English;"/>	  

Note

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

3.6 Compatibility 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.

3.7 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.

Note that compatibilities with Bulk Properties Editor are different for Column/View Permission version 3.x and 4.x:

For Column/View Permission 3.x

Case 1:

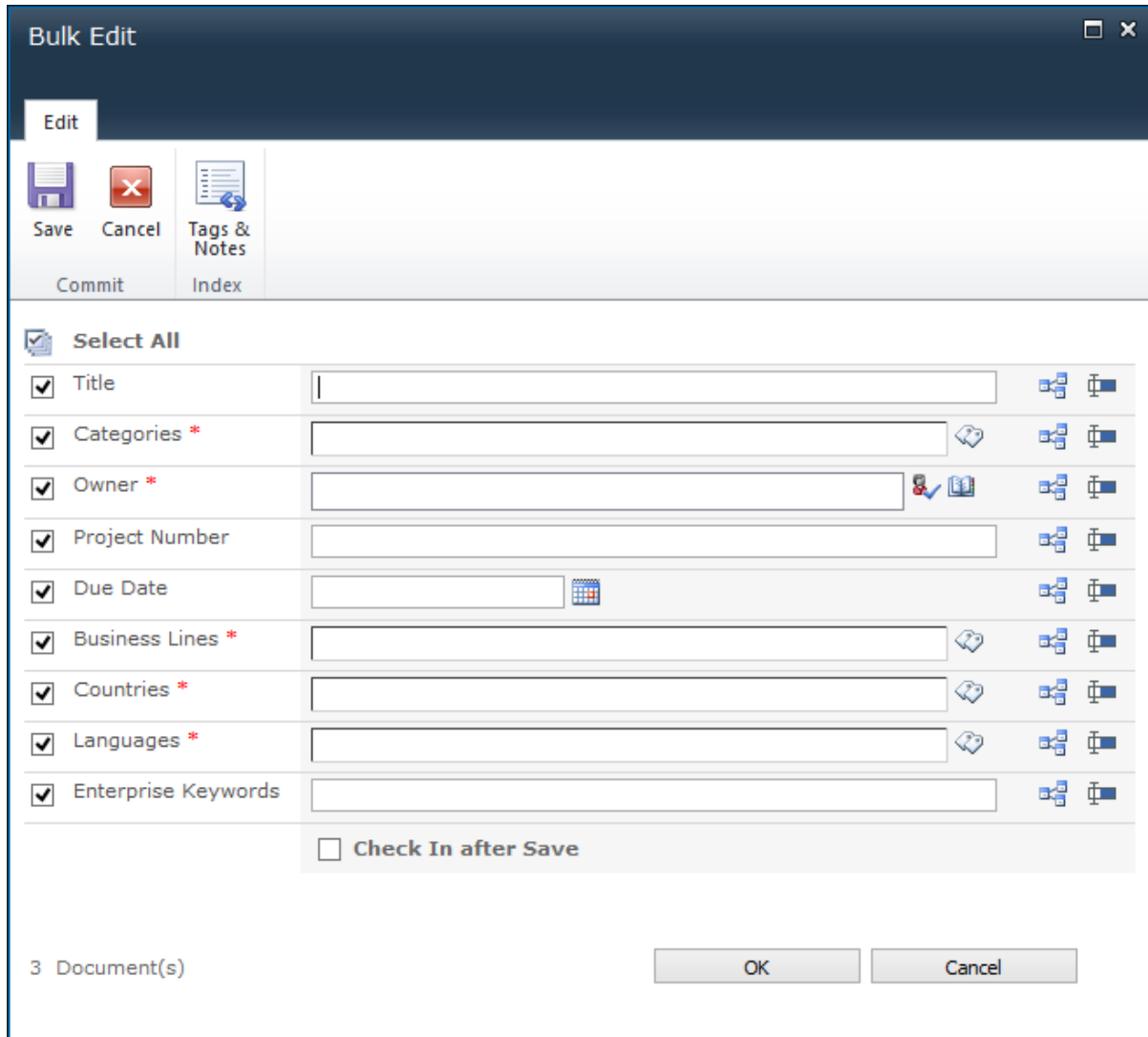
In Column/View Permission 3.x, you can set columns as hidden or read-only and no conditions. When users edit items using the Bulk Edit or Edit All command, those columns will be hidden or read-only in the Bulk Edit form or Edit All form and users cannot access them.

The screenshot shows the 'Bulk Edit' dialog box with the following components:

- Header:** 'Bulk Edit' title bar with a close button.
- Toolbar:** 'Edit' tab, 'Save' (floppy disk icon), 'Cancel' (red X icon), 'Tags & Notes' (notepad icon), 'Commit', and 'Index'.
- Select All:** A checkbox icon followed by the text 'Select All'.
- Property List:** A table-like structure with columns for a checkbox, the property name, a value field, and action icons. The rows are:
 - ☒ Title
 - ☒ Categories * (highlighted with a red box)
 - ☒ Owner *
 - ☒ Project Number
 - ☒ Due Date 2/27/2014 (highlighted with a red box)
 - ☒ Business Lines *
 - ☒ Countries * (highlighted with a red box)
 - ☒ Languages *
 - ☒ Enterprise Keywords
- Check In after Save:** A checkbox that is currently unchecked.
- Footer:** '4 Document(s)' on the left, and 'OK' and 'Cancel' buttons on the right.

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.



The Bulk Edit dialog box is titled "Bulk Edit" and features a dark blue header bar with a close button (X) in the top right corner. Below the header is a tab labeled "Edit". The main area contains a toolbar with icons for "Save" (floppy disk), "Cancel" (red X), "Tags & Notes" (notepad), "Commit" (checkmark), and "Index" (book icon). Below the toolbar is a section titled "Select All" with a checked checkbox. This section contains a list of fields, each with a checked checkbox, a text input field, and a set of icons (a blue square with a white 'X', a blue square with a white 'I', and a blue square with a white 'R'). The fields are: Title, Categories *, Owner *, Project Number, Due Date, Business Lines *, Countries *, Languages *, and Enterprise Keywords. Below the list is a checkbox labeled "Check In after Save". At the bottom left, it says "3 Document(s)". At the bottom right are "OK" and "Cancel" buttons.

Field	Value	Icons
<input checked="" type="checkbox"/> Title		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Categories *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Owner *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Project Number		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Due Date		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Business Lines *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Countries *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Languages *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Enterprise Keywords		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'

☐ Check In after Save

3 Document(s)

OK Cancel

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.

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

Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse.

☐ Preserve Authors and Timestamps

☒ Check In after Save

This document was not checked out.

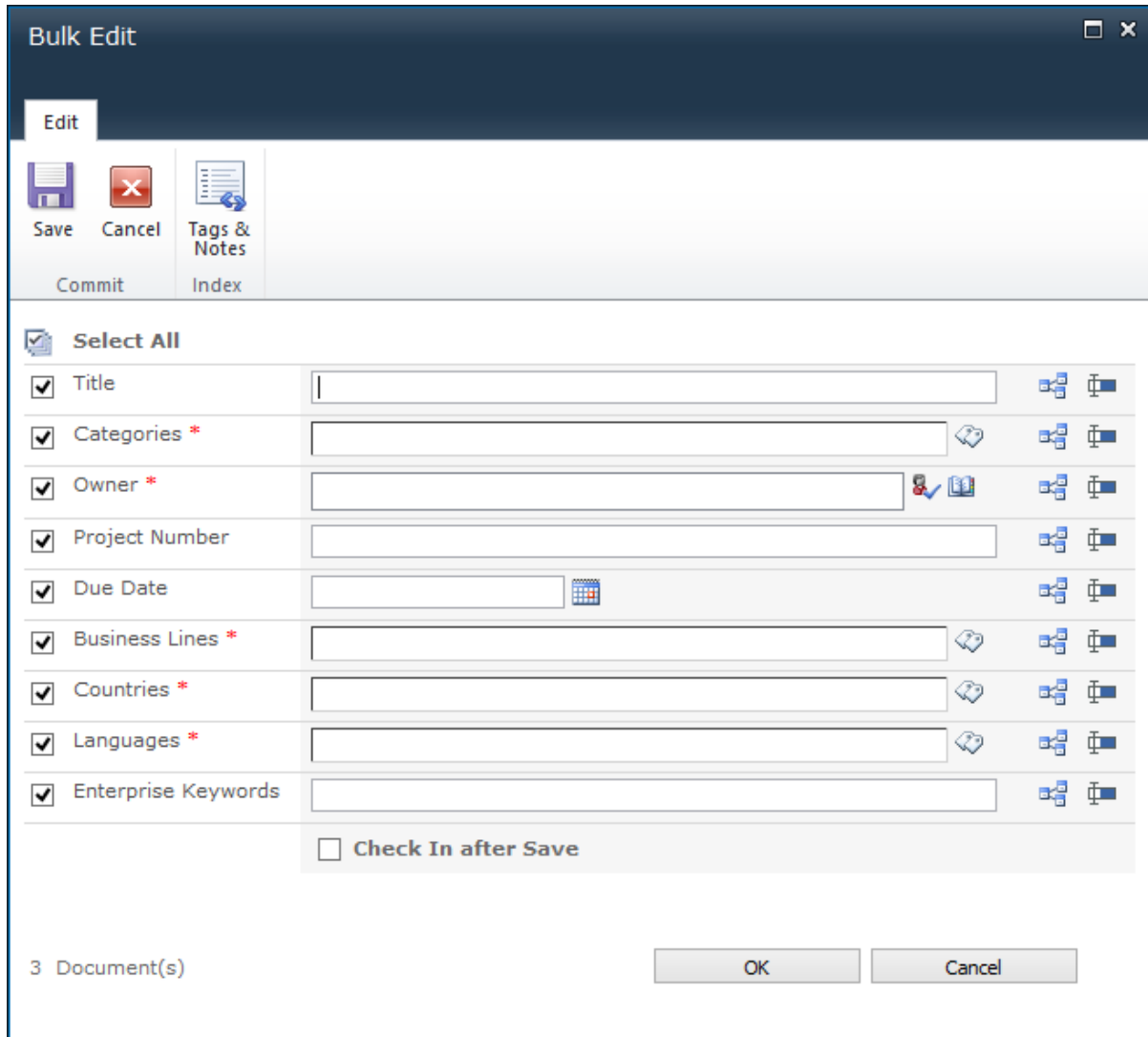
< 1 of 6 >

Save & Next Cancel

For Column/View Permission 4.x

Case 1:

You can configure column permissions in Column/View Permission 4.x. 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.



The Bulk Edit dialog box is titled "Bulk Edit" and features a dark blue header bar with a close button (X) in the top right corner. Below the header is a tab labeled "Edit". The main area contains a toolbar with icons for "Save", "Cancel", "Tags & Notes", "Commit", and "Index". Below the toolbar is a section titled "Select All" with a checked checkbox. This section contains a list of fields, each with a checked checkbox, a text input field, and a set of icons (a blue square with a white 'X', a blue square with a white 'I', and a blue square with a white 'R'). The fields are: Title, Categories *, Owner *, Project Number, Due Date, Business Lines *, Countries *, Languages *, and Enterprise Keywords. Below the list is a checkbox labeled "Check In after Save". At the bottom left, it says "3 Document(s)". At the bottom right are "OK" and "Cancel" buttons.

Field	Value	Icons
<input checked="" type="checkbox"/> Title		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Categories *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Owner *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Project Number		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Due Date		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Business Lines *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Countries *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Languages *		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'
<input checked="" type="checkbox"/> Enterprise Keywords		Blue square with white 'X', Blue square with white 'I', Blue square with white 'R'

☐ Check In after Save

3 Document(s)

OK Cancel


Case 2:


You can configure column permissions (hidden or read-only) in Column/View Permission 4.x. 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		 
	Enterprises Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse.	
	<input type="checkbox"/> Preserve Authors and Timestamps 	
	<input type="checkbox"/> Check In after Save	
	This document was not checked out.	

< 1 of 6 >

Save & Next

Cancel

4. Supported Libraries or Lists

Bulk Properties Editor 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

5. Troubleshooting & Support

Troubleshooting FAQ:

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 A: License Management

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

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

Finding License Information

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

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: e4c9171bd1aa49cea8903e0a7e0e812643f8360be
a74459ca3bf6b2e0240f194

☐ Farm License
Farm ID: {e4c9171b-d1aa-49ce-a890-3e0a7e0e8126}
Number of Users: 24 user(s)

☐ Site Collection License
Site Collection ID: 1316fb72-1436-41cf-949d-56ca6020320e Change
Site Collection: <http://pro-mac>

Download Close

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

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

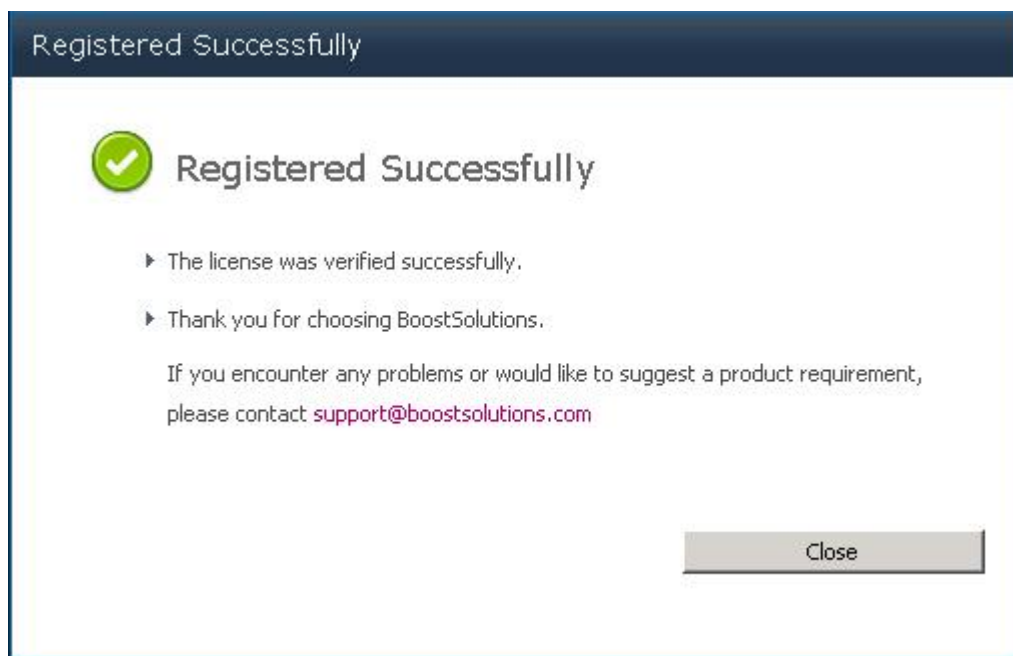
License Registration

- 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.



The dialog box has a dark blue header with the title "Register or Update license". Below the header, the text "Please upload a license code file or enter the license code to activate the product." is displayed. There are two radio buttons: "Upload a license code file" (which is selected) and "Enter license code". The "Upload a license code file" option has a text input field and a "Browse..." button. The "Enter license code" option has a large text input field. At the bottom, there are two buttons: "Register" and "Close".

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



The dialog box has a dark blue header with the title "Registered Successfully". Below the header, there is a green checkmark icon followed by the text "Registered Successfully". Below this, there are two bullet points: "▶ The license was verified successfully." and "▶ Thank you for choosing BoostSolutions.". Below the bullet points, there is a paragraph of text: "If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com". At the bottom right, there is a "Close" button.

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