

ArtfulBits Bulk Check In

For Microsoft® SharePoint®



User Guide

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Overview

ArtfulBits Bulk Check In is created to make check in task much easier. It allows checking an entire group of documents and changing their properties at one operation. Besides, it can be integrated into SharePoint Multiple Upload tool that makes it possible to use all *ArtfulBits Bulk Check In* features right after multiple documents are uploaded.

Feature List

Feature	SharePoint Server 2010	SharePoint Server 2013
Upload and check in multiple documents at the same time	✓	✓
Check in documents stored in subfolders	✓	✓
Edit document fields on check in	✓	✓
Auto fill the default column values	✓	✓
Options to overwrite existing column values or fill in only empty columns	✓	✓
Interactive documents tree for file and folders selection	✓	✓
Support of custom document libraries	✓	✓
Support of standard SharePoint document versioning	✓	✓
Customizable per document library	✓	✓
Language pack support (desired localization can be added by request)	✓	✓

Why ArtfulBits Bulk Check In?

ArtfulBits Bulk Check In extends standard SharePoint Check In tools with several really useful things:

- Firstly, you can check in multiple documents from any library location in one operation, including those from folders and subfolders. Select or deselect documents or entire folders, browse library structure using interactive documents tree.
- Secondly, you can perform two tasks in one, editing document properties on check in. *ArtfulBits Bulk Check In* provides you with different edit options like overwrite existing column value, fill in if blank or ignore.
- Finally, *ArtfulBits Bulk Check In* is integrated into SharePoint Multiple Upload dialog. Therefore, you are able to use all its features when multiple files uploading.

How to Use

Configuration

In order to enable and configure **Bulk Check In feature** for Document library, go to **Library Settings** and select **Bulk Check In settings** link under **Permissions and Management** tab:

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](#)
[Bulk Check In Settings](#)

Settings page will appear.

Bulk Check In Features Enable or disable different Bulk Check In features	Enable Bulk Check In ribbon action? <input checked="" type="radio"/> Yes <input type="radio"/> No Enable Bulk Check In on multiple upload? <input checked="" type="radio"/> Yes <input type="radio"/> No
Document Properties Enable this feature to edit document's properties before check in.	Edit document properties? <input checked="" type="radio"/> Yes <input type="radio"/> No Hide these properties: Owner Edit these properties: Title Description Expiration Date Description Up Down
Documents Tree Enable this feature to show all documents, folders and subfolders inside Bulk Check In dialog.	Show documents tree? <input checked="" type="radio"/> Yes <input type="radio"/> No

In **Bulk Check In Features** section two features can be enabled or disabled. Enabling **Bulk Check In ribbon action** will make Bulk Check In button appears in the ribbon near the standard SharePoint check in buttons. Enabling **Bulk Check In on multiple upload** will make Bulk Check In appears after you uploaded multiple documents, so you will be able to check in and edit properties straight after uploading.

In **Document Properties** section you can change behavior for the *document properties editing section* of *Bulk Check In dialog*. If you need to edit document properties before check in, choose **Yes** for **Edit document properties** question. You will see a picker box appears, having all available document properties, where you can choose those you need to see in edit form and those you don't.

In **Documents Tree** section you can show or hide tree of all documents, folders, and subfolders in left panel of *Bulk Check In dialog*. This allows you to browse all documents in library and select or deselect them to be checked in. In order to show this tree, **Show Documents Tree** option should be enabled.

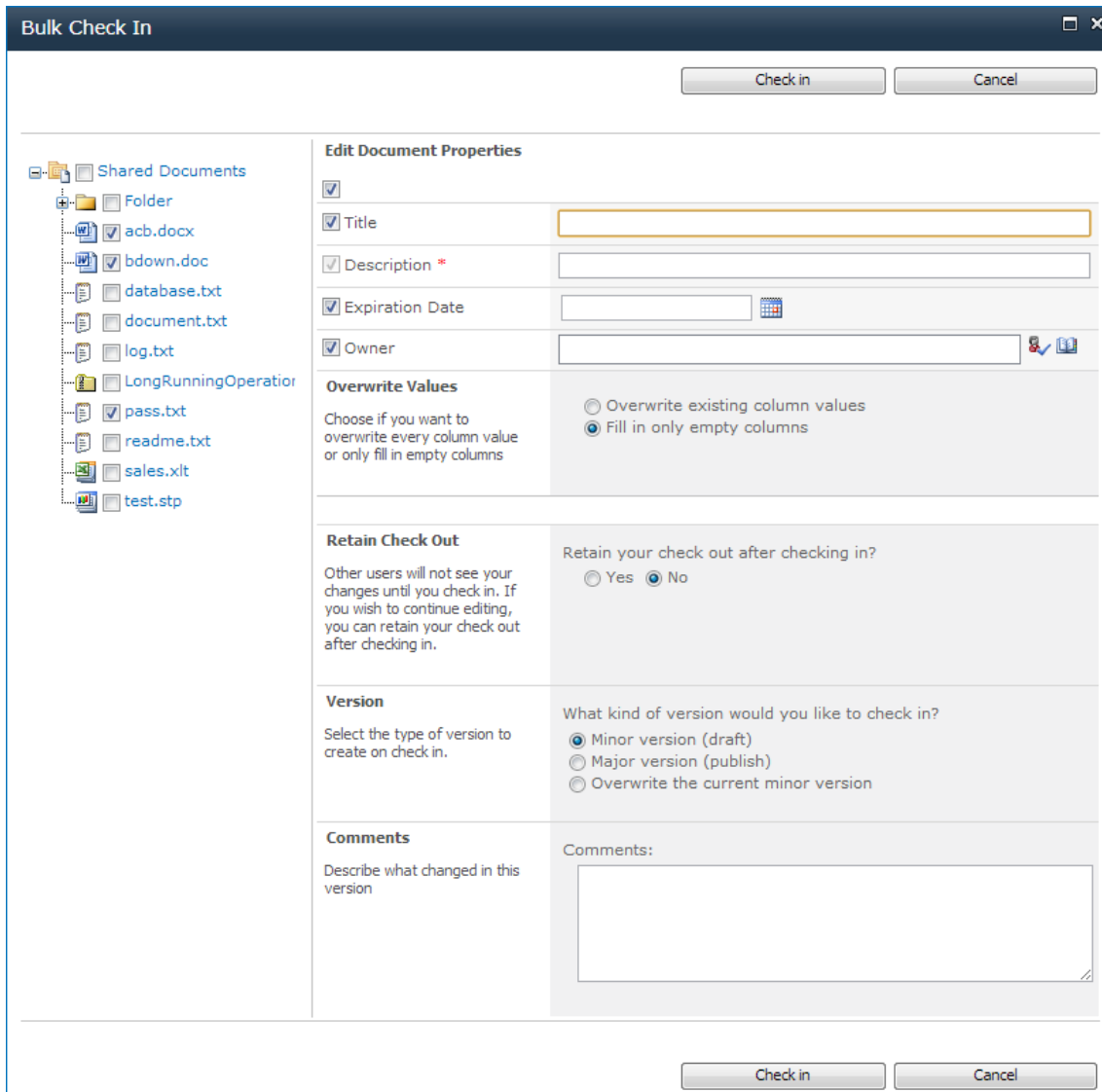
Click **Save** button to apply settings.

How to Use

To check in multiple documents inside document library, follow the steps:

1. Select documents you need to check in.

- Click on Bulk Check In icon to open *Bulk Check In Dialog*. Notice, that **Bulk Check In ribbon action** should be enabled for this library (See configuration section above).



The image shows a 'Bulk Check In' dialog box. At the top, there are 'Check in' and 'Cancel' buttons. On the left, a 'Shared Documents' tree lists files: Folder, acb.docx, bdown.doc, database.txt, document.txt, log.txt, LongRunningOperation, pass.txt, readme.txt, sales.xlt, and test.stp. The right side is divided into sections: 'Edit Document Properties' with checkboxes for Title, Description, Expiration Date, and Owner, each with a corresponding input field; 'Overwrite Values' with radio buttons for 'Overwrite existing column values' and 'Fill in only empty columns'; 'Retain Check Out' with a text explanation and radio buttons for 'Yes' and 'No'; 'Version' with a text explanation and radio buttons for 'Minor version (draft)', 'Major version (publish)', and 'Overwrite the current minor version'; and 'Comments' with a text area. At the bottom, there are 'Check in' and 'Cancel' buttons.

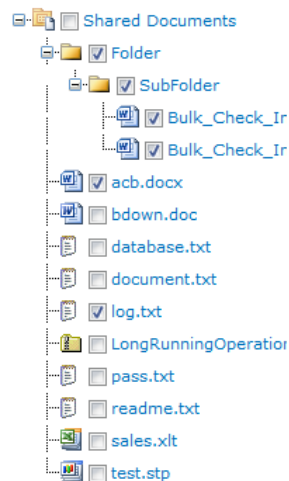
To check in selected documents, press **Check In** button at the top or at the bottom of Bulk Check In dialog. In order to skip, press **Cancel**.

Before check in you can change several things.

Documents tree.

If **Documents Tree** option is enabled (See configuration section above) you will be able to see a list of all documents from the document library, that are currently checked out, and, also, folder structure. All documents that are currently selected (have ticks near its title) will be affected by Bulk Check In operation. You can easily select or deselect document in any part of a library to be checked in. Notice, that:

- If a folder is selected, all checked out documents inside it will be affected.
- You can explore document library structure by expanding folders and subfolders inside the tree.





Edit Document properties

You can edit the properties (columns) of the documents that will be checked in. To assign some “value” to the document’s property just type it in the appropriate edit field. Notice, that:

- Initially, “value” will be assigned to the document only if an appropriate property is empty. You can change this behavior by setting **Overwrite column values** in the settings box above. Then all document properties will be overwritten with new “values” (if an appropriate edit field is enabled).
- Uncheck the checkbox near edit field to ignore it.
- Required fields are marked with red asterisk, cannot be unchecked and must be filled.
- All values inside edit fields will be validated, so you will not be able to check in anything until all values are correct.

Note: It is possible to hide either some properties of *document’s properties editing* or the whole thing (See configuration section above).

Edit Document Properties

<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Title	<input type="text"/>
<input checked="" type="checkbox"/> Person	<input type="text" value="User"/>  
<input checked="" type="checkbox"/> Number3 *	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Number	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Number2	<input type="text" value="3"/>

Overwrite Values
Choose if you want to overwrite every column value or only fill in empty columns

☐ Overwrite existing column values
☒ Fill in only empty columns

Check in section

In this section you can find some standard SharePoint check in options.

Retain Check Out: The default value is **No**, which means that documents will just be checked in. If you want to check in your documents, but continue editing, you can set this option to **Yes**. Documents will be checked in and checked out again.

Version: Select what document version to create (minor, major, or overwrite current minor). This section will be shown if library versioning settings are switched on.

Comment: Don't forget to describe changes in this version of documents.

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? <input type="radio"/> Yes <input checked="" type="radio"/> No
Version Select the type of version to create on check in.	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
Comments Describe what changed in this version	Comments: <div>New Version</div>

If **Bulk Check In on multiple upload** option is enabled, then *Bulk check In dialog* will automatically be displayed after documents are uploaded.

Upload Multiple Documents

☒ Add as a new version to existing files

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

Type	Name	Size	Status
	NewDoc1.txt	5 KB	Done (File checke...
	NewDoc2.txt	24 KB	Done (File checke...
	NewDoc3.txt	19 KB	Done (File checke...

3 out of 3 files uploaded
Total upload size: 49 KB

After clicking **Done**, *Bulk check In dialog* will be opened with new documents automatically selected.

See Also



[Cascaded Lookup Column](#)

Cascaded Lookup Column allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.



[Category Column](#)

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.



[Column Data Adapter](#)

Column Data Adapter is an extension component providing ability to use ArtfulBits Columns in Microsoft Access forms, reports and Microsoft Excel.



[Column Permissions](#)

Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.



[Cross-Site Lookup Column](#)

Use Cross-Site Lookup Column for getting data from any site within site collection. Component includes a powerful function of searching over lookup list. This function provides substring matching in selected column which is very useful for large lists (over 50-100 items).



[Discussion Column](#)

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.



[Follow-Up Column](#)

Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.



[Image Upload Column](#)

Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.



[KPI Column](#)

KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.



[Link to Document Column](#)

Link to Document Column allows referencing files and folders placed at Document Library and provides easy and intuitive way to download files directly from column. Use this column to provide a browsing interface that allows users to browse to an object to link to instead of typing a URL.



Parent Selector Column

Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.



Password Change Web Part

Password Change Web Part allows users to change their own passwords from within the SharePoint environment using standard text box interface (current password, new password and confirm new password).



Password Expiration Web Part

Password Expiration Web Part enables Active Directory users to be notified via Web Part interface that their passwords are about to expire. It also automatically sends out email notifications to users before the password expiration date.



Professional Calendar Web Part

Professional Calendar Web Part provides following key benefits: it allows combining events from different SharePoint Lists, from any SharePoint Site, in one Calendar view; allows specifying different color sets for different event sources; supports on-the-fly AJAX-enabled editing features in Outlook like style; and other enhanced functionalities.



Progress Column

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page using percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.



Video

Video Column and Video Web Part are powerful controls made for uploading, managing, linking and playing video files. These controls support variety of video files that can be uploaded from computer, or linked from SharePoint library or streamed from direct URL.

Remarks

Information in this document may be outdated. Please, visit www.ArtfulBits.com for the latest product version.