
Power 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:

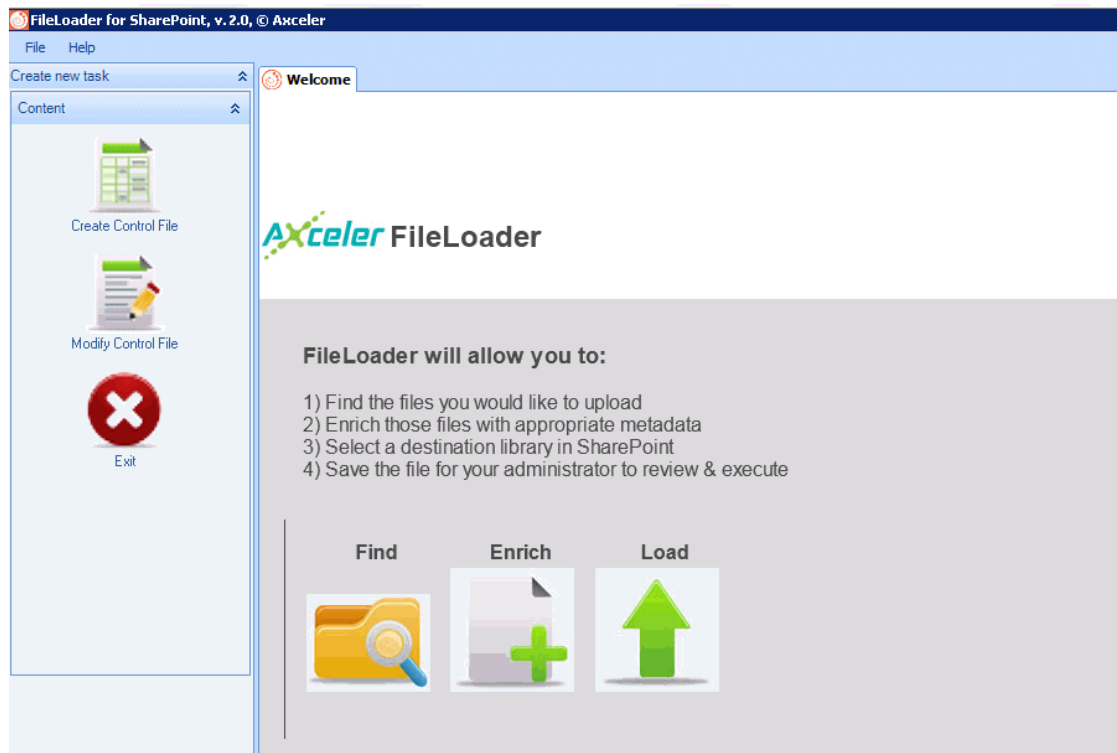
Do one of the following:

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

OR

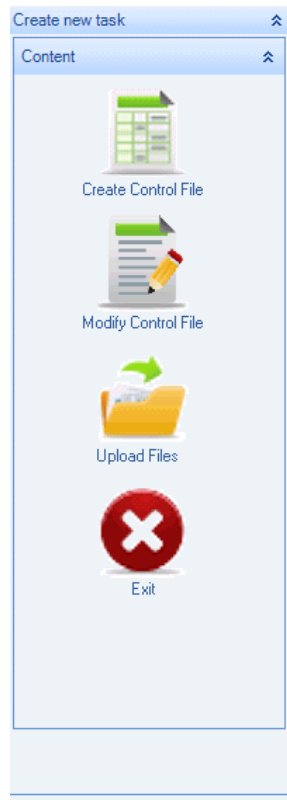
- If you have a shortcut on your desktop, double-click the FileLoader for SharePoint icon.

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 a licensed Power User, the left panel includes the options to Create and Modify Control Files as well as Upload Files to SharePoint.



From the FileLoader Welcome page you can:

- ***create or modify a control file*** (see "Creating a Control File" on page 11)
- ***upload files to SharePoint*** (see "Uploading Files to SharePoint" on page 30)
- ***set General Options*** (see "Setting General Options for FileLoader" on page 37)

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).

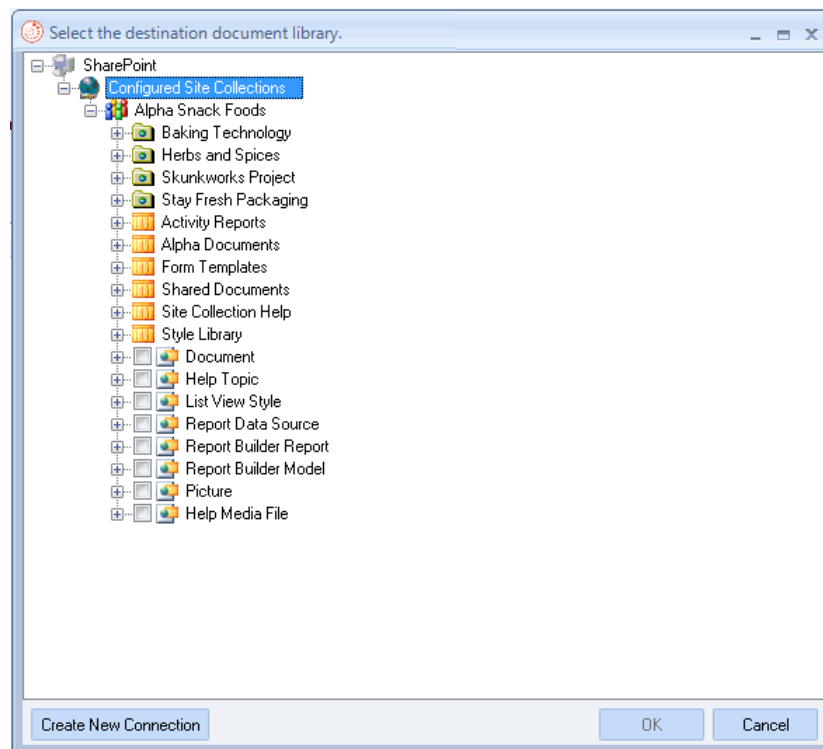
The individual responsible for generating control files and the individual responsible for uploading files to SharePoint:

- 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.)

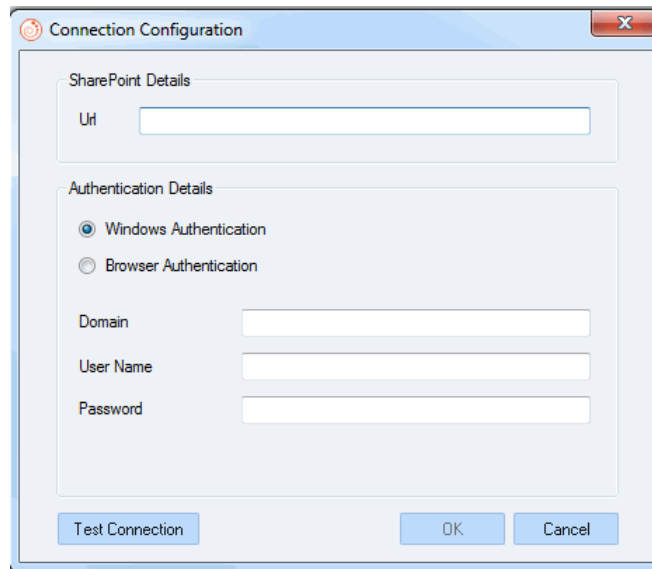
Note that, when you connect to a site, all child objects (subsites, lists, and libraries) for which you have permissions are included in the connection.



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).

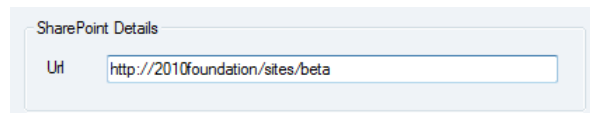
To create a new connection:

- 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]**.

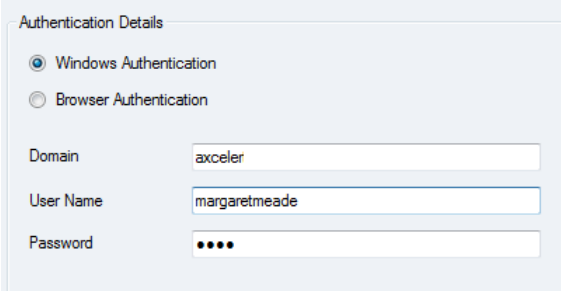
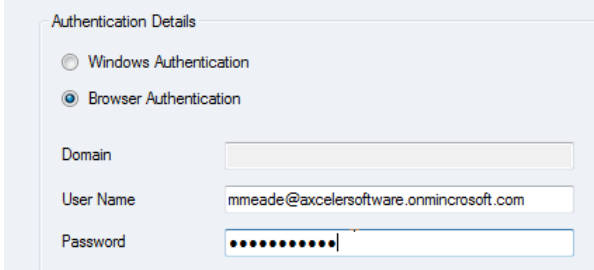


- 2 Complete the Connection Configuration dialog as follows:

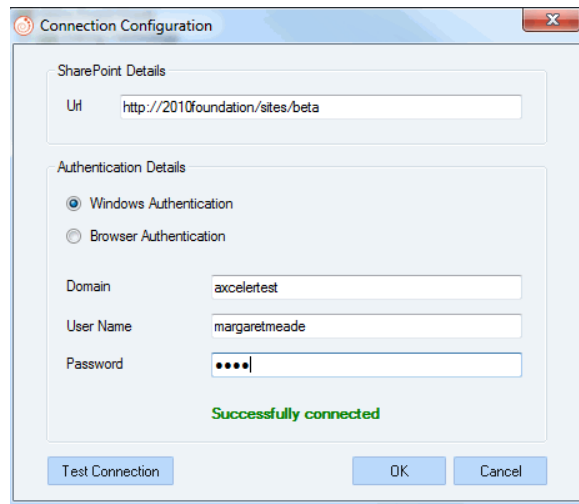
- a) For **SharePoint Details**, enter the site collection or site url.



- 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 four 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 ten dots.</p>


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

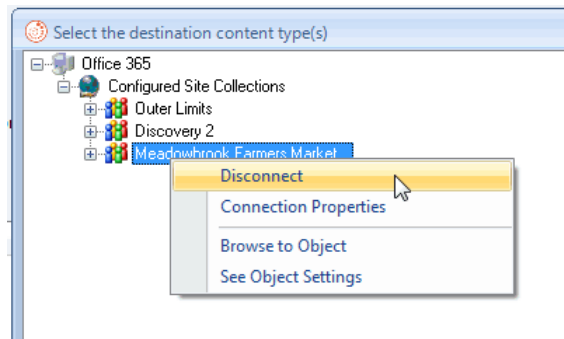


Once you receive the message **Successfully connected**, click **[OK]** to return to the Configured Site Collections tree. The newly-connected site will display in the tree.

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.

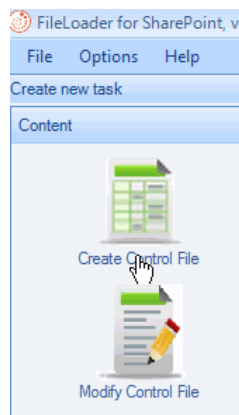
Creating a Control File

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.

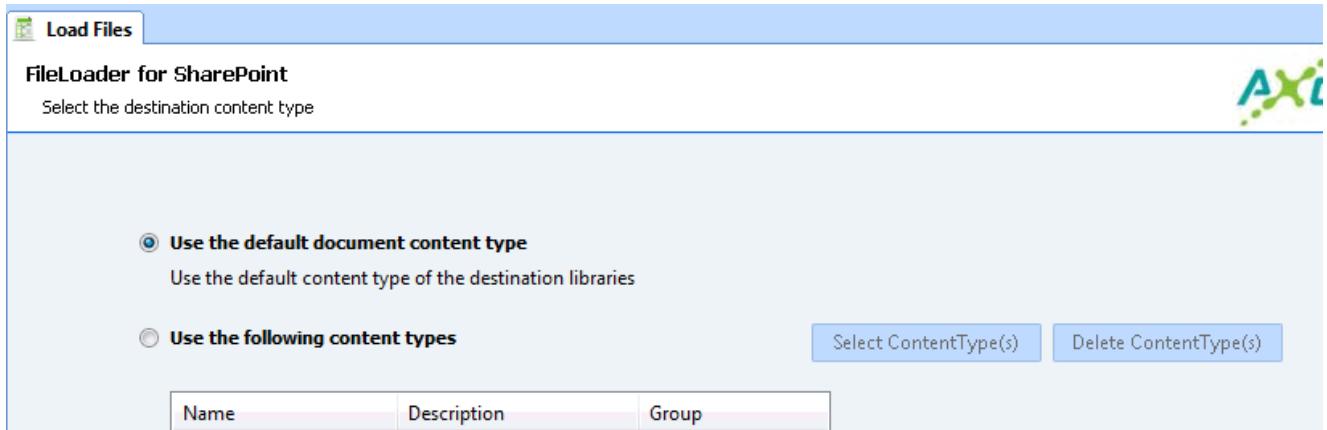
To create a control file:

- 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="727 1035 1437 1766" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div> <p data-bbox="634 1787 1520 1871">If the destination to which you want files uploaded does not appear in the tree, you may need to create a new connection (see "Configuring Connections to SharePoint" on page 7).</p>

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

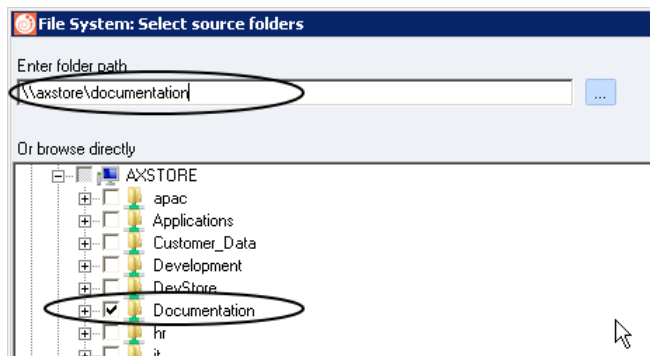
	A	B	C	D
1	FL Status	Source Content Type	Source Type	Source Na
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				

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.

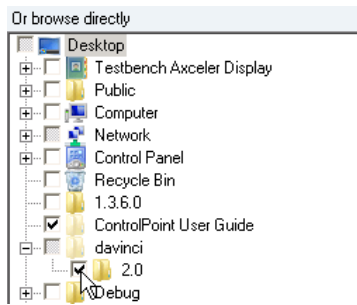
To upload files from your file share:

- 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

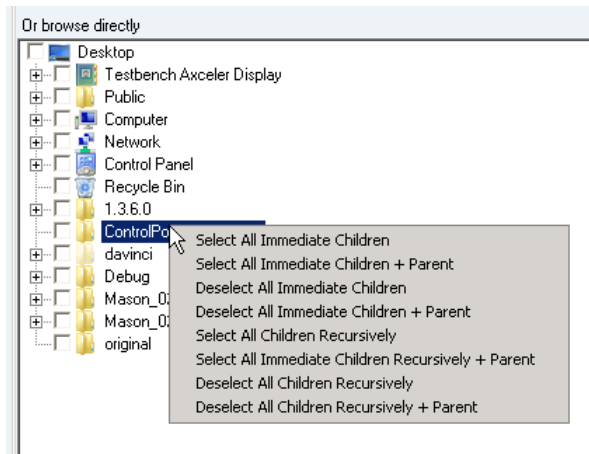


OR

- 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.

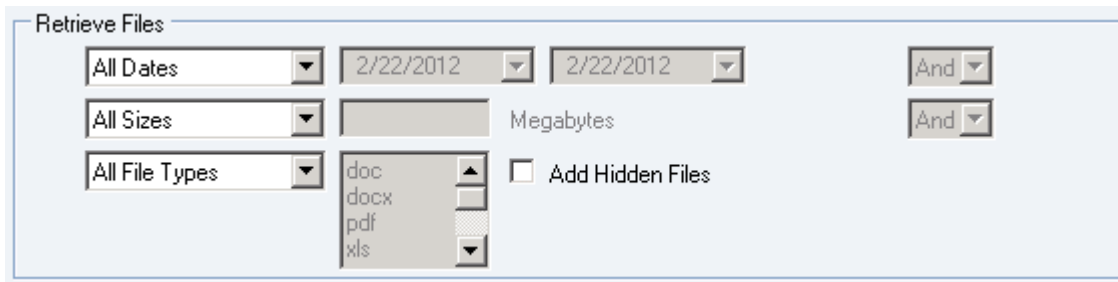


Use the information in the table below for guidance.

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



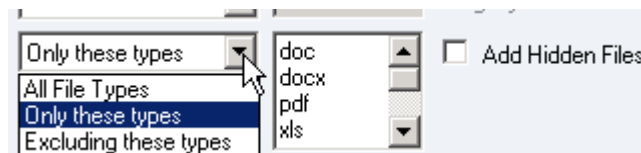
AND/OR

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



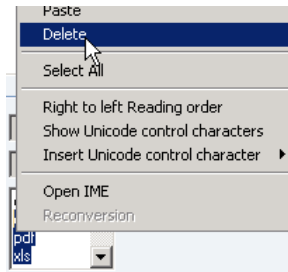
AND

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



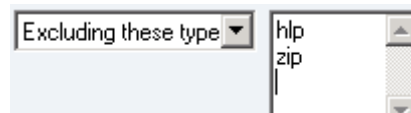
Note that whenever the dialog is opened, this list box includes the same default list of file extensions. Licensed Administrators and Power Users can change both the default drop-down selection and the default list of file extensions for their own FileLoader installation via the **General Options > Content Filtering tab** (see "General Options - Content Filtering" on page 40). You can also 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.

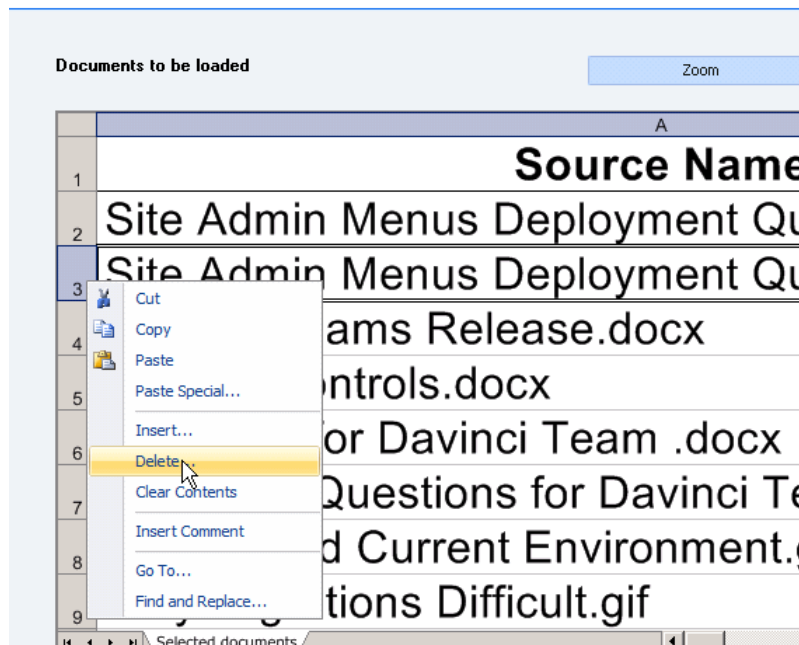


If you want to Add Hidden Files within selected folders, check this box.

- 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).

Content Preview

Add your files, organize versions, and assign destinations



- 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

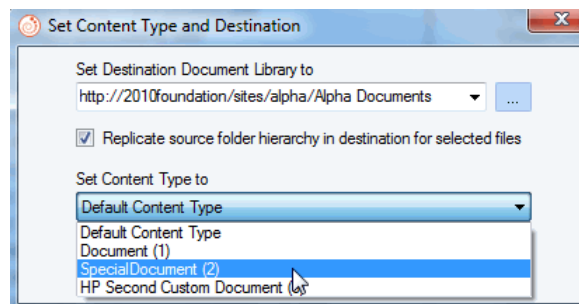
To apply a custom content type and/or choose a destination for files within your control file:

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

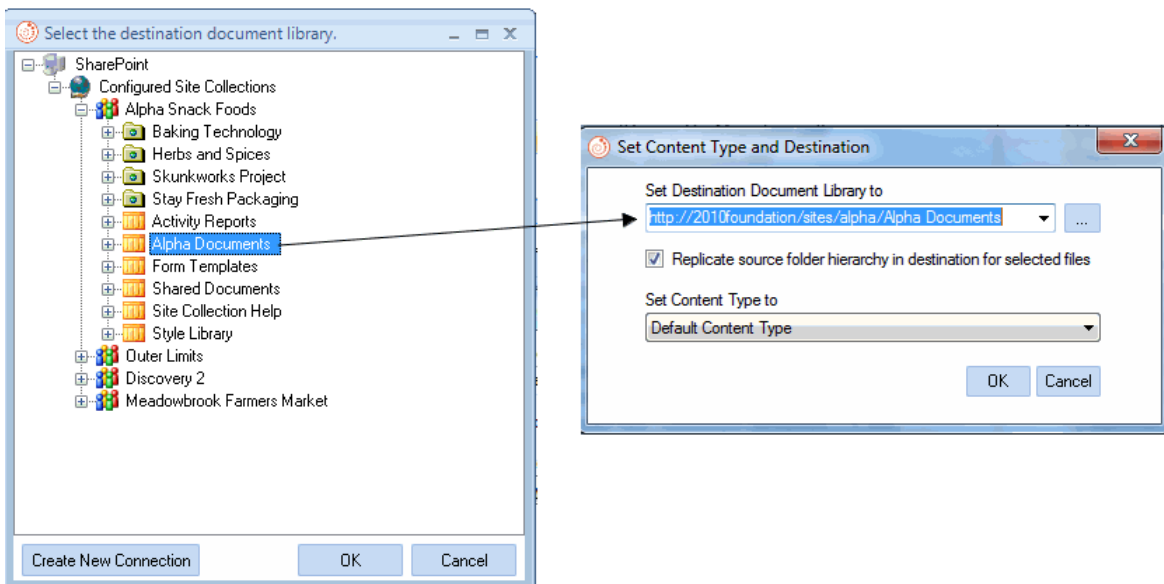
NOTE: If you want to set the same destination/content type for all files in the current worksheet, click **[Select All]**.

- 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]**.

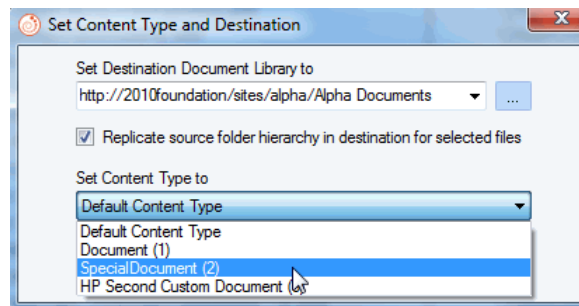


- 3 To set the destination library, click the [...] button and select the document library from the Configured Site Collection tree. (If the destination you want to set does not appear in the tree, you may need to **create a new connection** (see "Configuring Connections to SharePoint" on page 7).)



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* (on page 31).

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** (see "General Options - Content Loading" on page 38)).

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...

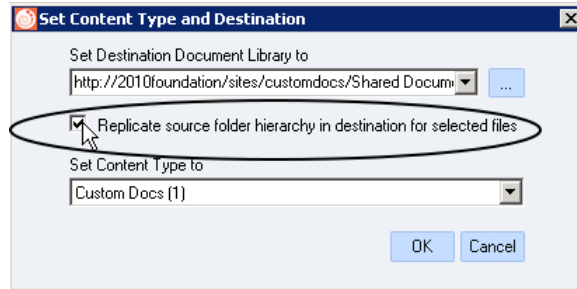
Saving a Control File

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

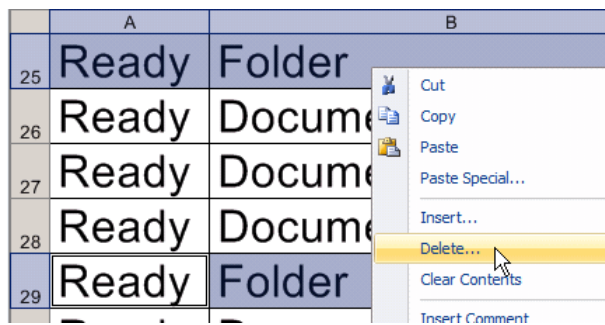
By default, FileLoader ignores the folder structure imported from a file share, essentially loading a flat file into SharePoint. However, when you Set Destinations for content, you have to option to replicate the source folder hierarchy.



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	
Destination	
1	
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.

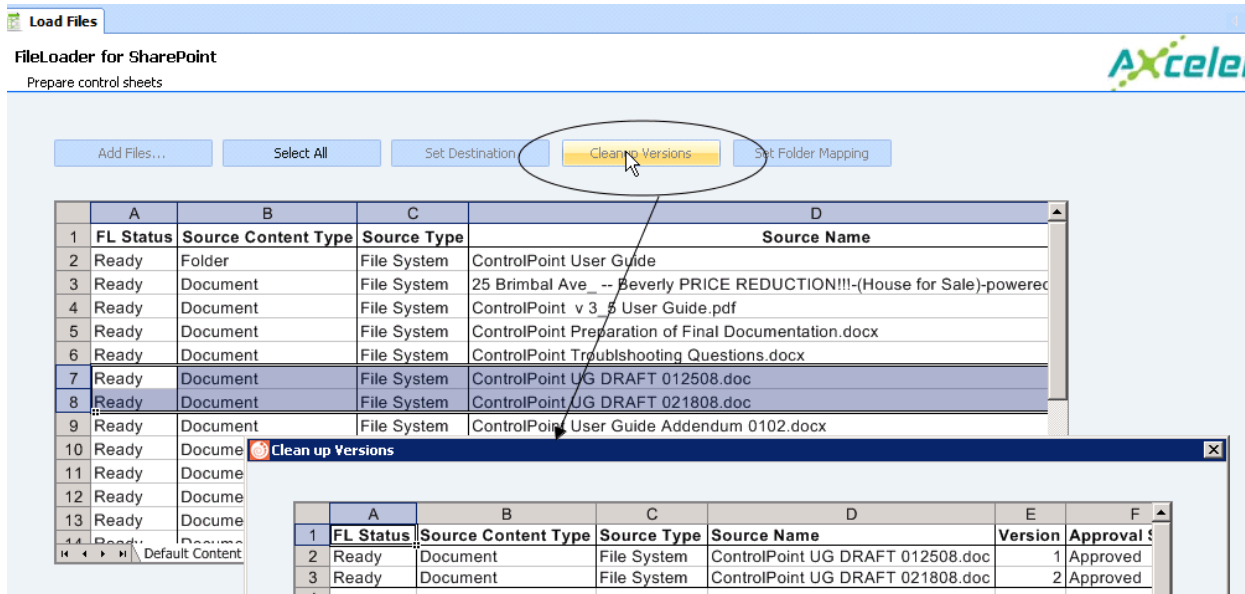
The screenshot shows the SharePoint interface for a document library. The breadcrumb path is 'Custom Content Types > Shared Documents > All Documents'. Below the breadcrumb, there is a 'Home' button and a navigation pane with 'Libraries', 'Lists', and 'Calendar'. The main content area shows a document named 'ControlPoint User Guide DRAFT'. A 'Version History' dropdown menu is open, showing a 'Delete All Versions' link. An arrow points from this link to the version history table below.

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

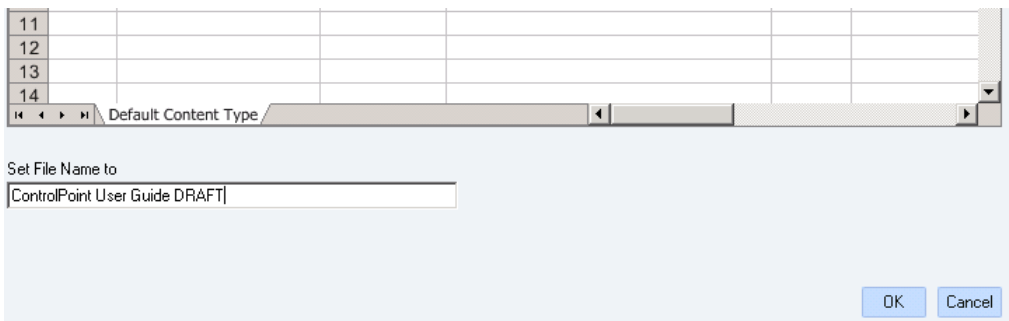
To clean up document versions:

- 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.

Flagging Columns You Do Not Want to Migrate

On the *General Options - Content Loading tab* (see "General Options - Content Loading" on page 38), you can specify a prefix to columns that you want FileLoader to ignore during migration (`skip_` is the default value). You can, for example, create a "sign-off" column that end users can complete to indicate approval of their content after reviewing and updating a control file.

M	N
Created	skip_Signed Off by
2/28/2012 1:41 PM	James Joyce
12/5/2007 11:28 AM	Margaret Meade
3/24/2008 1:08 PM	Samuel Clemmens
2/28/2012 1:41 PM	

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.

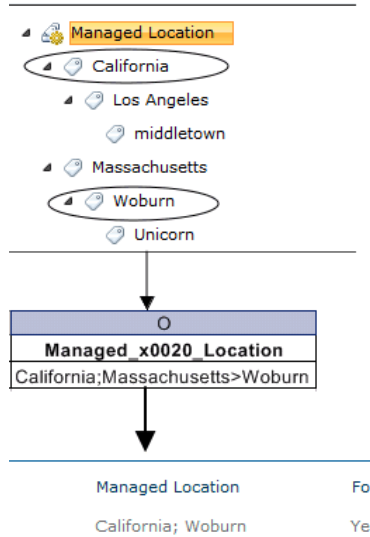
You can also use FileLoader to update only column metadata (and leave existing content intact). This is one of the *File and Folder Options* (see "Choosing File and Folder Options" on page 31) that can be specified by an Administrator or Power User before the content is uploaded.

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.

B	
Managed x0020 Location	For x002
	F
California	1
California > Los Angeles	1
California > middletown	1
Massachusetts	1
Massachusetts > Woburn	1
Massachusetts > Woburn > Unicorr	1
Massachusetts > medford	1
Massachusetts > Cambridge	1

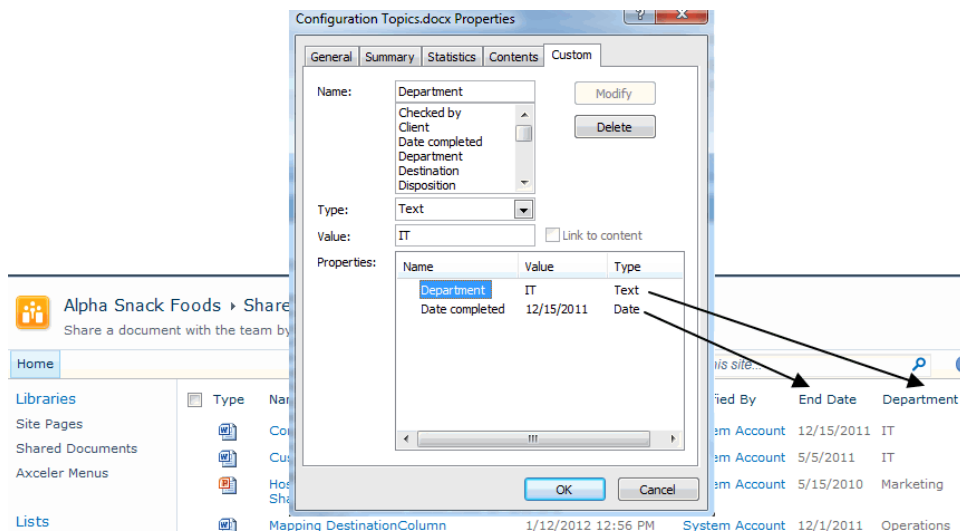
If multiple values are allowed for the column, however, the drop-down is not available. To apply multiple Managed Metadata values to a document, enter each value separated by a semicolon (;). If using a value nested beneath a term set, enter the full hierarchy (for example *Term Set>Term* or *Term Set>Term>Term*.)



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

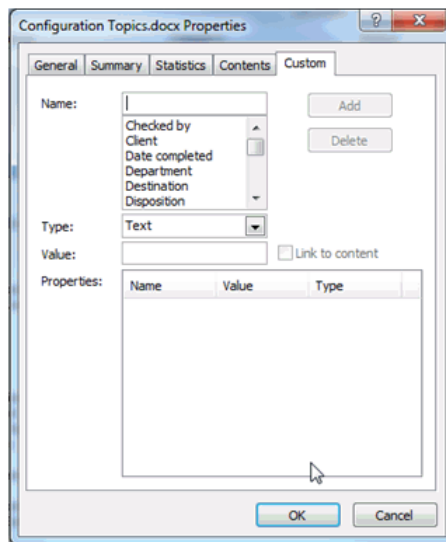


To view custom properties for a Microsoft Office file:

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

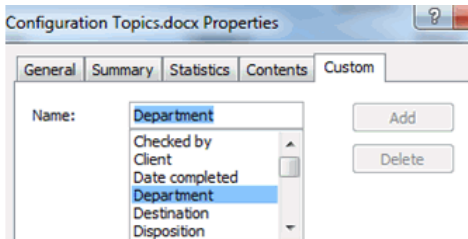
If you are starting from within ...	Then ...
an Office 2007 file	<ul style="list-style-type: none"> ▪ Click the Microsoft Office icon. ▪ Choose PREPARE > PROPERTIES. ▪ From the DOCUMENT PROPERTIES drop-down, choose ADVANCED PROPERTIES.
an Office 2010 file	<ul style="list-style-type: none"> ▪ Choose FILE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

- 2 Select the Custom tab.



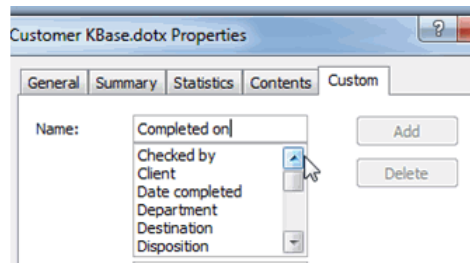
To create a new custom property:

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



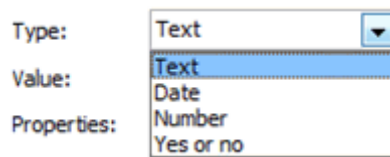
OR

- 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.

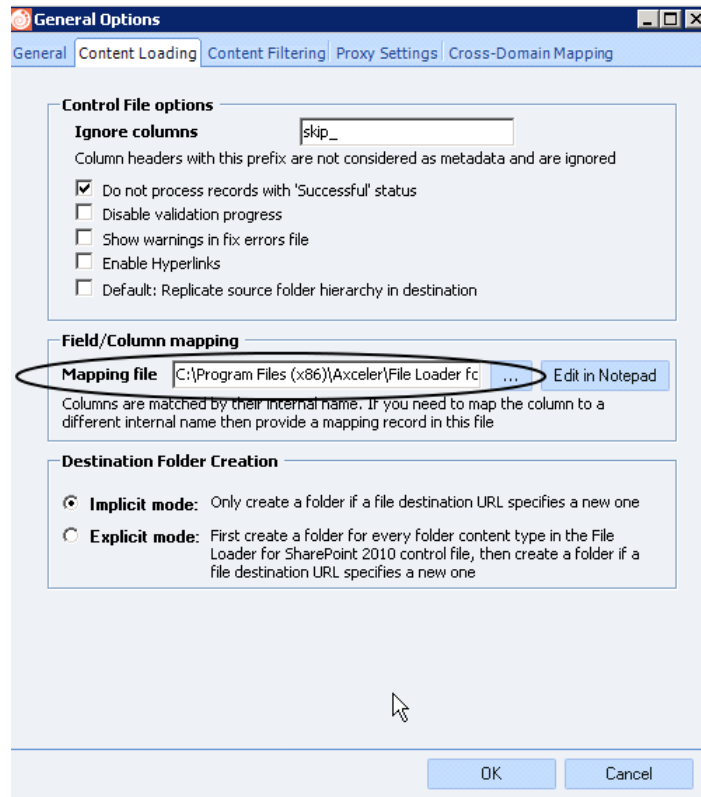


- 3 Enter a **Value** for the property.
- 4 Click [**Add**].

To map custom properties to SharePoint columns:

- 1 From the FileLoader main menu, choose OPTIONS > GENERAL OPTIONS.
- 2 Select the Content Loading tab.

Note that, in the Field/Column mapping section, the Mapping file field is initially pre-populated with the default path to the file External Field Map.xml.



- 3 Click [Edit in Notepad].
- 4 Between the <CustomProperties> tags, enter each custom property mapping in the following format:

```
<Mapping DestinationColumn="SP_Column_Name" CustomProperty
    ="File_Property_Name" />
```

NOTE: SP_Column_Name refers to the column's internal name, which may or may not be the same as its display name. To indicate a space between words in a SharePoint column name, use the string _x0020.

EXAMPLE:

```

                <Field Name="Subject" SharePoint07Name="Source Name" />
            </Fields>
        </Lotus>
    </FileSystem>
    <BuiltinProperties AllowExtendedProperties="true">
        <Mapping DestinationColumn="FileSize" DsoField="FileSize" openXMLField="FileSize" />
        <Mapping DestinationColumn="FileTitle" DsoField="Title" openXMLField="title" />
        <Mapping DestinationColumn="FileLastAccessDate" DsoField="LastAccessDate" openXMLField="LastAccessDate" />
        <Mapping DestinationColumn="Created" DsoField="dateCreated" openXMLField="created" />
        <Mapping DestinationColumn="Modified" DsoField="dateLastSaved" openXMLField="modified" />
        <Mapping DestinationColumn="CreatedBy" DsoField="Author" openXMLField="creator" />
        <Mapping DestinationColumn="Modifiedby" DsoField="LastSavedBy" openXMLField="lastModifiedBy" />
    </BuiltinProperties>
    <CustomProperties>
        <Mapping DestinationColumn="CustomNumber" CustomProperty="DsoCustomNumber" />
        <Mapping DestinationColumn="Department" CustomProperty="Department" />
        <Mapping DestinationColumn="End_x0020_Date" CustomProperty="Date completed" />
    </CustomProperties>
</FileSystem>
</Mapping>

```

When loading the files to which you want to apply custom mapping:

Remember to choose a custom Content Type that contains the columns to which you want to apply the mapping.

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.

	A	B	C
1	Source Folder URL	Managed_x0020_Location	For_x0020_Customers
2	C:\Users\farm\Desktop\ControlPoint User Guide\1.0 BETA		
3	C:\Users\farm\Desktop\ControlPoint User Guide\1.1		
4	C:\Users\farm\Desktop\ControlPoint User Guide\2.1		
5	C:\Users\farm\Desktop\ControlPoint User Guide\3		
6	C:\Users\farm\Desktop\ControlPoint User Guide\3.5		
7	C:\Users\farm\Desktop\ControlPoint User Guide\3.8		
8	C:\Users\farm\Desktop\ControlPoint User Guide\4		
9	C:\Users\farm\Desktop\ControlPoint User Guide\4.1		
10	C:\Users\farm\Desktop\ControlPoint User Guide\4.2		
11	C:\Users\farm\Desktop\ControlPoint User Guide\4.5		
12	C:\Users\farm\Desktop\ControlPoint User Guide\ControlPoint Online		
13	C:\Users\farm\Desktop\ControlPoint User Guide\Mason		
14	C:\Users\farm\Desktop\ControlPoint User Guide\New folder		
15	C:\Users\farm\Desktop\ControlPoint User Guide\Sherlock		
16			
17			
18	↔		
19			

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	C
Source Folder URL	Managed_x0020_Location	For_x0020
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\3.8	Massachusetts > Woburn	1
C:\Users\farm\Desktop\ControlPoint User Guide\4	Massachusetts > Woburn > Unicorr	1
C:\Users\farm\Desktop\ControlPoint User Guide\4.1	Massachusetts > medford	1
	Massachusetts > Cambridge	1

3 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.



ets

s... Select All Set Content Type and Destination Cleanup Versions Set Folder Mapping

B	D	O	P
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

Default Content Type: Document (1) / Axceler Required Sheet /

Uploading Files to SharePoint

If you are a licensed FileLoader Administrator or Power User, you can upload control files to SharePoint document libraries.

If you are uploading files using a control file created by another user:

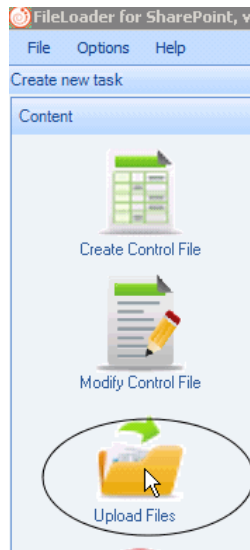
Make sure that:

- you have access to each **Source Folder** on the file share from which files will be uploaded, and
- you have a connection to each **Destination site collection**.

NOTE: If you do not already have a connection to the destination site collection(s), you can create it after loading the control file, as described in Step 2 of the following procedure.

To upload files to SharePoint:

- 1 From the FileLoader main page left menu choose **UPLOAD FILES**.



- 2 Either:

- Chose **Load Files** and *create a control file* (see "Creating a Control File" on page 11).

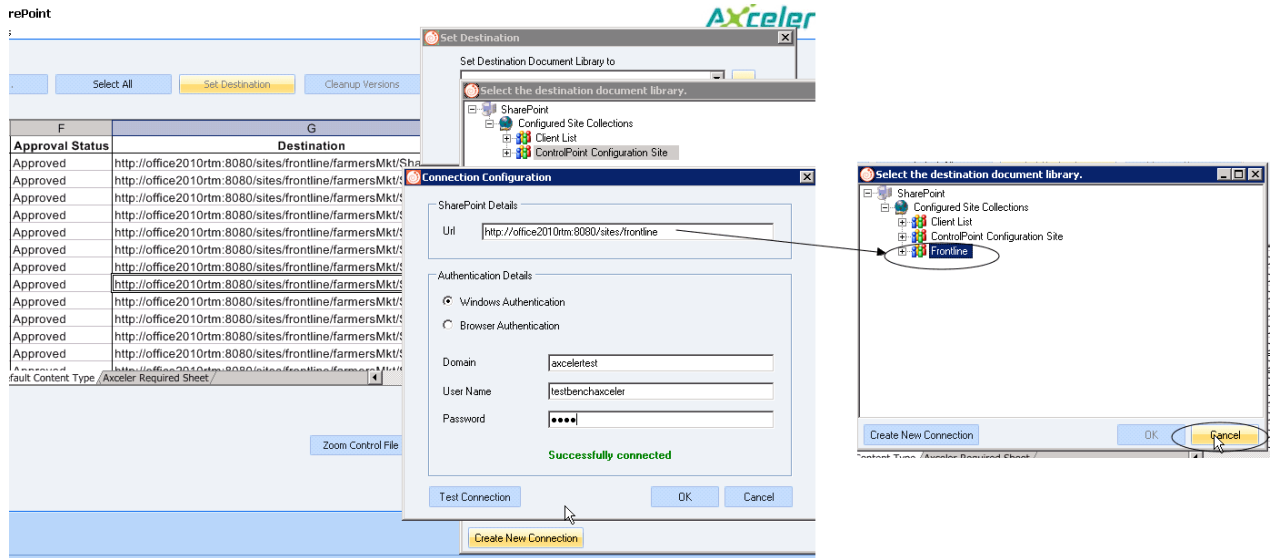
OR

- Chose **Load files using a control file** and open a control file that has been previously saved in FileLoader.

If you have loaded a control file created by another user and need to make a connection to the destination site collection:

- a) Select any cell within a row that contains data.

- b) Click **[Set Destination]**.
- c) Create a new connection to the site collection's root site using the procedure for *Configuring Connections to SharePoint* (on page 7). However, instead of selecting a document library after adding the connection, click **[Cancel]** to dismiss the Connection Configuration dialog.



3 When the control file is ready to upload to SharePoint, click **[Next]** to display the File and Folder Options screen.

Choosing File and Folder Options

Once you have finished configuring a task, you are given the opportunity to specify task-specific File and Folder Options.

NOTE: Settings that apply globally, independent of the current task, are set via *General Options* (see "Setting General Options for FileLoader" on page 37).

File and Folder Options
Select your file loading options

— If a file already exists at destination —

- Create a new version
- Delete file

— Folder Creation Mode —

- Implicit mode: Only create a folder if a file destination URL specifies a new one
- Explicit mode: First create a folder for every folder content type in the File Loader for SharePoint 2010 control file, then create a folder if a file destination URL specifies a new one

— Illegal Character Handling —

- Automatically fix source file and folder names that contain illegal characters
Replace illegal characters with

— Update Metadata Only —

- Only update metadata
Does not load files to the destination libraries, it updates existing metadata values
Warning: Updates do not apply to approval status and data in 'Default Content Type' worksheet

— Historical Source to Version Comments —

- Add historical source to version comments

Create New Version or Delete

If versioning is enabled on the destination library, and a file with the same name exists at the destination, FileLoader can either:

- Create a new version

OR

- Delete the file at the destination and replace it with the source file.

NOTE: The Delete the File option is available only if the *General Option to Preserve content has been unchecked* (see "General Options - General" on page 37).

Folder Creation Mode

If a task includes folders, you can have FileLoader handle their migration of folders in either of the following ways:

- **Implicit Mode** means that folders are created if a file or document destination refers to it. If the destination field of a file refers to a folder, it will create a folder.
- **Explicit Mode** means that a folder will be created if defined in the control file, regardless of whether or not there is content. Some users want to duplicate existing folder structures, and manually move files once inside SharePoint.

The default selection for this option is set on the *General Options - Content Loading tab* (see "General Options - Content Loading" on page 38).

Illegal Character Handling

FileLoader 2010 allows you to replace characters within source file and folder names that are considered "illegal" in SharePoint with a character you specify.

Update Metadata Only

Users have the ability to modify metadata in their migrated data quickly and easily using FileLoader 2010. Changes to metadata can be made to a control file, and by selecting this option, only the updated metadata will be changed in the SharePoint destination site.

Historical Source to Version Comments

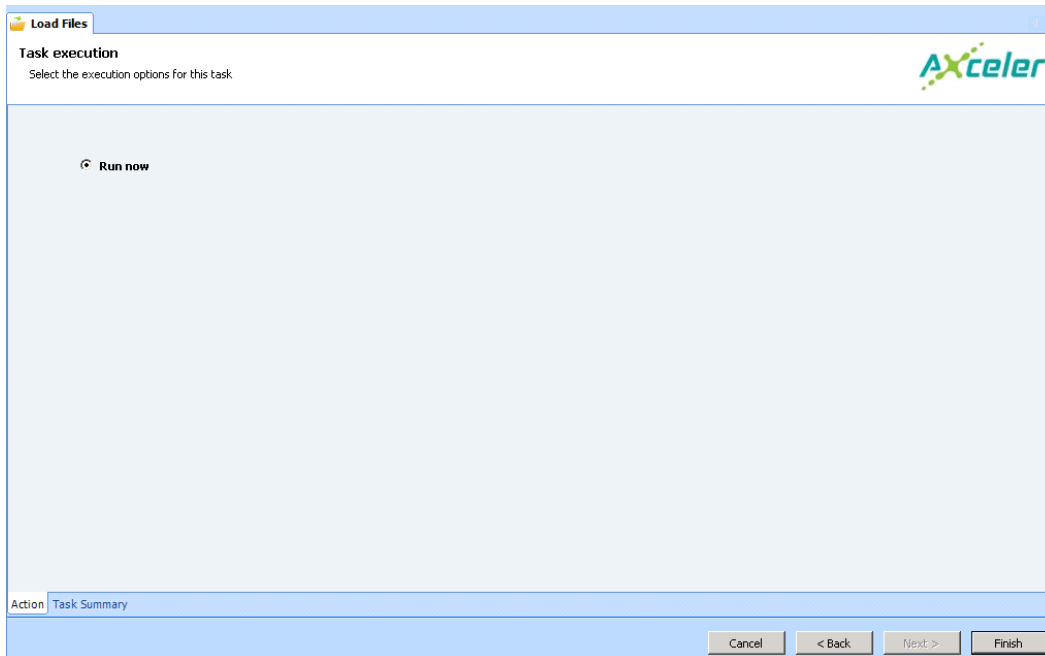
When the **Add historical source to version comments** is checked, the original source destination and other historical data will be recorded in the Comments column of the document's version history.

No. ↓	Modified	Modified By	Size	Comments
3.0	3/24/2008 1:08 PM	Daria O'Connor	3.7 MB	Created By: AXCELERTEST\doconnor, Modified By: AXCELERTEST\doconnor, Replicated by File Loader for SharePoint 2010. Historical Version: 1.0. Historical source: C:\Users\testbenchaxceler\Desktop\ControlPoint User Guide\1.0 BETA/ControlPoint User Guide BETA.doc v.1.0
2.0	3/24/2008 1:08 PM	Daria O'Connor	3.7 MB	Created By: AXCELERTEST\doconnor, Modified

If this box is unchecked, the Comments column will be left blank.

Executing the Task

Once you have finished specifying file and folder options for the control file, click **[Next]** to display the Task execution tab., with the **Run now** option selected.



To execute the task:

Click **[Finish]**.

Error Handling

If errors are found within your migration, FileLoader provides detailed information on where the errors took place, and a quick and easy method for correcting the error and re-running the content. When errors occur, a dynamic button appears entitled Fix Errors that allows you to filter your control file to just these items, allowing you to iterate and re-run the file.

To view migration results, including any errors:

From the Task Execution screen, click [**Migration Report**].

After selecting your view (All, Errors, or Successful), you can make the necessary changes to the control file in the content preview screen, save the control file and edit in Excel, or zoom the control file, edit and save.

NOTE: If the Do not process records with 'Successful' status is checked on the *General Options - Content Loading tab* (see "General Options - Content Loading" on page 38), and you want to re-migrate any files with a 'Successful' status, you will need to first re-set the FL Status to 'Ready.'

If all errors have been corrected, the migration report will show all green indicators. You can view and save a final control file by selecting Migration Report and saving a copy of the control file locally.

Setting General Options for FileLoader

There are a number of FileLoader settings that are applied globally, independent of the current task, although they can be changed at any time before a task is executed.

To access General Options:

From the FileLoader Options menu, choose OPTIONS > GENERAL OPTIONS.

The General Options dialog consists of the following tabs:

- General
- Content Loading
- Content Filtering
- Cross-Domain Mapping

General Options - General

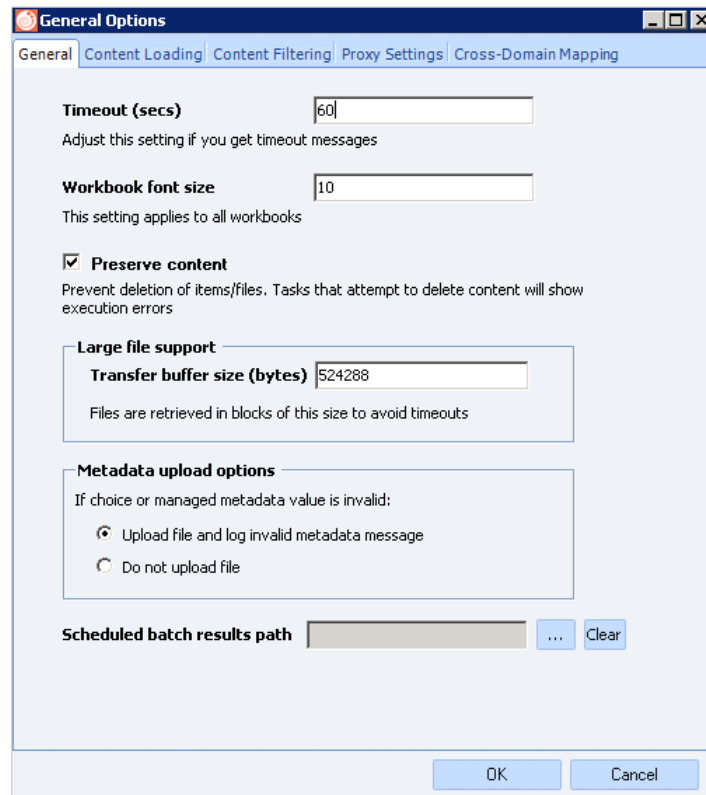
Within the General Options - General tab, you can modify the timeout setting to meet your performance needs, as well as the font size for all workbooks.

Additionally, you can control the **Preserve Content** default setting, which determines whether you want FileLoader to delete content of the same name upon migration. If checked, this setting works in conjunction with the task-specific Version or Delete option on the ***File and Folder Options page*** (see "Choosing File and Folder Options" on page 31). If this option is unchecked, FileLoader will *not* allow you to overwrite a file of the same name in the destination library.

The **Metadata upload** options allow you to determine whether or not to upload a file that uses an invalid Managed Metadata value.

NOTE: If you choose to **Upload file and log invalid metadata message** and a default value has been defined for the column, that value will be used in lieu of the invalid value.

If you are a licensed FileLoader Administrator only: A **Scheduled batch results path** is necessary if you want to schedule a task or batch to be executed at a later time. If you do not enter a path, the location where FileLoader is installed (by default, C:\Program Files\Axceler\FileLoader for SharePoint) will be used.



General Options - Content Loading

The General Options - Content Loading tab includes the following settings:

Control File options

Control File options are settings that determine how to allow the user to ignore defined columns, modify the validation variables for task execution, as well as the default value for the task-specific **Replicate** source folder hierarchy in destination option.

For example, the **Ignore columns** options let you apply a prefix to columns that you do not want to migrate.

NOTE: When **Do not process records with 'Successful' status** is checked (the default value), you must change the FL Status of all 'Successful' migrations back to 'Ready' in order to rerun the task.

The **Show URL Char Count** column option lets you track the number of characters in the relative url (that is, the path to the file less the Base URL. FileLoader enforces SharePoint's limit of 260 characters for a relative URL.

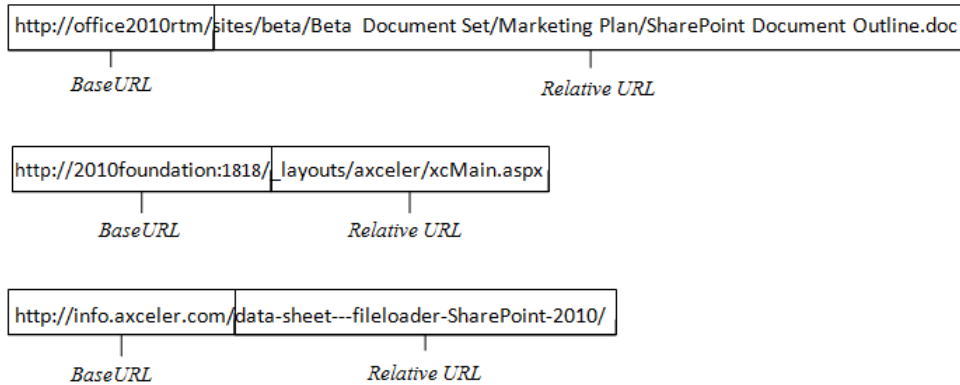
If you enable this option, enter the **Base URL**, which consists of the protocol, server or domain name, the port number (if applicable), and slash ("/").

Show URL Char Count column and warn when maximum is reached

Base Url :

E.g : http://server.acme.local

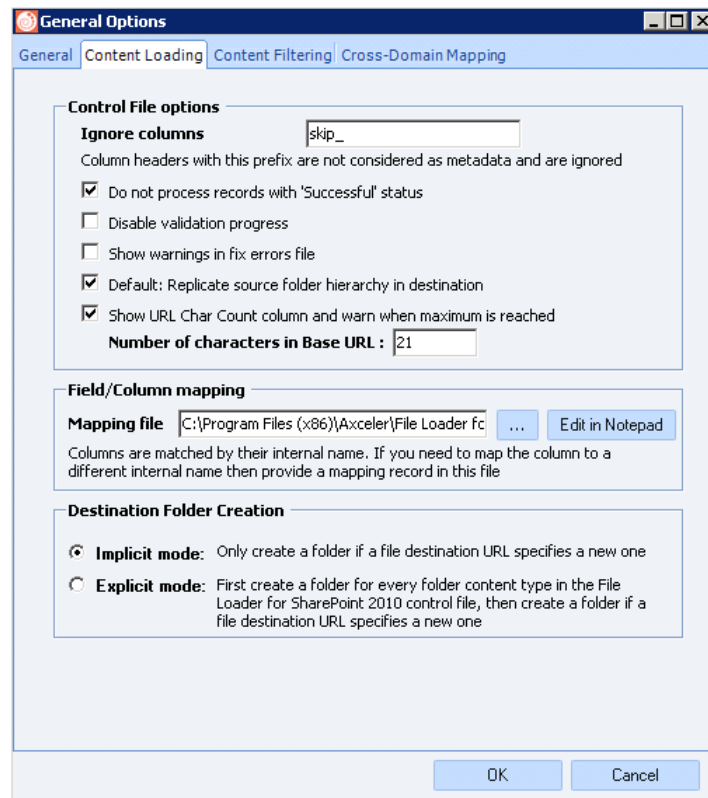
EXAMPLES:



Field/Column mapping

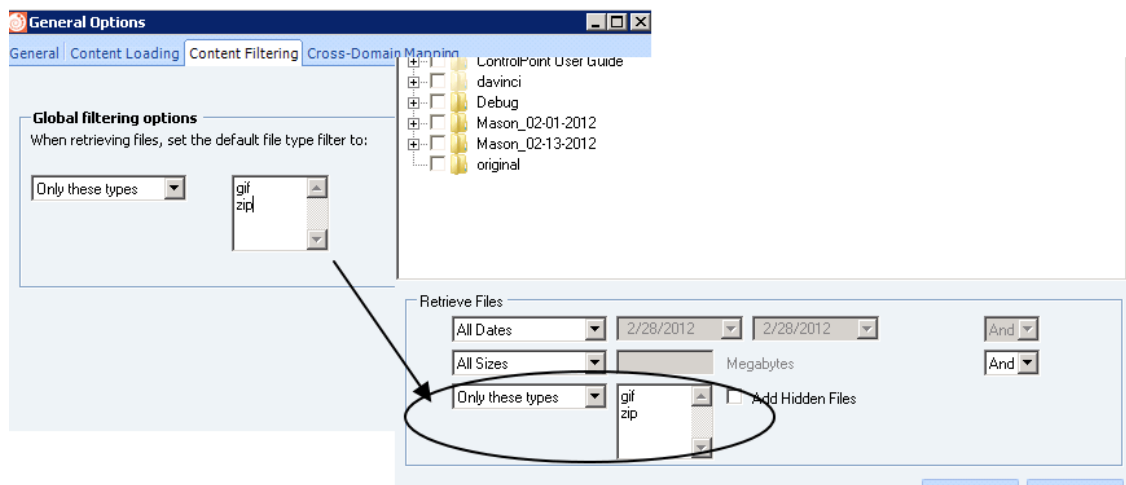
If you use the FileLoader *Field/Column Mapping functionality* (see "Mapping Custom Property Values to SharePoint Column Metadata" on page 23), enter the path to the Mapping file in this field

The Destination Folder Creation option is used to set the default value for the task-specific **Folder Creation Mode option** (see "Choosing File and Folder Options" on page 31).



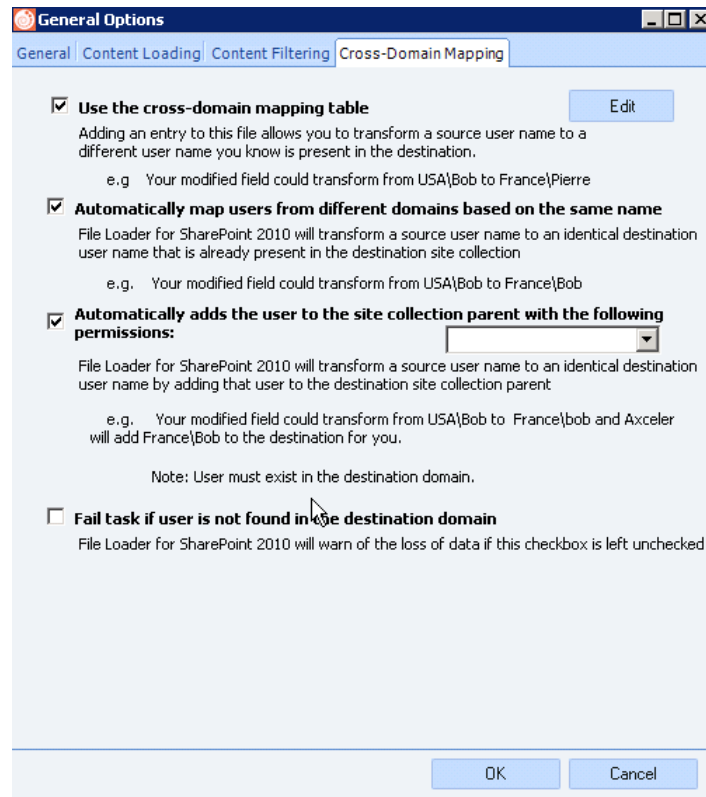
General Options - Content Filtering

The General Options - Content Filtering tab enables you to specify the default drop-down option and file types for filtering files on the File System: Select source folders dialog.



General Options - Cross-Domain Mapping

Within the General Options - Cross-Domain Mapping tab, you can map a user in the source domain to a different domain at the destination.



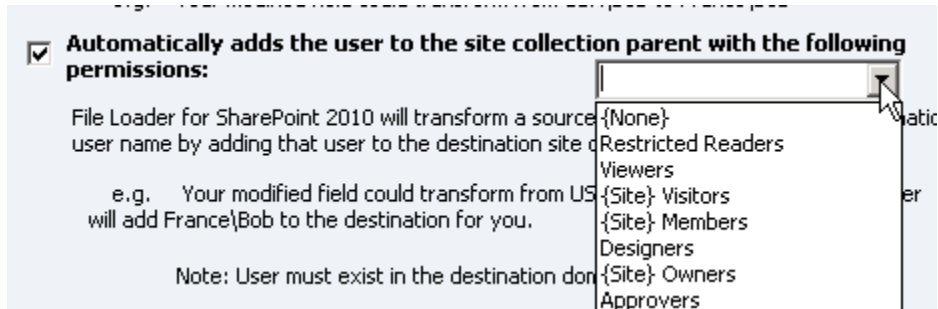
If you choose to **Use the cross-domain mapping table**, you can map users from the source domain to the same or different users in a different domain at the destination. Click **[Edit]** to update the table.

Cross-Domain User Mapping		
Export Import Save		
	A	B
	Source User	Destination User
1		
2	axcelertest\jamesjoyce	axceler\jamesjoyce
3	axcelertest\marktwain	axceler\sammuelclemens
4	axcelertest\wirving	axceler\washintonirving

Currently, you cannot use this option to map users within the *same* domain.

If you choose to **Automatically map users from different domains based on the same name**, FileLoader will map source user names to identical destination user names, regardless of whether they have been explicitly entered in the Cross-Domain User Mapping table.

If a document owner does not already have permissions at the destination site, the **Automatically adds the user to the site collection parent with the following permissions** option allows you to set a specific permission for that user at the destination.



If the **Fail task if user is not found in the destination domain** is left checked (default) and the user is not found at the destination, the System Account will be assigned as the content owner. Changing General Options for End Users (Control File Generators)

End users with only Control File Generator privileges do not have access to General Options from within FileLoader, because most of them apply to uploading files. You can, however, change settings that do apply—such as Control File options and Content Filtering—by updating the file `GeneralOptions.xml` which is located, by default, in the following folder on the machine where FileLoader is installed: `C:\Program Files\Axceler\FileLoader for SharePoint`.

```

1 <?xml version="1.0" encoding="utf-8"?>
2 <GeneralOptions xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
3   <Timeout>60</Timeout>
4   <WorkbookFontSize>10</WorkbookFontSize>
5   <BatchPath />
6   <DontDestroyData>true</DontDestroyData>
7   <UploadFile>true</UploadFile>
8   <SkipPrefix>skip_</SkipPrefix>
9   <IgnoreSuccessStatus>true</IgnoreSuccessStatus>
10  <FixShowsWarnings>false</FixShowsWarnings>
11  <ReplicateSourceFolders>false</ReplicateSourceFolders>
12  <MapFileName>C:\Program Files\Axceler\FileLoader for SharePoint\ExternalFieldMap.xml</MapFileName>
13  <CreateFolderByContentType>false</CreateFolderByContentType>
14  <AddURLLengthColumn>true</AddURLLengthColumn>
15  <HostNameUrl>http://office2010rtm</HostNameUrl>
16  <HideContentLoaderUI>false</HideContentLoaderUI>
17  <ContentFileTypeFilter>All File Types</ContentFileTypeFilter>
18  <ContentFileExtFilter>doc
19  docx
20  pdf
21  xls
22  xlsx
23  txt
24  ppt
25  pptx</ContentFileExtFilter>
26  <UseProxy>false</UseProxy>
27  <ProxyAddress />
28  <ProxyUser />
29  <ProxyPassword />
30  <ProxyByPassAddresses />
31  <ProxyByPassLocal>false</ProxyByPassLocal>
32  <UseCrossDomainMappingTable>true</UseCrossDomainMappingTable>
33  <UseThisDomainMapping>true</UseThisDomainMapping>
34  <AttemptToCreateUser>true</AttemptToCreateUser>
35  <CreateUserInGroup />
36  <FailIfUserNotPresent>false</FailIfUserNotPresent>
37  <Threshold>500000000</Threshold>
38  <BufferSize>524288</BufferSize>
39  <HttpRequestTimeout>100000</HttpRequestTimeout>
40  <MaxProgressTreeLimit>50</MaxProgressTreeLimit>
41  <ValidateWorkbookRowLimit>100</ValidateWorkbookRowLimit>
42  <DoNotShowConnectionDialog>true</DoNotShowConnectionDialog>
43 </GeneralOptions>

```

Control File options

Content Filtering

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 Davinci Migrator, have your customer license number ready.

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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***

(<http://www.axceler.com/Support/CustomerPortal.aspx>) and access the following product resources:

- announcements of new versions, critical patches, or other information that may be useful to users of 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.