HarePoint Import and Upload
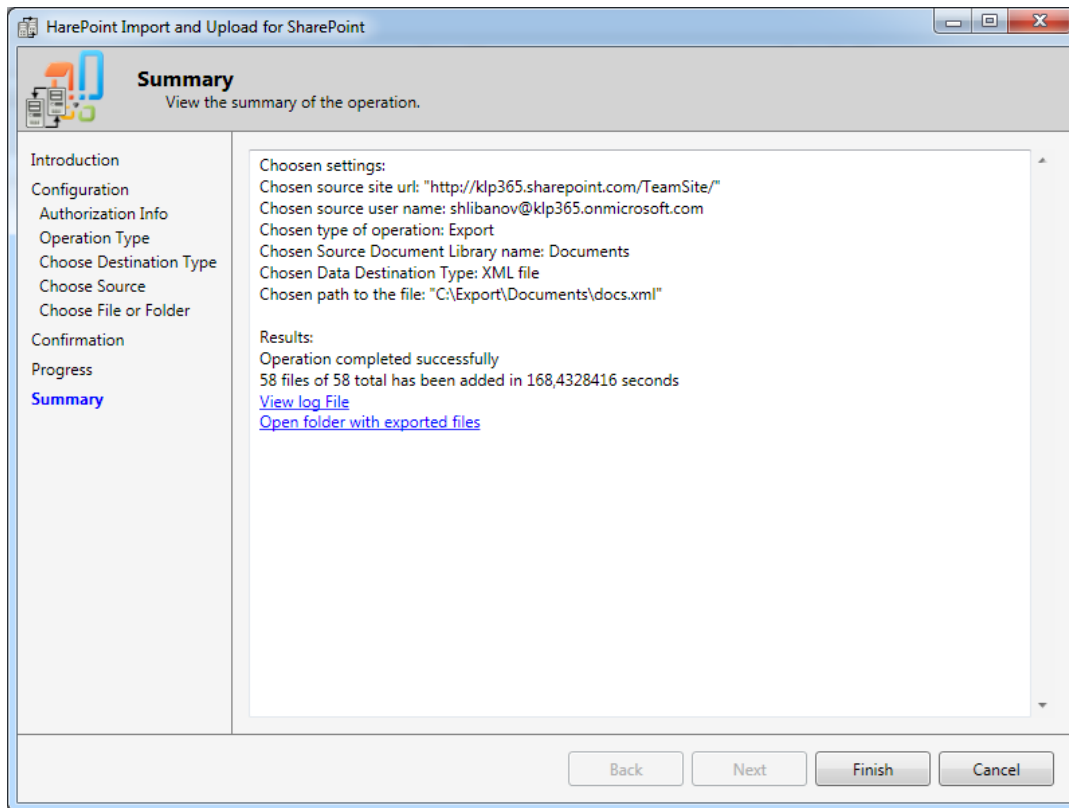
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I. Introduction

HarePoint Import and Upload for SharePoint allows you to migrate (import/export and upload/download) data between SharePoint sites, as well as between SharePoint document libraries and the file system. The product lets you can easily import documents, files and list items.

These data can be moved to existing document libraries or lists, or into new ones, all while preserving the needed attributes (views, permissions, etc.).

The data transfer process is very simple: you just select the data, indicate the targeted SharePoint site and document library or list name, and configure the migration parameters (for example: whether to rewrite existing files, preserve permissions, etc.).

The product supports Office 365, allowing you to upload/download data to and from SharePoint Online.

The additional command-line interface provides the ability to automate the process of data migration, that is, to set a schedule for migration.

We also recommend you to pay attention to the following products of our company:

- **HarePoint Workflow Scheduler for SharePoint 2010** is a free software product that allows automatic execution of SharePoint workflows by schedule. With its help, you can automate

recurring business processes, debug your workflows with various sets of parameters, test server's performance by starting workflows with specified frequency.

The product supports declarative workflows (created in Microsoft SharePoint Designer) and Visual Studio workflows. It supports both site and list workflows and allows launching workflow for every document or list item, for manually selected item or for items selected by CAML query. HarePoint Workflow Scheduler is fully compatible with InfoPath, and has the option to pass pre-defined parameters.

- **HarePoint Workflow Extensions for SharePoint 2010** provides over 180 new 'ready-to-use' activities for SharePoint workflow development. The product is fully supported by all Microsoft workflow development tools and there is no need to migrate and adapt current workflows to a new development environment, or to master and deploy new development tools. You can benefit from the power of the product in SharePoint Designer 2010, Microsoft Visual Studio 2010, and in Microsoft Visio 2010.
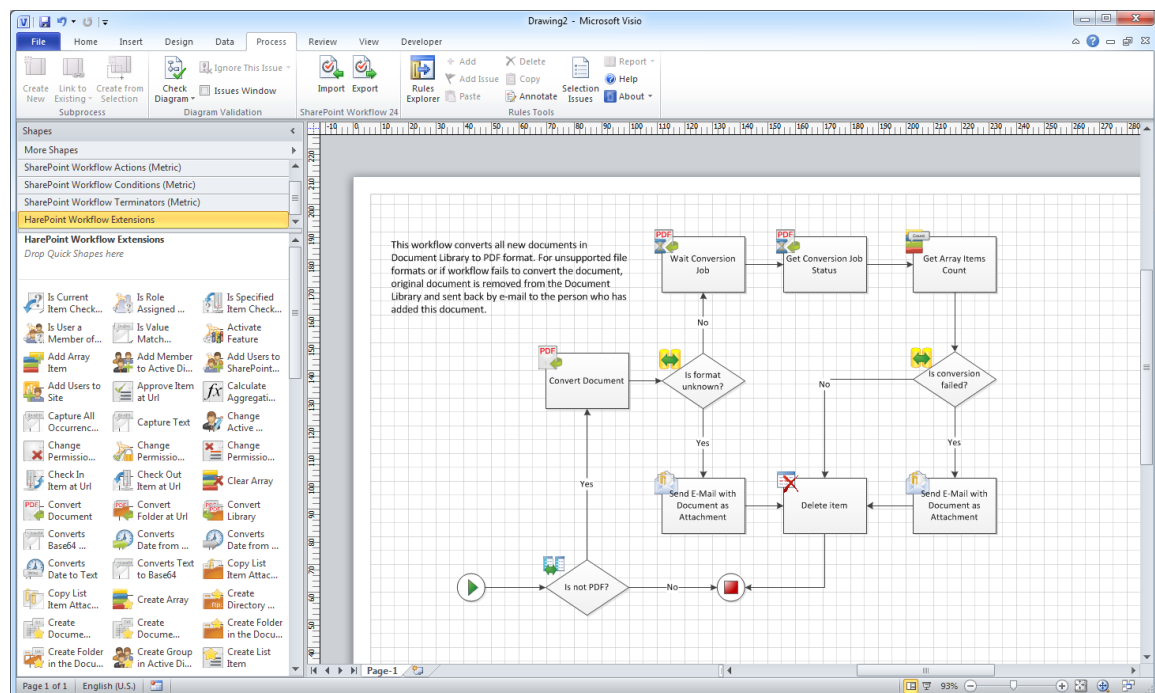
You will find the information on these products, as well as trial versions at www.harepoint.com.

II. Deployment

1. System requirements

HarePoint Import and Upload for SharePoint is a desktop application that can run on the following versions of Microsoft Windows operating system:

- Microsoft Windows Server 2003 with SP1 or higher;
- Windows Server 2003 R2;
- Windows Server 2008;
- Windows Server 2008 R2;
- Windows XP with SP2 or higher;
- Windows Vista;
- Windows 7.

The Product is also compatible with the following operating systems:

- Microsoft Small Business Server with SP1 or higher;
- Windows Small Business Server 2003 R2;
- Windows Small Business Server 2008;
- Windows Essential Business Server 2008;
- Windows Small Business Server 2011.

32-bit and 64-bit versions of the abovementioned systems are supported.

Microsoft .NET Framework v3.5 or higher is required before performing installation of HarePoint Import and Upload for SharePoint. Microsoft .NET Framework v3.5 or higher is the component of Microsoft Windows Server 2008, Windows Server 2008R2, Windows 7, and Windows Vista. In case of other operating systems the platform can be downloaded from the Microsoft download center.

2. Supported versions of Microsoft SharePoint

HarePoint Import and Upload for SharePoint is designed to work with:

- Microsoft SharePoint Server 2010,
- SharePoint Foundation 2010,
- Microsoft Office 365 / SharePoint Online.

3. Licensing and trial limitations

HarePoint Import and Upload for SharePoint is licensed for a number of seats. Seat - is the user who has access to the Product inside the company's environment.

You may use the Product on the basis of one of two licenses:

1. **Trial License**. Provided automatically for a 30-day period to use the Product in organization's environment without any limitations of Product functionality.
2. **Commercial License**. This license is purchased for a number of seats and allows using the Product in the organization's environment without limitation by usage time and functionality.

Note that after purchasing of Commercial License and entering registration key product becomes fully functional.

See product page at http://www.harepoint.com/ for more details about Product licensing.

4. Installing HarePoint Import and Upload

To install the product simply run **HarePointImportUpload.msi** from the program package and follow installation wizard steps.
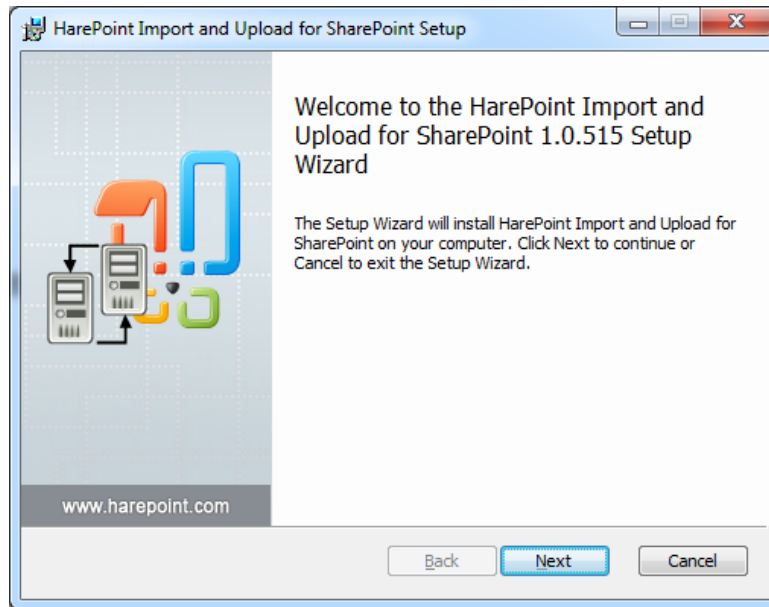
You can install the product on any computer in your organization which has access to the target SharePoint sites. Please note that some features are only available if the program is running on the server where SharePoint is installed.

After installation the Product is ready to work. See the Section III of this manual for the Product overview.

III. Product Overview

HarePoint Import and Upload for SharePoint consists of two software modules:

- Main application is a wizard, where you can configure the task step by step, execute this task or save it for later usage.
- Console helper application (HPIUConsole.exe) that is used to automatically launch tasks or to run by a schedule.

1. Main application
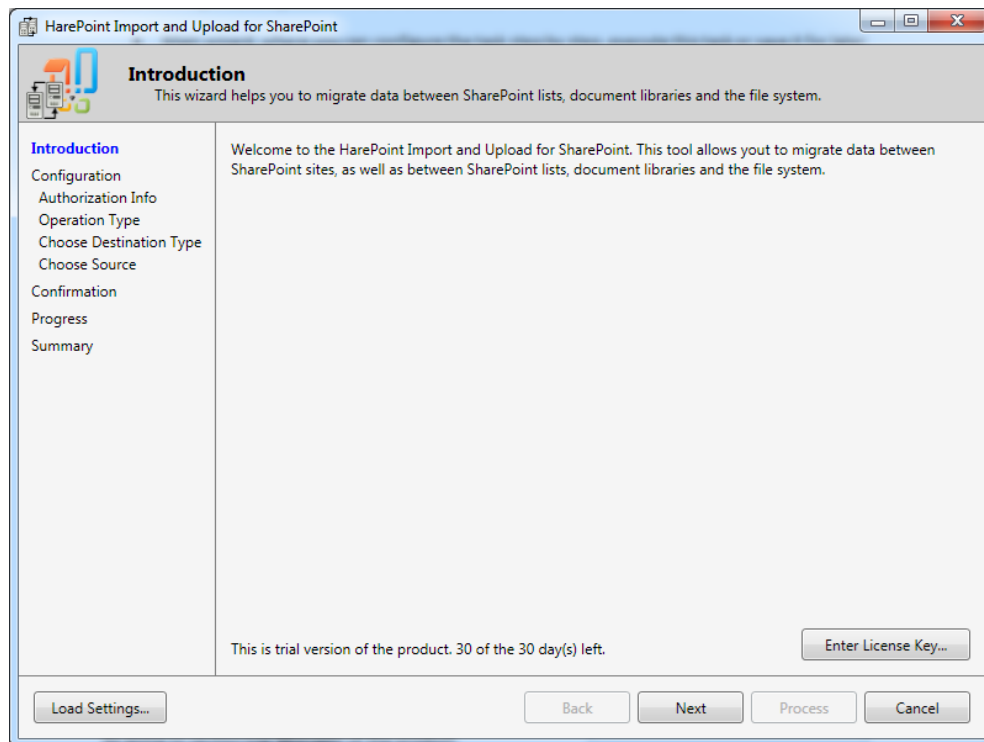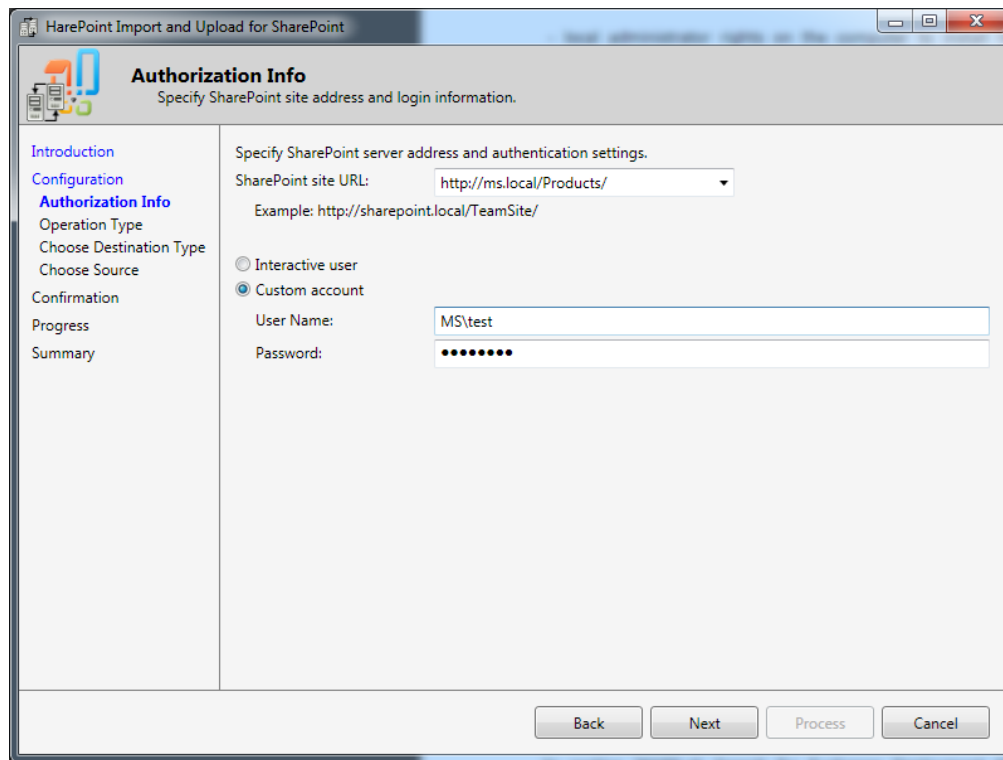

On the welcome screen of the main application wizard you can load previously saved task using **Load Settings…** button. If you have a license for the product, please enter license key in the window that opens when you click **Enter License Key…** button.

Number and type of steps in the wizard depends on the type of operation performed.

2. Connecting to SharePoint site

Regardless of the type of operation selected you will need to connect to the source and / or the target SharePoint site. To do this you need to specify the full URL of the site, as well as authentication settings. Authorization can be done either by using the current user account or by specifying user name and password. User name can be specified in form USER@DOMAIN or DOMAIN\USER.
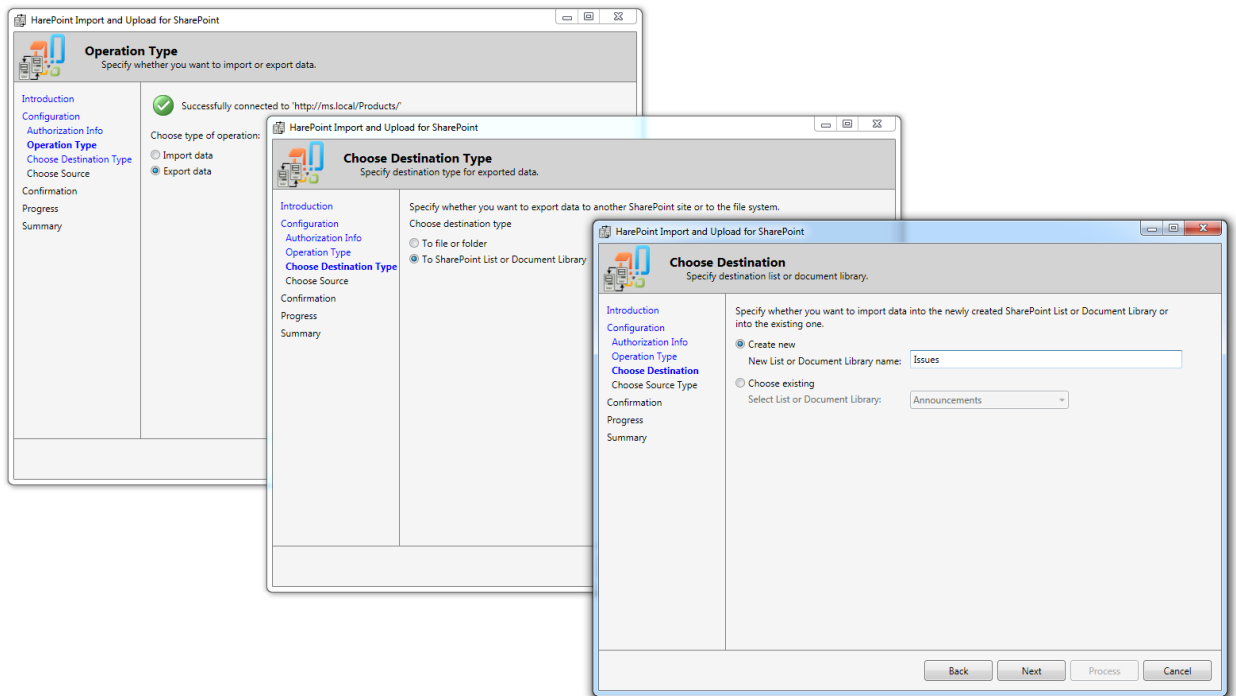
3. Choosing operation type and destination

On the next two steps you have to choose whether you want to export or import data and specify where you are going to export or import data.

4. Importing data

When you choose import then the following types of data sources are supported:

- XML files previously exported with HarePoint Import and Upload;
- Another SharePoint List or Document Library located on the same or another SharePoint site;
- Folder or network share (available only when importing into existing Document Library).

When you choose import then the following options are available:
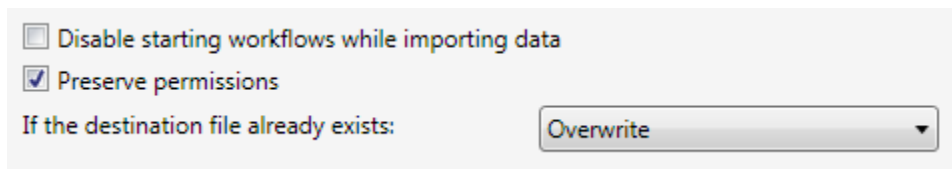
- **Disable starting workflows while importing data** – temporary disables workflow execution for target list or document library while importing data;

- **Preserve permissions** – transfers permissions of the source list or document library to target. Available only when importing from XML file or another SharePoint list or document library;
- **If the destination file already exists** – the following options are available: *Overwrite, Skip, Append unique Id.*

When you importing data from CSV the program analyze the source file and try to suggest correct values for field separator and field data delimiter fields. You can specify these values manually:

Export File Information
Select the field separator and field data delimiter in the destination file

Field separator: Comma(,)   ▼
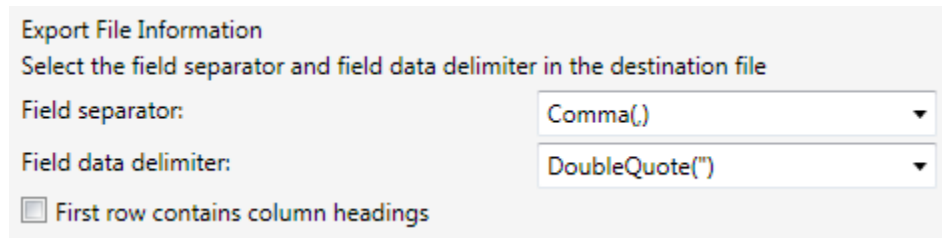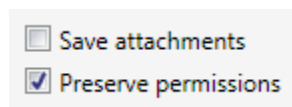Field data delimiter: DoubleQuote(")   ▼
☐ First row contains column headings

5. Exporting data

When you choose export then the following types of destinations are supported:

- XML file. If necessary a folder named "Exported files" will be created. It will contain list item attachments or documents;
- CSV file (available only when you exporting SharePoint list);
- Folder or network share (available only when you exporting Document Library);
- Another SharePoint List or Document Library located on the same or another SharePoint site.

When you choose export then the following options are available:

☐ Save attachments
☑ Preserve permissions

- **Save attachments** – specifies whether you want to export attachments when you exporting SharePoint list;
- **Preserve permissions** – specifies whether you want to export or transfer permissions. Unavailable when you exporting list to CSV file or document library to a folder or network share.

When you exporting data into CSV file the following additional options are available:

Export File Information
Select the field separator and field data delimiter in the destination file

Field separator: Comma(,)   ▼

Field data delimiter: DoubleQuote(")   ▼

☐ First row contains column headings

6. Mapping list fields

If you transfer data between the two lists or importing data from file into list you may need to map source and target columns. The program analyze source and target field names (if available) and data type and try to map fields automatically. But you can always make changes in field mapping manually:

If there is no corresponding source column for specific target column you can choose *Empty* option that will set empty values for specified target column.

7. Executing import/export operation

On the next steps you can see summary or the task you defined in previous steps:
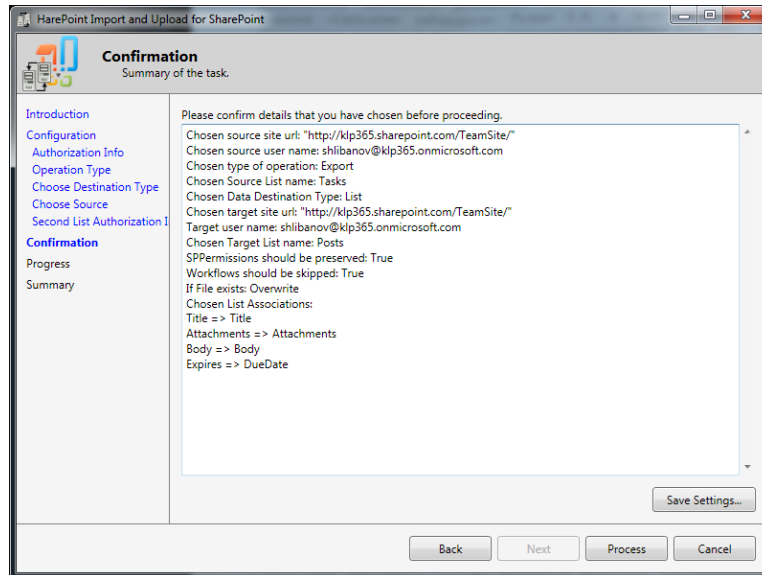
On the *Confirmation* step you can also save the task for later usage or for using with HarePoint Import and Upload console helper application (see Section 8 for details).

On the *Progress* step you can see the progress of the operation. On the *Summary* step you can see the results of operation and check the log file.
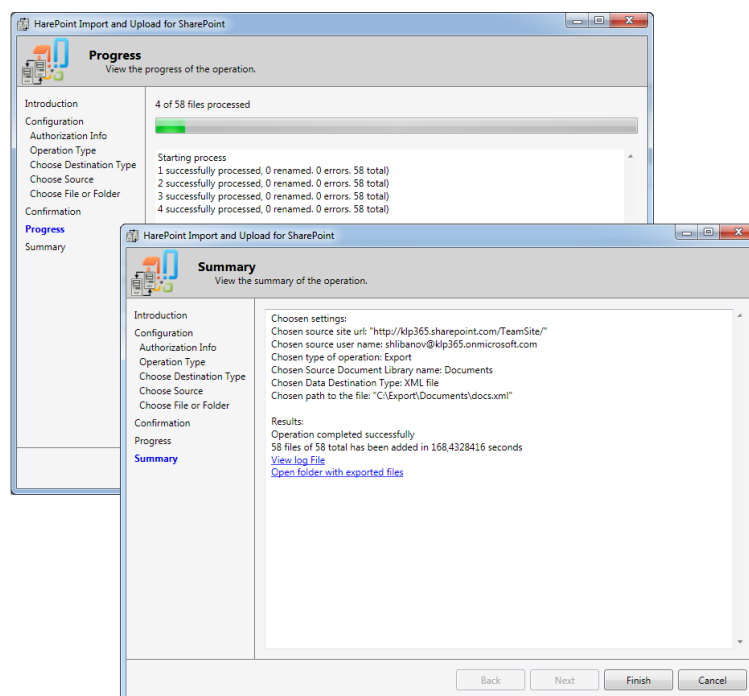
8. Console helper application

Console helper application (HPIUConsole.exe) is used to automatically run tasks previously saved from the main application. By default, the program is located at *"C:\Program Files (x86)\HarePoint\HarePoint Import and Upload\"* folder. The following options are available:

Usage: HPIUConsole <Required Option> [<Optional Modifier>...]

```
<Required Options>
    /? /help                            Help Information
    /config "{Config File Name}"        Executes program using settings from config file (full path to the config file is required)
<Optional Modifiers>
    -saccount({login},{Password})       Specifies login and password for accessing source SharePoint site
    -taccount({login},{Password})       Specifies login and password for accessing target SharePoint site
    -we                                 Enable starting workflows while importing data
    -wd                                 Disable starting workflows while importing data
    -pe                                 Enable preserving permissions
    -pd                                 Disable preserving permissions
    -rmeskip                            Skip errors (default)
    -rmeabort                           Abort processing on error
```

Appendix A. Troubleshooting

A.1 Where is the log file located?

When you experience a problem with HarePoint Import and Upload and plan to contact technical support, be sure to attach the log files to your request. Log files are located at *%APPDATA% HarePointImportAndUpload* folder *(e.g. C:\Users\<username>\AppData\Roaming\HarePointImportAndUpload\HarePointImportAndUpload.log).*