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| SharePoint Content Manager - User Guide |
| User Manual |
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| **08/17/2017** |

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This document will provide users with instructions on how to use QIPoint’s SharePoint Content Manager™ tool.

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# Introduction

This utility is part of the SharePoint Essentials Toolkit TM Suite. This utility is used to manage content in SharePoint sites.

# Installation & Minimum Requirements

Please see the “SharePoint Essentials Toolkit – User Guide” for installation instructions.

## IMPORTANT: This program does not need to be installed on a SharePoint Server.

## Minimum Hardware Recommendations

**Processor:** Minimum Dual-Core, 3GHz. Recommended Quad-Core 3GHz or higher  
We recommend Quad-Core 3GHz processor or higher when scheduling more than 20 Jobs at the same time.

**RAM:** Minimum 1GB available. Recommended 2GB or higher available

We recommend:

* At least 1GB of available RAM for jobs\* with less than 200GB and less than 10K items to copy
* At least 2GB of available RAM for jobs\* with 200GB to 500GB or with 10-100K items to copy
* At least 4GB of available RAM for jobs\* with 500GB+ or with 100K items or more to copy
* At least 8GB of available RAM for jobs\* with 1TBGB+ or with 500K items or more to copy

\*Jobs – includes all jobs being run at one time, such as multiple jobs in a schedule for one or more sites

**Hard Disk:** 200MB Available Hard Disk Space (for the application files, logs, temp files and reports).   
Temp files are automatically cleared as needed. This is in addition to the disk space required by the SharePoint Essentials Toolkit.

## Supported SharePoint Versions

Microsoft SharePoint Online / Office 365  
Microsoft SharePoint Server 2016  
Microsoft SharePoint Foundation 2013  
Microsoft SharePoint Server 2013  
Microsoft SharePoint Foundation 2010  
Microsoft SharePoint Server 2010

## .NET Framework Required

.NET Framework 4.5 or higher is required. If it is not found on the client machine, the user will be prompted to automatically download and install the prerequisite.



## Local Machine & Windows System Permissions Required

Please see the SharePoint Essentials Toolkit User Manual.

## Anti-Virus, Offline Sync Folders (i.e. Google Drive, OneDrive, Drop Box, etc) and Performance

Please see the SharePoint Essentials Toolkit User Manual.

# SharePoint User Permissions Required

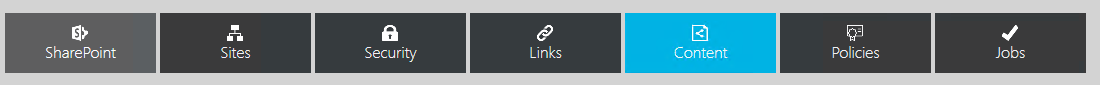
Users require specific SharePoint permissions to be able to use the tool, see below for the specific permission levels required:

* A member of “Site Collection Administrators” group
* Or have Full Control at Web Application level user policy
* Or have Full Control at Site (SPWeb) level

## Office 365 Accounts

* When copying Office 365 SharePoint sites, an Organizational account must be used, such as [user@mycompany.com](mailto:user@mycompany.com) or [user@mycompany.onmicrosoft.com](mailto:user@mycompany.onmicrosoft.com). Microsoft accounts (Windows Live IDs) such as [user@live.com](mailto:user@live.com) or [user@hotmail.com](mailto:user@hotmail.com), are not currently supported for authentication.

# Getting Started



## Quick Overview

This component has several features to help SharePoint users manage content. Below is a list of the main features:

### Item Query

* + This is a very powerful tool that allows a user to perform a query against items and files across one or more sites and site collections.
  + Examples: Find all files larger than 50MB, or all files containing a specific web part, or all files containing a specific CSS reference.

### Copy Wizard

* + Allows a user to copy a SharePoint Lists/Content Types/Site Columns from one site to another (they can be from the same or different environments and SharePoint versions)
  + SharePoint Lists include: All Lists and Libraries (including custom ones), Web Pages, Wiki Pages from a Source Site to a Target List.

### Bulk Upload

* + This feature allows a user to upload files from a file share or their desktop PC to SharePoint. The tool has ability to auto-rename (such as replace special characters), filter by date (such as only copy recent files), preserve modified and author information from files, mapping folder names to metadata, etc..

## Item Query

### What can I use this for?

This component can be used to query items in every list and library in every site (that you select) to build a single report on them and their locations:

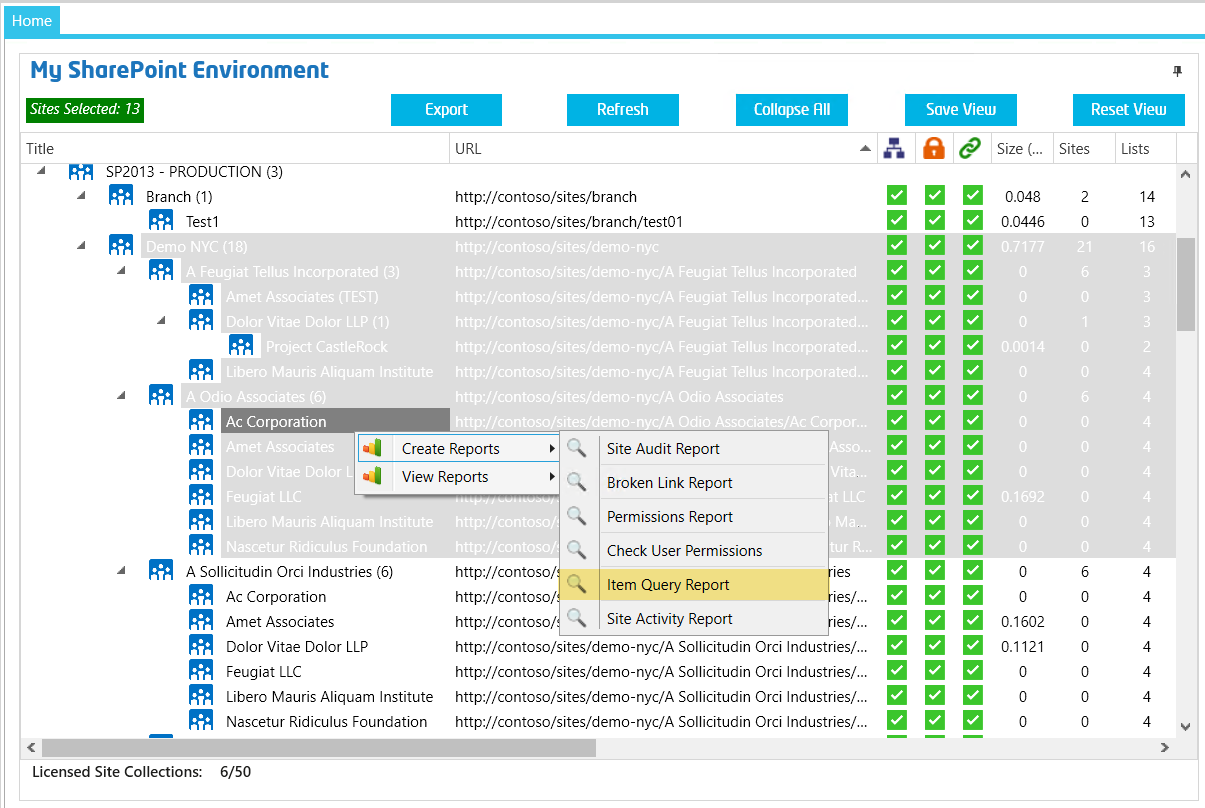
All Items and Files:

* modified by a specific user
* that match metadata
* that match a specific Content Type
* that contain a certain keyword (including within PDFs, Office documents and item metadata)
* that contain text that matches a regular expression (including within PDFs, Office documents and item metadata)
* more…

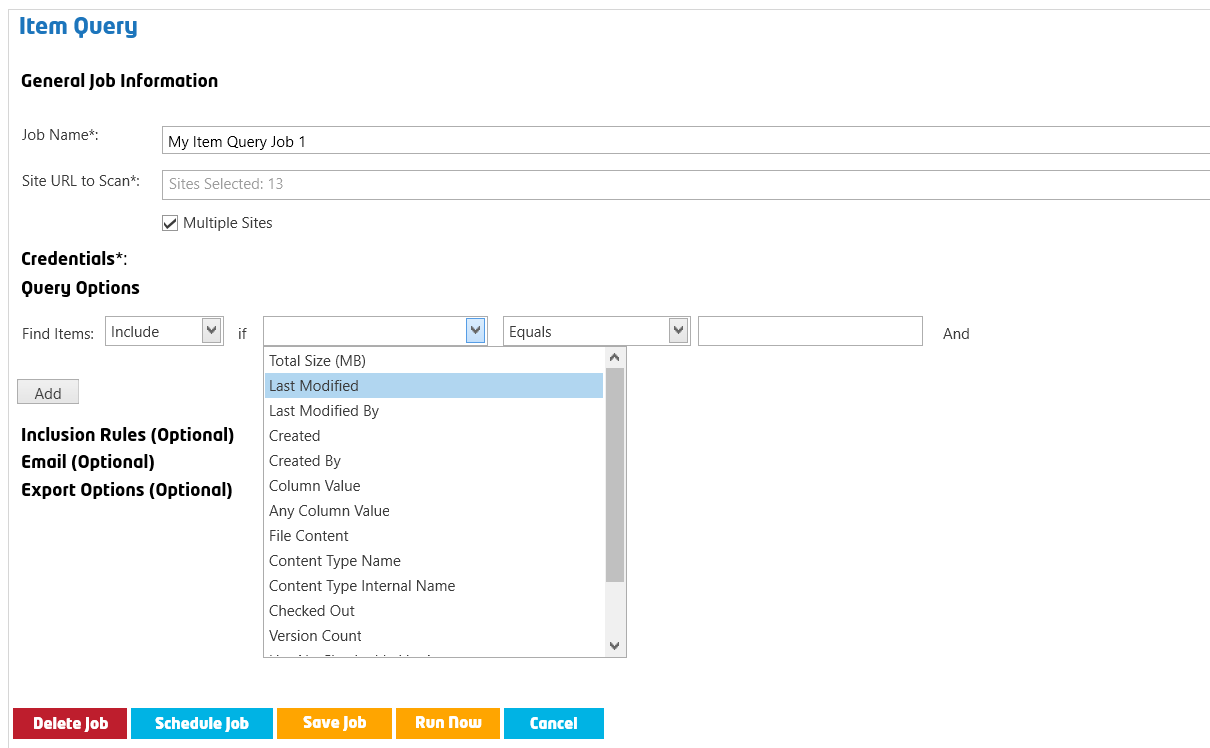
You build these reports against an entire Farm, Web Application, Site Collection, subsite or specific SharePoint List.

### Starting an Item Query

1. In the Home Page Dashboard, select one or more sites that you want to query

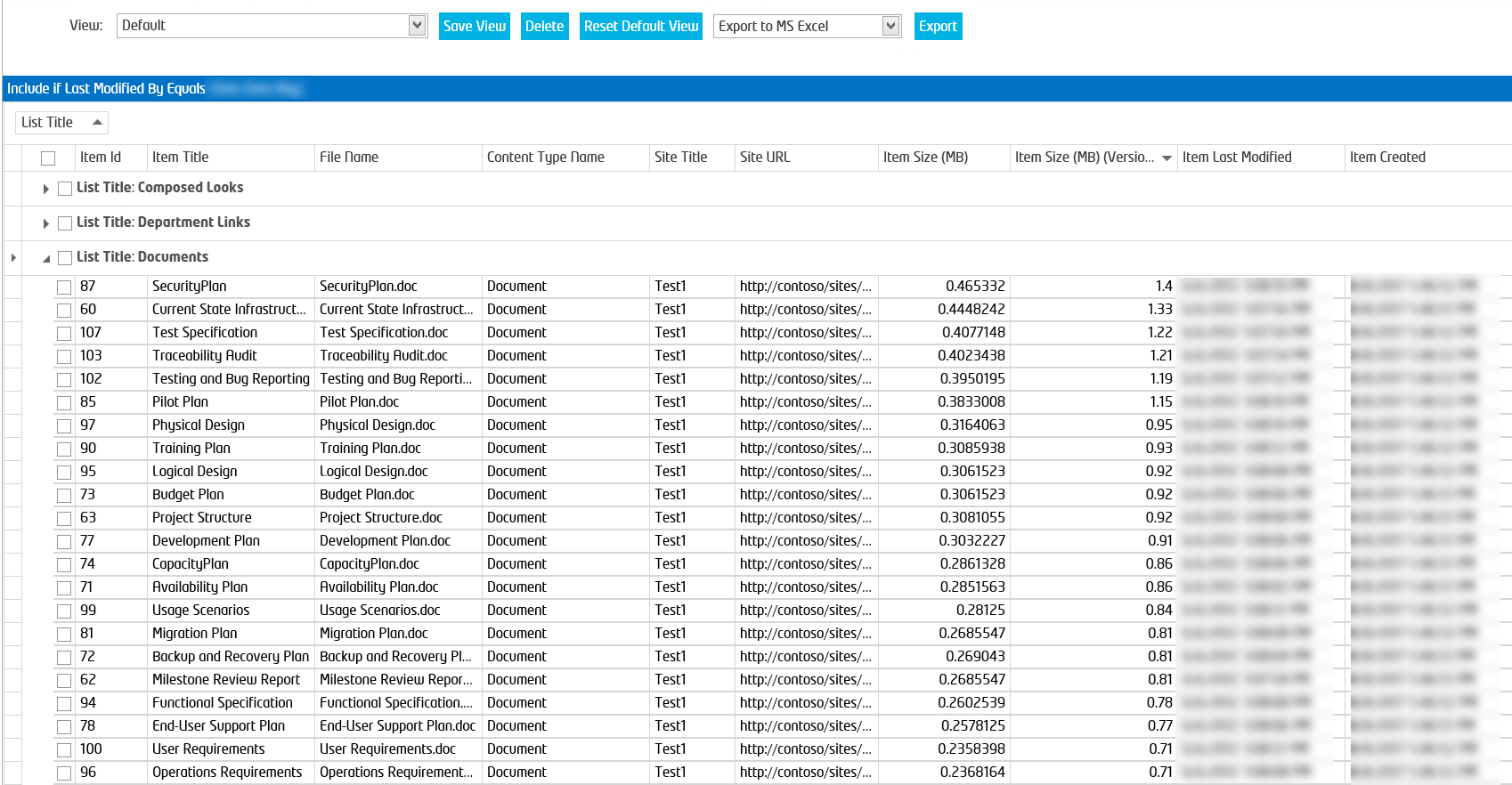


1. A Item Query window will open
2. From here you can enter a Job Name, and then choose the criteria for the items you want to include in the report:



1. Click “Run Now” to start the Item Query Job

Once the job is complete, it will show you a list of results from all sites and lists queried for Item/File/Page matches:



## Copy Wizard

### What can be copied

This component can be used to copy:

* SharePoint Lists or Libraries (including items and files)
* SharePoint List Items, Files and Folders
* SharePoint Content Types
* SharePoint Site Columns

You can copy from one Farm, Web Application, Site Collection or subsite to another. Such as a SharePoint List or Library from SharePoint 2010 to SharePoint Online (Office 365) or within the same SharePoint environment.

### Features & Notes on Behavior

When Copying Lists

* If the Content Type is not found in target, the tool will retrieve the ‘Base Type’ of the source Content Type and use that for the target Item Content Type. For example, if you have a custom Content Type called “ABC Content Type” based on a Document Set SharePoint Content Type, the tool will first try to use the custom Content Type (“ABC Content Type”), and if it is not found in target, it uses the “Document Set” base Content Type.
* If a Permissions Level is used in the Source but not found in the target, the Permission Level will be created in the Target Site automatically and assigned accordingly to the List/Item/File/Folder.

### Limitations

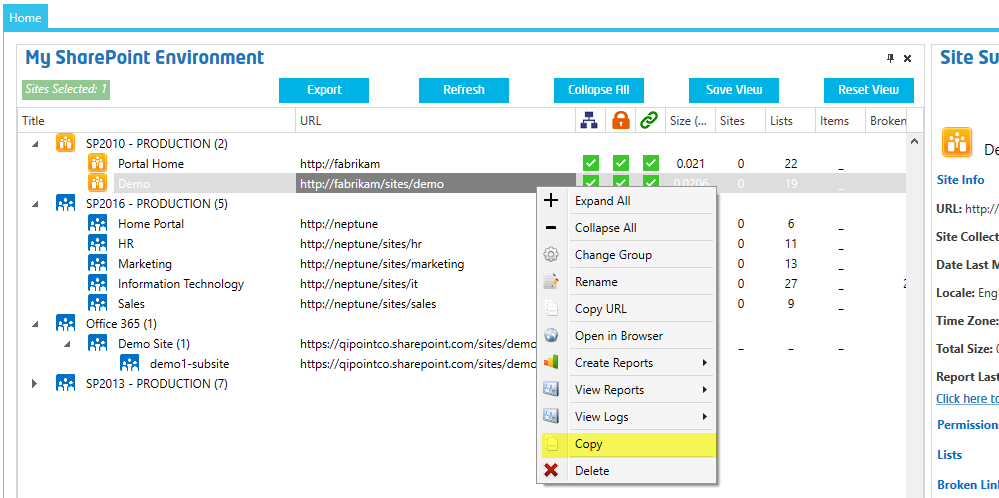
The following are not currently supported by the tool: (coming soon as free update)

* SharePoint Workflows
* Copy Permission Levels separately
* Mapping Permissions or Users
* Mapping Content Types
* Mapping Metadata

*After you have added sites to the Home Page Dashboard (see the “SharePoint Essentials Toolkit User Manual” on how to do this), you can perform a Copy operation by doing the following:*

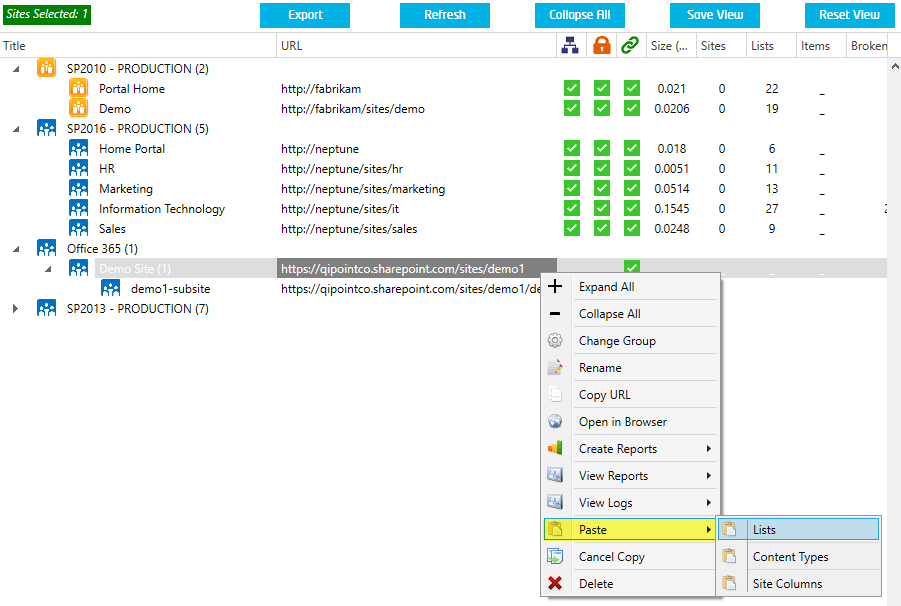
### Step One - Copy

(Source) Right click the Site you want to copy FROM (the ‘Source’)



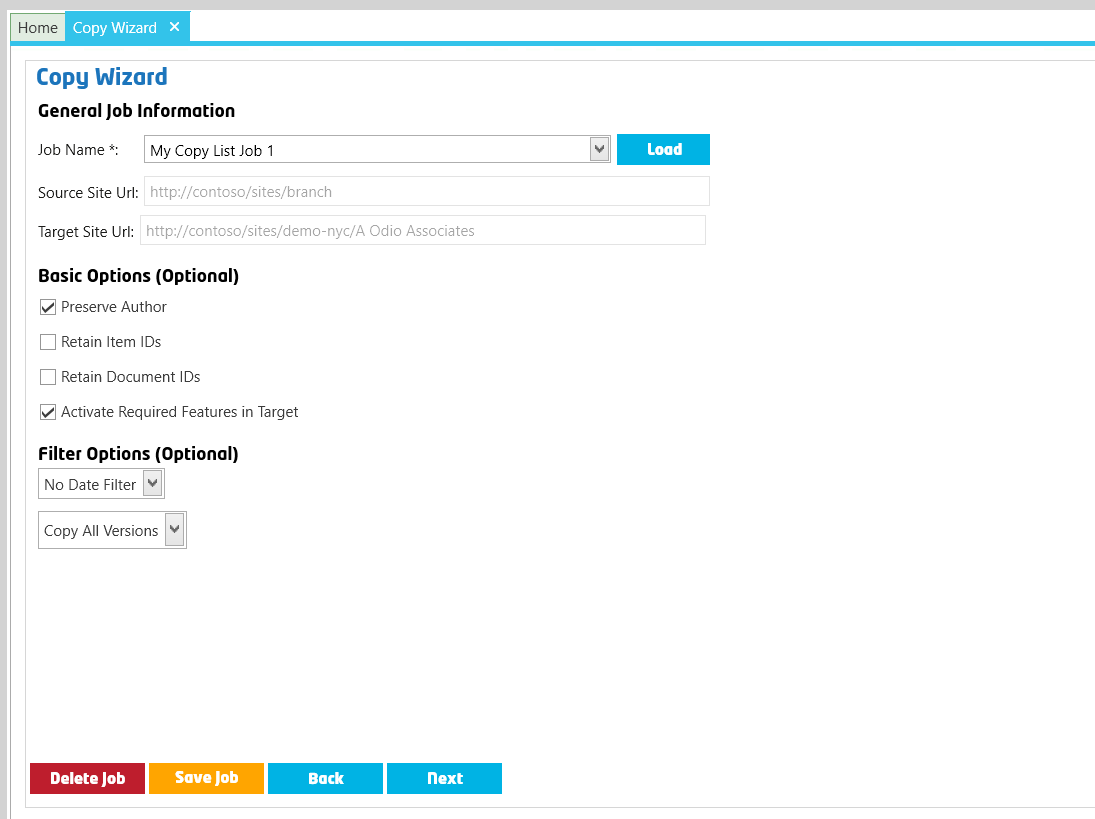
### Step Two - Paste

(Destination) Right click the Site you want to copy TO (the ‘Target / Destination’)



### Step Three – Select Global Options

You will then be prompted with a window below. Here you will set the options that will be applied to all Lists copied in this job.



#### *Global Options*

The options below will be applied to all SharePoint Lists & Libraries copied in this Job.

##### General Job Information

###### Job Name

This is the Name of the job. A folder will be created in the report directory for every job. You can use the same Job Name to group reports. The job name will be used to help identify the report if scheduled and will appear in the Job History section. You must rename the job if you want to save the job for future re-use.

###### Source Site URL

This is the Site where you will be copying FROM.

###### Target Site URL

This is the Site where you will be copying TO.

##### Basic Options (Optional)

###### Preserve Author

When SharePoint content is copied, select this option ON to keep the Last Modified By User and Last Modified Date in the target site.

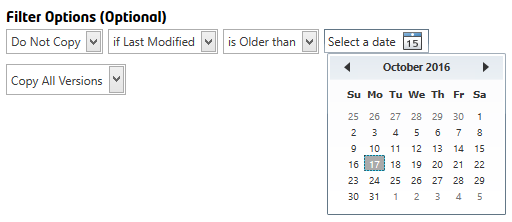
###### Retain Item IDs

Use this option to keep SharePoint Item IDs from source to target. This is important when copying lists that have lookup fields to other lists, otherwise the references can be incorrectly set.

##### Filter Options (Optional)

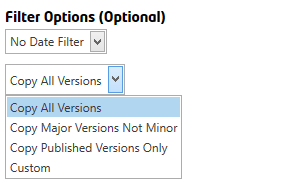
###### Date Filter

When SharePoint content is copied, you can filter results that are copied by Date Last Modified. For example, you may want to exclude old content that was not modified in the last 12 months.



###### Version Filter

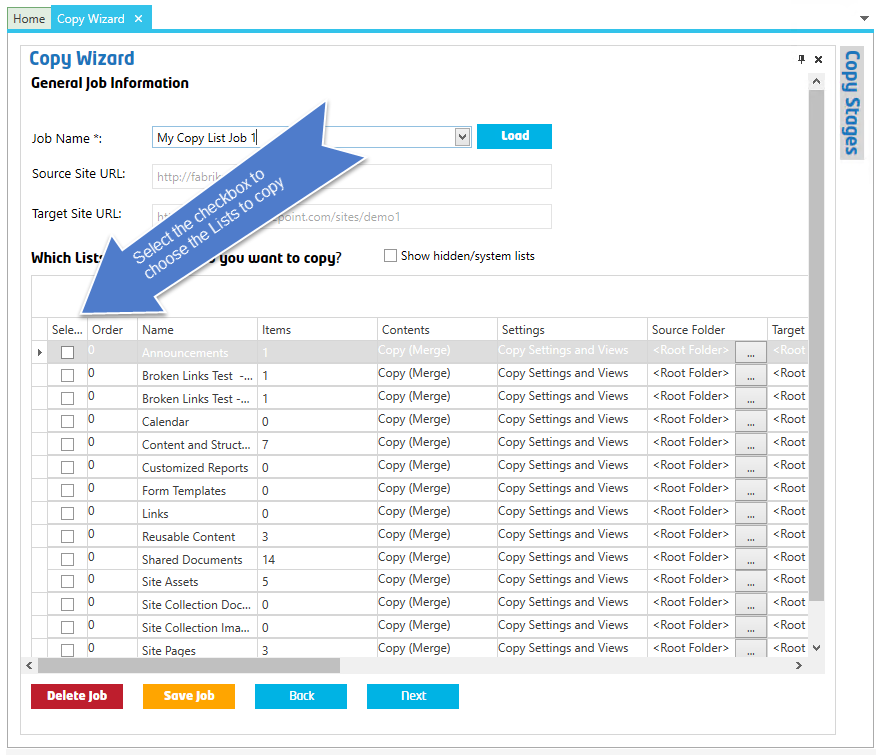
When SharePoint content is copied, you can choose if all versions will be copied over or if only certain versions should be copied, such as only Published versions.



### Step Four – Select Lists & Options

After clicking the “Next” button from previous page, you will be prompted with the window below.

From here you need to select the Lists & Libraries you want to copy (from the ‘source site’) to the ‘target site’.



#### List Level Options

Each List has several options you can choose from. Below are descriptions for each of these options.

##### Order

You can optionally set the order of when this List should be copied. You may want to change this value if there are Lists with Lookup Columns to other lists, so then you can ensure those lists are present as needed.

##### Name (Read Only)

This is the Name of the SharePoint List as found in the Source Site. This value is not editable and is only for informational purposes.

##### Items (Read Only)

This is the number of SharePoint List Items/Files/Folders, as found in the Source Site. This value is not editable and is only for informational purposes.

##### Contents

Select how you want to handle copy conflicts for list items. Such as if a file or web page with the same name exists in the target list.

You can choose from one of the following, the default is “Copy (Merge)”

**No**No items will not be copied, only the SharePoint List will be created.

**Copy (Overwrite)**If a file is found with the same name, the file will be OVERWRITTEN. If versioning is enabled on the target list, a new version will be created for the target list item. SharePoint Items that do not have a conflict will get copied to the target list.

Page Library files (aspx pages) – With this option, SharePoint Pages will be copied exactly as from Source, URLs within the page will be automatically fixed to match the target, ‘mirrored’. This can be useful if copying from a PRODUCTION Site to a STAGING Site for example, or if there are heavy customizations in the web page that need to be copied over. List View Web Parts will be added but you will receive an error “List does not exist in target’ if the List with the same List Name does not exist in the target Site. Using this option will usually detach the Web Page from the Site Definition.

**Copy (Merge) – Default Option**If a file is found with the same name, the file will not be updated. There will be no change in the target list item. You will see a warning in the Active Logs that the file already exists and was skipped. SharePoint Items that do not have a conflict will get copied to the target list.

Page Library files (aspx pages) – In most cases, you want to use this option. With this option, SharePoint Pages will be CREATED as NEW web pages in the target library, URLs within the page will be automatically fixed to match the target. Web Parts will automatically be added and recreated in the target web page. List View Web Parts will be added but you will receive an error “List does not exist in target’ if the List with the same List Name does not exist in the target Site. Using this option will NOT detach the Web Page from the Site Definition, however in some cases you will need to click “Revert to Site Definition” if prompted in the web page.

**Copy (Changes Only)**If a file is found with the same name, the file will only be OVERWRITTEN if the SOURCE List item has a ‘newer’ last modified date than the target list item found. There will be no change in the target list item if the target list item date is the same or newer. You will see a warning in the Active Logs that the file already exists and was skipped since the Last Modified Date is the same or newer than Source list item. SharePoint Items that do not have a conflict will get copied to the target list.

Page Library files (aspx pages) –With this option, SharePoint Pages will be CREATED as NEW web pages in the target library if they do NOT already exist and if the web page already exists, but is older than the source Last Modified Date. URLs within the page will be automatically fixed to match the target. Web Parts will automatically be added and recreated in the target web page. List View Web Parts will be added but you will receive an error “List does not exist in target’ if the List with the same List Name does not exist in the target Site. Using this option will NOT detach the Web Page from the Site Definition, however in some cases you will need to click “Revert to Site Definition” if prompted in the web page.

##### Settings

This option allows the user to copy the source List Settings and Views to the target.

You can choose from one of the following, the default is “Copy Settings and Views”

**No**Only the SharePoint List will be created; the Settings and Views will not be copied.

**Copy Settings**Only the SharePoint List Settings will be copied.

**Copy Views**Only the SharePoint List Views will be copied.

**Copy Settings and Views – Default Option**Both the SharePoint List Settings and Views will be copied.

##### Source Folder

You can choose if you want to copy List Items FROM a specified folder.

##### Target Folder

You can choose if you want to copy List Items TO a specified folder.

##### Include Sub Folders

You can choose if you want to include sub folders when copying from the source to target. If you select ‘No’, then all files and items will be copied from only the current folder in the source (specified in the ‘Source Folder’ column in the tool, see above).

##### Permissions

You can choose if you want to copy List Items permissions.

**Do Not Copy – Default Option**List permissions will NOT be copied from source to target.

**Copy (Overwrite)**List permissions will be copied from source to target. If the List has existing SharePoint Groups, Domain Groups or Users that exist with the same name in the target, they will be OVERWRITTEN with the object(s) in the source. Use this option if you want the target List to have exactly the same permissions as the Source.

**Copy (Merge)**List permissions will be copied from source to target. If the List has existing SharePoint Groups, Domain Groups or Users that exist with the same name in the target, they will be MERGED with the object(s) in the source.

##### Check In

You can choose if you want to automatically Check In List Items in the target list.

**No**List Items will NOT be Checked In. Only users who can see Drafts will be able to see these items in the target list. No major versions will be created for these new items if they do not exist in target.

**Major (Publish) – Default option**List Items will be Checked In as a Major (Published) version. If the item already exists in the target, a new Major (Published) version will be created.

**Minor**List Items will be Checked In as a Minor version. If the item already exists in the target, a new Minor version will be created.

##### Filter Items Using View

You can choose if you want to Filter Items that are being copied by specifying a SharePoint View from the drop-down list. The drop-down list will show you all available views for that List in the Source. By default, no View Filter is used.

##### Target List Name

You can specify a NEW List Title in the target site. To do this, simply rename the text value. By default, this will be the same List Name as from the source.

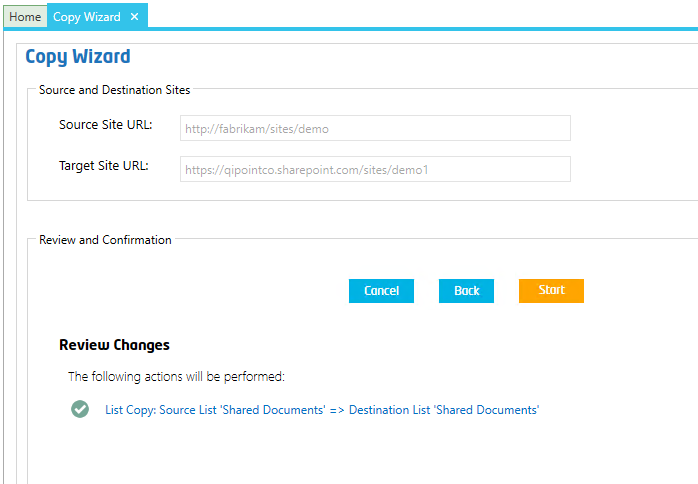
##### Target List Internal Name

You can specify a NEW Internal List Name in the target site. To do this, simply rename the text value. By default, this will be the same Internal List Name as from the source. The Internal List name is used in the URL of the list and other areas such as when filters or search queries are used.

### Step Five – Review & Start Job

From here you can review the changes to be made in the target site.

When ready Click Start.



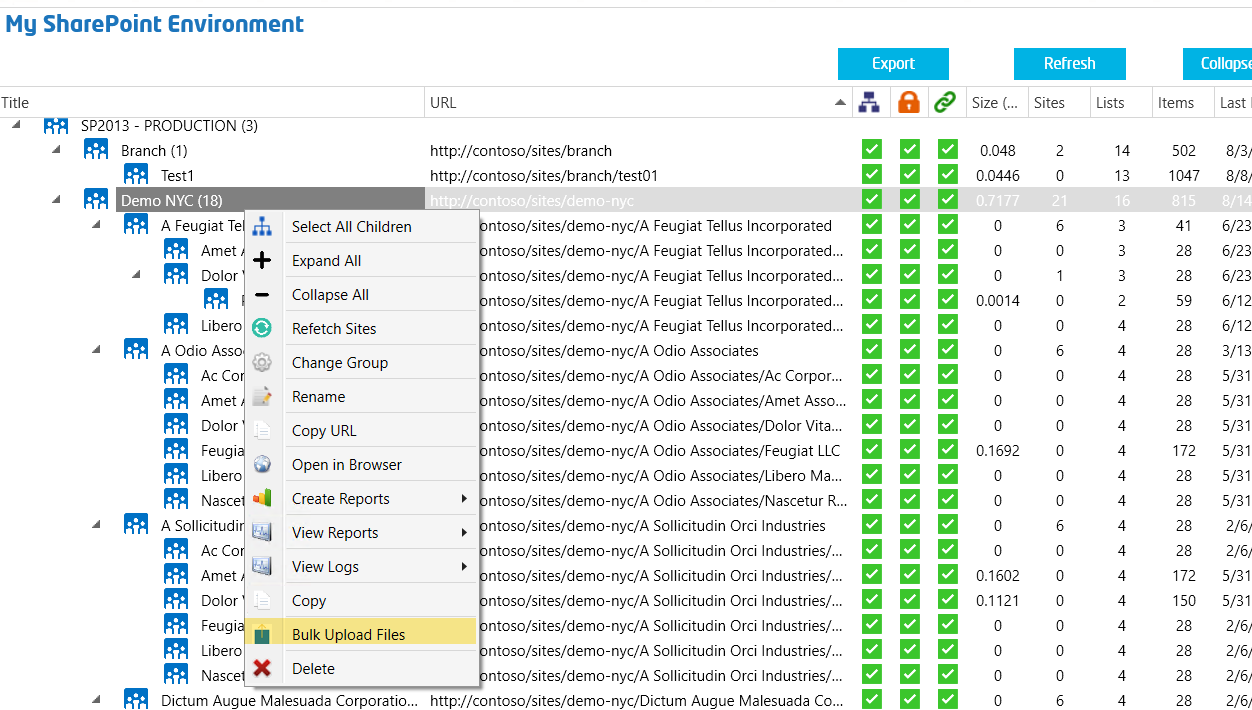
## Bulk Upload

### Getting Started

You can use this tool to bulk upload from file shares or from your desktop PC to SharePoint.

### Step One – Right Click and select ‘Bulk Upload’

From the Home Page Dashboard, right click on the site that you want to bulk upload files to.



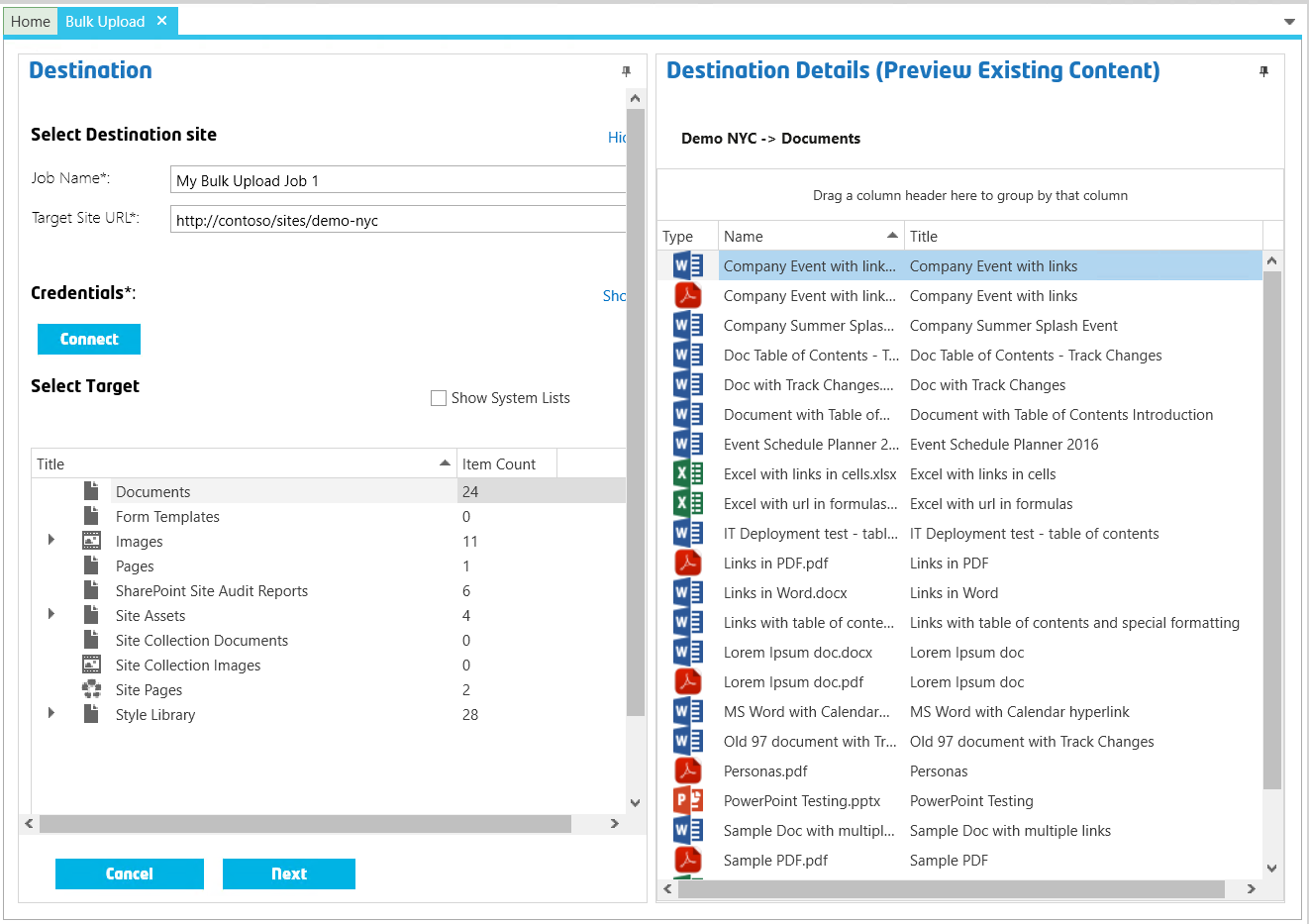
### Step Two –Click Connect and choose Target Library

You can now enter a unique Job Name or use the default option. Click Connect button to retrieve the SharePoint Lists from the site.

You should then be able to see a list of the Libraries that you can upload to in the target site.

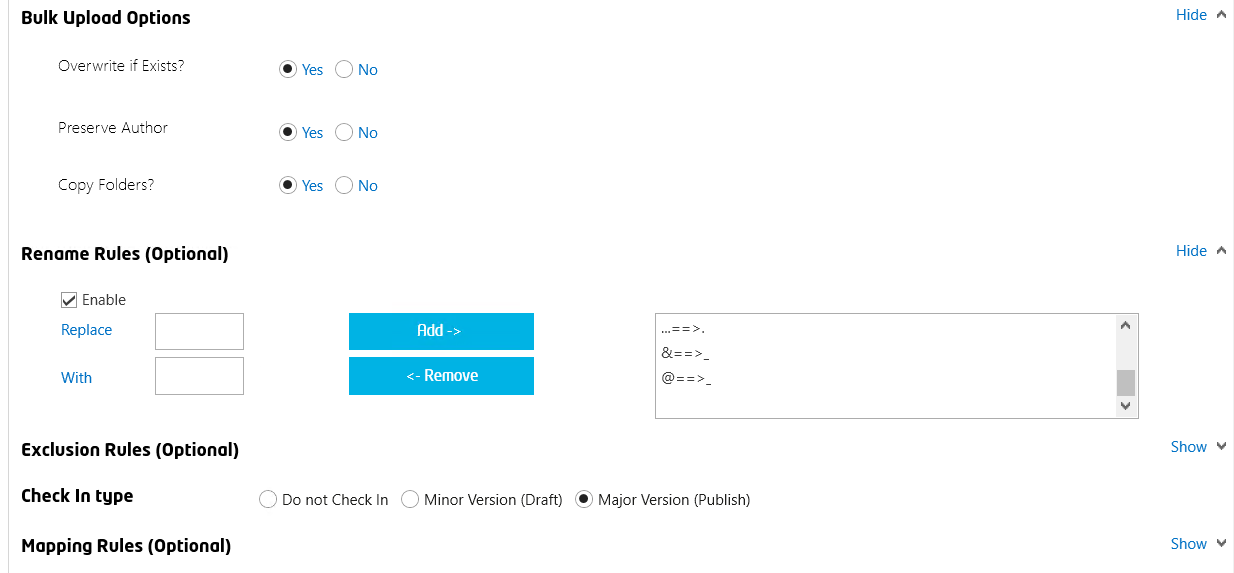
Select the Library or Folder within a Library to upload to. A preview of the files will be visible in the right-hand panel “Destination Details (Preview Existing Content)”.

Click “Next”



### Step Three - Choose Options

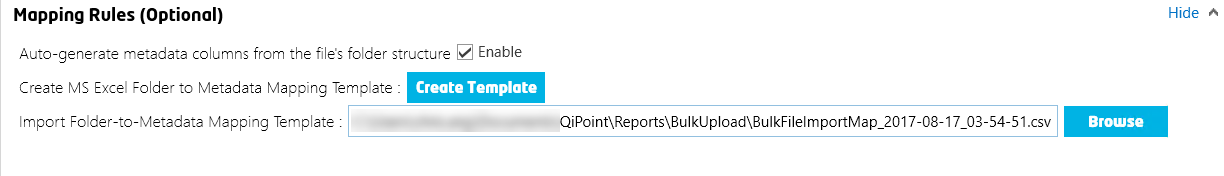
Select any options needed. You may use renaming rules to auto-replace invalid characters that would normally cause a ‘copy-paste’ to fail since SharePoint blocks certain file characters.



### Mapping Rules

You may use mapping rules to copy folder names to specific meta-data columns.

1. Drag and Drop files that you will be importing into the target site
2. Click ‘Create Template’ and the tool will automatically create a CSV file to be used to set meta-data for the files that are being imported.
3. Copy the path that appears in the textbox



1. Paste this path into Windows File Explorer to open the CSV file
2. The CSV file should open and you may begin updating the metadata to be set for each item. See below for a definition of the columns. Folder Names will be used in the path to try to populate the Item Metadata. If the SharePoint Column does not already exist in the target list, it will automatically be created by the tool.
3. Save the updated CSV

##### Mapping Rules CSV Columns

FilePath

Do not change: this is the physical path the tool uses to retrieve the files for uploading to SharePoint

NewFileName

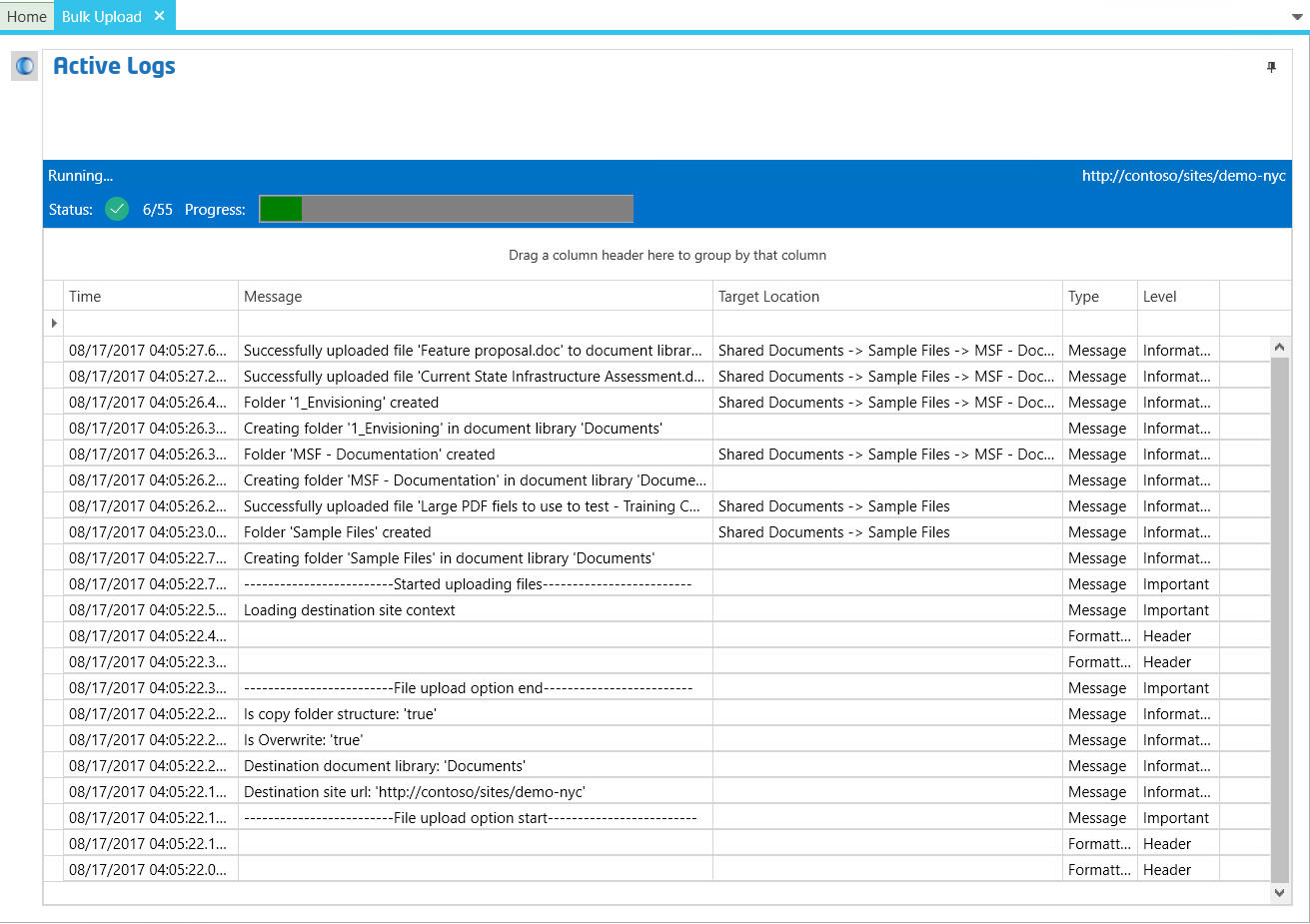
You may provide a new file name for the item here or leave it the same. The File Name will also be applied automatically to the ‘Title’ column.

Column[x]

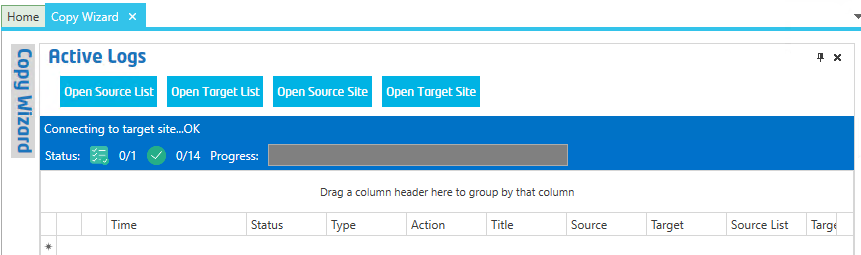
You must change the name of the column for the tool to update metadata, any column header in the CSV that begins with ColumnN (N being a number) will be skipped and not used for updating.

### Step Four - Click Upload

This will begin the file upload to SharePoint. You should see the progress in the Active Logs window. If there are any errors, they will appear in red.

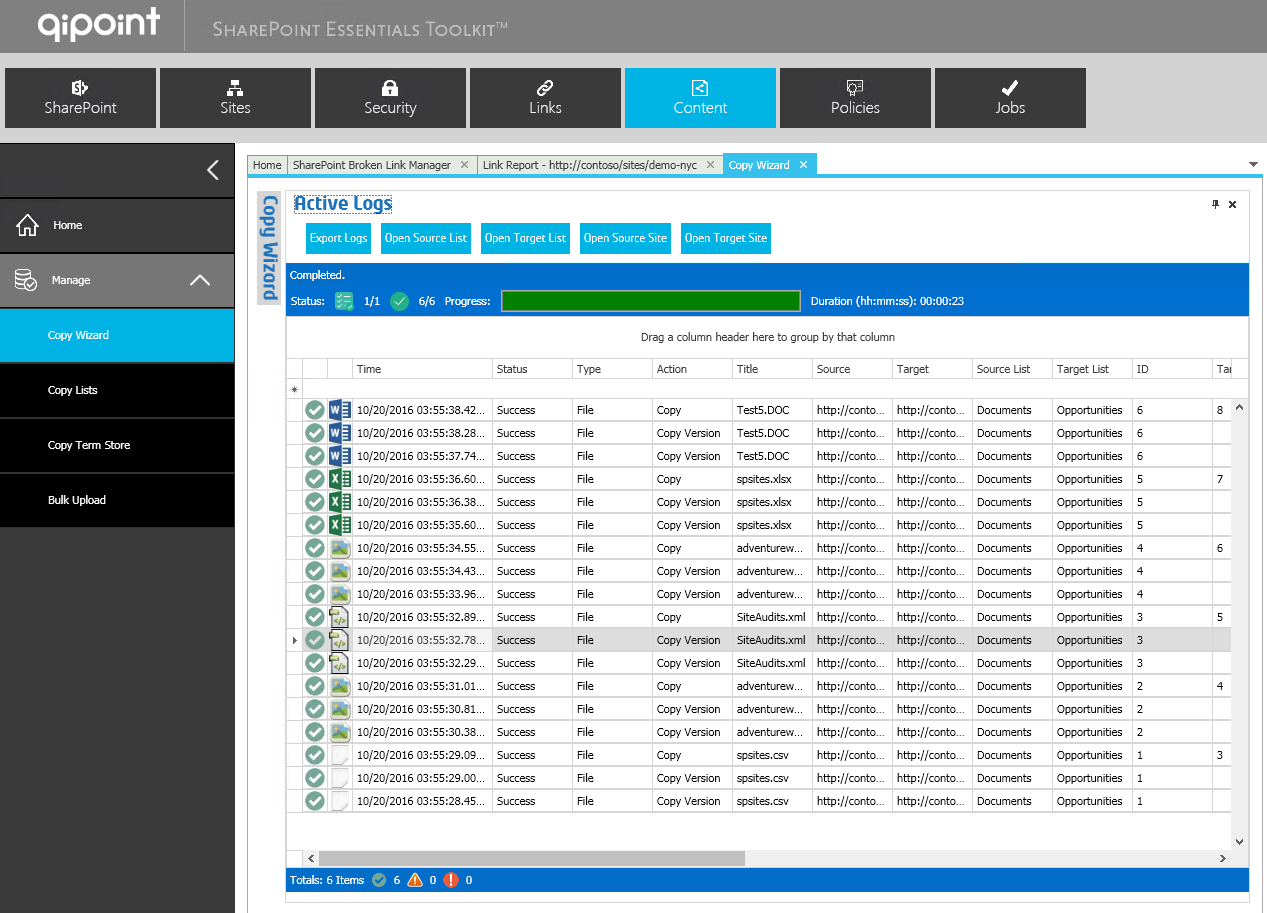


## Progress Bar & Job Logs



As the Job is running, a progress bar will indicate the number of SharePoint Lists remaining and the total number of items to be copied.

You will see the Active Logs populate with items as they are copied from Source to Target.



# Technical Support

If you need technical assistance, not to worry! We offer several ways to get in touch with our support team.

**Email:** [support@qipoint.com](mailto:support@qipoint.com)

**Phone:** 917-633-5998 opt. 1

**Online Support Ticket System:** <http://support@qipoint.com>

We are here to help!