
End User's Guide



FileLoader for SharePoint

v. 2.0



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Preface

This guide provides detailed information about FileLoader for SharePoint, a tool for identifying, organizing, and moving content from file shares to SharePoint libraries.

FileLoader gives you flexibility and control over how content is moved from file shares, and provides the ability to maintain, update, or transform content, metadata, versioning, and folder structure.

FileLoader Users

FileLoader for SharePoint is designed for three distinct user groups:

Control File Generators (End Users) are business users who can use FileLoader to create and modify control files—which are formatted as Excel-style "workbooks"—to prepare files for uploading to SharePoint libraries.

Power Users, who may be department managers or governance/compliance personnel, for example, can create and modify control files as well as upload individual control files to SharePoint in real time.

Administrators are generally responsible for administration of the SharePoint farm. They can use FileLoader to create and modify control files, upload control files to SharePoint libraries either in real time or on a schedule. They can also upload control files in batches.

Getting Started with FileLoader

To open the FileLoader application:

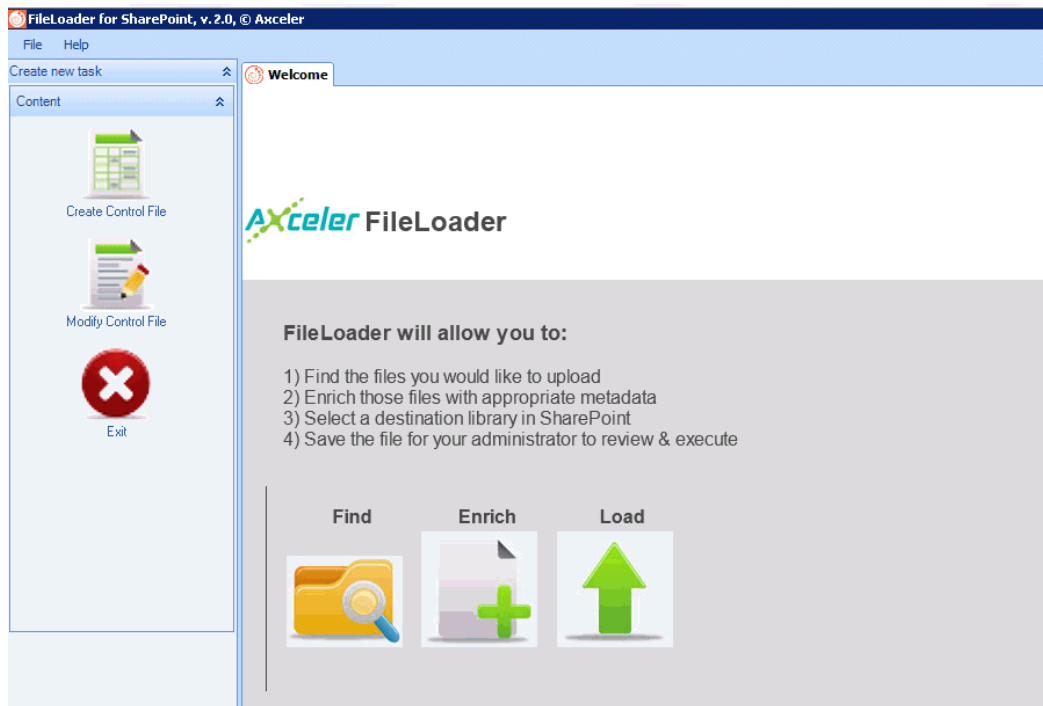
Do one of the following:

- From the Start menu, choose ALL PROGRAMS > FILELOADER FOR SHAREPOINT.

OR

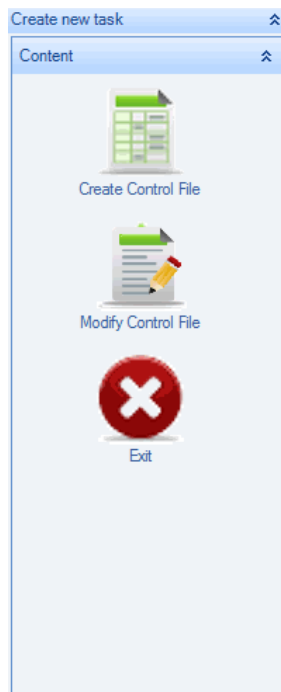
- If you have a shortcut on your desktop, double-click the FileLoader for SharePoint icon.

The FileLoader Welcome page displays. By default, FileLoader displays as a static Web page provided by Axceler.



The icons that you see in the left navigation panel depend on your FileLoader user type.

For an end user (Control File Generator) the left panel includes the options to Create and Modify Control Files.



Configuring Connections to SharePoint

In order to specify a destination library in a control file (the worksheet from which files are uploaded) or to upload files to SharePoint, a connection must be established to the relevant SharePoint site(s).

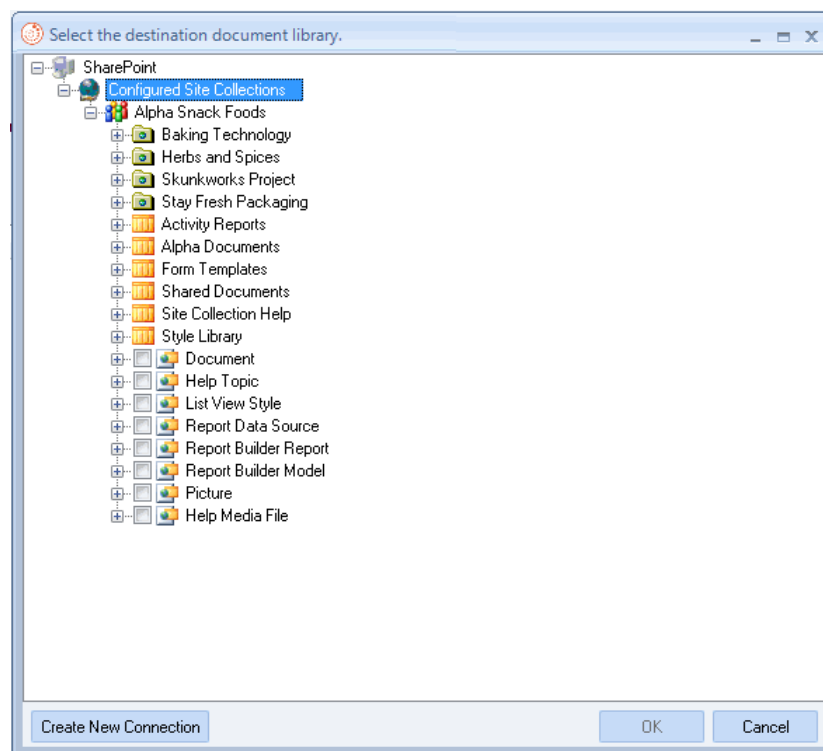
The individual responsible for generating control files and the individual responsible for uploading files to SharePoint:

- must have access to the folders on the file share from which files will be uploaded (mapped drives should not be used)

AND

- must have permissions to Add Files to a document library within the selected SharePoint site. (Add Files is a fine-grained permission that is part of the SharePoint built-in permissions levels Full Control, Design, and Contribute.)

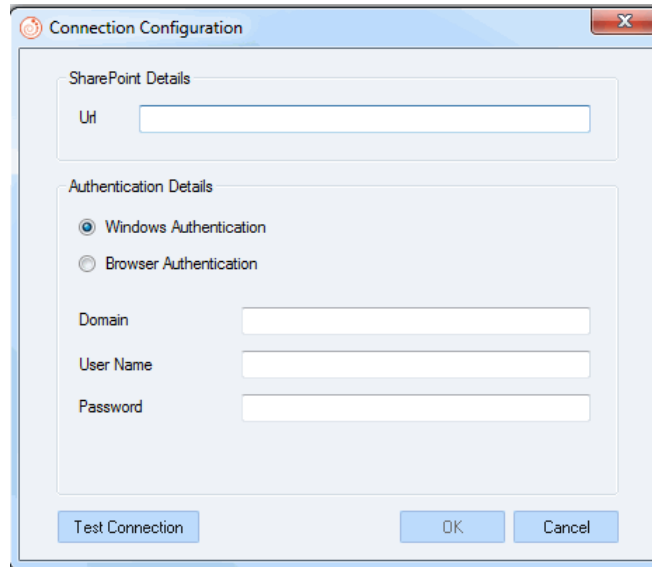
Note that, when you connect to a site, all child objects (subsites, lists, and libraries) for which you have permissions are included in the connection.



Once a connection is made, it is retained locally and can be used for subsequent FileLoader sessions, unless it is *explicitly disconnected* (see "Disconnecting a Configured Connection" on page 10).

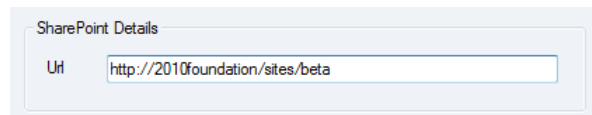
To create a new connection:

- 1 From the Configured Site Collections dialog (accessible via the FileLoader *Select Content Types or Set Destination option* (see "Selecting a Content Type and/or Destination Library" on page 17)), click **[Create New Connection]**.

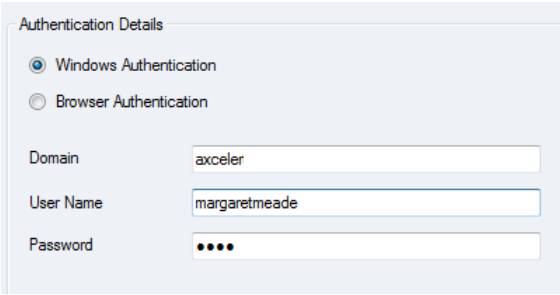
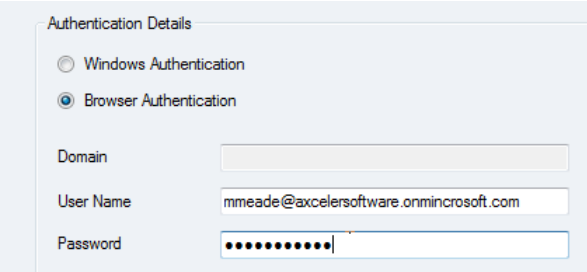


- 2 Complete the Connection Configuration dialog as follows:

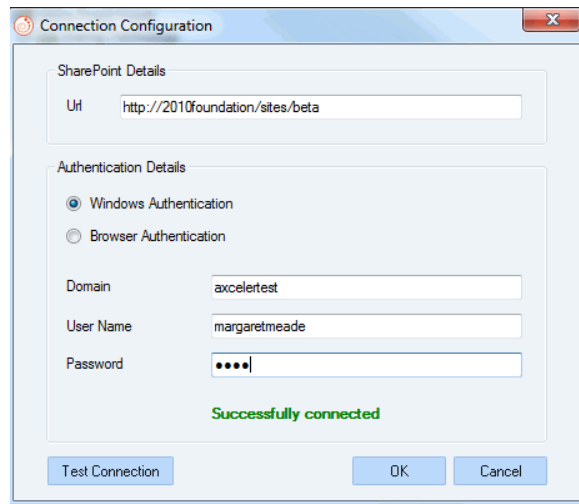
- a) For **SharePoint Details**, enter the site collection or site url.



- b) For **Authentication Details**, enter the applicable login credentials for connecting to the site. Use the information in the following table for guidance.

If ...	Then
<p>SharePoint resides on a local server and you log in using the same credential used to log into Windows</p>	<ul style="list-style-type: none"> ▪ Select Windows Authentication, and ▪ provide the following credentials: <ul style="list-style-type: none"> ▪ Domain ▪ User Name ▪ Password  <p>The screenshot shows the 'Authentication Details' dialog with 'Windows Authentication' selected. The 'Domain' field contains 'axceler', 'User Name' contains 'margaretmeade', and 'Password' is masked with dots.</p>
<p>SharePoint resides in a hosted environment, such as Office 365, and you log in using different credentials than those used to log into Windows</p>	<ul style="list-style-type: none"> ▪ Select Browser Authentication, and ▪ provide the following credentials: <ul style="list-style-type: none"> ▪ User Name ▪ Password  <p>The screenshot shows the 'Authentication Details' dialog with 'Browser Authentication' selected. The 'Domain' field is empty, 'User Name' contains 'mmeade@axcelersoftware.onmicrosoft.com', and 'Password' is masked with dots.</p>


c) Click [**Test Connection**].

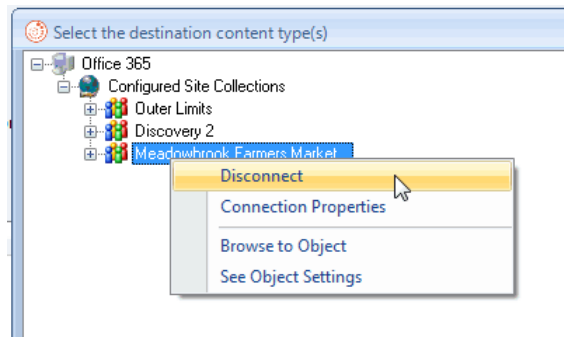


Once you receive the message **Successfully connected**, click **[OK]** to return to the Configured Site Collections tree. The newly-connected site will display in the tree.

Disconnecting a Configured Connection

To disconnect a connected site collection from FileLoader:

- 1 From the Configure Site Collections dialog, highlight the site with which you made the connection (identified by the  icon).
- 2 Right-click and choose DISCONNECT.



A pop-up will display asking you to confirm the action.

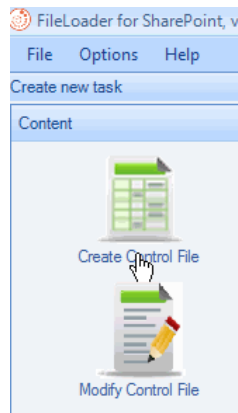
Creating a Control File

A control file is an Excel-style "workbook" that FileLoader uses to upload files to SharePoint. From within a control file you can:

- load documents from a file share
- specify the SharePoint content type (which includes any custom columns and associated metadata) that you want to apply to the documents)
- manage folder structures
- clean up source document versioning
- map column metadata
- save the document as an Excel file which can be updated offline or uploaded to SharePoint by a FileLoader Administrator or Power User.

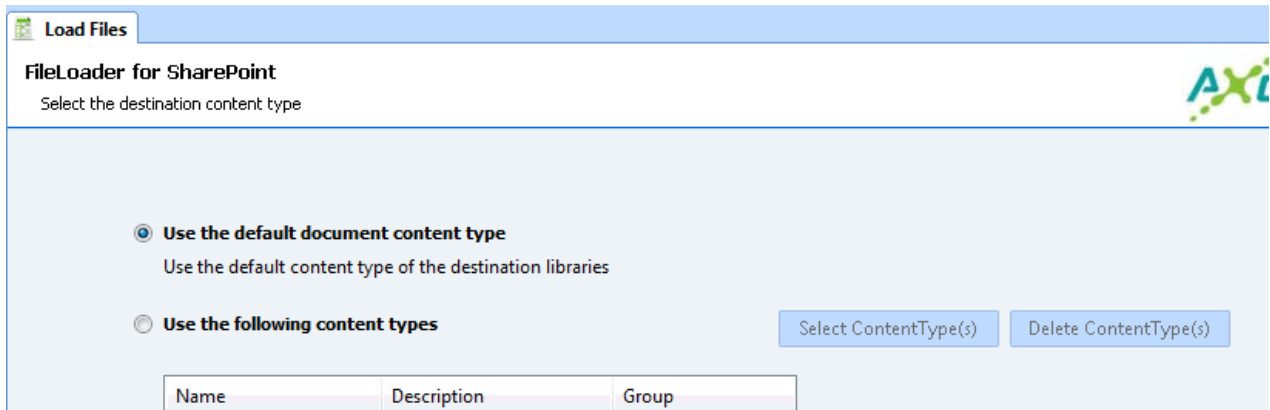
To create a control file:

- 1 From the FileLoader left navigation pane, choose CREATE CONTROL FILE.



NOTE: Administrators and Power Users can also create a control file as the first step if they choose to **UPLOAD FILES**.

2 Use the information in the following table to determine the appropriate action to take.



If you want to use...	Then ...
the SharePoint "out-of-the-box" content type for a standard document library	accept the default selection Use the default document content type.
one or more non-default content types (for example, a content type to which columns have been added)	<ul style="list-style-type: none"> ▪ Select Use the following content types then click [Select content Type(s)]. ▪ From the Select the destination content type(s) dialog, drill down to each destination library to which you want to upload files and select the content type(s) that you want to use. <div data-bbox="695 1045 1406 1776" data-label="Image"> </div> <p data-bbox="626 1801 1477 1896">If the destination to which you want files uploaded does not appear in the tree, you may need to <i>create a new connection</i> (see "Configuring Connections to SharePoint" on page 7).</p>

Click [OK] then [Next>] to create a worksheet for each selected content type.

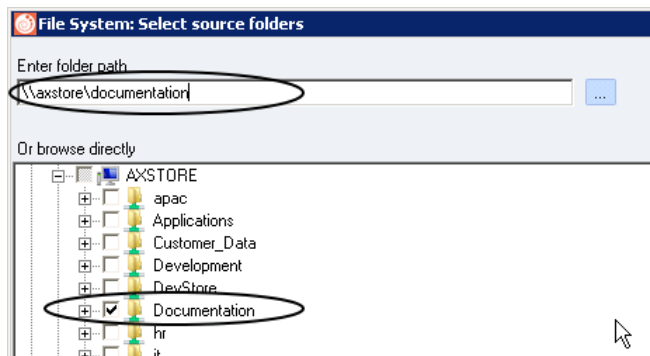
	A	B	C	D
1	FL Status	Source Content Type	Source Type	Source Na
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				

Loading Files from a File Share

REMINDER: If a different user will be uploading the control file to SharePoint, he/she must also have access to the source file share and mapped drives should not be used.

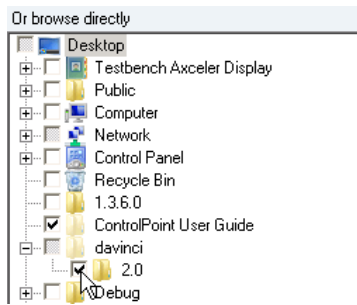
To upload files from your file share:

- 1 Click [Add Files].
- 2 From the File System: Select source folders dialog, select the folder(s) that include the files you want to include in the task. You can either:
 - enter the folder path then click the [...] button to have the target folder selected automatically

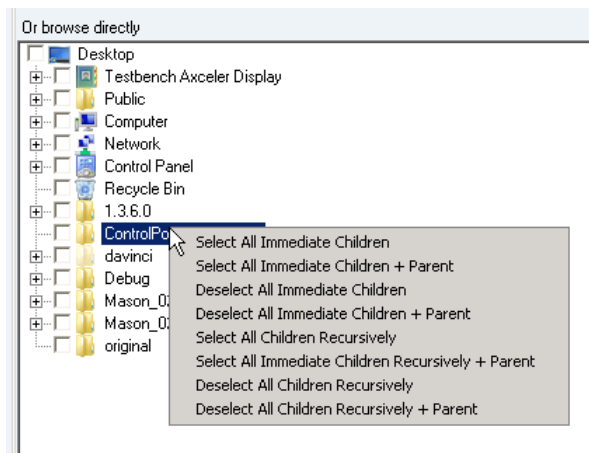


OR

- browse through the tree, and check the box to the left of each folder you want to include



- 3 If a folder contains nested subfolders, you can select the content you want to include from a right-click menu.

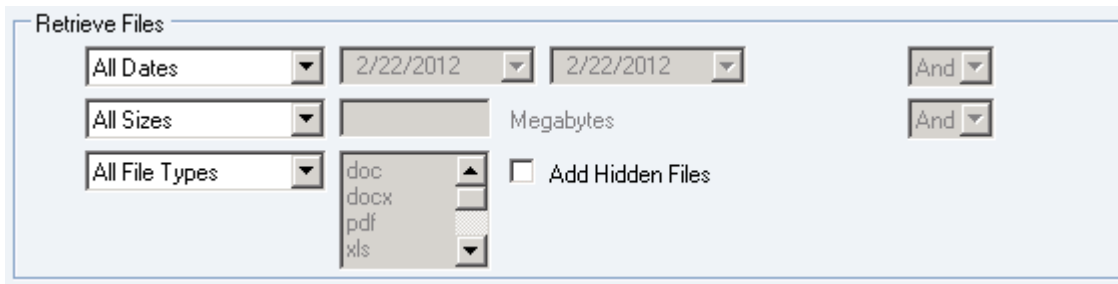


Use the information in the table below for guidance.

If you want to ...	Then ...
include files within the selected folder only	go to the next step.
include files within folders immediately below the selected folder, but <i>not</i> files within the <i>selected</i> folder	choose SELECT ALL IMMEDIATE CHILDREN.
include files within folders immediately below the selected folder, <i>and</i> files within the selected folder	choose SELECT ALL IMMEDIATE CHILDREN + PARENT.
undo the Select All Immediate Children selection	choose DESELECT ALL IMMEDIATE CHILDREN.
undo the Select All Immediate Children + Parent selection	choose DESELECT ALL IMMEDIATE CHILDREN + PARENT.
include files within all nested folders below the selected folder, but <i>not</i> files within the selected folder	choose SELECT ALL CHILDREN RECURSIVELY
include files within all nested folders below the selected folder <i>and</i> files within the selected folder	choose SELECT ALL CHILDREN RECURSIVELY + PARENT.

If you want to ...	Then ...
undo the Select All Children Recursively selection	choose Deselect All Children Recursively.
undo the Select All Children Recursively + Parent selection	choose Deselect All Children Recursively + Parent.

4 If you want to further refine your selection you can choose to **Retrieve Files:**



- that meet specified date criteria



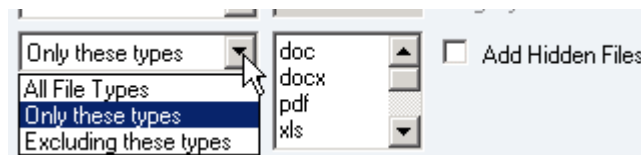
AND/OR

- are greater or less than a specified size (in megabytes)



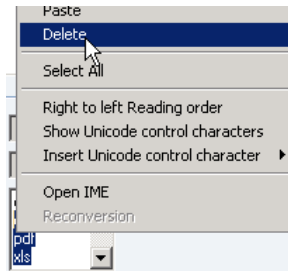
AND

- only files that are (or are not) of one or more specific types.



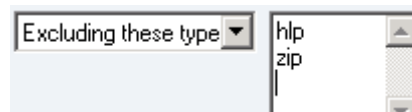
Note that whenever the dialog is opened, this list box includes the same default list of file extensions. You can customize it for the current task only by:

- deleting file extensions from the list



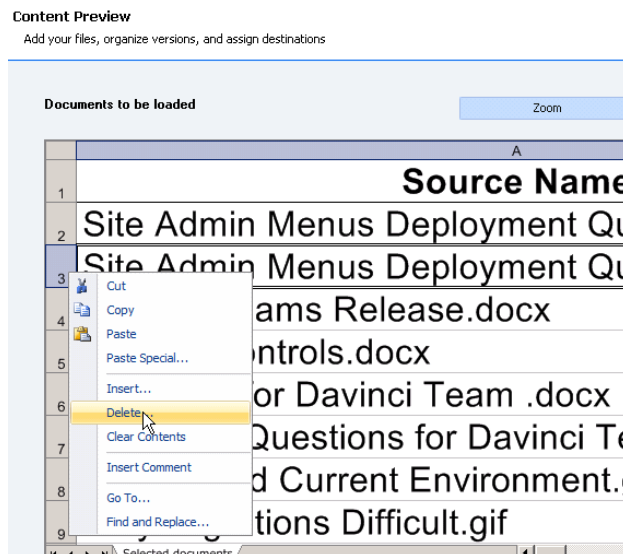
AND/OR

- entering file extensions (one per line) directly into the list box.



If you want to Add Hidden Files within selected folders, check this box.

- 5 Click **[OK]** to populate the Content Preview worksheet with the selected files.
- 6 Note that you can use the Excel-like interface to further refine your list of files. (For example, you can find and delete individual files that you do not want to migrate).



- 7 If you want to add additional files, click **[Select Document Libraries/Folders]** and repeat Steps 3-6.
- 8 Click **[Next>]** to load the selected files into the worksheet for the default content type.

Selecting a Content Type and/or Destination Library

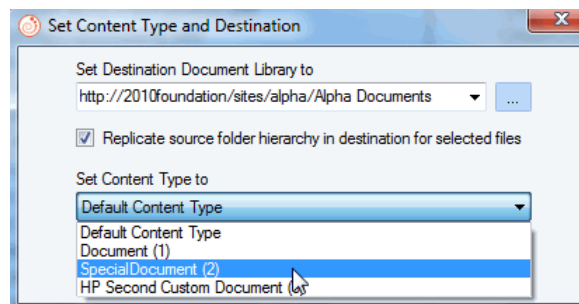
To apply a custom content type and/or choose a destination for files within your control file:

- 1 Select the rows for which you want to set destination.

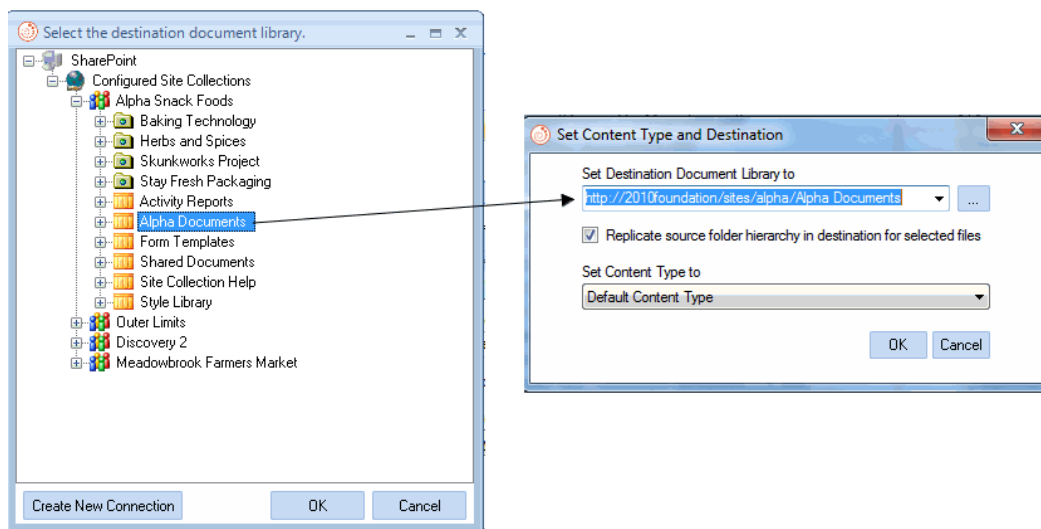
NOTE: If you want to set the same destination/content type for all files in the current worksheet, click **[Select All]**.

- 2 Click **[Set Content Type and Destination]**.

NOTE: If you initially chose to Use the default document content type, the button will be labeled **[Set Destination]**.

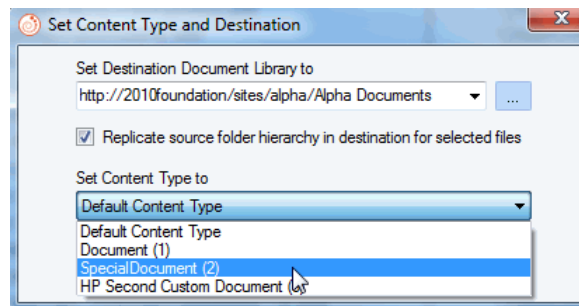


- 3 To set the destination library, click the [...] button and select the document library from the Configured Site Collection tree. (If the destination you want to set does not appear in the tree, you may need to *create a new connection* (see "Configuring Connections to SharePoint" on page 7).)



NOTE: If you want to Replicate source folder hierarchy in destination for selected files, check this box. If you leave this box unchecked, files will be uploaded without source folders. See also *Managing Folder Structures* and Choosing File and Folder Options.

To set the content type, select from the **Set Content Type** to drop-down (which is populated with the content types that have been selected for the control file).



NOTE: If you chose to Use the default document content type, this drop-down will not display in the dialog.

If you choose a custom content type, selected files are moved to the appropriate worksheet.

Tracking the Relative URL Character Count

FileLoader enforces SharePoint's 260-character limit for a relative URL. The relative URL is the path to the file, minus the Base URL. Once you have selected a destination, FileLoader will display the **URL Char Count** column by default. This column tracks the number of characters in the relative url (after subtracting the number of characters in the Base Url, which must be specified on the General Options > Content Loading tab).

When a relative url reaches or exceeds 257 characters, FileLoader will issue a warning by displaying the count highlighted and in red.

H	I	
Destination File Name	URL Char Count	
ControlPoint Online v_4_5 Configuration and Troubleshooting Guide.pdf	260	C:\Users\testbencha...
Configuration Topics.docx	88	C:\Users\testbencha...
ControlPoint Online v_4_5 User Guide.docx	104	C:\Users\testbencha...

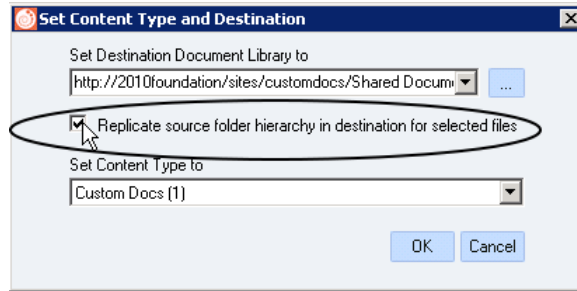
Saving a Control File

At any time before uploading to SharePoint, you can use the **[Save as Control File]** option to save the in Excel format. You can then make changes (such as filling in destinations and other metadata) offline.

The file can also be re-opened at any time from within FileLoader, via the **[Load Control File]** option.

Managing Folder Structures

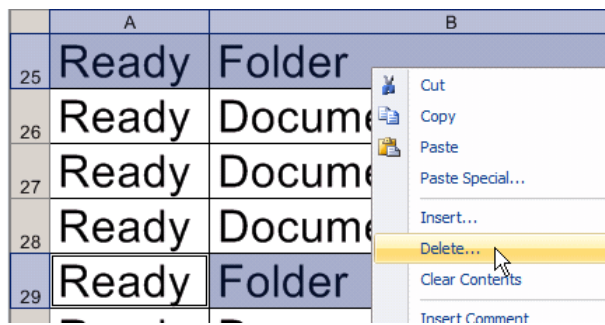
By default, FileLoader ignores the folder structure imported from a file share, essentially loading a flat file into SharePoint. However, when you Set Destinations for content, you have to option to replicate the source folder hierarchy.



If you choose to replicate the source folder hierarchy in the destination library, you can modify the folder structure within the task worksheet. You can:

- Delete folders (for example, you may want to clean up any empty folders before migration).

NOTE: If you delete a folder that has content assigned to it, FileLoader will implicitly recreate it as part of job execution.



- Create new folders by copying/pasting an existing folder path from the Destination column into new rows, and modifying the name and location.

G	
1	Destination
2	http://2010foundation/sites/customdocs/Shared Documents
3	http://2010foundation/sites/customdocs/Shared Documents/1.0 BETA
4	
G	
1	Destination
2	http://2010foundation/sites/customdocs/Shared Documents
3	http://2010foundation/sites/customdocs/Shared Documents/1.0 BETA
4	http://2010foundation/sites/customdocs/Release Documents/1.0 FINAL

Cleaning Up Source Document "Versions"

By default, if a file with the same name and location at the destination, FileLoader will create a new version of the document, visible via the library's version history.

Frequently, users maintain "versions" of a document on a file share by renaming files after making changes.

Name	Date modified	Type
ControlPoint UG DRAFT 021808	2/18/2008 6:07 PM	Microsoft Office ...
ControlPoint UG DRAFT 012508	1/25/2008 5:40 PM	Microsoft Office ...
Windows	12/16/2011 3:03...	File Folder

The Clean Up Versions option lets you present multiple files as a single document, keeping the existing document name or renaming it. FileLoader will assign version numbers (based on Created date) and save them in SharePoint document version history. You can modify these version numbers as well as other information, such as metadata defaults.

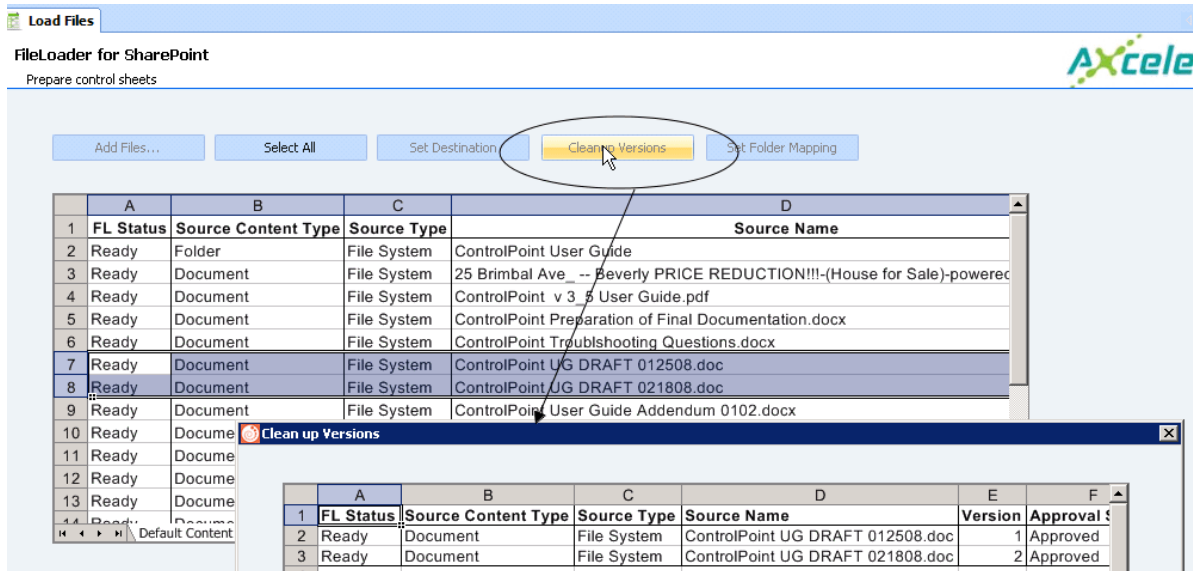
The screenshot shows the SharePoint interface for a document library. The document name is "ControlPoint User Guide DRAFT". A "Version History" dropdown menu is open, showing a "Delete All Versions" link. Below the menu is a table of document versions.

No.	Modified	Modified By
2.0	2/24/2012 1:38 PM	System Account
1.0	1/25/2008 12:39 PM	AXCELERTEST\docc

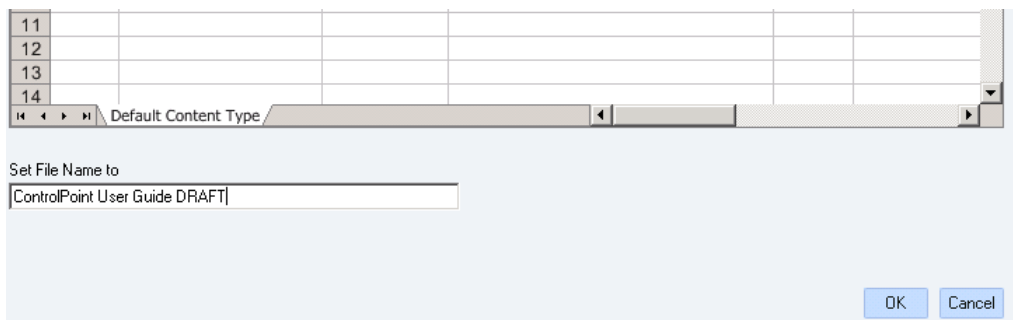
To clean up document versions:

- 1 From within a FileLoader task worksheet, select the rows on which you want to act.
- 2 Click **[Clean Up Versions]**.

Each selected row displays in the Clean up Versions grid.



- 3 In the Set File Name to field, enter the file name as you would like it to appear in the SharePoint document library.



Note that you can change the default version numbers that FileLoader has assigned, either in this grid or after you return to the control file.

- 4 Click [OK] to close the Clean up Versions grid.

Note that when you return to the applicable content type grid, the modified versions are moved to the bottom of the control file, allowing you to focus on unmodified content.

Mapping to Managed Metadata

In SharePoint Server 2010 you have the ability to build centrally-managed metadata term sets using the Managed Metadata Service.

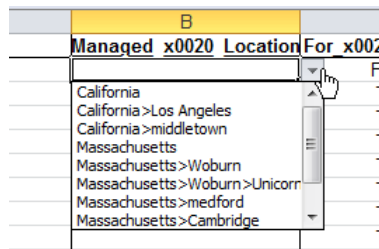
For information on using the SharePoint Managed Metadata service, refer to the following Microsoft TechNet tutorial: ***How Do I: Use the SharePoint 2010 Managed Metadata Service?*** (<http://technet.microsoft.com/en-us/sharepoint/ff394027>)

You can use FileLoader for SharePoint to map your file share content to Managed Metadata within custom Content Types, greatly reducing the time it would take to update this content manually.

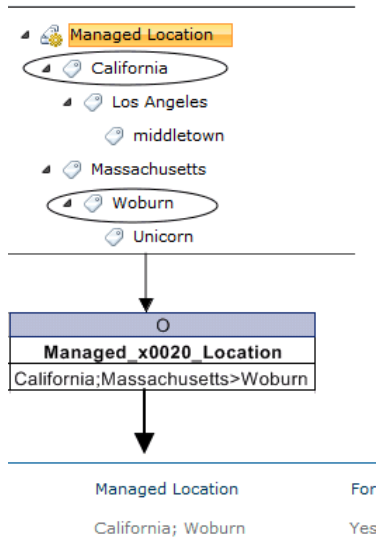
You can also use FileLoader to update only column metadata (and leave existing content intact). This is one of the File and Folder Options that can be specified by an Administrator or Power User before the content is uploaded.

Specifying Multiple Values for a Managed Metadata Column

If a Managed Metadata column only allows a single value, all valid values are selectable from a drop-down.



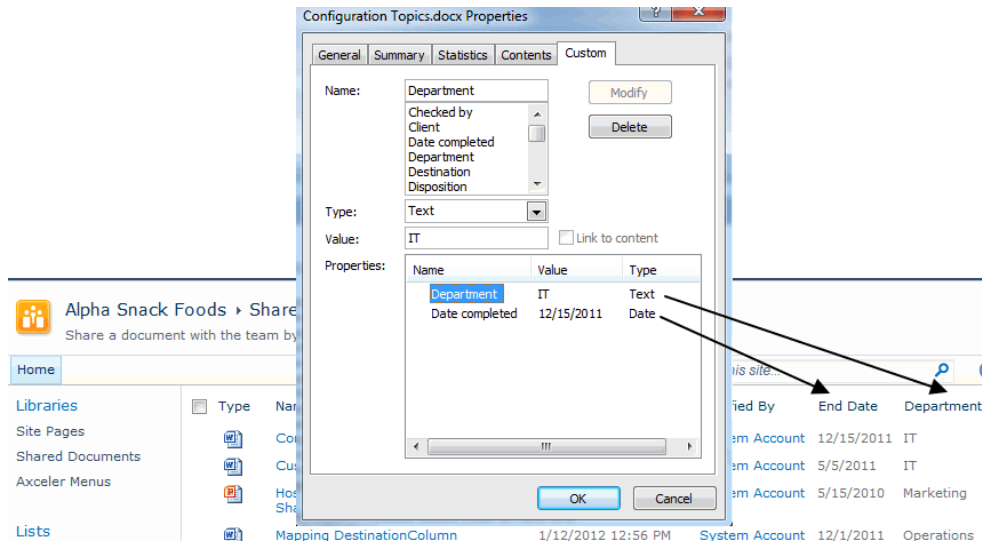
If multiple values are allowed for the column, however, the drop-down is not available. To apply multiple Managed Metadata values to a document, enter each value separated by a semicolon (;). If using a value nested beneath a term set, enter the full hierarchy (for example *Term Set > Term* or *Term Set > Term > Term*.)



Mapping Custom Property Values to SharePoint Column Metadata

You can use the Field/Column mapping option to populate columns in a SharePoint document library with custom property values defined for the following types of Microsoft Office files:

- Excel
- PowerPoint
- Project
- Word

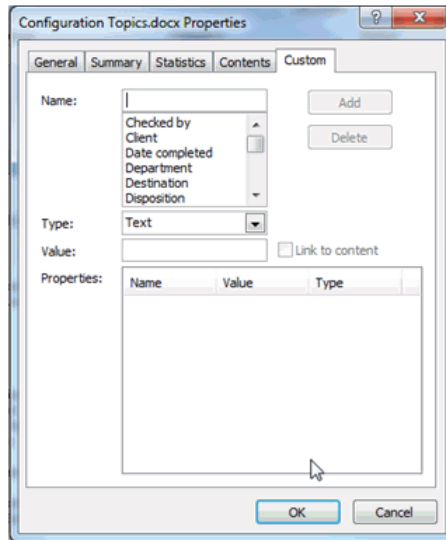


To view custom properties for a Microsoft Office file:

- 1 Use the information in the table below to determine the appropriate action to take.

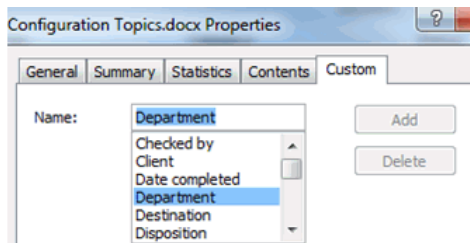
If you are starting from within ...	Then ...
an Office 2007 file	<ul style="list-style-type: none"> ▪ Click the Microsoft Office icon. ▪ Choose PREPARE > PROPERTIES. ▪ From the DOCUMENT PROPERTIES drop-down, choose ADVANCED PROPERTIES.
an Office 2010 file	<ul style="list-style-type: none"> ▪ Choose FILE > INFO. ▪ From the PROPERTIES drop-down choose ADVANCED PROPERTIES.

2 Select the Custom tab.



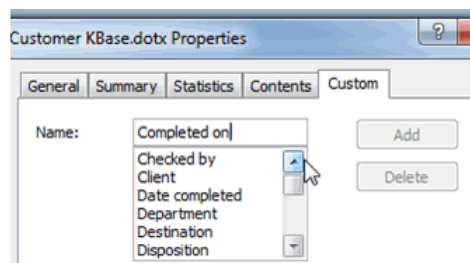
To create a new custom property:

- 1 For Name, specify a name for the property. Either
 - Select a value from the list



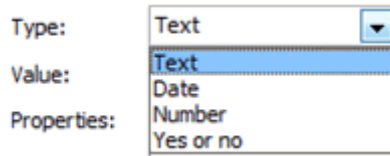
OR

- Enter a new name.



NOTE: This name will be *mapped* to the column name defined in the SharePoint Content Type; however the source and destination does not have to use the *same* name.

- 2 Select a data Type from the drop-down.



- 3 Enter a Value for the property.
- 4 Click [Add].

Mapping Column Values to Folder Contents

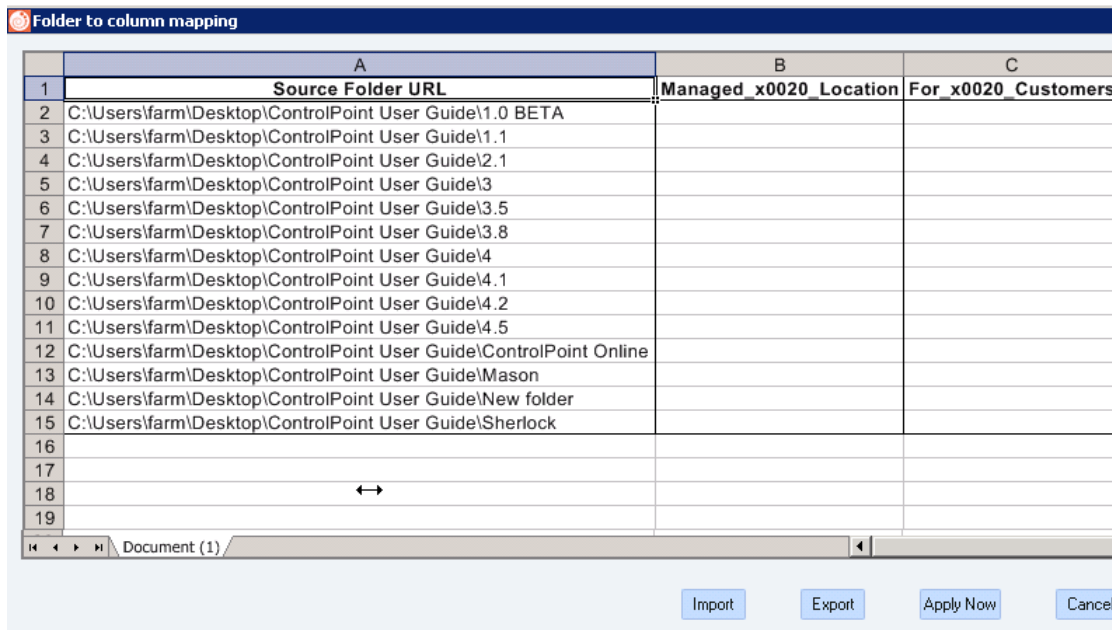
The Folder to Column Mapping option lets you apply values within SharePoint document library columns—including columns that use Managed Metadata—to all items within a source folder.

Just as you can *save a control file in Excel format* (see "Saving a Control File" on page 18), you can export a column mapping worksheet as an Excel file, then distribute it to end users for completion offline.

To map column values to folder contents:

- 1 From within a FileLoader task worksheet, click [Set Folder Mapping].

The Folder to column mapping worksheet displays in a separate window, with the Source Folder URL of each folder in the current task and all of the custom (non-default) columns that have been defined for the Content Type.



- 2 Now you can:
 - Specify the values you want to apply to items within each folder from within FileLoader

OR

- Click **[Export]** and save the contents of the Folder to Column Mapping window to an Excel file for distribution to end users. (You can later upload the file using the **[Import]** function.)

Note that if valid values have been defined for the column, they will display in a drop-down list. If you choose to export the contents of the Folder to column mapping window, the choices drop-downs be retained in the Excel version of the worksheet.

A	B	
Source Folder URL	Managed_x0020_Location	For_x0020_Customer
C:\Users\farm\Desktop\ControlPoint User Guide\1.0 BETA		F
C:\Users\farm\Desktop\ControlPoint User Guide\1.1	California	1
C:\Users\farm\Desktop\ControlPoint User Guide\2.1	California>Los Angeles	1
C:\Users\farm\Desktop\ControlPoint User Guide\3	California>middletown	1
C:\Users\farm\Desktop\ControlPoint User Guide\3.5	Massachusetts	1
C:\Users\farm\Desktop\ControlPoint User Guide\3.5	Massachusetts>Woburn	1
C:\Users\farm\Desktop\ControlPoint User Guide\3.8	Massachusetts>Woburn>Unicorn	1
C:\Users\farm\Desktop\ControlPoint User Guide\4	Massachusetts>medford	1
C:\Users\farm\Desktop\ControlPoint User Guide\4.1	Massachusetts>Cambridge	1

- To save your changes and return to the task worksheet, click **[Apply Now]**. To return to the task worksheet without saving the contents of the current window, click **[Cancel]**.

When you return to the task worksheet after saving your changes, the column values specified for a particular folder are applied to each item that resides within that folder.

The screenshot shows the Axceler FileLoader interface. At the top right is the Axceler logo. Below it are several buttons: "s...", "Select All", "Set Content Type and Destination", "Cleanup Versions", and "Set Folder Mapping". The main part of the interface is a table with the following columns: "Source Content", "Source Name", "Managed_x0020_Location", and "x0020_Customer". The table contains the following data:

Source Content	Source Name	Managed_x0020_Location	x0020_Customer
Folder	3.5		
Document	CP Security Overrides.docx	Massachusetts>Woburn	FALSE
Document	Overriding ControlPoint Default Security.docx	Massachusetts>Woburn	FALSE
Document	ControlPoint v 3 5 Installation and Upgrade	Massachusetts>Woburn	FALSE
Folder	pdf		
Document	CP User Guide DRAFT 081709.pdf	Massachusetts>Woburn	TRUE
Document	ControlPoint v 3 5 Features ONLY.pdf	Massachusetts>Woburn	TRUE
Document	ControlPoint v 3 5 User Guide.pdf	Massachusetts>Woburn	TRUE
Document	ControlPoint v 3 5 Site Administrator's Guide	Massachusetts>Woburn	TRUE
Document	ControlPoint Schedule Monitor.pdf	Massachusetts>Woburn	TRUE
Document	ControlPoint 3 5 1 User Guide Addendum.pdf	Massachusetts>Woburn	TRUE
Document	ControlPoint Invoking Reports By URL.pdf	Massachusetts>Woburn	TRUE
Document	ControlPoint v 3 5 Installation and Upgrade	Massachusetts>Woburn	TRUE
Folder	Tesla		
Document	DemoHome.htm	California>Los Angeles	FALSE