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Installation Guide

# ControlPoint FileLoader

v. 2.5





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## Preface

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

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

## ControlPoint FileLoader Users

ControlPoint FileLoader is designed for three distinct user groups:

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

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

## Where to Install ControlPoint FileLoader

ControlPoint FileLoader can be installed either on a client machine or on a SharePoint Web front-end server that meets *System Requirements* (on page 4).

A client-based installation is especially convenient for Power Users and End Users, because it allows them to use ControlPoint FileLoader on their own machines. Users access SharePoint sites by configuring remote connections.

If ControlPoint FileLoader is installed on a server and the installer detects SharePoint 2010 (Foundation or Server), an additional component—the ControlPoint FileLoader Local Connector—is also installed. Administrators who log into the server with the appropriate account credentials can use the Local Connector to upload files to SharePoint directly, without the need for remote connections. By using the Local Connector, Administrators can realize significant time savings over the use of remote connections, especially when uploading or a large number of files to multiple site in a single batch.

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# System Requirements

## Operating System

- ControlPoint FileLoader can be installed on a machine running Windows 7 or Windows Server 2008.
- .NET Framework v. 4.0

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**NOTE:** If the required version of .NET Framework is not detected, the FileLoader installer will prompt you to download and install it. You will be unable to run FileLoader until it is installed.

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## Microsoft SharePoint

ControlPoint FileLoader can be used to upload files to Microsoft SharePoint 2010 or 2013 Foundation or Server, on-premise or hosted installations.

## Install Account

The account used to install ControlPoint FileLoader must have administrator privileges on the machine where ControlPoint FileLoader is to be installed.

## Power User and End User Accounts

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

- if files will be uploaded from a file share, must have access to folders on that file share
- if files will be copied from SharePoint, must have at least Read access to the applicable SharePoint libraries

AND

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

## Administrator Accounts

The account used to log into the Administrator version of ControlPoint FileLoader must be a member of the **Local Administrators group** on the machine where FileLoader is installed.

To use the ControlPoint FileLoader **Local Connector** to upload files from a file share directly to SharePoint from the Web front-end server, the account must *also*:

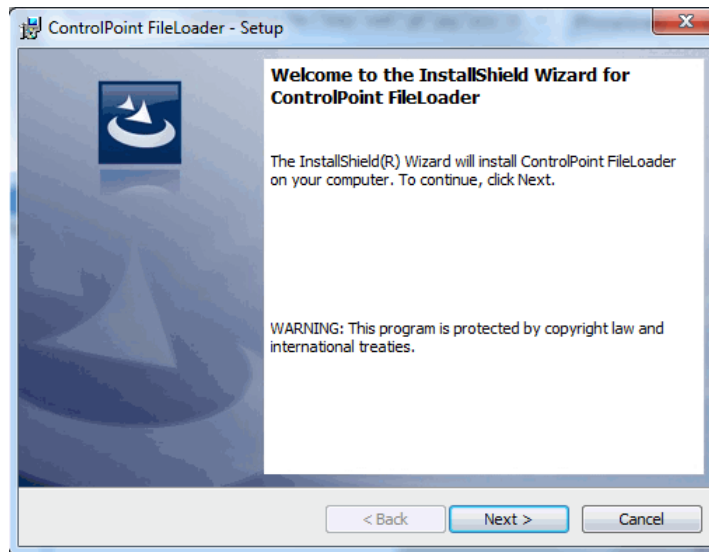
- Be in the same domain as the SharePoint farm to which files will be uploaded.
- Be a member of the **SharePoint Farm Administrators group**.
- Be a **Site Collection Administrator** for each site collection to which content will be uploaded

- Be added to the **db\_owner** role on the SQL server for each of the following databases:
  - SharePoint Central Administration content database
  - SharePoint Configuration database
  - each content database to which files will be uploaded

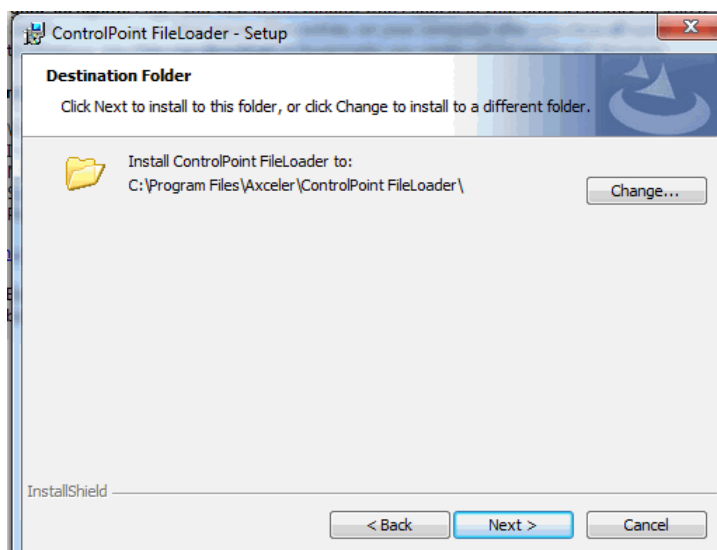
## Installing ControlPoint FileLoader

To install ControlPoint FileLoader:

- 1 Download or copy ControlPoint FileLoader to the machine where it will be installed.
- 2 Double-click the zip file to extract ControlPoint FileLoader files.
- 3 Double-click the file ControlPoint for FileLoader Setup.exe to begin the installation process.



- 4 From the Welcome screen, click [**Next>**] to display the Axceler License Agreement.
- 5 Read the license agreement. Check the I have read and agreed to the Axceler license agreement box.
- 6 Click [**Next>**] to display the Destination Folder dialog.



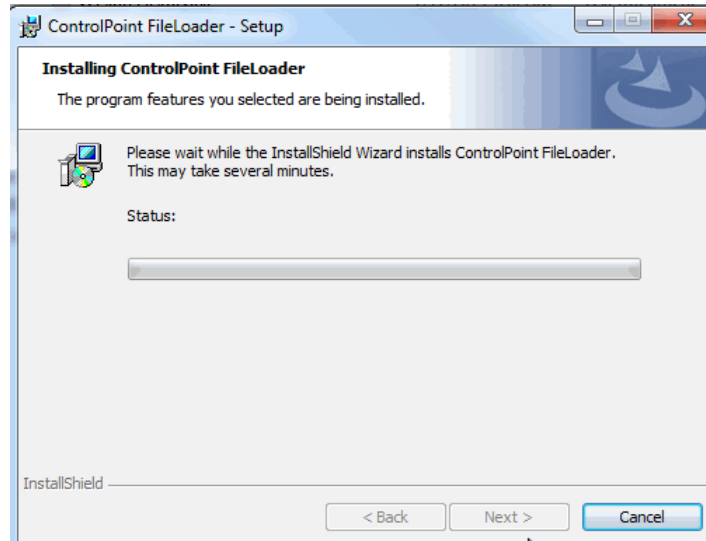


The InstallShield Wizard specifies a default install directory (but you can click [**Change**] and select a different one):

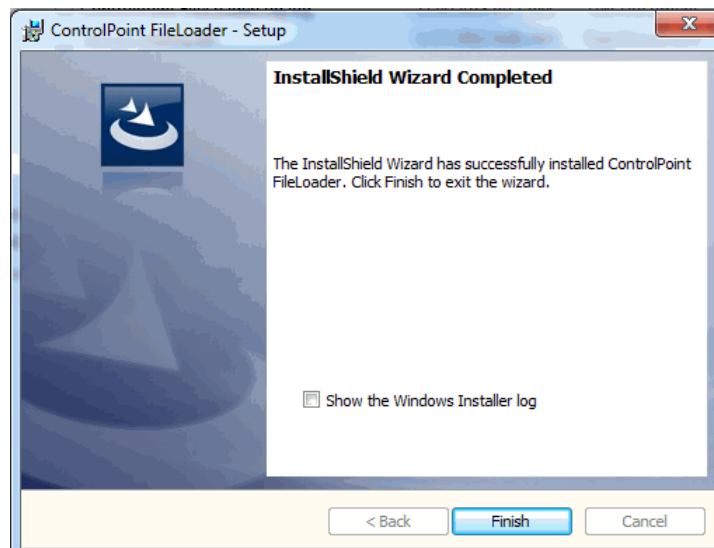
- On a 32-bit system: C:\Program Files\Axceler\ControlPoint FileLoader
- On a 64-bit system: C:\Program Files (x86)\Axceler\ControlPoint FileLoader.

The InstallShield Wizard specifies a default install directory (C:\Program Files\Axceler\ControlPoint FileLoader), but you can click [**Change**] and select a different one.

- 7 To begin the installation, click [**Next>**], then [**Install**].



- 8 When the installation is complete, click [**Finish**] to exit the installer.



If you want to enable Power User or Administrator functionality, continue with *Activating Your ControlPoint FileLoader License* (see "*Activating Your ControlPoint FileLoader Administrator or Power User License*" on page 8)

## Activating Your ControlPoint FileLoader Administrator or Power User License

If you want to enable Power User or Administrator functionality, you must activate your ControlPoint FileLoader license .

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NOTE: A license is not needed to use Control File Generator (end user) functionality only.

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To activate your ControlPoint FileLoader license:

- 1 Do one of the following:
  - Double-click the ControlPoint FileLoader License Manager shortcut (if it appears on your desktop).OR
  - From the Start menu, choose ALL PROGRAMS > CONTROLPOINT FILE LOADER > CONTROLPOINT FILELOADER LICENSE MANAGER.
- 2 Enter your Name and Organization and the Serial Number provided by Axceler.



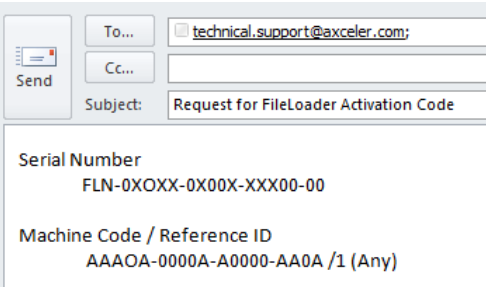
The screenshot shows a Windows dialog box titled "File Loader 2010 License Manager". The dialog has a blue background and a key icon on the left. The main text reads "Register File Loader 2010 License Manager" and "To continue you must register your copy of File Loader 2010 License Manager." Below this is a form with three input fields: "Name" (containing "Boss Man"), "Organization" (containing "Axceler"), and "Serial Number" (containing "FLN-0X0XXX-0X00X-XXX00-00"). The "Serial Number" field has a red dot next to its label. At the bottom right, there are "Register" and "Cancel" buttons.

- 3 Click [**Register**] to display the Activate ControlPoint FileLoader License Manager Dialog.



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

If you ...	Then ...
have access to the internet	Click [ <b>Activate Over the Internet</b> ]. When the activation is completed, click [ <b>OK</b> ] then close the License Manager.

If you ...	Then ...
do not have access to the internet	<p>Click [<b>Activate by Entering a Code</b>].</p> <p>Click [<b>Copy to Clipboard</b>].</p> <p>Compose an email to <i>Axceler Technical Support</i> (see "<i>Technical Support</i>" on page 13):</p> <ul style="list-style-type: none"><li>▪ For the Subject, enter "Request for ControlPoint FileLoader Activation Code."</li><li>▪ Paste the contents of the clipboard (that is, the Serial Number and Machine Code) into the body of the email.</li></ul>  <p>You will receive a return email from Axceler with your activation code. Paste it into the Activation Code field of the Activate Offline dialog, then click [<b>Activate</b>].</p>

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## Upgrading from an Earlier Version of FileLoader

If you are upgrading from a version earlier than 2.0:

- 1 Uninstall the currently-installed application (using the Windows CONTROL PANEL > PROGRAMS AND FEATURES option).
- 2 Install the latest version using the instructions for *Installing ControlPoint FileLoader* (on page 6).
- 3 To enable Power User or Administrator functionality, perform the procedure for *Activating Your ControlPoint FileLoader License* (see "*Activating Your ControlPoint FileLoader Administrator or Power User License*" on page 8).

If you are upgrading from version 2.0 or above:

There is no need to uninstall the currently-installed application. Simply run the file ControlPoint for FileLoader Setup.exe to perform the upgrade. The current FileLoader License will remain activated.

Note that, for this type of upgrade:

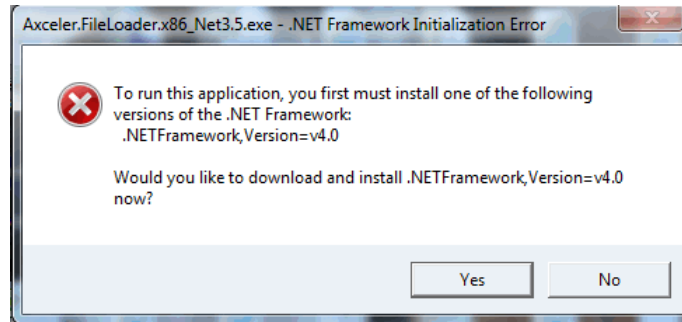
- Rather than creating a new ControlPoint FileLoader folder, the installer will update the files in the FileLoader for SharePoint folder where it was originally installed.
- The current FileLoader License will remain activated.

Users upgrading from 2.0 will need to re-establish any existing remote connections, so that credentials can be stored for future use by FileLoader. Refer to the topic "Re-establishing Remote Connections after an Upgrade from FileLoader 2.0" in the ControlPoint FileLoader User Guide or Online Help.

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## Installing .NET Framework Version 4.0

Beginning with version 2.1, ControlPoint FileLoader requires that the .NET Framework, Version 4.0 be installed on the local machine. If it is not installed, the first time ControlPoint FileLoader is invoked, a message will display, prompting you to download and install it.



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

If you want to ...	Then ...
be directed to the Microsoft .NET download page	click <b>[Yes]</b> .
dismiss the dialog	click <b>[No]</b> .  (Be aware, however, that you will not be able to run the FileLoader application until the .NET Framework v. 4.0 is installed.)

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## Technical Support

Axceler is committed to providing timely and effective customer support to its customers worldwide. Axceler Technical Support is available to help you solve problems. The standard customer support contract guarantees technical support during contractually specified hours. To obtain technical support for ControlPoint FileLoader, have your customer license number ready.

To contact Axceler Technical Support, telephone, fax, or e-mail the nearest office listed below.

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### Axceler - North America

600 Unicorn Park Drive

Woburn, MA 01801

Phone: 781.995.0063

Toll Free: 866.712.6530

Fax: 781.287.0180

e-mail: [Technical.Support@Axceler.com](mailto:Technical.Support@Axceler.com)

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### Axceler - Europe

7 Swallow Place

London W1B 2AG, UK

Phone: +44 (0) 20 7850.0199

Fax: +44 (0) 20 7850.0270

e-mail: [Technical.Support.UK@Axceler.com](mailto:Technical.Support.UK@Axceler.com)

### The Axceler Customer Portal

If you have an active support contract with Axceler and your email address is in Axceler's Technical Support database, you can log into the Axceler Customer Portal at <https://support.axceler.com> and access the following product resources:

- announcements of new versions, critical patches, or other information that may be useful to users of ControlPoint FileLoader
- the product Knowledge Base, which includes training videos, product documentation, and FAQs
- articles, use cases, white papers, and company blogs

You can also connect directly with Axceler's support team and file and manage your own support tickets.

If you are visiting the portal for the first time, enter your email address in the log in screen then click the **[Retrieve Password]** button. You will promptly receive a temporary password for your account via email from Axceler Technical Support.