

User Manual

SPList Export for SharePoint 2010



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1 About SPList Export for SharePoint 2010 (SPListX)

SPList Export for SharePoint 2010 (SPListX) is a powerful tool to export document / picture library / list contents and associated metadata to the Windows File System. SPListX tool exports SharePoint libraries, lists folders, documents, attachment version histories and metadata to the desired destination location. The software supports Microsoft SharePoint Foundation 2010 / Microsoft SharePoint Server 2010, Microsoft Office SharePoint Server 2007 / Windows SharePoint Services 3.0 environment and Microsoft SharePoint Portal Server 2003 / Windows SharePoint Services 2.0 environment.

The functional **benefits of using SPList Export** for SharePoint 2010 include:

- Provides a simple solution to export folders and documents along with their associated metadata
- Export files from different SharePoint libraries to file server or network shares
- Export attachments from different SharePoint list items to file server or network shares
- Export SharePoint libraries for offline viewing or backup / restore purposes
- Export folder / document / list item metadata in multiple file formats for easy viewing, re-import to another DMS or perform an in-depth analysis
- Propagates original Created Date & Last Modified Date in SharePoint to the file system fields for each folder / document
- Automate export tasks through command-line or Windows Task Scheduler interface
- Perform the export process based on the line entries in the batch descriptor file
- Export files, list items and attachments based on SharePoint search results

1.1 Technical Support

Please send all Technical Support questions to support@vyapin.com.

Please send us the following additional information if you are reporting a problem:

- 1) Versions of SPListX that you are evaluating or you have registered with us. Version information could be found in the "About" Screen and in "Help".
- 2) Additional services or resource consuming processes/applications (like anti-virus) running in the background on SPListX installed machine as well as the source MOSS / WSS and destination.
- 3) Hardware configuration of the machine where SPListX and MOSS / WSS is installed.
- 4) 'Service Pack' version of Windows Server & MOSS / WSS running currently.
- 5) Send us the "SPListXErrorLog.txt" available in the installation path of SPListX (e.g., **<Application Data Folder> \SPListX\Log**).

While running a task, a set of files (ActivityLog.txt, ActivityErrors.txt, MetadataErrors.txt and SPListXErrorLog.txt) will be generated under the respective task folder in History folder, available in the installation path of SPListX (e.g., <Application Data Folder> \SPListX\TaskHistory\<taskname>\<timestamp>).

NOTE: **<Application Data Folder>** is the common area where SPListX tasks and task history will be stored in the machine running SPListX. The **<Application Data Folder>** specified at the time of installing SPListX can be found from the **Help -> About** screen. The default path of **<Application Data Folder>** is as follows:

- a) Windows XP, Windows Server 2003 - C:\Documents and Settings\All Users\Documents
- b) Windows 7/ Vista, Windows Server 2008 - C:\Users\Public\Documents

1.2 System requirements

For the computers running by SPListX

- **Hardware:** Intel Pentium processor, 10 MB disk space to install SPListX
- **Software:** - Windows 7 / Vista / XP (or) Windows Server 2008 / 2003 with the latest service packs and .NET Framework 2.0 or higher

1.3 How to Activate the Software?

Once you purchase the software online or through any one of our resellers, you will receive a sale notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to activate the software.

In case you do not receive an e-mail from our sales team after you purchase the software, please send the following information to our sales department at sales@vyapin.com with the sales order number:

- **Company Name:** End-user Company Name
- **Location:** City & Country for the Company Name given above

Please allow 12 to 24 hours from the time of purchase for our sales department to process your orders.

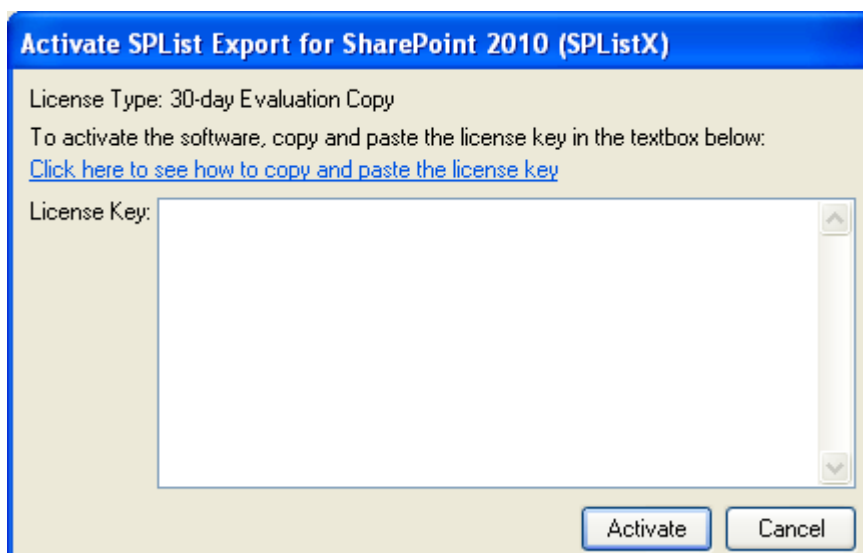


Image 1 - Activate screen

CHAPTER 1 – About SPList Export for SharePoint 2010 (SPListX)

Perform the following steps to activate the software:

- 1) Download evaluation/trial copy of software from the respective product page available in our website at <http://www.vyapin.com/>
- 2) Install the software on the desired computer.
- 3) You will receive a license key through e-mail as soon as the purchase process is complete.
- 4) Click 'Activate' in Help -> About -> Activate menu to see the Activate dialog (as shown in Image 1).
- 5) Please Copy the license key sent to you through email, and pastes it in the 'License Key' textbox. For help on how to copy the license key, click 'Click here to see how to copy and paste the license key' link in the Activate dialog (as shown in Image 2).

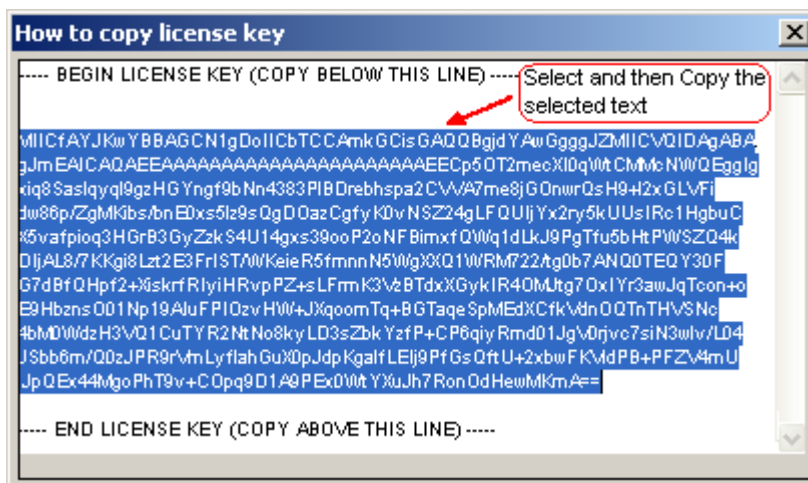


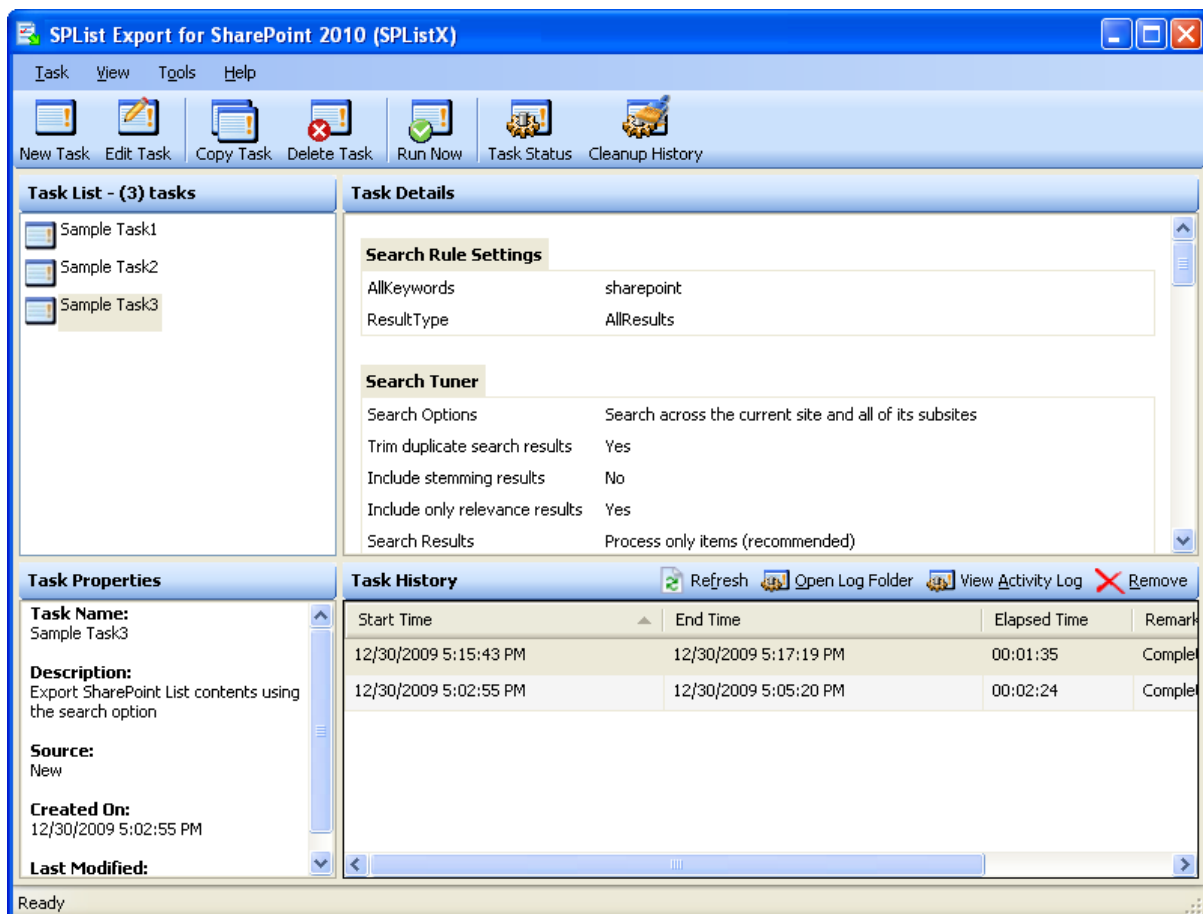
Image 2 - How to copy license key screen

Chapter 2

2 SPListX Features

2.1 Task Manager

SPListX creates export tasks for export process setup to export documents, list items and metadata from SharePoint to file system. SPListX Task Manager in the main application window will help you manage SPListX export tasks and their corresponding task history. SPListX Task Manager provides menu and tools to work with the tasks easily.



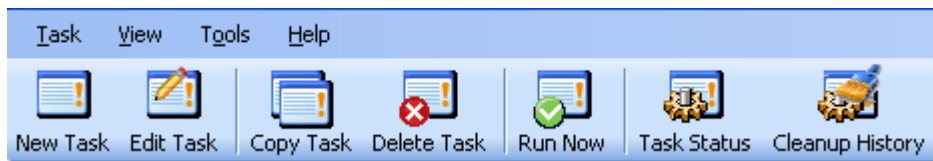
SPListX Task Manager contains a standard menu bar and toolbar along with four panes to manage SPListX export task effectively:

CHAPTER 2 – SPListX Features

- 1) Task List pane
- 2) Task Properties pane
- 3) Task Details pane
- 4) Task History pane

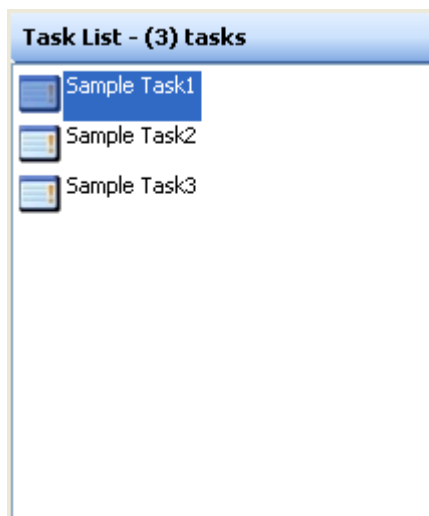
Standard menu bar and toolbar

Standard menu bar and toolbar contain all the commands (or actions) to work with a SPListX export task.



Task List:

Task List pane contains all export tasks created by the user. Task related operations such as Edit Task, Copy Task, Delete Task and Run Now can be performed based on the selected task in the Task List pane. The remaining panes will change their content based on the selected task. Total task count will be displayed at the top of the banner.



Task Properties:

Task Properties pane displays the information about the currently selected task in Task List pane. It provides information about Task Name, Task Type, Created On and Last Modified On. If the currently selected task is setup to run using a Windows Scheduled Task (setup to run at a scheduled time), then the Task Properties adds additional information about schedule task such as run as and last Run status etc.

CHAPTER 2 – SPListX Features

Task Properties	
Task Name:	Sample Task1
Description:	Export SharePoint List contents using the browse option
Source:	New
Created On:	12/30/2009 4:42:00 PM
Last Modified:	12/30/2009 4:54:41 PM

Task Details:





Task Details pane displays the task settings about currently selected task in Task List pane.

Task Details	
Site Settings	
URL	http://rd81:9002
User Option	Use currently logged on user
Search Tuner	
Search Options	Search across the current site and all of its subsites
Trim duplicate search results	Yes
Include stemming results	No
Include only relevance results	Yes
Search Results	Process only items (recommended)
Export Options	
Export Options	Export list contents and metadata
Creates full destination folder path from	Yes

Task History:

Task History pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.

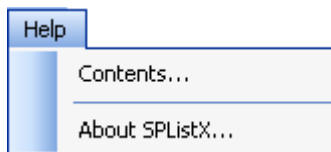
CHAPTER 2 – SPListX Features

Task History				 Refresh	 Open Log Folder	 View Activity Log	 Remove
Start Time	End Time	Elapsed Time	Remarks				
12/30/2009 4:42:01 PM	12/30/2009 4:42:17 PM	00:00:16	Completed successfully				
12/30/2009 4:54:42 PM	12/30/2009 4:54:46 PM	00:00:04	Incomplete: refer activity log				
12/30/2009 4:54:50 PM	12/30/2009 4:55:13 PM	00:00:22	Terminated: canceled by user				

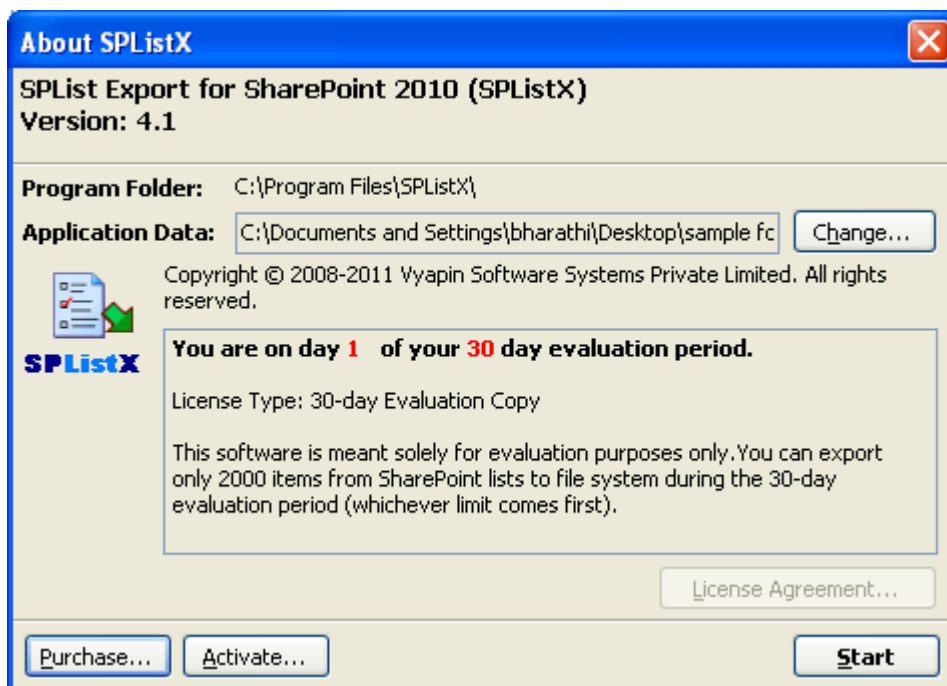
2.2 Change Application Data Folder Location

SPListX enables you to change **Application Data** folder location, where SPListX export tasks and related settings, activity logs and error logs are stored, at any time after installing SPListX software. To change the Application Data folder location, perform the following steps given below:

1. Select **About SPListX** from **Help** menu

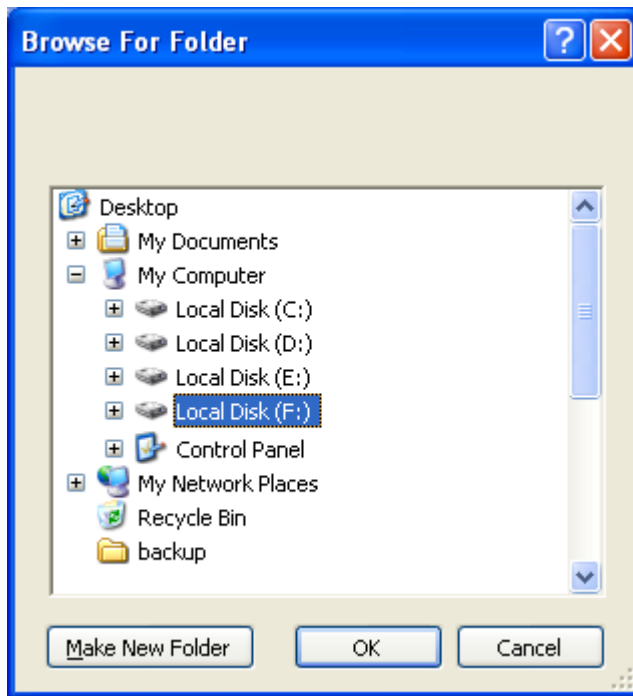


2. The **About SPListX** dialog appears as shown below:

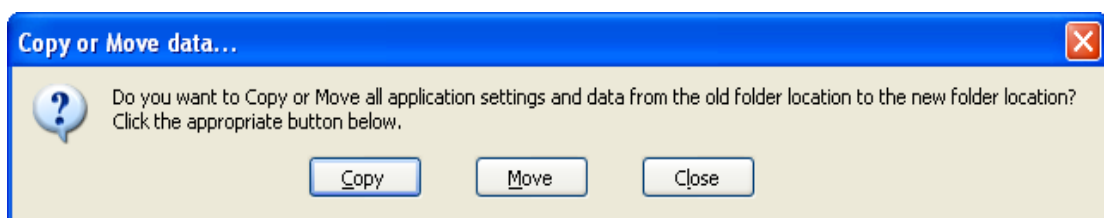


3. Click **Change...** button to change **Application Data** folder location of SPListX application. The Browse for Folder location dialog will appear as shown below:

CHAPTER 2 – SPListX Features



4. Select a desired folder location and Click OK. The folder location can be local drives or mapped network drives.
5. SPListX provides an option to copy or move the existing SPListX application settings (SPListX export task settings, task histories, activity logs, error logs etc.) to the new location once you change the Application Data Folder. Once you specify the new Application Data folder location, SPListX will prompt you to copy or move existing SPListX application settings to the new location as shown below:



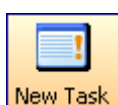
6. Click the desired action (Copy / Move / Close) to proceed. SPListX will use the new Application Data folder location henceforth.

2.3 Create new Task

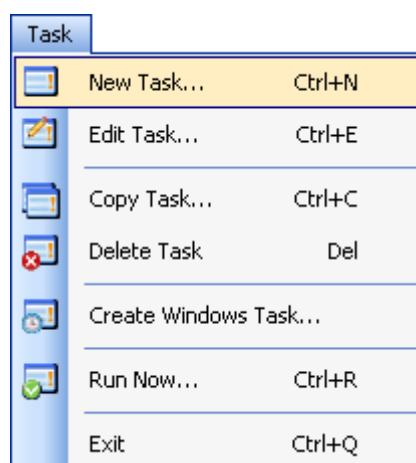
You can create a task to export folders, files, list items including attachments along with their metadata from SharePoint list to file system or network share. SPListX facilitates exporting files, list item attachments and its associated metadata from SharePoint list using the following export methods (or task types):

- A. Export SharePoint List contents using the browse option:** Export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
- B. Export SharePoint List contents using a batch descriptor file:** Export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
- C. Export SharePoint List contents using the search option:** Export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint search results.

1) Click **New Task** from SPListX main screen.

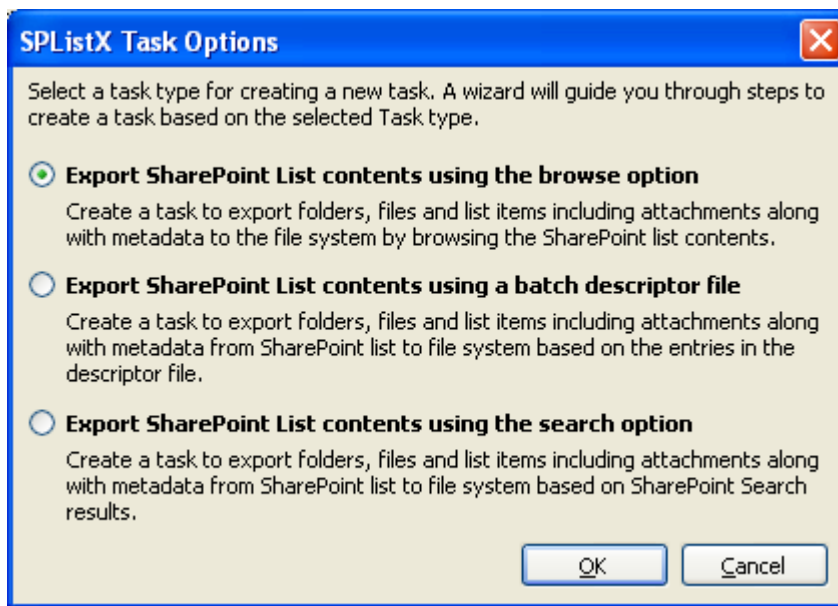


Or Select **New Task** from **Task** menu



Or Press Ctrl+N

- 2) Select a task type in **New Task** dialog and click **OK**.

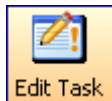


- a) Create a task to **Export SharePoint List contents using the browse option**
- b) Create a task to **Export SharePoint List contents using a batch descriptor file**
- c) Create a task to **Export SharePoint List contents using the search option**

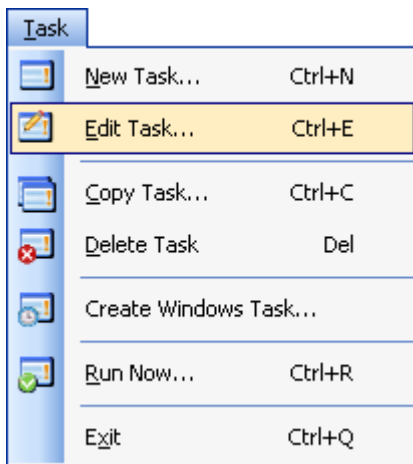
2.4 Edit an existing task - (Edit Task)

To edit an existing task:

- 1) Select a task in the **Task List** pane.
- 2) Click **Edit Task** from SPListX main screen.



Or Select **Edit Task** from **Task** menu



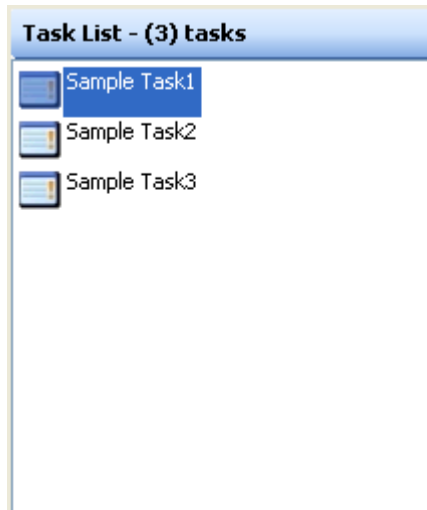
Or Press Ctrl+E

- 2) **SPListX Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.
 - a) Edit **Export SharePoint List contents using the browse option**
 - b) Edit **Export SharePoint List contents using a batch descriptor file**
 - c) Edit **Export SharePoint List contents using the search option**

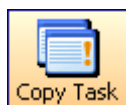
2.5 Copy an existing task

To copy or create a new task from an existing SPlistX export task:

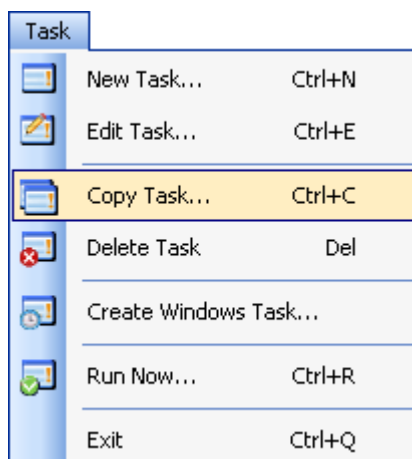
- 1) Select a task from the **Task List** pane.



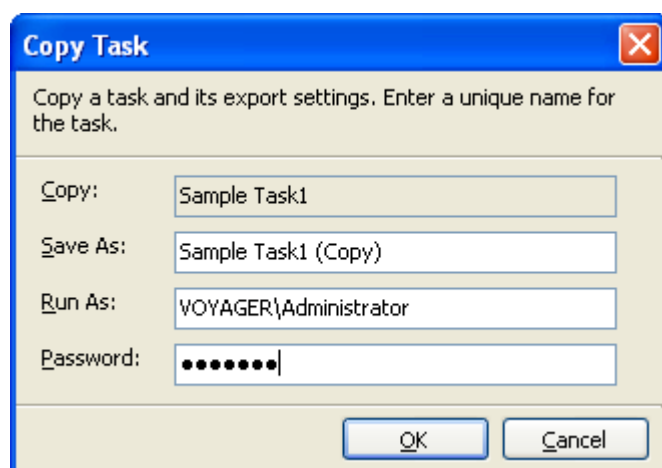
- 2) Click **Copy Task** from SPlistX main screen.



Or Select **Copy Task** from **Task** menu



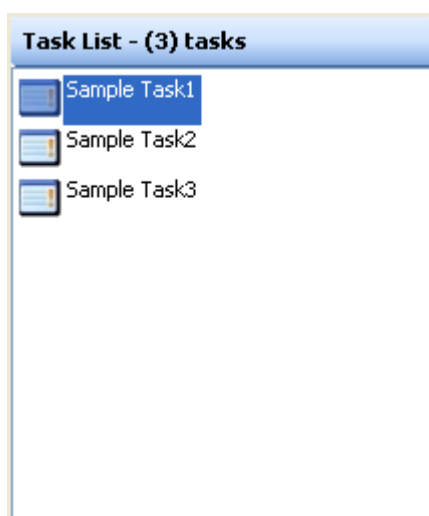
- 3) In **Copy Task** dialog, enter a new task name in **Save As** text-box; specify a **Run As** account and **Password** (if applicable) and Click **OK** to create a new task with the same export settings specified in the selected task.



2.6 Delete an existing task

To delete a SPListX export task:

- 1) Select a task from **Task List** pane.

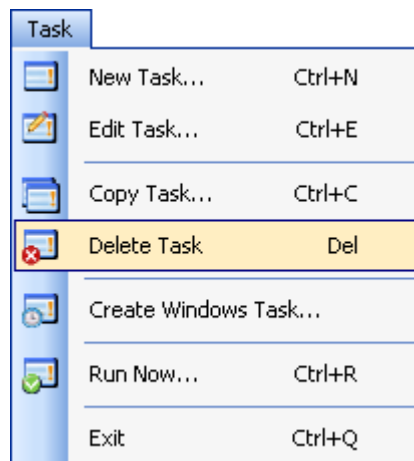


- 2) Click **Delete Task** from SPListX main screen.



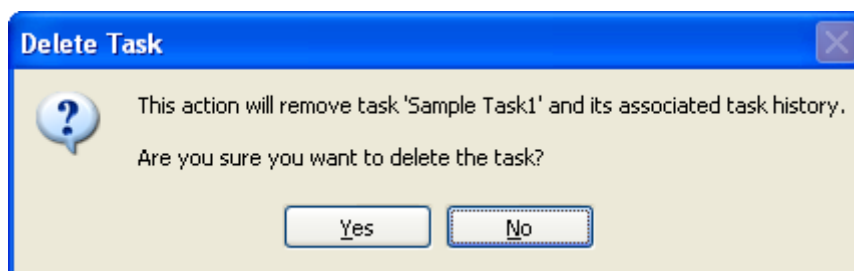
CHAPTER 2 – SPListX Features

Or Select **Delete Task** from **Task** menu



Or Press **Del** key

3) Click **Yes** in **Delete Task** message-box shown below:

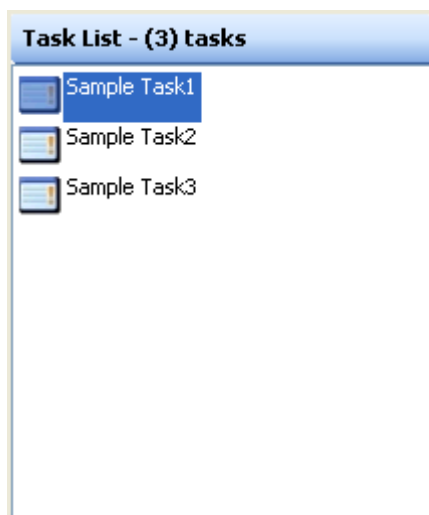


NOTE: Deleting a task will permanently delete the selected task and its task history items.

2.7 Run a task

SPListX 'Run Now' feature allows the user to instantiate a task anytime after the task has been created. To run a SPListX export task:

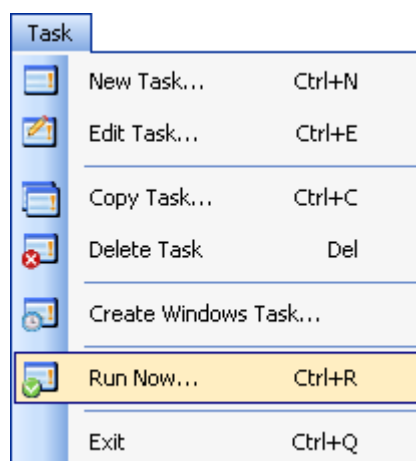
- 1) Select a task from **Task List** pane.



- 2) Click **Run Now** from SPListX main screen.



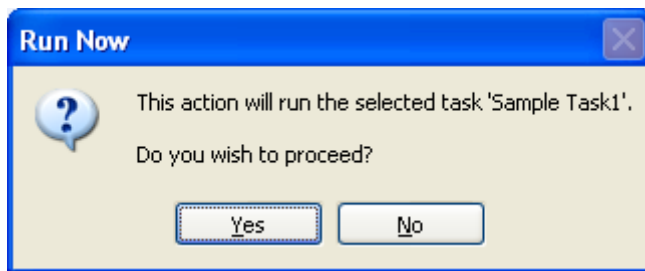
Or Select **Run Now** from **Task** menu



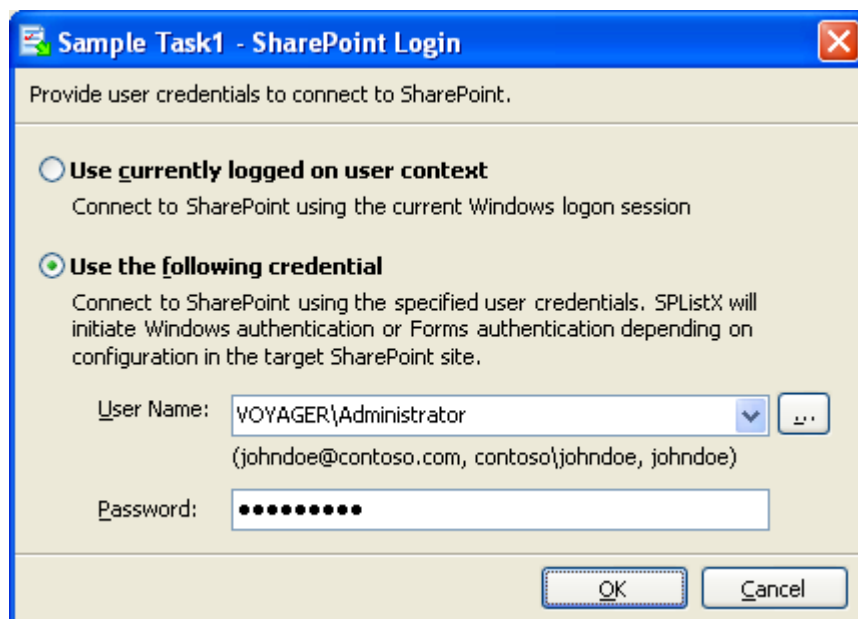
Or Press Ctrl+R Key

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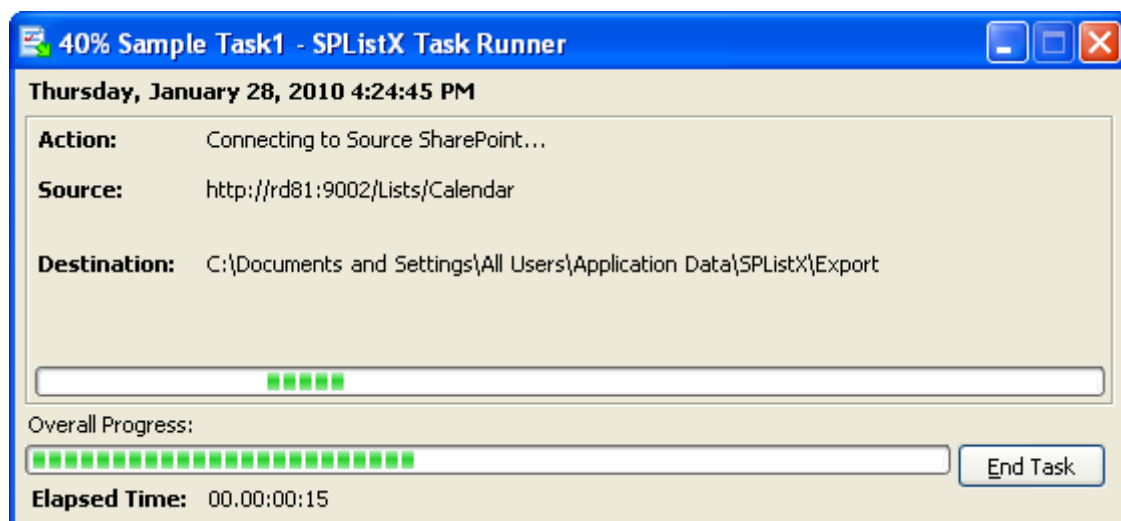
- 3) Click **Yes** in **Run Now** confirmation message box shown below:



- 4) The **Credential Dialog** will appear as shown below. The given credential will be used to connect to the SharePoint site.



- 5) The current process of task will be reported in a new dialog as shown below:



- 6) Once the export task is complete, a new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

2.8 Run a Task from Command Line

SPListX command line feature allows the user to instantiate a task from DOS command prompt anytime after an export task has been created using SPListX' s task wizard.

To run a SPListX export task from command line:

1) Usage:

***SPListX TaskRunner <task name> [/profile: user name] [/u: user name]
[/p: password] [/noprompt]***

Where,

SPListX TaskRunner	Name of the SPListX Task Runner application, Specify absolute path where the SPListX TaskRunner located.
--------------------	--

For example:

C:\Program Files\SPListX\SPListX TaskRunner

Task name:	Name of the SPListX Task to run from DOS command prompt, enclose the task name in double quotes.
------------	--

For example:

"Sample Task1"

/Profile	Denotes profile name stored in the current user context using SPListX' s Profile Manager, in which SPListX task must be run. Enclose the user name in double quotes.
----------	--

For example:

"/profile: voyager \admin user"

"/profile: Contoso\johndoe"

"/profile:johndoe@contoso.com"

"/profile: johndoe"

CHAPTER 2 – SPListX Features

/u Denotes user name context in which SPListX task must be run in the domain\username format. Enclose the user name in double quotes.

For example:

"/voyager\administrator"

"/u: Contoso\johndoe"

"/u:johndoe@contoso.com"

"/johndoe"

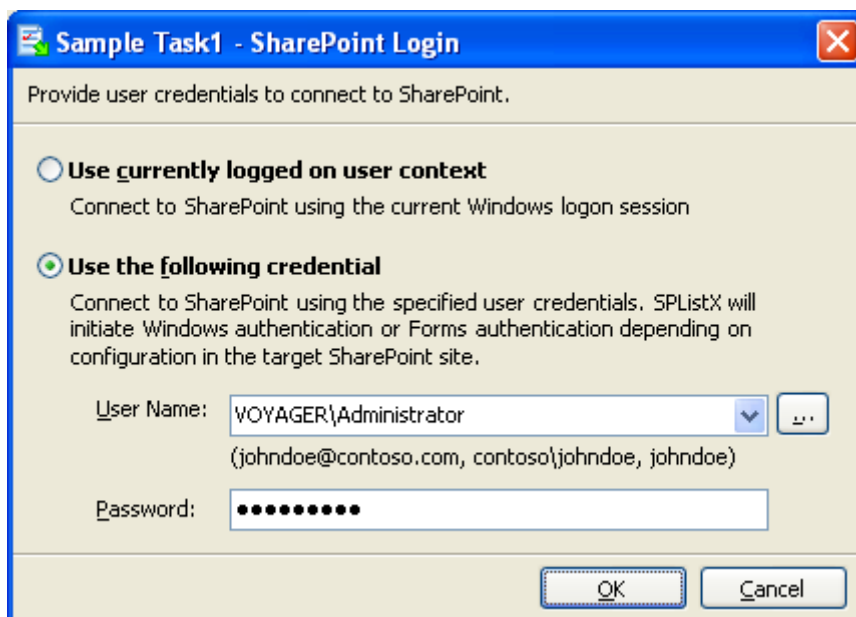
/p Denotes the password for the user name specified in /u parameter. Enclose the password in double quotes.

For example:

"/p: 2ab45fb"

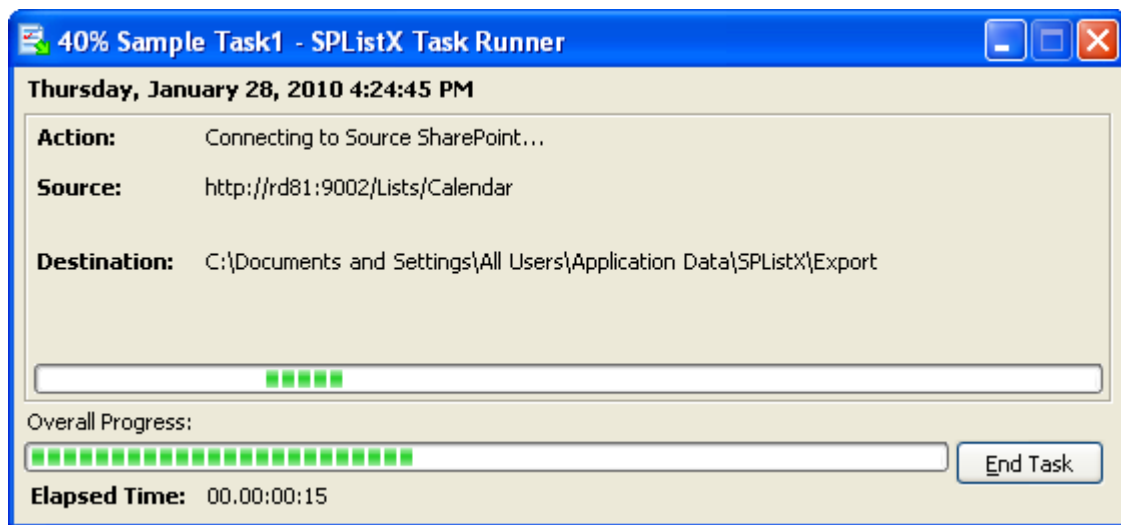
/noprompt This optional flag suppresses SPListX's login dialog prompt to enter user credentials to connect to SharePoint

- 2) If **/noprompt** flag is not used, then the **Credential Dialog** will appear as shown below. The given credential will be used to connect to SharePoint.



CHAPTER 2 – SPListX Features

- 3) The export task will be reported in a new dialog as shown below:



- 4) Once the export task is complete, click **Refresh** button available in **Task History** pane in SPListX main application. A new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

Examples of invoking an export task from the command prompt:

```
C:\Program Files\SPListX> SPListXTaskRunner "mytask1" "/u:
voyager\administrator" "/p: 2az" /noprompt
```

```
C:\Program Files\SPListX> SPListXTaskRunner "Sample Task1" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

```
C:\Program Files\SPListX> SPListXTaskRunner "Sample Task2" "/profile:
voyager\adminuser" /noprompt
```

```
D:\>"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

```
D:\>"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

DOS batch file examples:

- To execute SPListX task one by one from a batch file:

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task1"
"/u:johndoe@contoso.com" "/p: test" /noprompt
```

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task2" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

CHAPTER 2 – SPListX Features

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3"
"/u:johndoe@contoso.com" "/p: test" /noprompt "C:\Program
Files\SPListX\SPListXTaskRunner" "Sample Task4"
"/profile:johndoe@contoso.com" /noprompt
```

- To execute multiple SPListX tasks simultaneously:

```
start "cmd" "C:\Program Files\SPListX\SPListXTaskRunner" "Sample
Task1" "/u: voyager\user1" "/p: ctest1" /noprompt
```

```
start "cmd" "C:\Program Files\SPListX\SPListXTaskRunner" "Sample
Task2" "/u: voyager\user2" "/p: ctest2" /noprompt
```

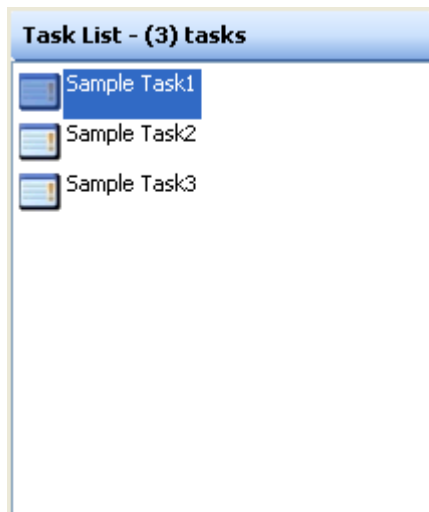
2.9 Create Windows Task

Use this tool to create a Windows Task in Windows Task Scheduler interface to automatically run the export tasks at scheduled intervals.

This tool helps you to re-create the Windows Schedule Task in the following two scenarios:

- To create Windows Schedule Task that was accidentally deleted and is required to be created again with the same schedule settings
- To create Windows Schedule Task when the SPListX export tasks are migrated from an old machine to a new machine

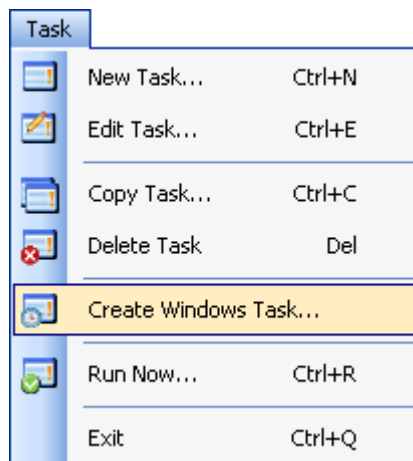
1) Select a task from the **Task List** pane



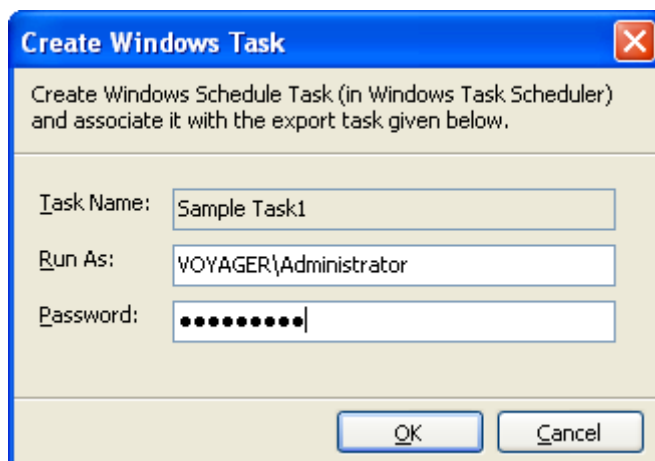
2) If SPListX has enough information about the required Windows Schedule Task, the **Create Windows Task** option will be enabled.

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Select **Create Windows Task** from **Task** menu



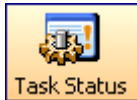
- 3) In **Create Windows Task** dialog, specify a **Run As** account and **Password** and Click **OK** to create a new schedule task with the same schedule settings that was previously saved by SPListX Export Task Wizard.



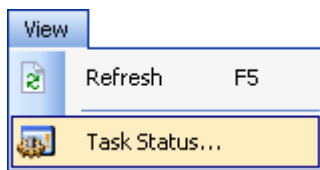
2.10 Task Status

To view and manage task status of a selected task:

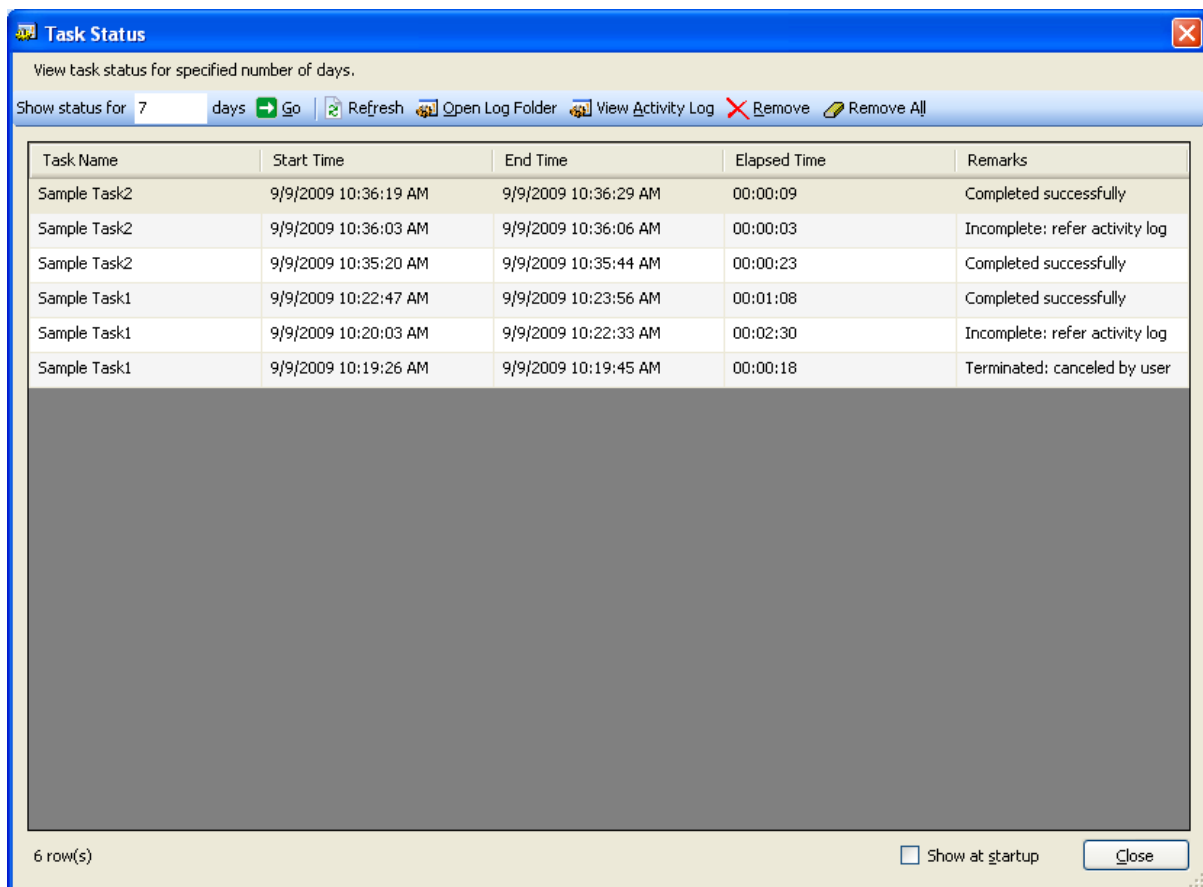
- 1) Click **Task Status** from SPListX main screen.



Or Select **Task Status** from **Tools** menu



- 2) The **Task Status** dialog appears as shown below:



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- 3) Show status for <n> days:** Upon clicking Go button, displays task history entries of all tasks that were run within the specified number of days.
- 4) Refresh:** Reloads the task history entries and updates the newly run tasks (if any).
- 5) View activity log:** Displays activity log of the currently selected task history item.
- 6) Remove:** Removes the currently selected task history entry and its associated log folders and files.
- 7) Remove all:** Removes all task history entries and their associated log folders and files that are currently displayed.
- 8) Click Close** button to close this window.

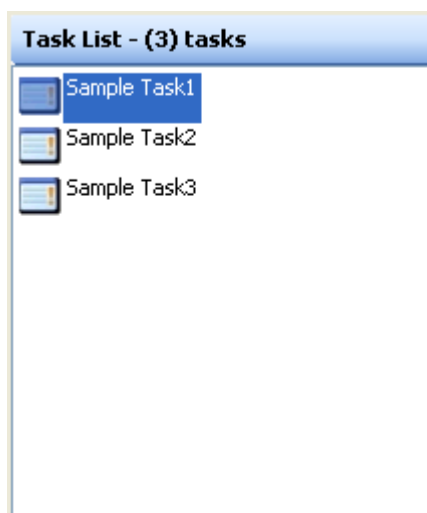
2.11 Task History

When an export task is run in SPListX, the task export information is maintained in the 'TaskHistory' folder. The task history information can be seen at right-bottom of SPListX application's main window.

Task History			
Refresh Open Log Folder View Activity Log Remove			
Start Time	End Time	Elapsed Time	Remarks
12/30/2009 4:42:01 PM	12/30/2009 4:42:17 PM	00:00:16	Completed successfully
12/30/2009 4:54:42 PM	12/30/2009 4:54:46 PM	00:00:04	Incomplete: refer activity log
12/30/2009 4:54:50 PM	12/30/2009 4:55:13 PM	00:00:22	Terminated: canceled by user

To view task history of a particular task:

- 1) Select a task from **Task List** pane.



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- 2) The history of task will be displayed at right-bottom of SPListX main window as shown below.

Task History			
Refresh Open Log Folder View Activity Log Remove			
Start Time	End Time	Elapsed Time	Remarks
12/30/2009 4:42:01 PM	12/30/2009 4:42:17 PM	00:00:16	Completed successfully
12/30/2009 4:54:42 PM	12/30/2009 4:54:46 PM	00:00:04	Incomplete: refer activity log
12/30/2009 4:54:50 PM	12/30/2009 4:55:13 PM	00:00:22	Terminated: canceled by user

Where

Start Time -> Date and Time a task was initiated.

End Time -> Date and Time a task completed its export process

Elapsed Time -> Total time (hh:mm:ss) a task has taken to complete its export process.

Remarks -> Brief remark about the status of export.

Possible Remarks	Description
Completed Successfully	Export process was completed successfully without any errors
Incomplete: refer activity log	Export process encountered certain errors as described in the activity log
Incomplete: Eval limit reached	Export process reached the maximum allowed number of files to export in evaluation / trial version. This message is applicable for evaluation / trial version only.
Terminated: Cancelled by User	Export Process was cancelled by the User.

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Terminated abnormally	The Export Process was abnormally terminated/killed.
Failed: the following error occurred while creating activity log.	The export process could not be initiated as there were issues in creating the activity log files and initiating the export process.

The following operations can be performed on Task history items:

- **View activity log**
- **Remove a task history item**
- **Manage task status**
- **Cleanup history**

2.12 Profile Manager

Use this tool to create a user profile in **Windows Stored User Names and Passwords** applet / **Credential Manager**, in order to specify the user context to run SPListX export tasks. The stored user profile will be very useful when you are trying to perform the following export tasks in scheduled manner using SPListX:

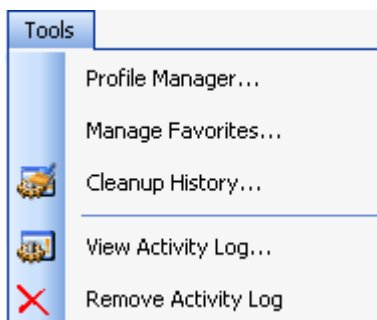
- Exporting contents between two different Windows Domain Forest
- Exporting contents from SharePoint residing in completely disconnected / untrusted Windows Domain
- Exporting contents using Laptop / PC that is not part of the SharePoint domain
- Exporting contents using Forms Based Authentication (FBA)

The stored user profile persists for all subsequent logon sessions on the same computer where SPListX is installed. The stored user profiles are visible to other logon sessions on the same computer.

The stored user profile created by using SPListX Profile Manager is restricted to the Windows user profile context used to create the stored user profile. If the Windows User Profile is maintained locally, SPListX stored user profile is accessible only by the same user in the same computer. If the user, who creates SPListX stored user profile, has a Roaming user account in the enterprise, the SPListX stored user profile can be accessed by the same user in any computer in the Windows enterprise.

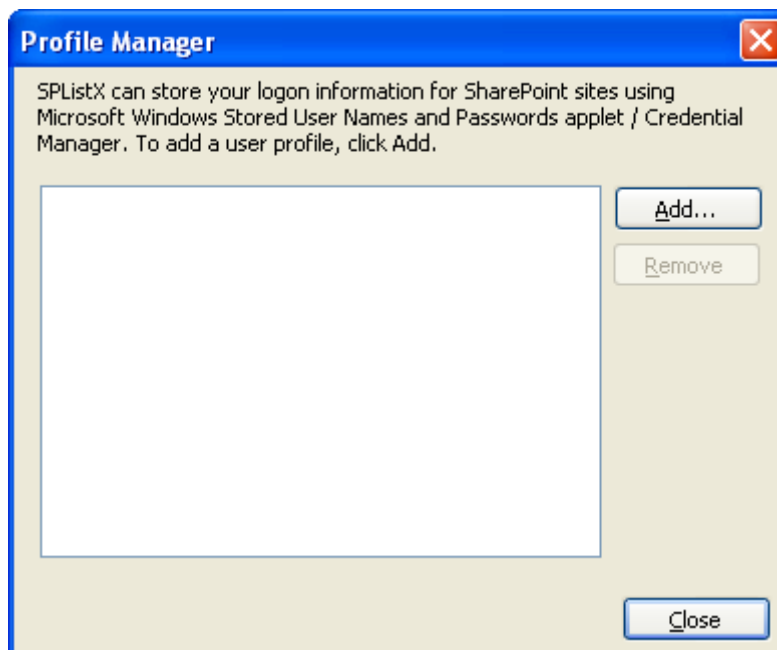
The stored user profile is a generic credential of **Windows Stored User Names and Passwords** applet / **Credential Manager** and can be used by SPListX application only. The credential information is stored securely in an 256 bit encrypted format in **Windows Stored User Names and Passwords applet / Credential Manager**.

- 1) In order to create a SPListX stored user profile, select **Profile Manager** from **Tools** menu.



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2) The **Profile Manager** dialog will be shown as below:



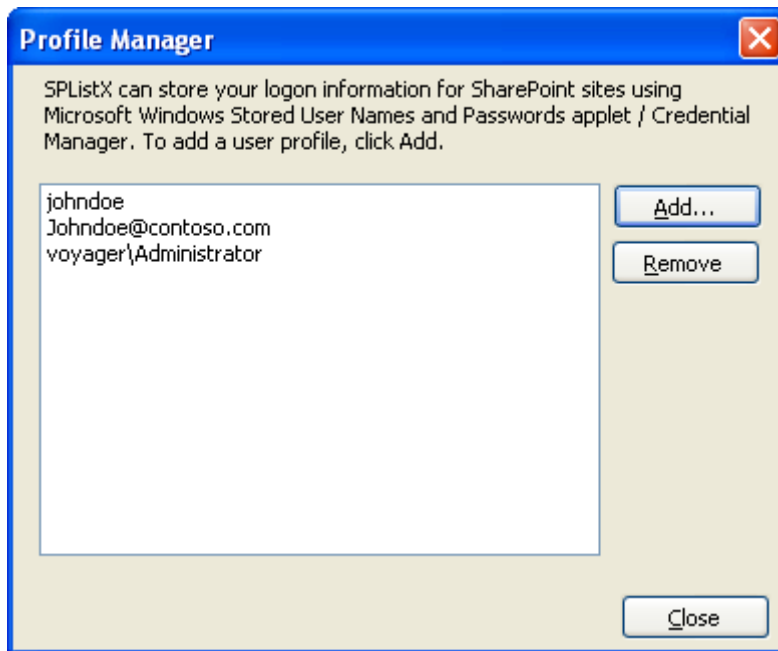
3) In order to add user profile, click **Add** button and provide user information in the **New User Profile** as shown below:



Click **OK**

CHAPTER 2 – SPListX Features

- 4) The newly added user profile will be shown in the **Profile Manager** as below:



Henceforth, the stored user profile can be used as credential input in SPListX application in order to connect to the SharePoint environment.

- 5) Click **Close** button to close the **Profile Manager** dialog.

Additional References:

Behavior of stored user names and passwords

<http://support.microsoft.com/kb/281660>

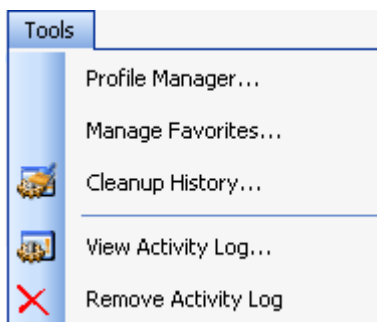
Stored User Name and Password Best practices

[http://technet.microsoft.com/en-us/library/cc784749 \(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc784749 (WS.10).aspx)

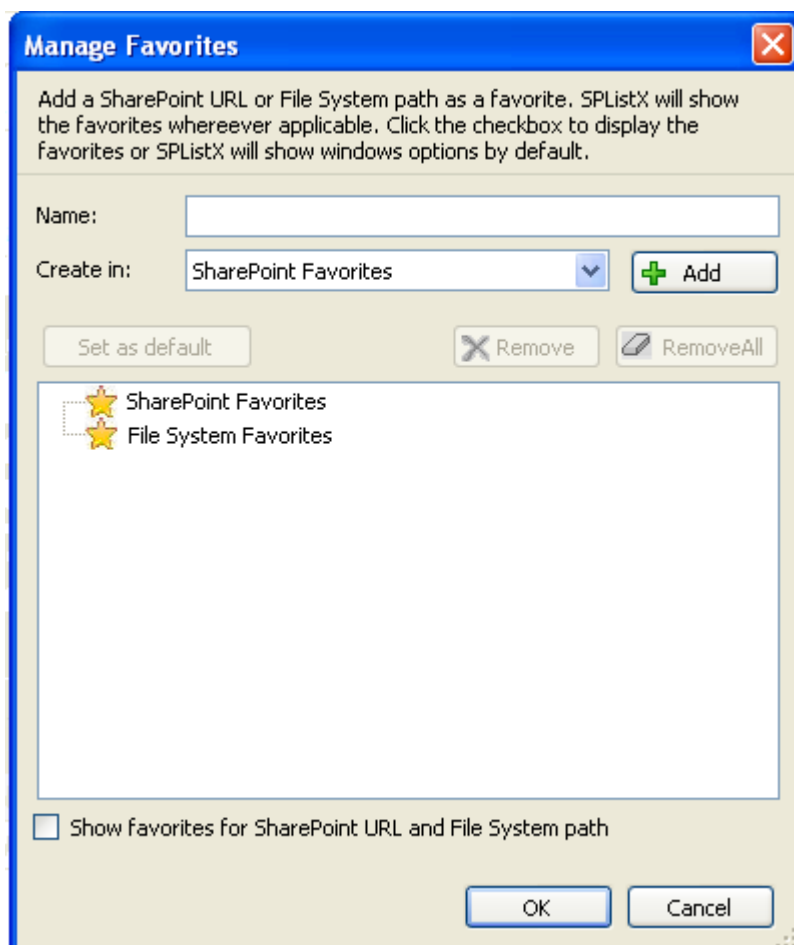
2.13 Manage Favorites

Use this tool to add frequently used SharePoint URL and File System path as favorites. Once added to favorites list, SPListX will show the relevant entries in the favorites as a dropdown wherever applicable. You can also set a particular URL and Path as a default favourite to select the entry by default in the appropriate steps.

- 1) In order to create SPListX favorites, select **Manage Favorites** from **Tools** menu.

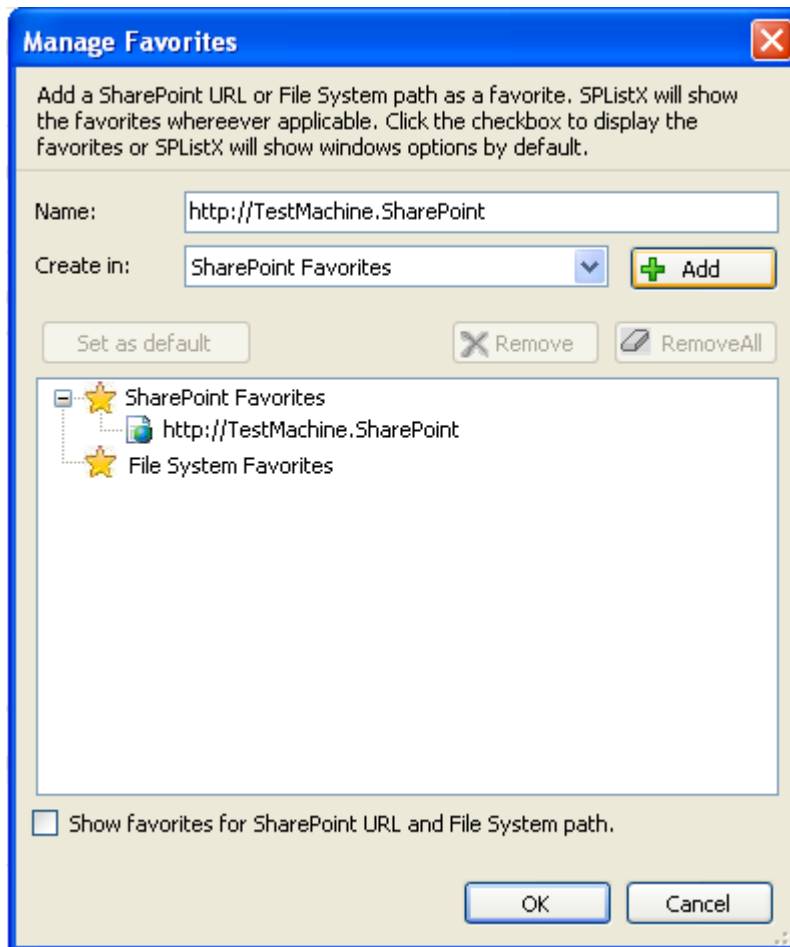


- 2) The **Manage Favorites** dialog will be shown as below:



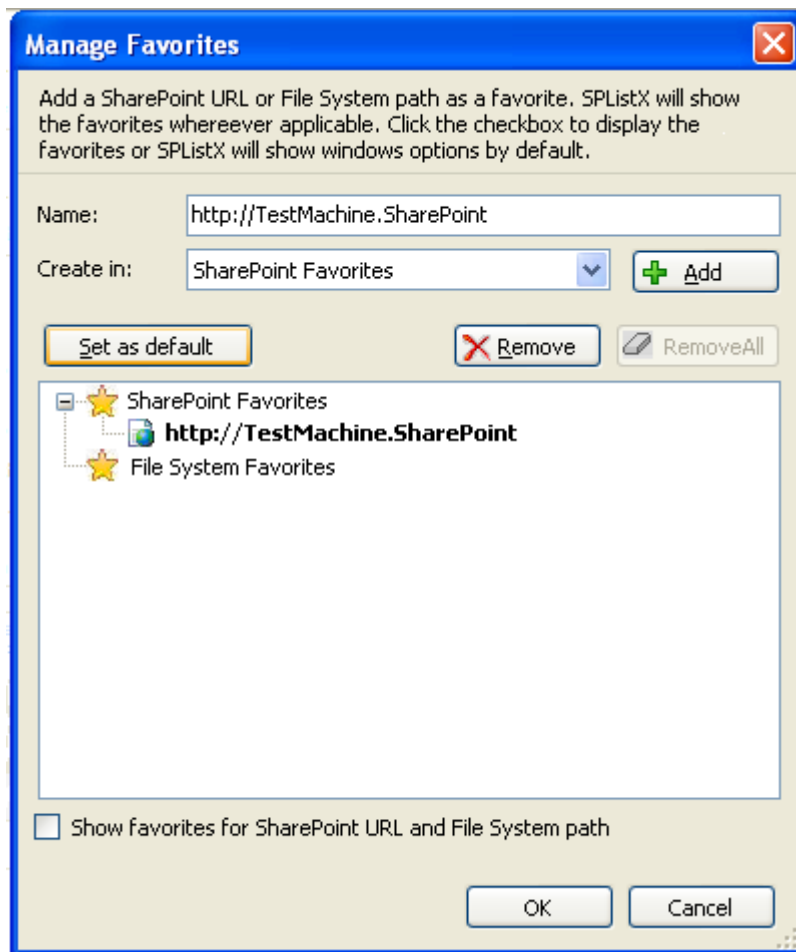
CHAPTER 2 – SPListX Features

- 3) In order to add a favourite, select a favourite Type (i.e. SharePoint Favourite or File System Favorite) and click **Add** button to add the new favourite to the favourite list as shown below:



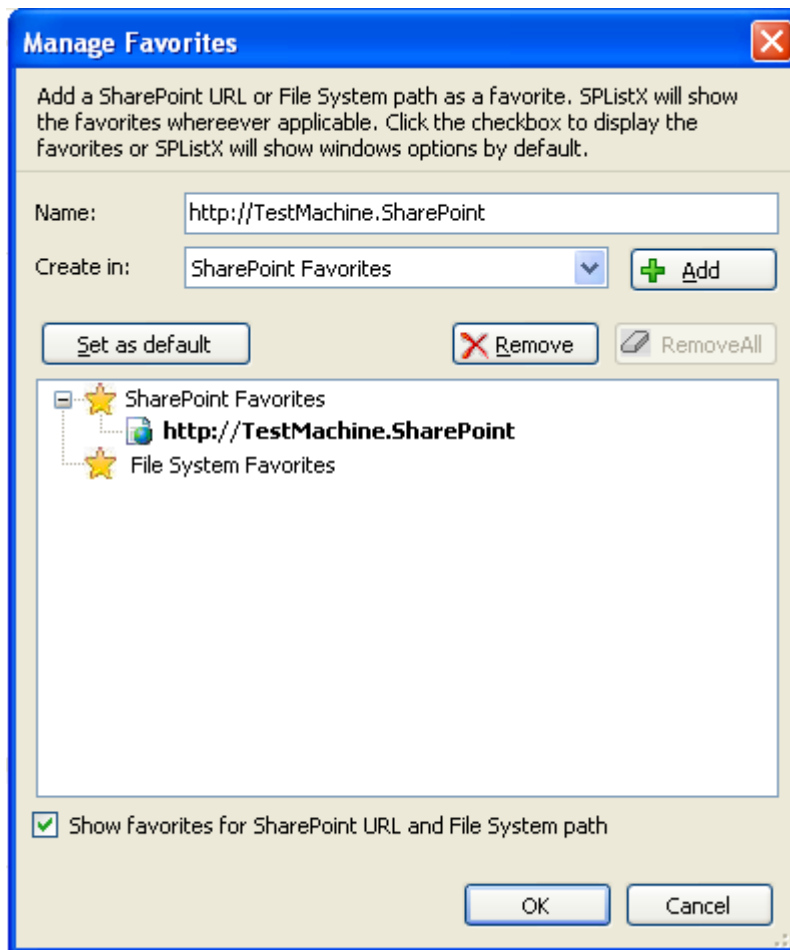
CHAPTER 2 – SPListX Features

- 4) In order to set **Default favorite**, select a favorite and Click **Set as default** button to set the default favorite. The Default favorite will be highlighted in Bold.



CHAPTER 2 – SPListX Features

- 5) To enable the favorites, you have to check the **Show favorites for SharePoint URL and File System path** option and Click **OK** button to enable the feature.



Henceforth, Manage Favorites will show the favorites as a dropdown wherever applicable.

2.14 Remove a task history item

To remove a task history item:

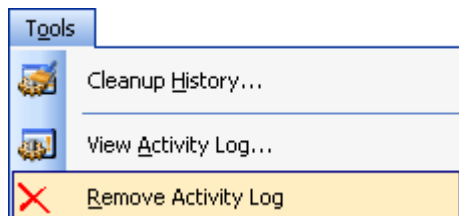
- 1) Select item from **Task History** pane.

Task History			
Refresh Open Log Folder View Activity Log Remove			
Start Time	End Time	Elapsed Time	Remarks
12/30/2009 4:42:01 PM	12/30/2009 4:42:17 PM	00:00:16	Completed successfully
12/30/2009 4:54:42 PM	12/30/2009 4:54:46 PM	00:00:04	Incomplete: refer activity log
12/30/2009 4:54:50 PM	12/30/2009 4:55:13 PM	00:00:22	Terminated: canceled by user

- 2) Click **Remove** from SPListX main screen.



Or Select **Remove Activity Log** from **Tools** menu

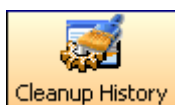


This will remove the currently selected activity log entry and log folders & files associated with the task history item. To maintain task history items, see Cleanup history and Task Status.

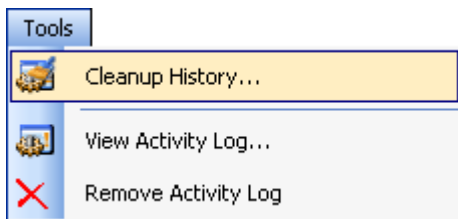
2.15 Cleanup History

SPListX maintain the task history of each task run in the application task history folder e.g., **<All Users Application Data> \SPListX\TaskHistory\<task name>\<timestamp>**. Over a period of time, the task history folder grows in size. We recommend cleaning up the task history periodically to control the disk space usage. To cleanup task history, perform the following steps given below:

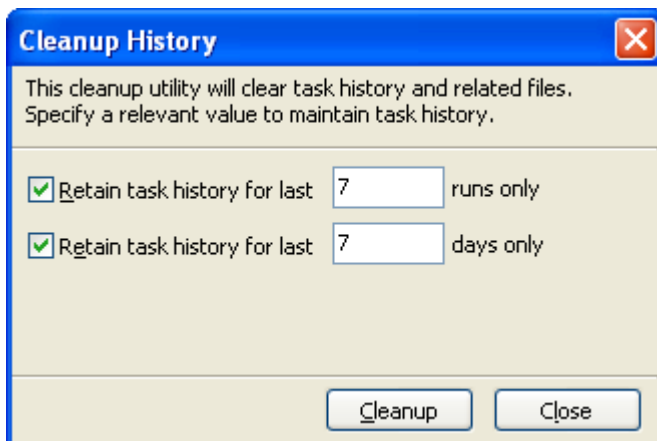
- 1) Click **Cleanup History** from SPListX Task Manager.



Or Select **Cleanup History** from **Tools** menu



- 2) The **Cleanup History** dialog appears as shown below:



- a) Selecting **Retain task history for last <n> runs only** option will remove all history entries for each task that are older than <n> runs (task instances).
- b) Selecting **Retain task history for last <n> days only** option will remove all history entries for each task that are older than <n> days.

2.16 View Activity Log

To view activity log associated with a task history item:

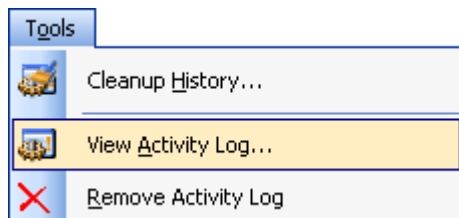
- 1) Select an item from **Task History** pane.

Task History			
Refresh Open Log Folder View Activity Log Remove			
Start Time	End Time	Elapsed Time	Remarks
12/30/2009 4:42:01 PM	12/30/2009 4:42:17 PM	00:00:16	Completed successfully
12/30/2009 4:54:42 PM	12/30/2009 4:54:46 PM	00:00:04	Incomplete: refer activity log
12/30/2009 4:54:50 PM	12/30/2009 4:55:13 PM	00:00:22	Terminated: canceled by user

- 2) Click **View Activity Log** from SPListX main screen.

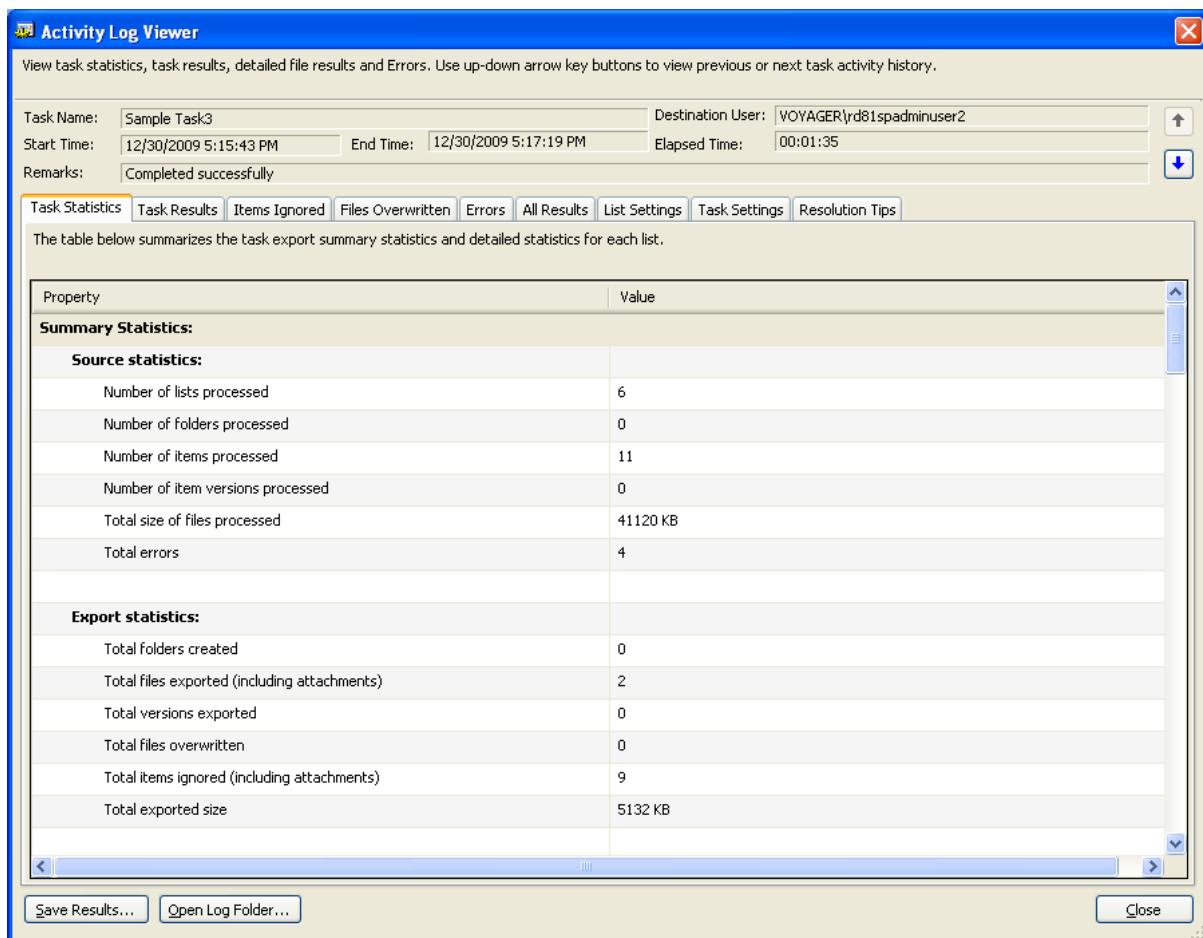


Or Select **View Activity Log** from **Tools** menu



CHAPTER 2 – SPListX Features

3) The **Activity Log Viewer** dialog appears as shown below.



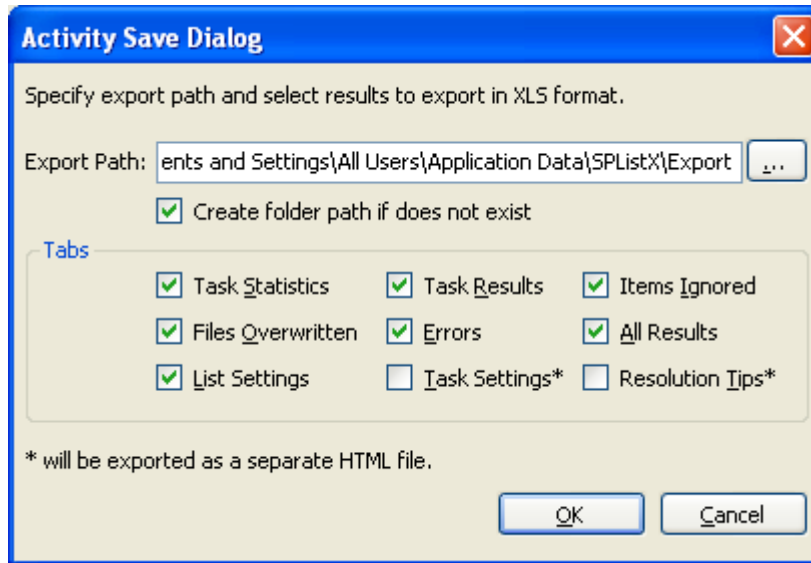
4) The activity log of a task is classified into nine different categories (seen under separate tabs):

- a) **Task Statistics:** Summarizes the manage task summary statistics and detailed statistics for each SharePoint list.
- b) **Task Results:** Summarizes detailed result of each task level check.
- c) **Items Ignored:** Summarizes the items ignored during export process based on certain conditions.
- d) **Files Overwritten:** Summarizes the files overwritten during export process.
- e) **Errors:** Summarizes the errors that occurred during export.
- f) **All Results:** Summarizes the detailed results of the export task.
- g) **List Settings:** Summarizes the destination List Settings at the time of export.
- h) **Task settings:** Summarizes the task settings at the time of export.
- i) **Resolution Tips:** Summarizes the commonly encountered error messages and the ways to address them.

CHAPTER 2 – SPListX Features

- 5) Click **Save Results** button.

The **Activity Save dialog** appears as shown below.



- 6) Select reports to save task results in Microsoft Excel format. Each report in ActivityLogViewer dialog is stored as a separate worksheet in MS-Excel.

NOTE: Task Settings and Resolution Tips will be exported as a separate HTML file.

- 7) Click **Open Log Folder** buttons, to open the folder that contains the activity log of the currently displayed task history item.

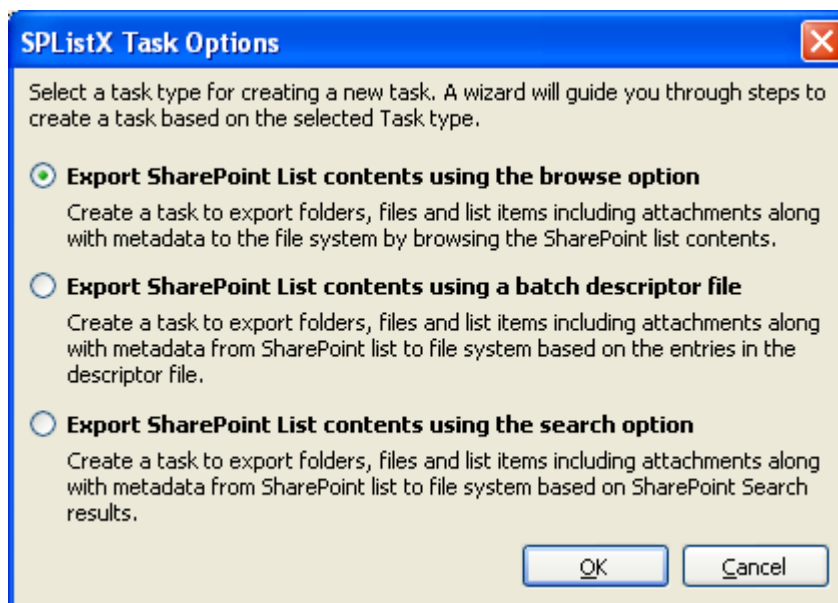
NOTE: For all errors, refer **File Errors** section of Activity Log to view a description of the actual error that occurred during export.

3 Export SharePoint List contents using the browse option

3.1 Create Task

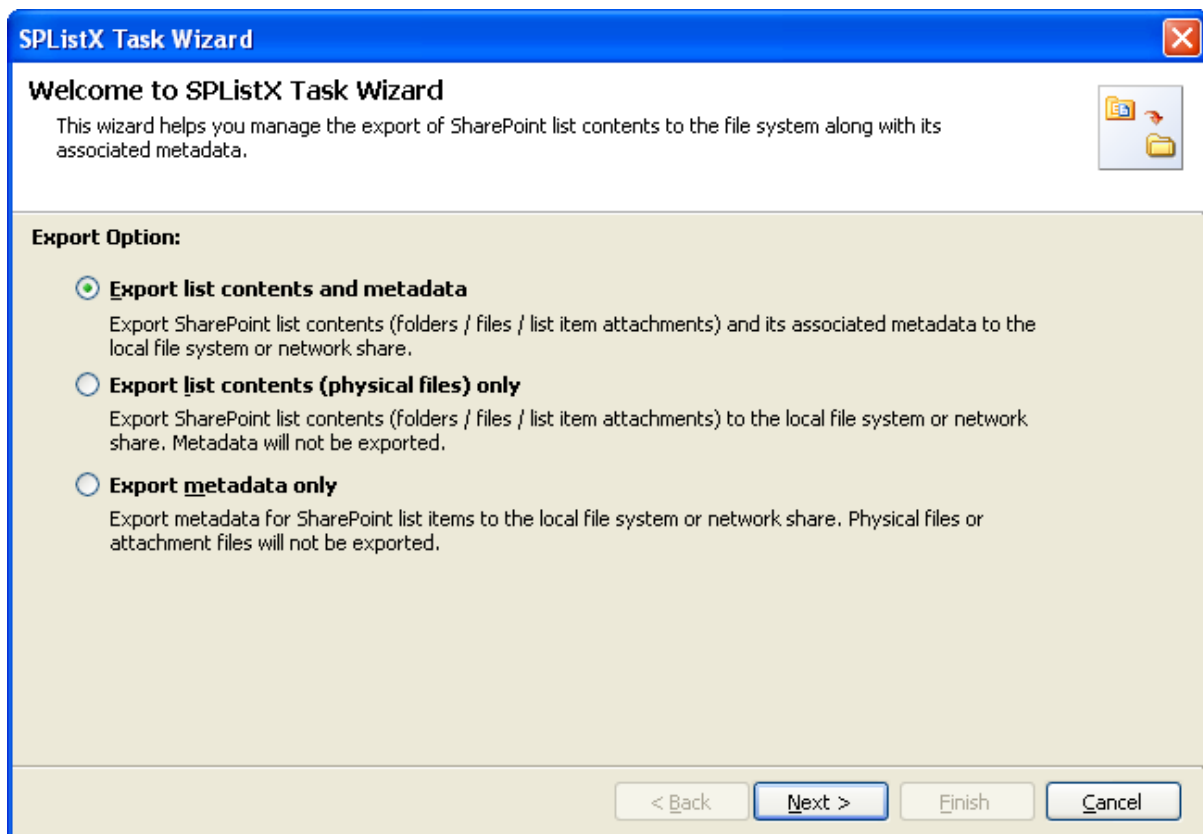
To create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share:

- 1) Select **Export SharePoint List contents using the browse option** in SPListX Task Options dialog as shown below and click **OK**.



CHAPTER 3 – Export SharePoint List contents using the browse option

2) The **SPListX Task Wizard** appears as shown below



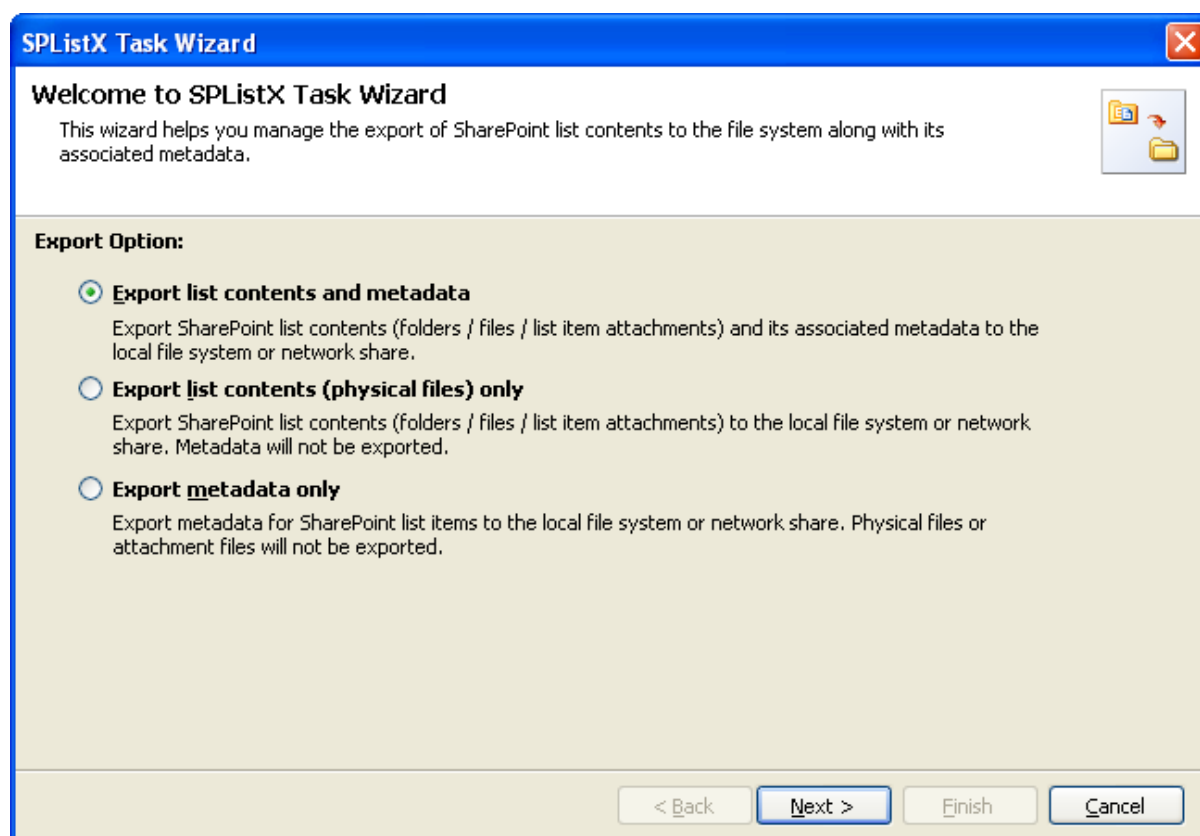
- 3) Click **Next** button
- 4) Specify the SharePoint source location
- 5) Add Folders and items to export
- 6) Specify Version Options
- 7) Specify Column Settings Options
- 8) Specify Export Conditions
- 9) Add Destination folder option
- 10) Specify File System Date Settings
- 11) Specify Metadata File Settings
- 12) Specify Task Settings
- 13) Click **Finish** button to create the task, or click **Back** button to change the task settings.

3.2 Export Options

You can create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share. The export task enables users to select the export options in order to specify his requirements.

- A. Export list contents and metadata:** Export SharePoint list contents (folders/files/list item attachments) and its associated metadata to the local file system or network share.
- B. Export list contents (physical files) only:** Export SharePoint list contents (folders/files/list item attachments) to the local file system or network share. Metadata will not be exported.
- C. Export metadata only:** Export metadata for SharePoint list contents to the local file system or network share. Physical files or attachment files will not be exported.

1) The **Export Options** step appears as shown below:



Select the required export options. The wizard guides you with the steps accordingly.

3.3 SharePoint source location

To specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items including attachments to the file system, perform the steps given below:

1) The SharePoint source location step appears as shown below:

The screenshot shows the 'SPListX Task Wizard' dialog box. The title bar is blue with the text 'SPListX Task Wizard' and a close button. The main window has a light beige background. At the top, it says 'Step Number: SharePoint URL and credentials'. Below this, there is a text box for 'URL:'. To the right of the URL text box is a checkbox labeled 'Add to Favorites'. Below the URL text box, there are two radio button options. The first option is 'Use currently logged on user context to connect to SharePoint' and is selected. Below it is the text 'Connect to SharePoint using the current Windows logon session.' The second option is 'Use the following credential to connect to SharePoint' and is not selected. Below it is the text 'Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.' Below the second option, there is a 'User name:' label followed by a text box containing 'VOYAGER\Administrator' and a dropdown arrow. Below the text box is the text '(johndoe@contoso.com, contoso\johndoe, johndoe)'. Below the 'User name:' label is a 'Password:' label followed by a text box. At the bottom of the dialog box, there is a checkbox labeled 'I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose.' At the very bottom of the dialog box, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- 2)** Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site, list or folder location in the URL textbox. SPListX will load the tree view of the source location from the level specified in this textbox
- 3)** Specify the users' credentials to connect to the SharePoint URL specified above using the options given below.
 - a) Use currently logged on user context** - Connect to SharePoint URL using the currently logged on user context
 - b) Use the following credential** - Connect to SharePoint URL using the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>,UserName@DomainName, UserName** and its corresponding

CHAPTER 3 – Export SharePoint List contents using the browse option

password. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

- 4) I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords / Credential Manager applet for this purpose** - In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

- 5)** Click ... button to create new user profile
6) Select Add to Favorites checkbox to add the URL to SharePoint Favorites.

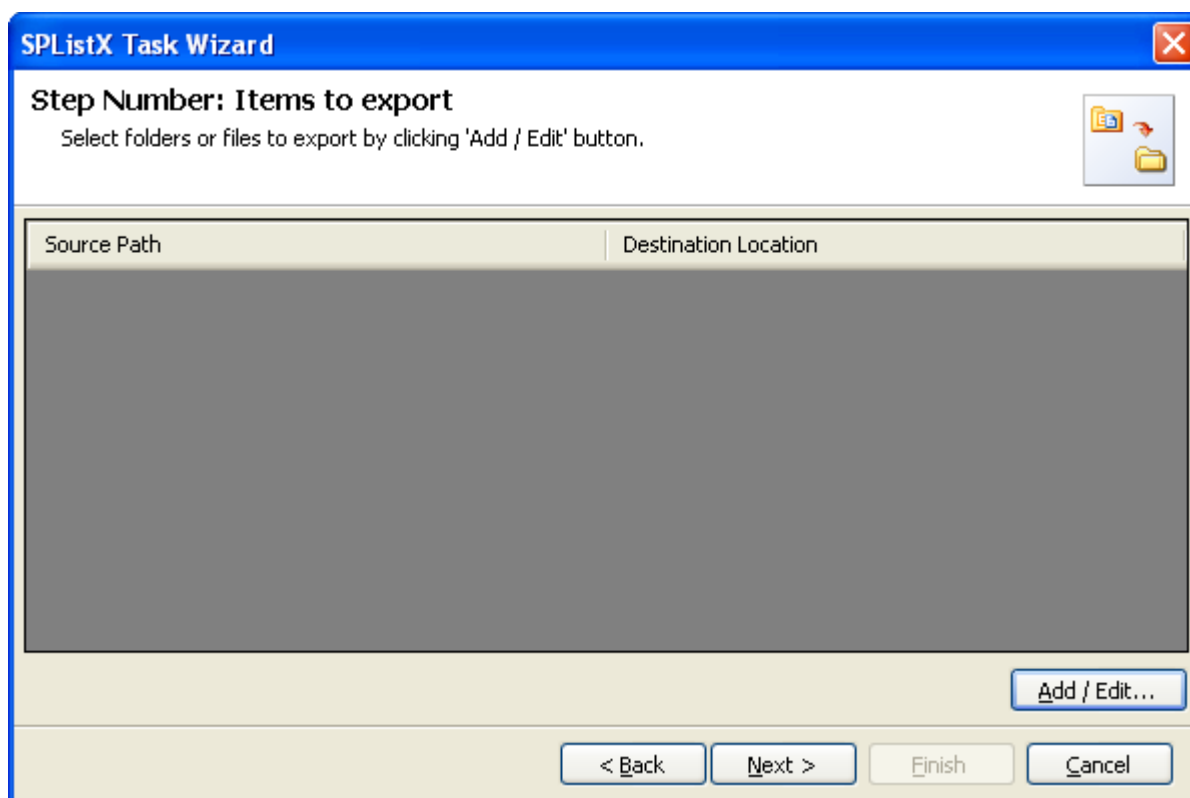
The screenshot shows the 'SPListX Task Wizard' window. The title bar says 'SPListX Task Wizard'. The main heading is 'Step Number: SharePoint URL and credentials'. Below this, a text box explains: 'Specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items to file system. User account specified below will be used to connect to SharePoint when running the export task.' To the right of this text is an icon showing a folder with a red arrow pointing to it. Below the text is a 'URL:' label followed by a text box containing 'http://rd81:9002'. To the right of the URL box is a checkbox labeled 'Add to Favorites'. Below the URL box are two radio button options. The first is 'Use currently logged on user context to connect to SharePoint' with the text 'Connect to SharePoint using the current Windows logon session.' below it. The second is 'Use the following credential to connect to SharePoint' with the text 'Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.' below it. This second option is selected. Below this are two text boxes: 'User name:' containing 'VOYAGER\Administrator' and a dropdown arrow, and 'Password:' containing a series of dots. Below the password box is a checkbox with the text 'I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet for this purpose.' followed by a question mark icon. At the bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Click **Next** to proceed

3.4 Items to Export

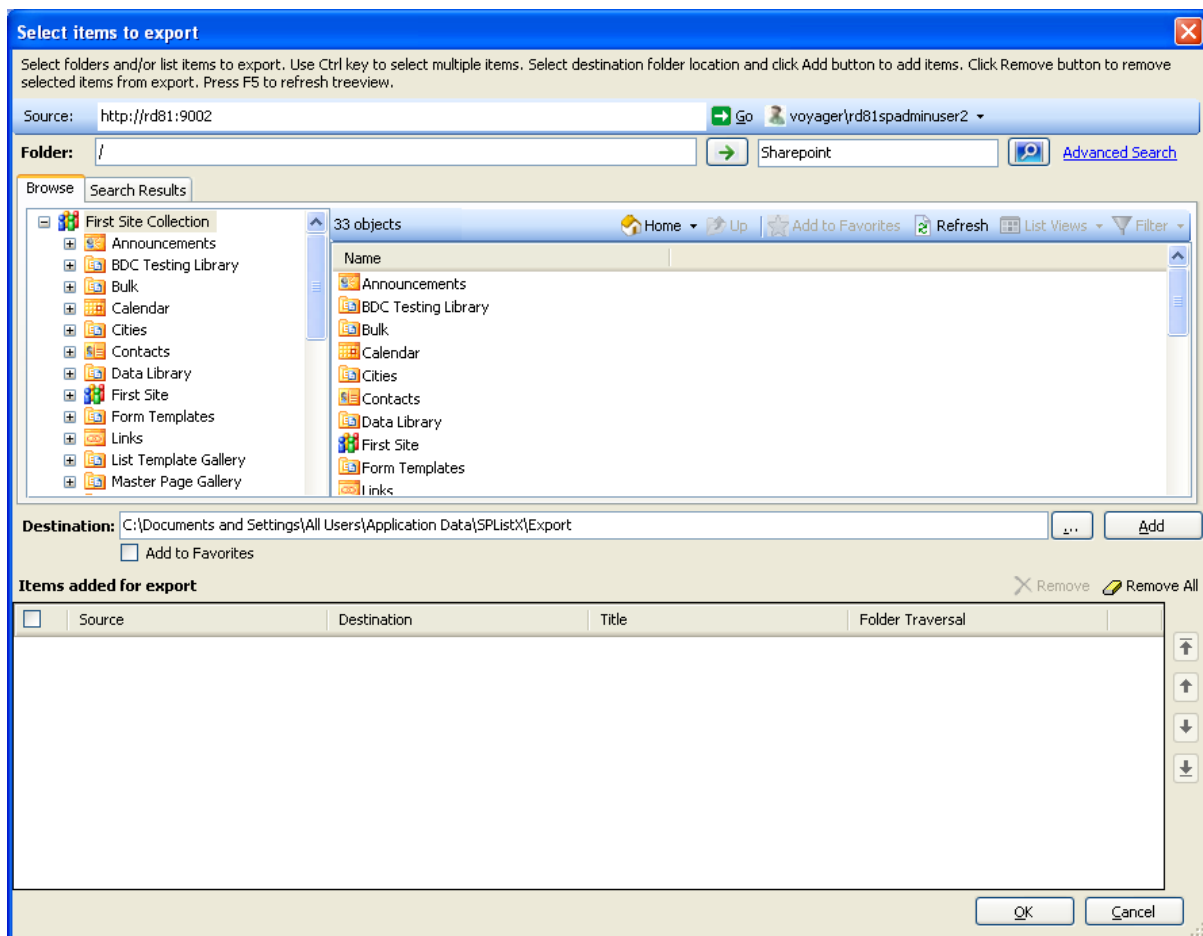
To add folders and items to export to the destination location in the file system:

- 1) The **Items to export** step appears as shown below:



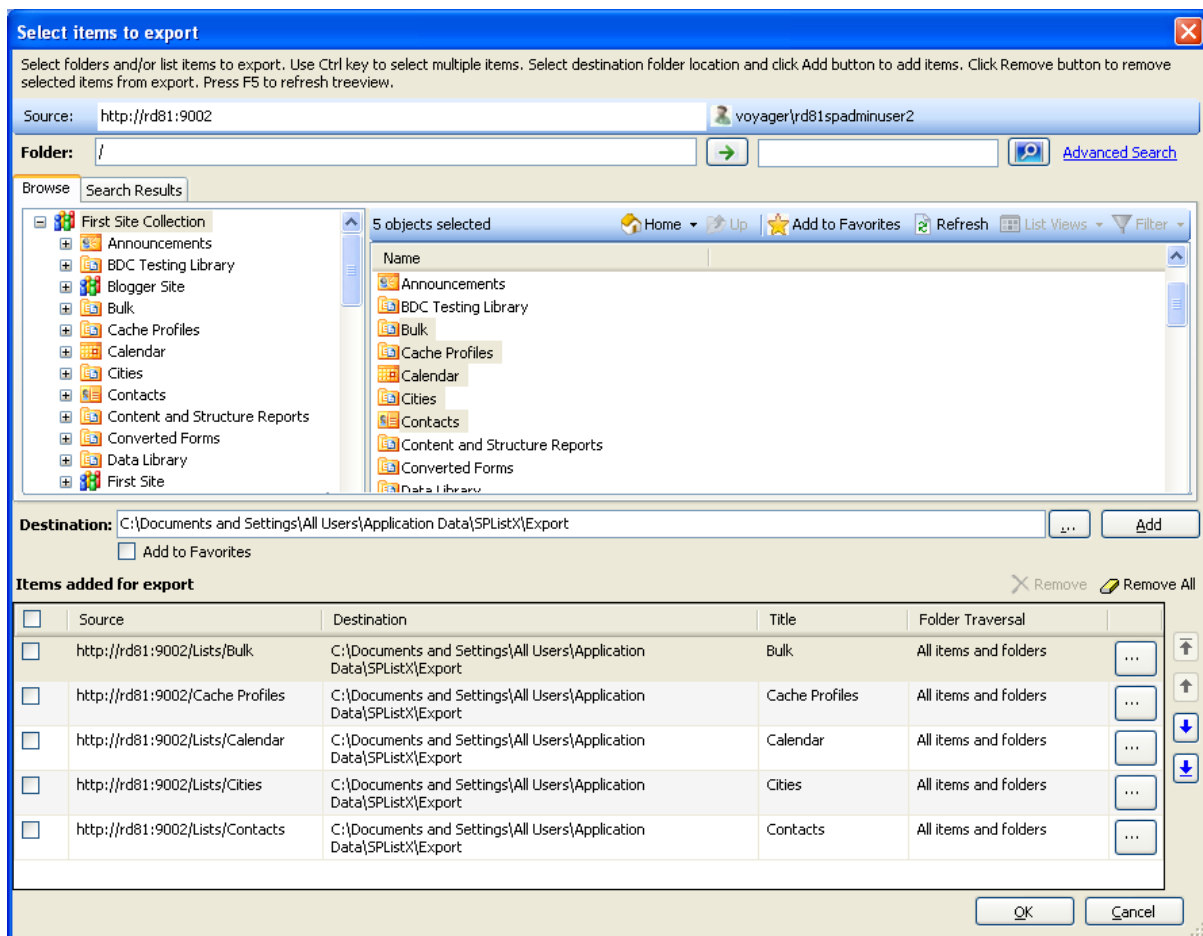
- 2) Click **Add / Edit** button to add and remove the folders and items for export.
- 3) The **Select items to export** dialog appears as shown below:

CHAPTER 3 – Export SharePoint List contents using the browse option



- 4) **Select items to export** dialog contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select site collection folder / file / list item to export. The **Folder** textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must specify the folder's relative path and Click the arrow button to mount the specified folder as a root item in the explorer view. This option will be very useful if the connected list contains large number of folders and sub-folders. The search textbox allows you to search for list items for the keyword specified in search textbox. Advanced Search Link will be enabled for site that has office search service. You will also see a textbox (middle) and browse button, which enables selection of destination location to export folders / items.

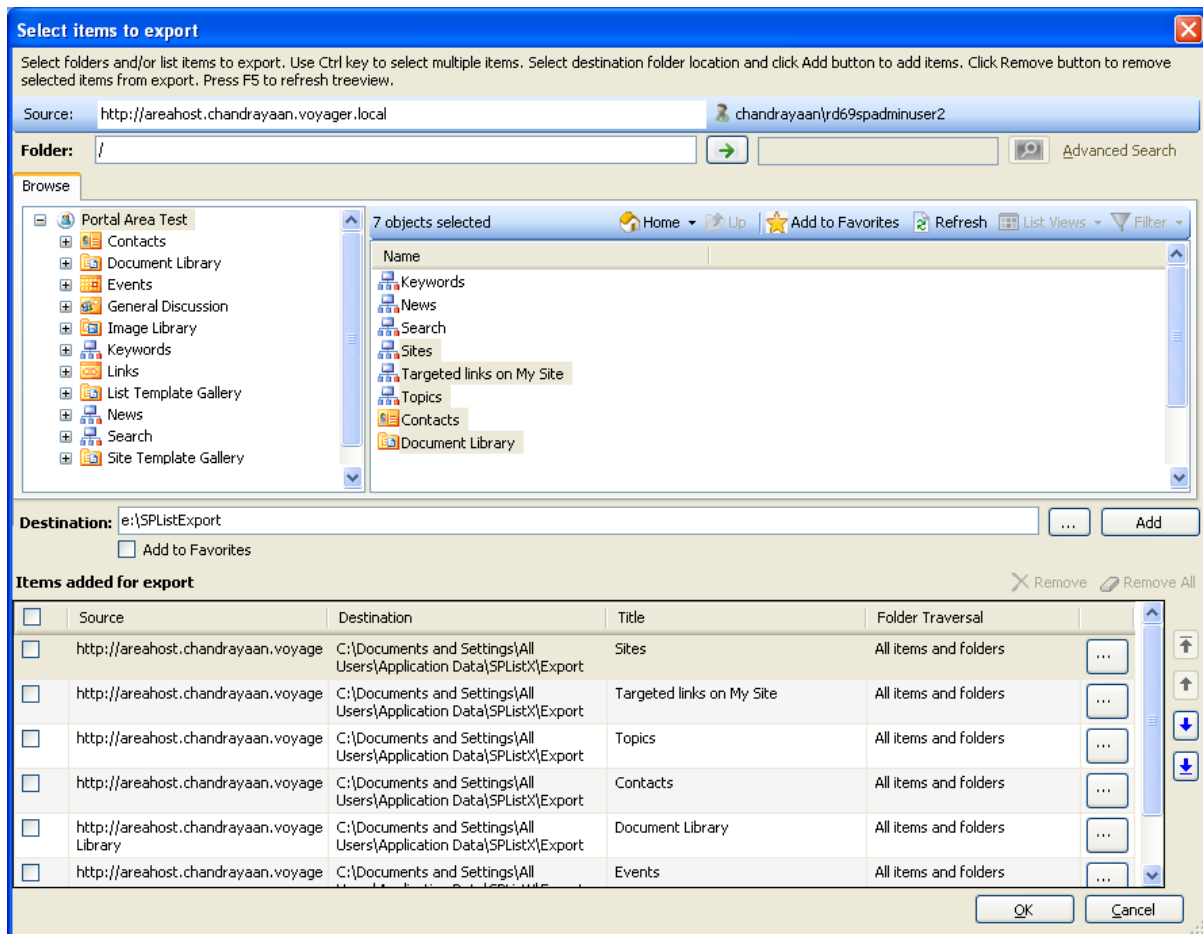
CHAPTER 3 – Export SharePoint List contents using the browse option



- 5) Browse the source folders and list items of connected SharePoint list and select the required folders and list items from either tree view (top left pane) or list view (top right pane). Select a destination location using browse option or enter the destination location path in the textbox and **click Add** button to export selected items.

All folders, files, list items including attachments, lists of a site and its sub-site can be exported by selecting Site collection node from tree-view. In SharePoint 2003, all folders, files, list items including attachments, lists of an area and its sub-area can be exported to file system.

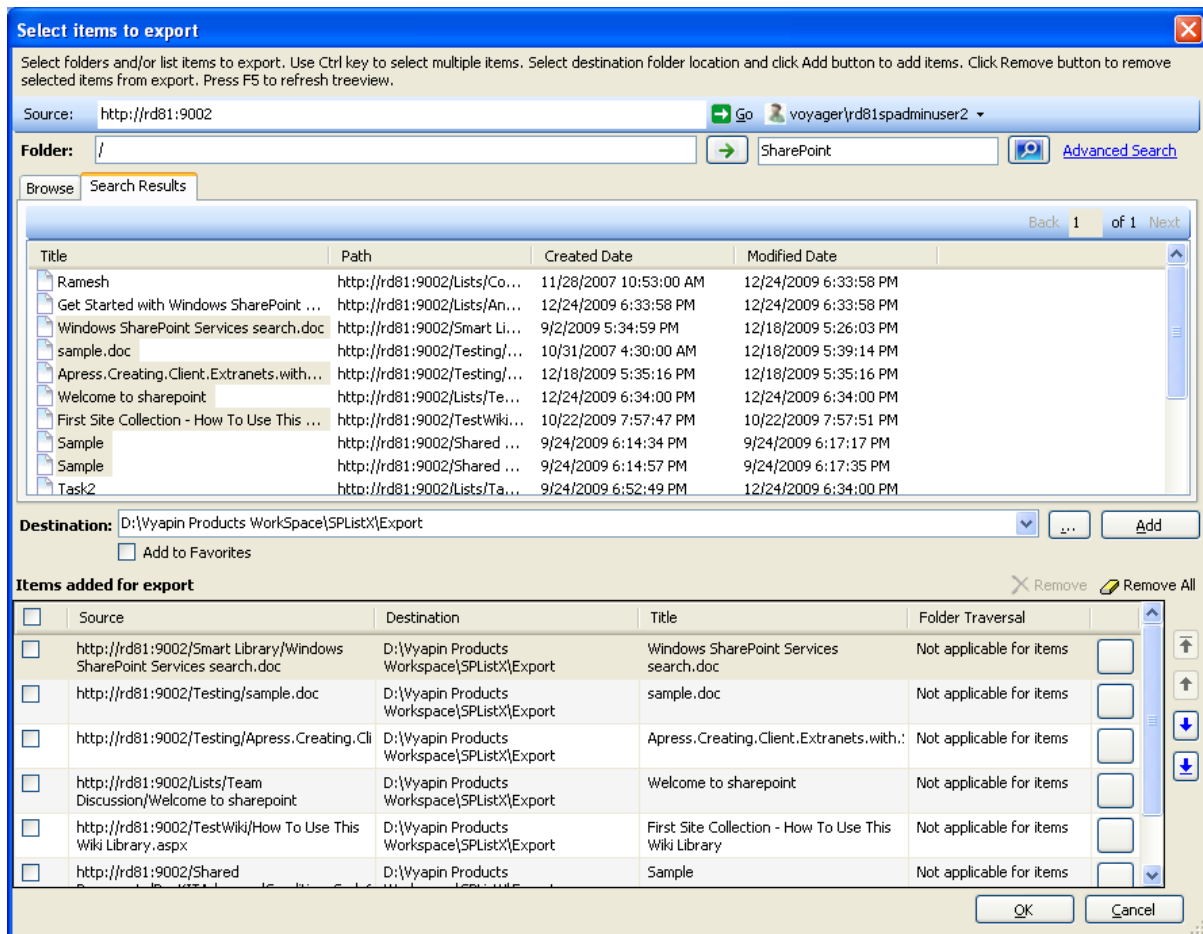
CHAPTER 3 – Export SharePoint List contents using the browse option



- 6) You can perform keyword search by entering search keyword in search keyword textbox and selecting the list items based on search results for exporting to the file system.

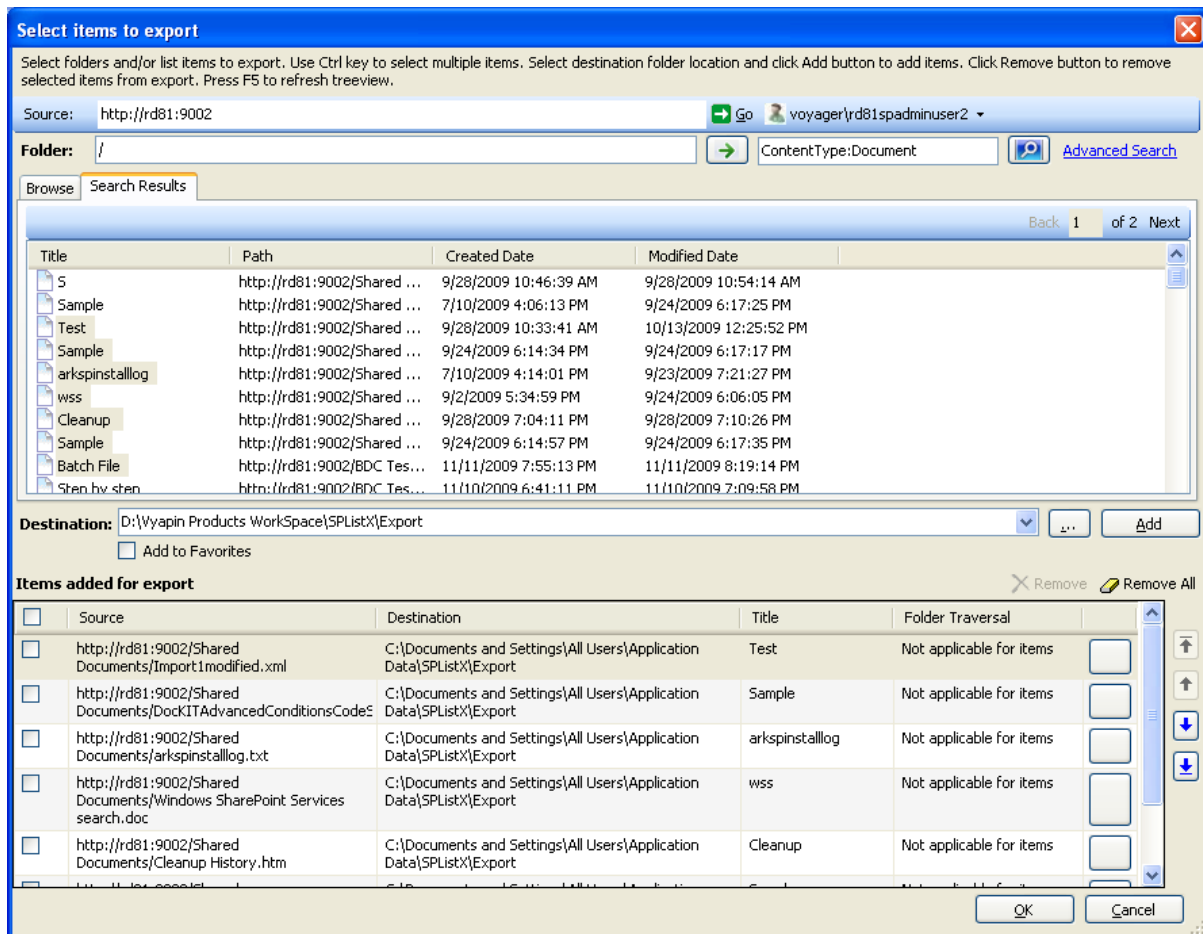
NOTE: Exporting based on search results is not applicable for SharePoint 2003.

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You can also enhance your keyword search by specifying Managed Property with value in keyword search textbox.

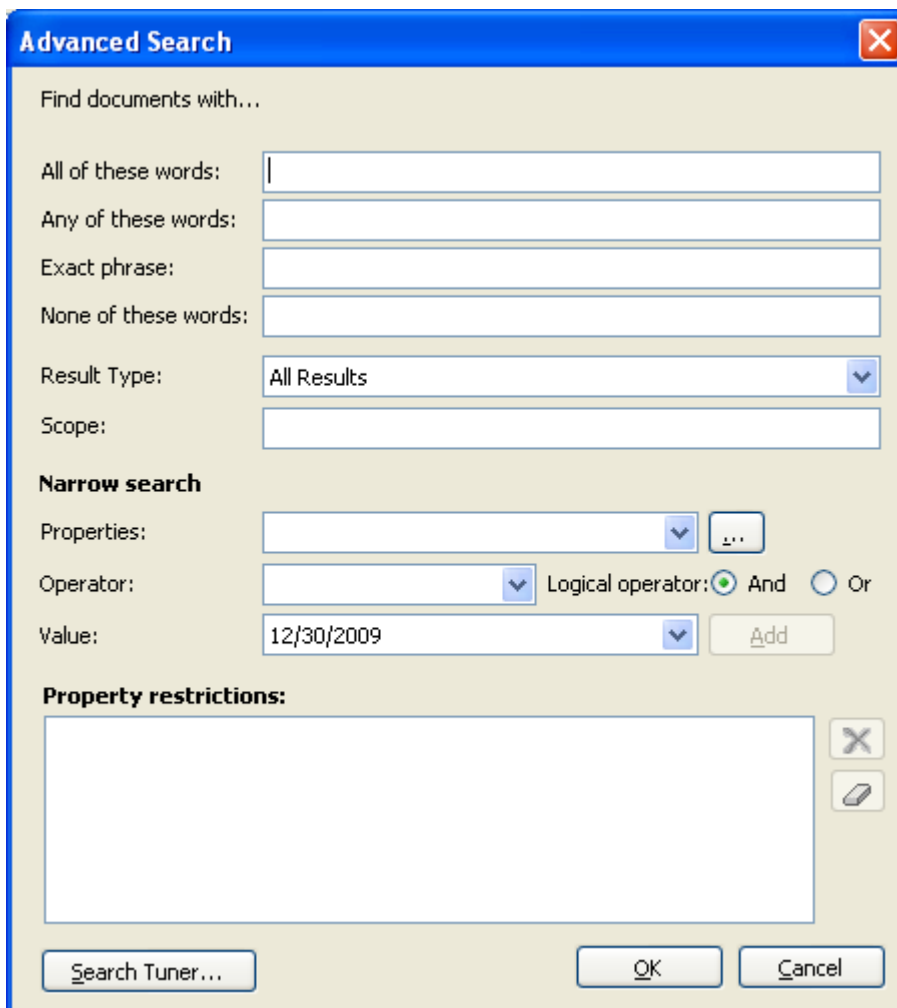
CHAPTER 3 – Export SharePoint List contents using the browse option



If advanced search is enabled in SharePoint site then you can perform advanced search by clicking advanced search link.

CHAPTER 3 – Export SharePoint List contents using the browse option

The Advanced search dialog appears as shown below:

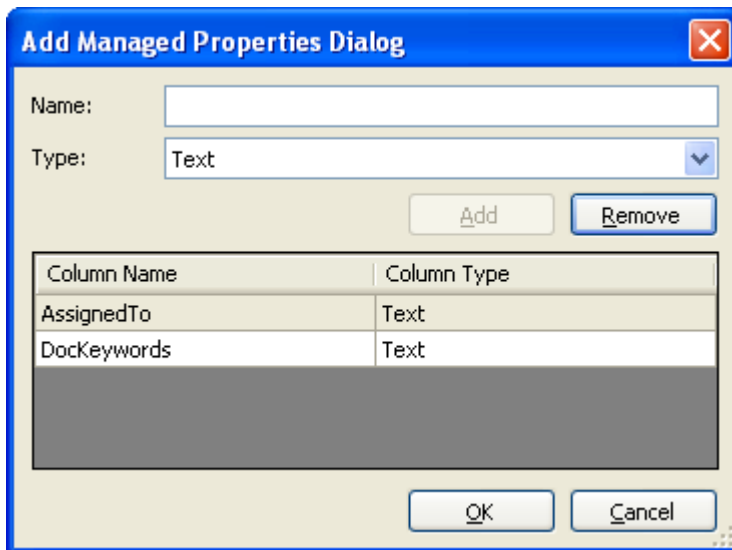


The image shows the 'Advanced Search' dialog box. It has a blue title bar with the text 'Advanced Search' and a close button. The main area is light beige. At the top, it says 'Find documents with...'. Below this are four text input fields: 'All of these words:', 'Any of these words:', 'Exact phrase:', and 'None of these words:'. Below these is a 'Result Type:' dropdown menu set to 'All Results', and a 'Scope:' text input field. A section titled 'Narrow search' follows. It contains a 'Properties:' dropdown menu, a 'Logical operator:' dropdown menu set to 'And', and a 'Value:' dropdown menu set to '12/30/2009'. There is an 'Add' button next to the 'Value:' field. To the right of the 'Properties:' dropdown is a button with three dots (...). Below the 'Narrow search' section is a 'Property restrictions:' section with a large empty text area and two buttons: a delete button (X) and a save button (floppy disk). At the bottom are three buttons: 'Search Tuner...', 'OK', and 'Cancel'.

Click (...) button to add the SharePoint managed properties in properties drop-down.

CHAPTER 3 – Export SharePoint List contents using the browse option

The Add Managed Properties Dialog appears as shown below:



The dialog box is titled "Add Managed Properties Dialog". It contains a "Name:" text box, a "Type:" dropdown menu currently set to "Text", and two buttons: "Add" and "Remove". Below these is a table with two columns: "Column Name" and "Column Type". The table contains two rows: "AssignedTo" with "Text" and "DocKeywords" with "Text". At the bottom are "OK" and "Cancel" buttons.

Column Name	Column Type
AssignedTo	Text
DocKeywords	Text

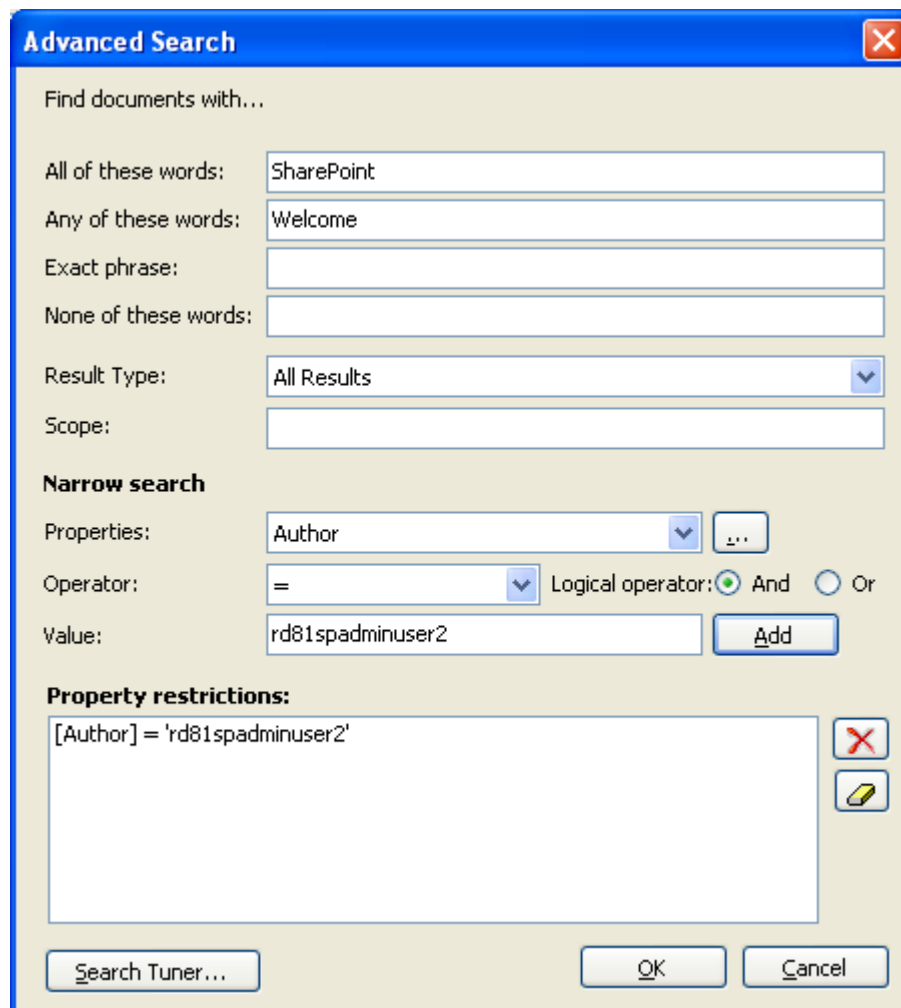
Specify the managed property **name** in **Name** textbox and select the data **type** of the column in SharePoint in the **Type** drop-down.

Click **Add** button to add the managed property to the property drop-down.

Click **Remove** button to remove the columns from the property drop-down.

You can specify the conditions by selecting the property name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as $>$, $=$, $>=$ etc. to define your query. Complex queries can be constructed by using logical operator 'AND' or 'OR'.

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The image shows a Windows-style dialog box titled "Advanced Search". It contains several input fields and buttons for refining a search. The "Find documents with..." section has four text boxes: "All of these words:" (containing "SharePoint"), "Any of these words:" (containing "Welcome"), "Exact phrase:" (empty), and "None of these words:" (empty). Below these are "Result Type:" (a dropdown menu set to "All Results") and "Scope:" (an empty text box). The "Narrow search" section includes a "Properties:" dropdown (set to "Author"), an "Operator:" dropdown (set to "="), and a "Value:" text box (containing "rd81spadminuser2"). There are also buttons for "Logical operator:" (radio buttons for "And" and "Or", with "And" selected) and an "Add" button. The "Property restrictions:" section features a large text area containing "[Author] = 'rd81spadminuser2'", with "X" and "Edit" icons to its right. At the bottom are buttons for "Search Tuner...", "OK", and "Cancel".

Advanced Search

Find documents with...

All of these words: SharePoint

Any of these words: Welcome

Exact phrase:

None of these words:

Result Type: All Results

Scope:

Narrow search

Properties: Author

Operator: =

Logical operator: ☒ And ☐ Or

Value: rd81spadminuser2

Add

Property restrictions:

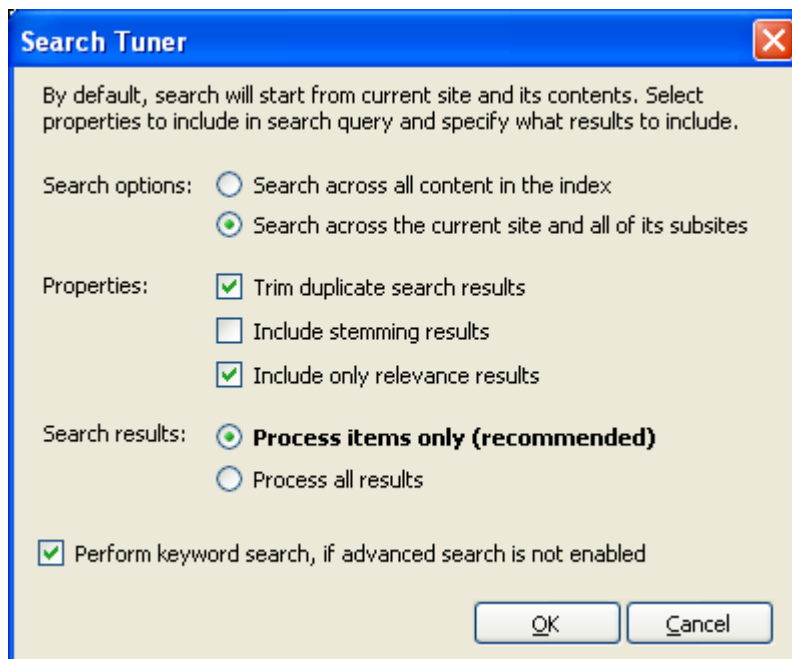
[Author] = 'rd81spadminuser2'

Search Tuner... OK Cancel

You can Tune search by clicking **Search Tuner...** button.

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The Search Tuner dialog appears as shown below:



a) Search Options:

Search across all content in the index - SPListX will search for list items across all the indexed content.

Search across the current site and all of its sub-site - By default, SPListX will search for list items at current site and all of its sub-sites.

b) Properties:

Trim duplicate search results - By default, SPListX will remove the duplicate items from search results.

Include stemming results - By default, SPListX will not include the stemming results.

Include only relevance results - By default, SPListX will include only relevance results.

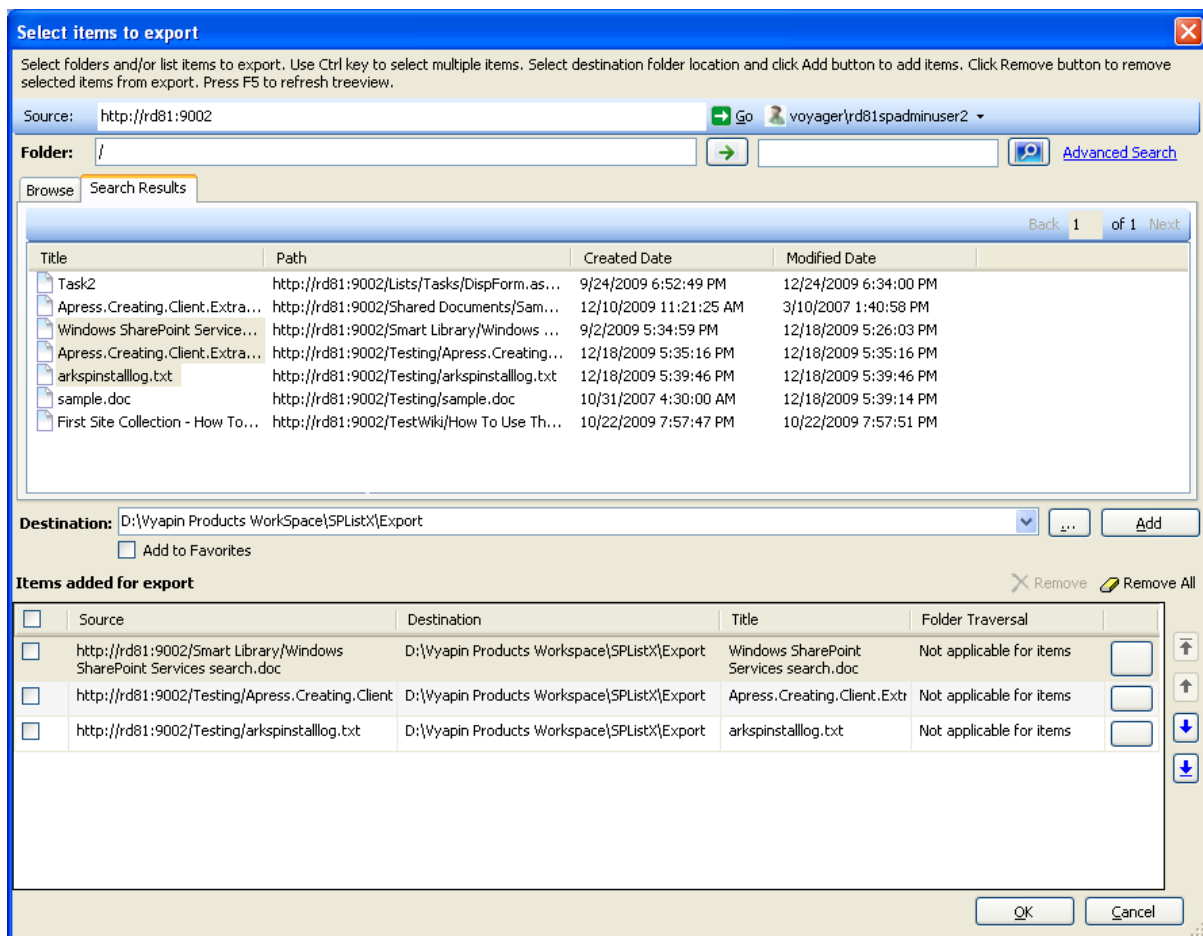
c) Search results:

Process only items (recommended) - By default, SPListX will search for list items only.

Process all results - SPListX will include all list view URLs, site URLs in search.

d) Perform keyword search, if advanced search is not enabled - To perform keyword search based on your keywords specified in All keywords textbox, Any Keywords textbox, Exact Phrase textbox and it will ignore all the properties, scopes and result types specified in search query.

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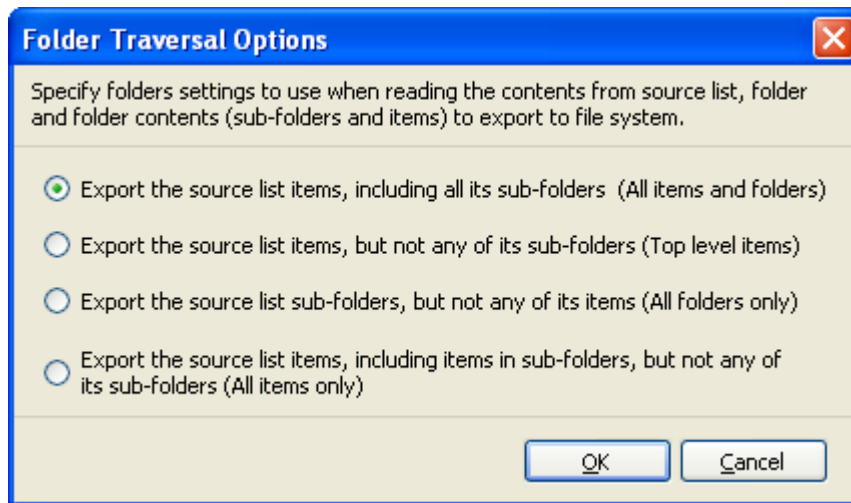


- 7) The selected top level site, sub-sites, lists, folders, files and list **items added for export** will be displayed in the Items added for export grid. SPListX processes the top-level folders and list items added for export in the order in which it appears in the **Items added for export** grid. The export process order can be changed by the **navigation** buttons available in the right side of the grid.
- 8) SPListX will export the folders, list items and associated metadata based on Folder Traversal Option.

Use button to edit the folder traversal option for list, folders that are added in **added for export grid view**.

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A Folder Traversal dialog appears as shown below.



Select any one of the following options given below to specify the contents to be exported from the source folders in SharePoint:

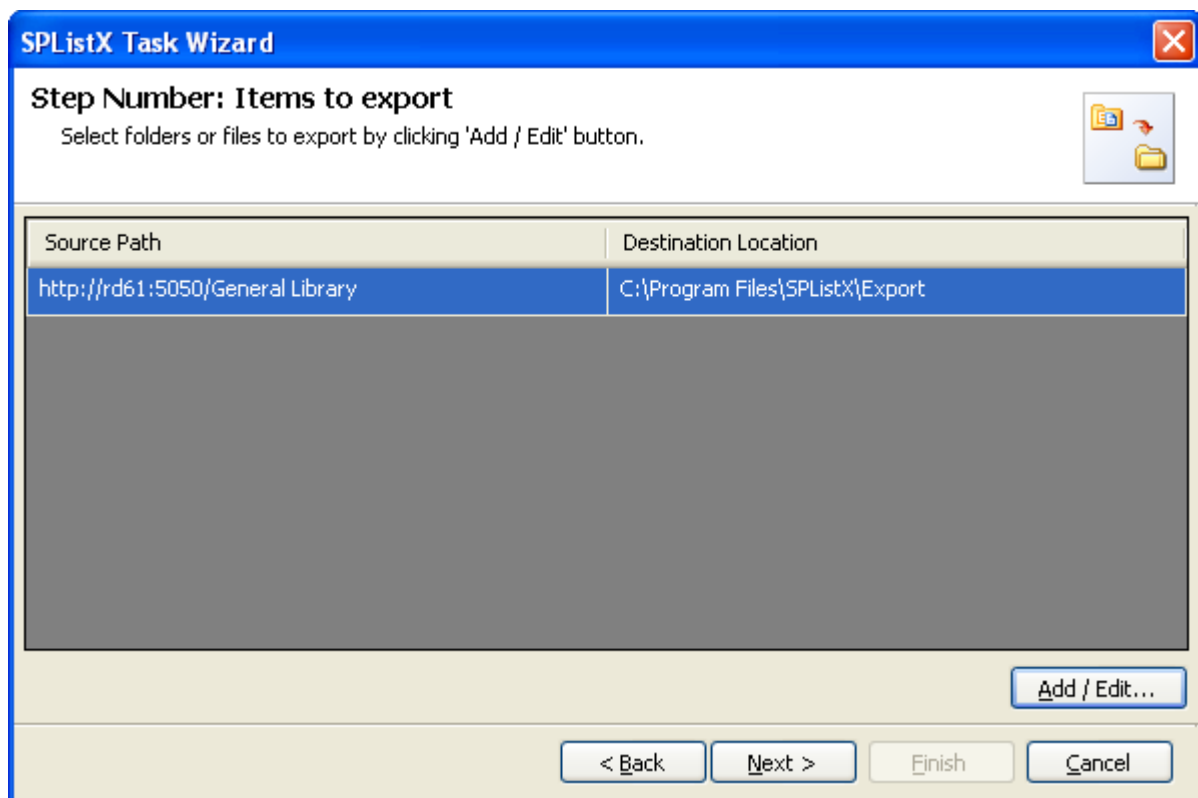
- a) **Export the source list items, including all its sub-folders (All items and folders)** - This option exports folders and list items exactly as they are in source SharePoint list. The source folder structure in the list will be retained in the destination location.
- b) **Export the source list items, but not any of its sub-folders (Top level items)** - This option exports list items available in the top-level folders only. SPListX will not traverse the sub-folders within the top level folders.
- c) **Export the source list sub-folders, but not any of its items (All folders only)** - This option creates the sub-folder structure in the destination location and ignores all list items that are available within the added top level folder and sub-folders.
- d) **Export the source list items, including items in sub-folders, but not any of its sub-folders** - This option exports list items only and ignore its source folder structure in the source list. In case of duplicate file names, file exported last will overwrite the existing file in the destination location.

NOTE: Folder Traversal option is not applicable for list items.

- 9) Click **OK** button to proceed or click **Cancel** to discard the changes.

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10) Items to export steps contains top level site, sub-sites, document library, folders and files added for export as shown below:



11) Click **Next** to Proceed

3.5 Version Options

To selectively export list item versions to the destination file system location:

- 1) The **Version Options** step appears as shown below:

SPListX Task Wizard

Step Number: Version Options

Specify the list item versions to export. By default, latest version of the list item will be exported.

Version Options:

- ☐ Latest version only
- ☐ Export version range: Start: End:
- ☐ Export version date range: Start: End:
- ☒ All Versions

< Back Next > Finish Cancel

- 2) By default, **Latest version only** option is selected. Item version settings will be used for each of the list item exported from the list.
- 3) Select any one of the following version settings.
 - a) **Latest version only** - Export the latest list item version from the source.
 - b) **Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5
 - c) **Export version date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is **Modified date** of a list item.
 - d) **All versions** - Export all list item versions available in the source list.

3.6 Column Settings Options

To selectively export metadata columns from the SharePoint list:

1) The **Column Settings Options** step appears as shown below:

SPListX Task Wizard

Step Number: Column Settings Options

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☒ Export all user defined columns
- ☐ Export selected columns

<Type column names here>

Examples:

Title
Description
Author

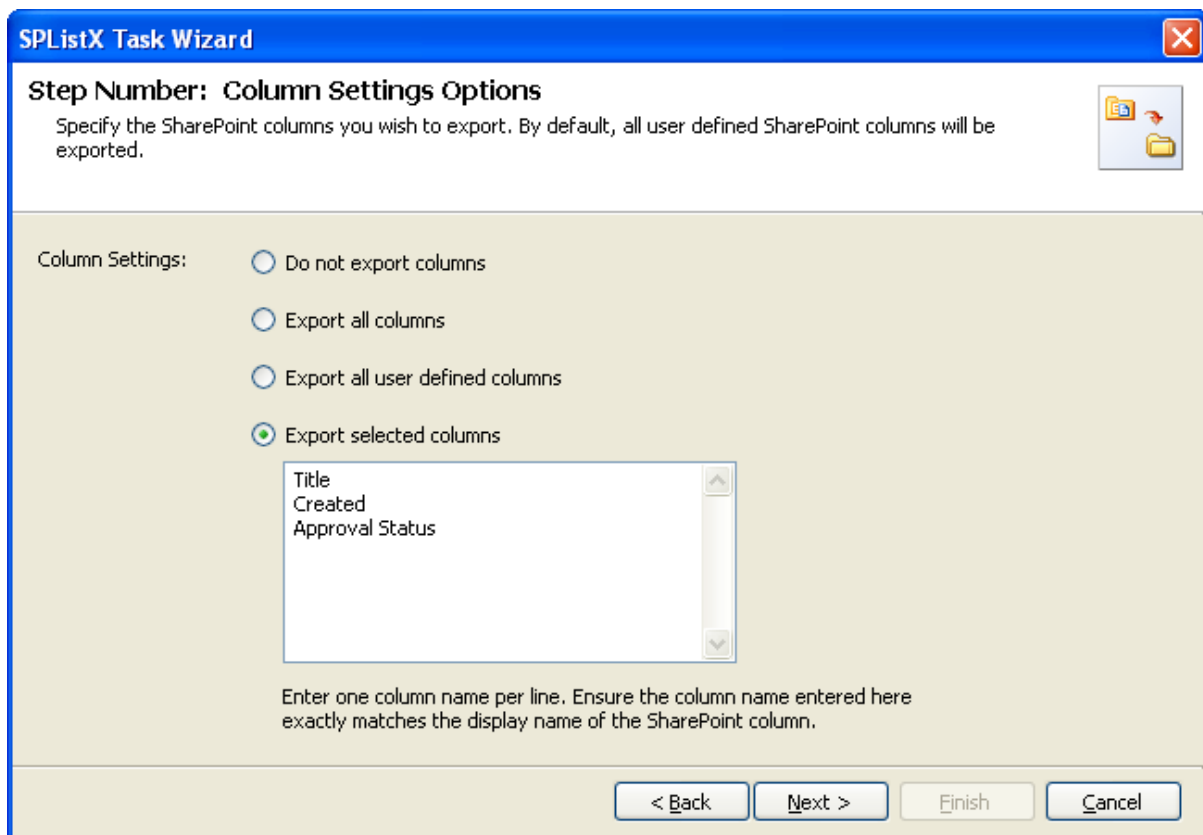
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back Next > Finish Cancel

2) Select any one of the following metadata settings:

- **Do not export columns** - This option does not export columns.
- **Export all columns** - Exports all columns available in the source SharePoint list, including SharePoint system columns such as Created, Modified, Approval Status, etc.
- **Export all user defined columns** - Exports all columns that are created by a SharePoint user
- **Export selected columns** - Exports columns that are specified in the textbox

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The screenshot shows the 'SPListX Task Wizard' dialog box. The title bar is blue with the text 'SPListX Task Wizard' and a close button. The main area has a light beige background. At the top, it says 'Step Number: Column Settings Options' followed by the instruction 'Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.' There is a small icon of a folder with a red arrow pointing to it. Below this, under 'Column Settings:', there are four radio button options: 'Do not export columns', 'Export all columns', 'Export all user defined columns', and 'Export selected columns'. The 'Export selected columns' option is selected. Below the radio buttons is a text box containing the column names 'Title', 'Created', and 'Approval Status'. At the bottom of the text box are up and down arrow buttons. Below the text box is the instruction 'Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.' At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

SPListX Task Wizard

Step Number: Column Settings Options

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☐ Export all user defined columns
- ☒ Export selected columns

Title
Created
Approval Status

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

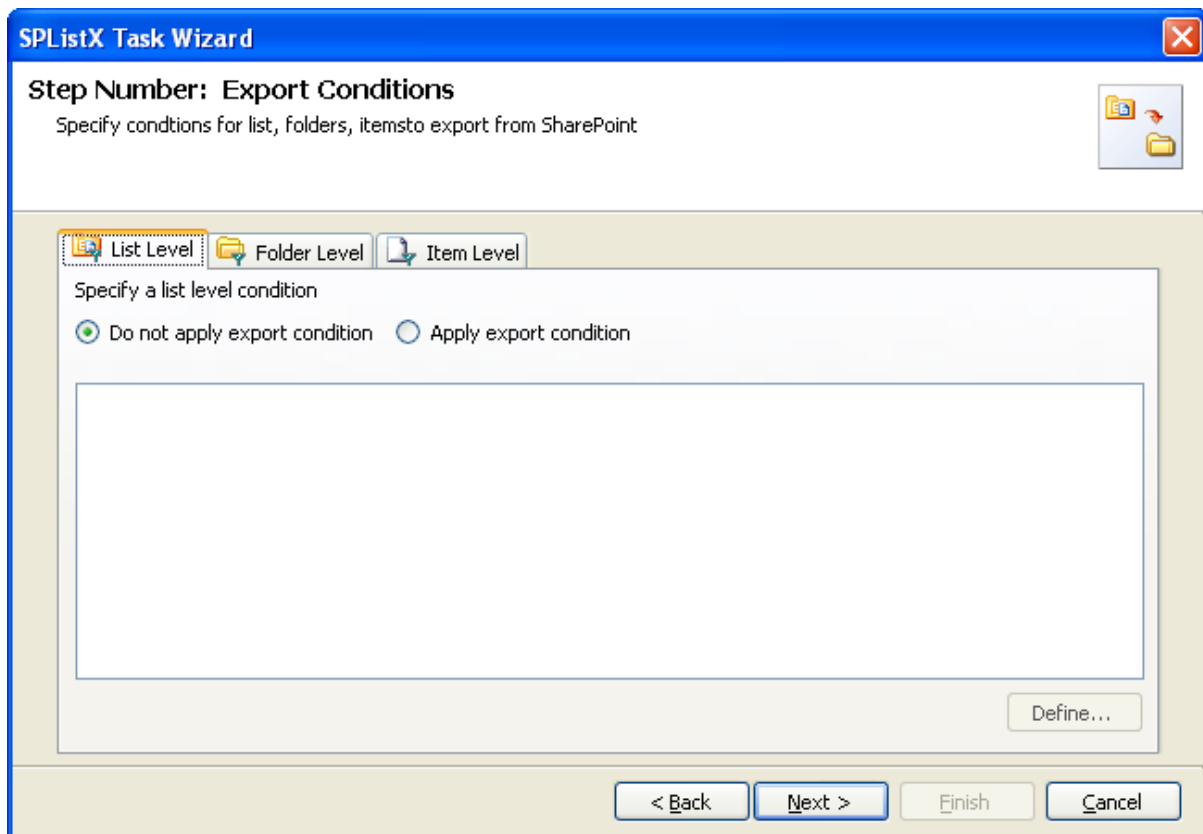
< Back Next > Finish Cancel

Click **Next to proceed.**

3.7 Export Conditions

SPListX can export folders, files and list items including attachments from SharePoint list based on certain export conditions. The conditions can be created by using SharePoint columns in the source list.

1) The **Export Conditions** step appears as shown below:



2) You can specify export conditions at three levels:

- List Level
- Folder Level
- List Item Level

3) List Level Conditions

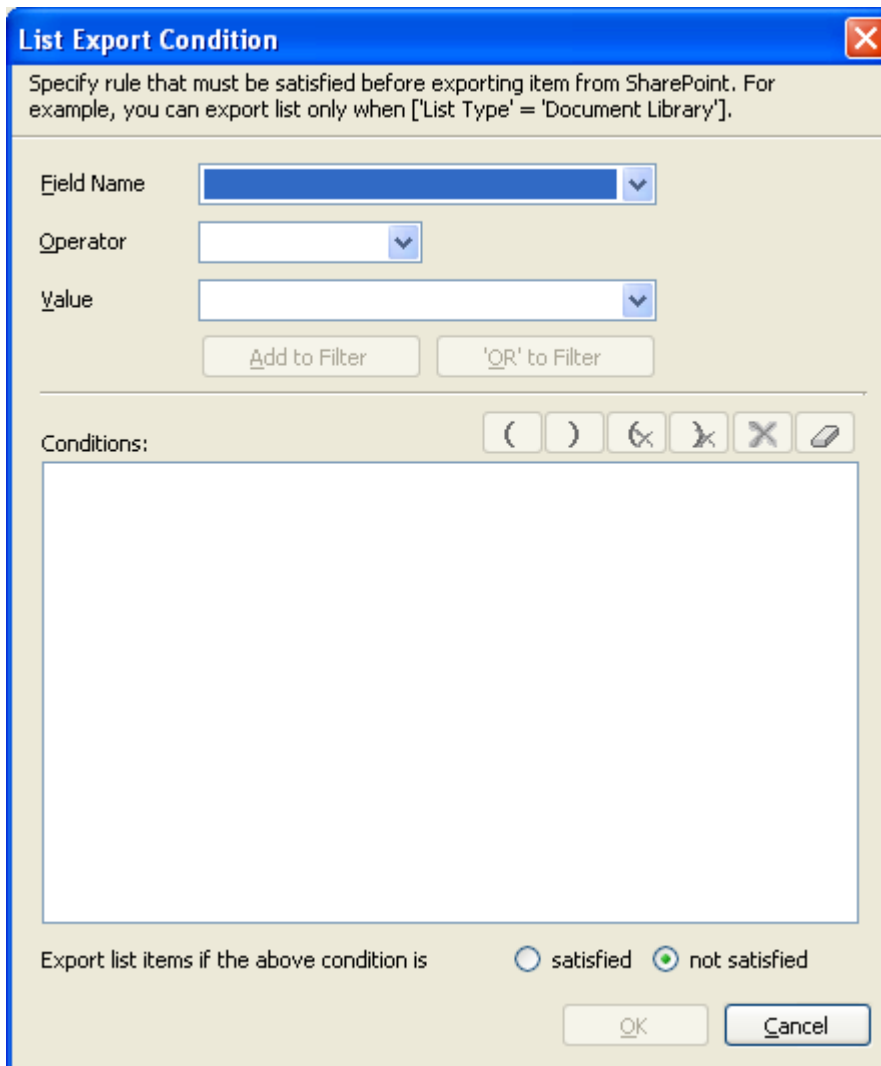
Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter lists.
- **Apply the following conditions** - The conditions specified will be used to filter lists taken for export from source SharePoint List.

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- 4) Click **Define** to specify the conditions

The **List Export Conditions Dialog** appears as shown below:



The screenshot shows a dialog box titled "List Export Condition" with a close button (X) in the top right corner. The dialog contains the following elements:

- A text box with the instruction: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library']."
- Three dropdown menus labeled "Field Name", "Operator", and "Value".
- Two buttons: "Add to Filter" and "'OR' to Filter".
- A "Conditions:" label followed by a set of icons: a left parenthesis '(', a right parenthesis ')', a double arrow '<=>', a double arrow '<=>', a double arrow '<=>', and a double arrow '<=>'.
- A large empty text area for defining conditions.
- Two radio buttons at the bottom: "satisfied" (unselected) and "not satisfied" (selected).
- Two buttons at the bottom right: "OK" and "Cancel".

- 5) You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

List Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library'].

Field Name: Base Type

Operator: =

Value: Document Library

'À' to Filter 'Ò' to Filter

Conditions:

- [Base Type] = 'Document Library'

Export list items if the above condition is ☐ satisfied ☒ not satisfied

OK Cancel

- 6) SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:
- **Export list items if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.
 - **Export list items if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export.

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7) Folder Level Conditions

Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter folders.
- **Apply the following conditions** - The conditions specified will be used to filter folders taken for export from source SharePoint List.

8) Click Define to specify the conditions

The **Folder Export Conditions Dialog** appears as shown below:

The screenshot shows the 'Folder Export Condition' dialog box. It has a title bar with a close button. The main area contains a text box with the instruction: 'Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By' = 'john doe']'. Below this are three dropdown menus: 'Field Name', 'Operator', and 'Value'. To the right of the 'Field Name' dropdown is a button with three dots (...). Below these dropdowns are two buttons: 'Add to Filter' and '"OR" to Filter'. Below these buttons is a section labeled 'Conditions:' with a large empty text area. Above this text area are several icons: a left parenthesis '(', a right parenthesis ')', a delete icon (X), a copy icon, a paste icon, and an eraser icon. At the bottom of the dialog, there is a label 'Export list items if the above condition is' followed by two radio buttons: 'satisfied' and 'not satisfied'. The 'not satisfied' radio button is selected. At the bottom right are 'OK' and 'Cancel' buttons.

9) Click (...) button to add the SharePoint columns in Field Name dropdown.

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The Add Fields Dialog appears as shown below:

Column Name	Column Type
Designation	Text
Date of join	DateTime
Authorized by	User

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

- 10)** You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

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Folder Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name: Created Date

Operator: <=

Value: 9/ 1/2009

'AND' to Filter 'OR' to Filter

Conditions:

[Created Date] > #9/1/2009#
AND [Created Date] <= #9/1/2009#

Export list items if the above condition is ☐ satisfied ☒ not satisfied

OK Cancel

11) SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

12) List Item Level Conditions

Same as Folder Level Conditions

13) Click Next to proceed.

3.8 Destination Folder Options

SPListX will create destination folders based on the following options given below.

- 1) The **Destination Folder options** specification wizard step appears as shown below:

SPListX Task Wizard

Step Number: Destination Folder Options
Specify folders settings to use when creating folders in file system.

Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No

Attachment Folder Tag:

Do you want to overwrite file if the file name already exists in destination location? ☐ Yes ☒ No

Alternate File Name Mask (Optional):

< Back Next > Finish Cancel

- 2) Select from the following options:
 - a) **Do you want to create current timestamp folder under destination location?** - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).
 - b) **Do you want to create top-level folder(s) included for export?** - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

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c) Do you want to create destination folder path if it does not exist? -

This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

d) Do you want to create a folder for the list or folder underneath, when its contents are empty? - This option creates the folder in the destination location, if the source list or folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

e) Do you want to create separate folder for storing attachments? - This option creates separate folder for storing attachments under the specified destination location by selecting the option (yes/No).

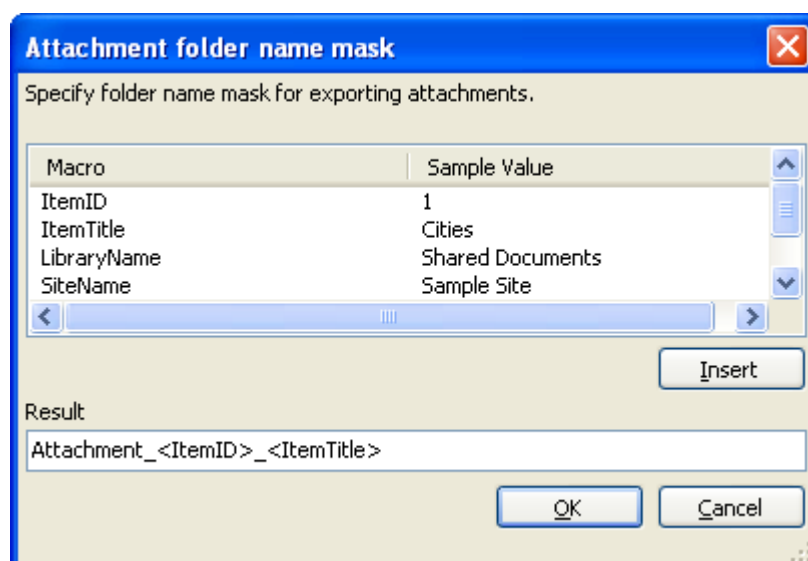
f) Do you want to overwrite file if the file name is already exist in destination location?

(i) Yes - Deletes the file from the destination location and exports the current source file.

(ii) No - Skips the file without overwriting the existing file with the same name.

- 3)** You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



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Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.

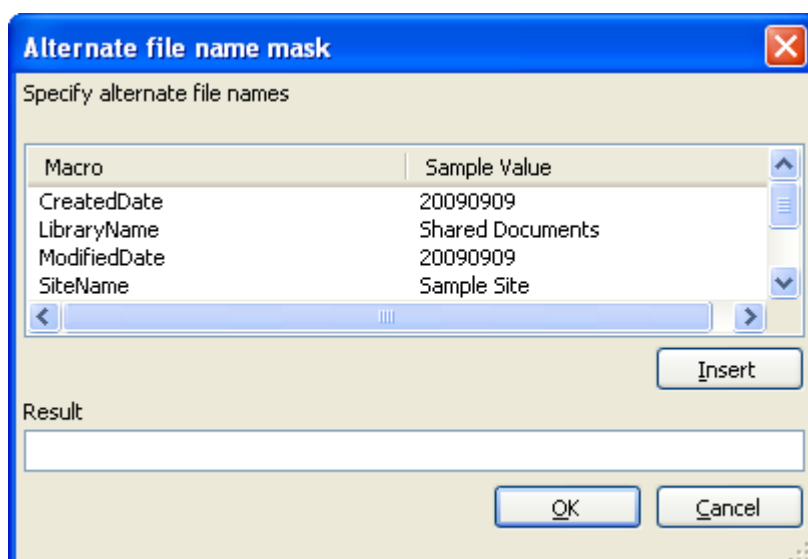
The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task1". The main heading is "Step Number: Destination Folder Options" with a subtitle "Specify folders settings to use when creating folders in file system." and a folder icon. The dialog contains several configuration options:

- "Do you want to create current timestamp folder under destination location?" with radio buttons for Yes and No (No is selected).
- "Do you want to create the top-level folder(s) included for export?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create destination folder path if it does not exist?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create a folder for the list or folder underneath, when its contents are empty" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create separate folder for storing attachments?" with radio buttons for Yes and No (Yes is selected).
- "Attachment Folder Tag:" with a text box containing "Attachment_<ItemID>_<ItemName>" and a browse button (three dots).
- "Do you want to overwrite file if the file name already exists in destination location?" with radio buttons for Yes and No (No is selected).
- "Alternate File Name Mask (Optional):" with an empty text box and a browse button (three dots).

At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

- 4) If you do not want to overwrite a file, if it already exists in the destination file system location, you can specify an alternate file name tag to be used for the exported file name. To select alternate file naming mask, click the button placed next to the alternate file tag name textbox. Alternate file name mask dialog appears as shown below:

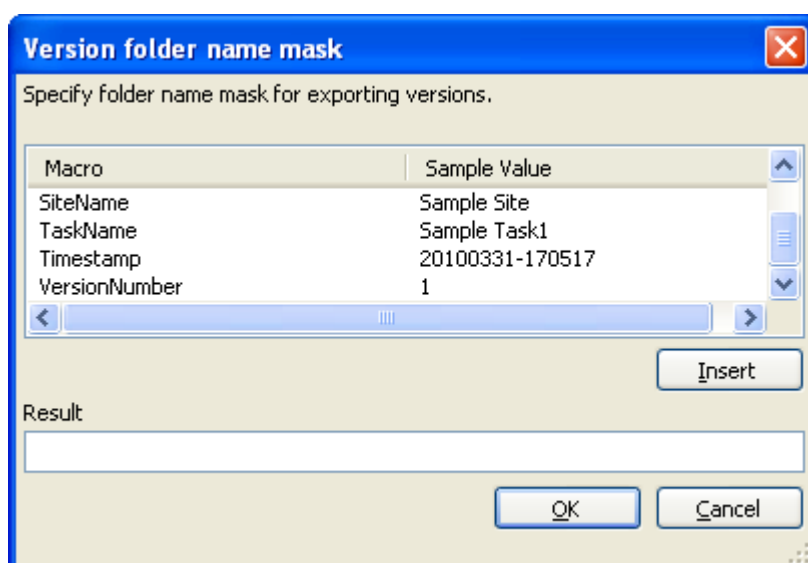
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Construct alternate file naming mask with the available mask provided in the dialog. Click OK to close the dialog. The constructed alternate file name mask will be placed in alternate file naming tag textbox. Files will be exported with the alternate naming mask.

- 5) When selecting **all versions or Export version range** option, a version folder name must be provided in Version Folder Name textbox. You have the option to select a version folder name when exporting document versions. The version folder will be named based on the folder naming convention specified by the user.

To select version folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



Construct version folder name with the available mask provided in the dialog. Click OK to close the dialog.

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The constructed folder name mask will be placed in version folder naming tag textbox as shown below.

The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task1". The main heading is "Step Number: Destination Folder Options" with a subtitle "Specify folders settings to use when creating folders in file system." There is a folder icon in the top right corner. The dialog contains several configuration options:

- "Do you want to create current timestamp folder under destination location?" with radio buttons for Yes and No (No is selected).
- "Do you want to create the top-level folder(s) included for export?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create destination folder path if it does not exist?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create a folder for the list or folder underneath, when its contents are empty" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create separate folder for storing attachments?" with radio buttons for Yes and No (Yes is selected).
- "Attachment Folder Tag:" followed by a text box containing "Attachment_<ItemID>_<ItemName>" and a browse button (three dots).
- "Do you want to overwrite file if the file name already exists in destination location?" with radio buttons for Yes and No (No is selected).
- "Alternate File Name Mask (Optional):" followed by an empty text box and a browse button (three dots).

At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

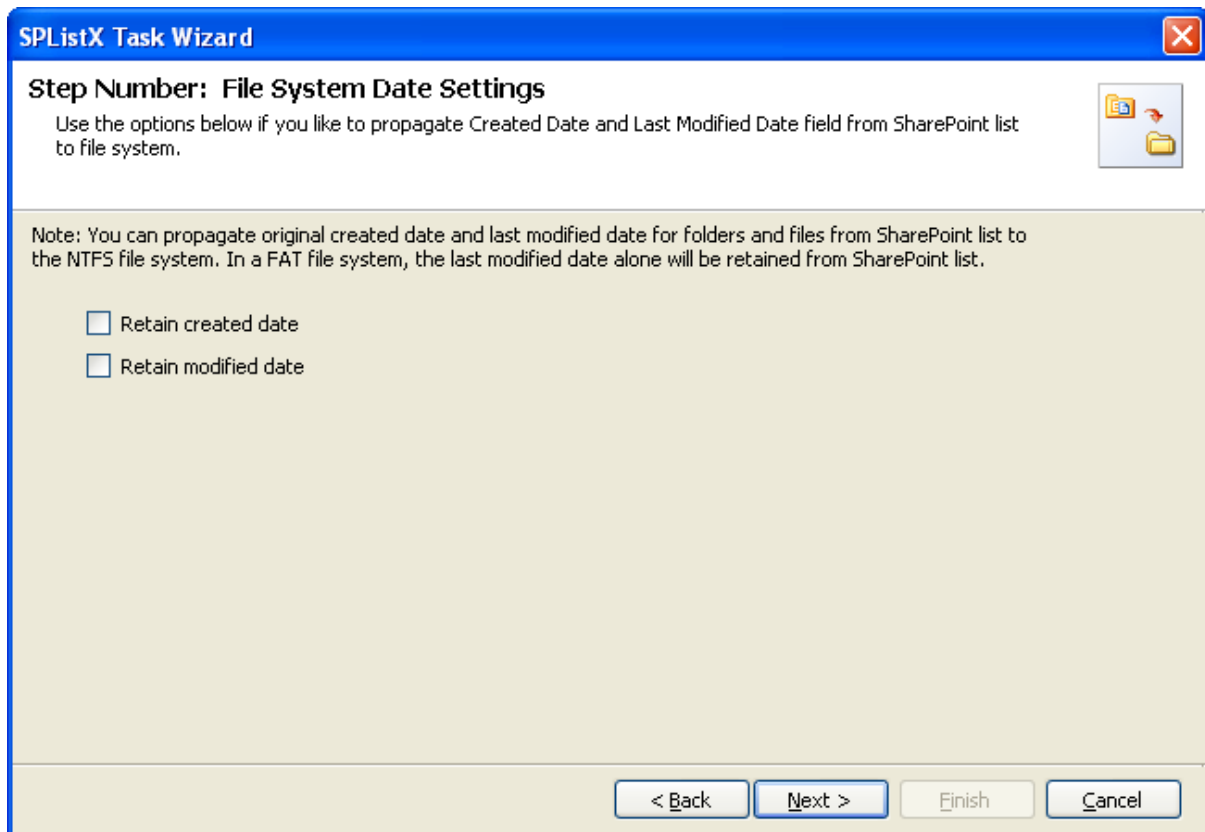
When exporting document versions, a new folder with the name specified in the textbox will be created as a sub-folder in the folder hierarchy and the respective versions will be exported to the corresponding version folder. For example if "Version History<Version Number>" is entered in the textbox, the respective document versions will be stored in folders such as "VersionHistory1", "VersionHistory1.1", "VersionHistory2" etc.

6) Click Next to proceed.

3.9 File System Date Settings

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:

1) The File System Date Settings wizard step appears as shown below:



2) Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

- a) Retain created date** - Carry forward / propagate *Created Date* field from the source folders, files and list item attachments to the Windows file system.
- b) Retain modified date** - Carry forward / propagate *Last Modified Date* field from the source folders, files and list item attachments to the Windows file system.

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NOTE: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

Click Next to proceed.

3.10 Metadata File Settings

To specify the metadata file location where the folder and list metadata is to be exported, follow the steps given below:

1) The Metadata File Settings step appears as shown below:

SPListX Task Wizard

Step Number: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/MDB/XLS/XML)

Metadata file option:

- ☐ Store metadata files in the respective list folder location
- ☒ Use different metadata file location

Metadata file location: ...

☒ Create folder path if it does not exist ☐ Add to Favorites

Metadata file format: ▼

☐ Export metadata Field Definitions as separate XML file along with the metadata file ⓘ

Metadata file naming mask: (One file for each list) Edit...

☐ Create metadata file even when there are no records to export

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number

Edit...

< Back Next > Finish Cancel

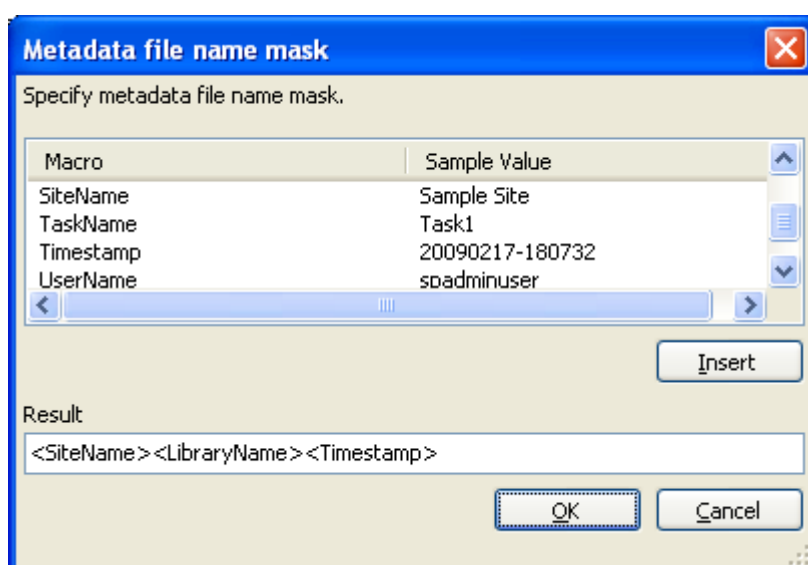
2) Specify a folder path where the selected list items metadata are to be exported.
You can also click browse ('...') button to launch folder browser dialog.

NOTE: Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

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- 3) Select a metadata file format using one of the following options:
 - a) **Comma delimited (CSV)** - Export metadata column values in comma separated values (CSV) file format.
 - b) **Microsoft Access (MDB)** - Export metadata column values in Microsoft Access database format.
 - c) **Microsoft Excel (XLS)** - Export metadata column values in Microsoft Excel format.
 - d) **Extensible Mark-up Language (XML)** - Export metadata column values in XML format.
- 4) Select a metadata file naming mask to use when creating the metadata file. Metadata file will be named based on the selected file naming options.

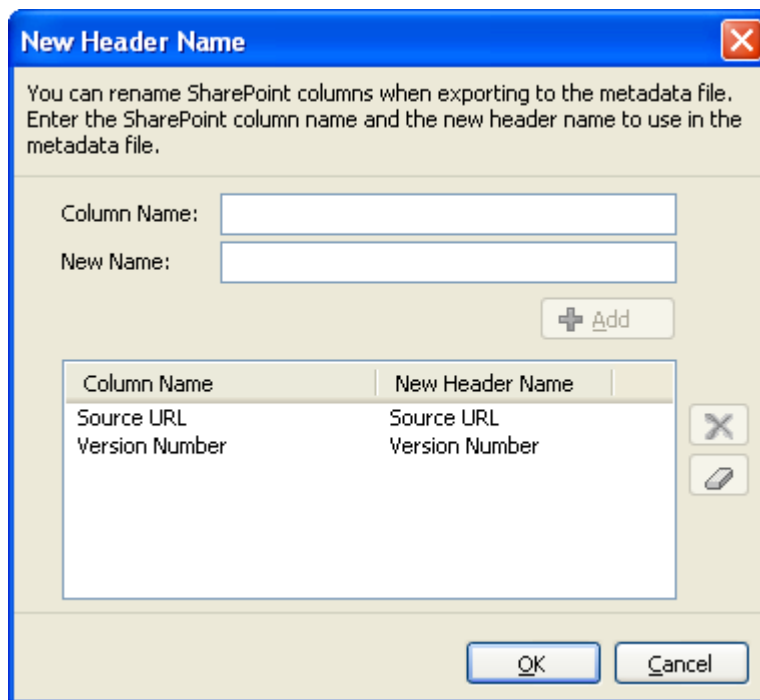
To select metadata file naming mask, click the button placed next to the metadata file naming mask text box. This dialog appears as shown below:



Construct metadata file name along with the available name mask provided in the dialog. Click OK to close the dialog. The constructed file name mask will be placed in metadata file naming mask textbox as shown above. The metadata file will be named using the resultant mask value.

- 5) By default, an empty metadata file will not be created. If you want to create an empty metadata file, then select "Create metadata file even when there are no list items" option.
- 6) You can specify new column names when generating the metadata file in the file system location. To use this feature, specify the new header names by clicking the Edit button. A New Header Dialog appears as shown below:

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New Header Name

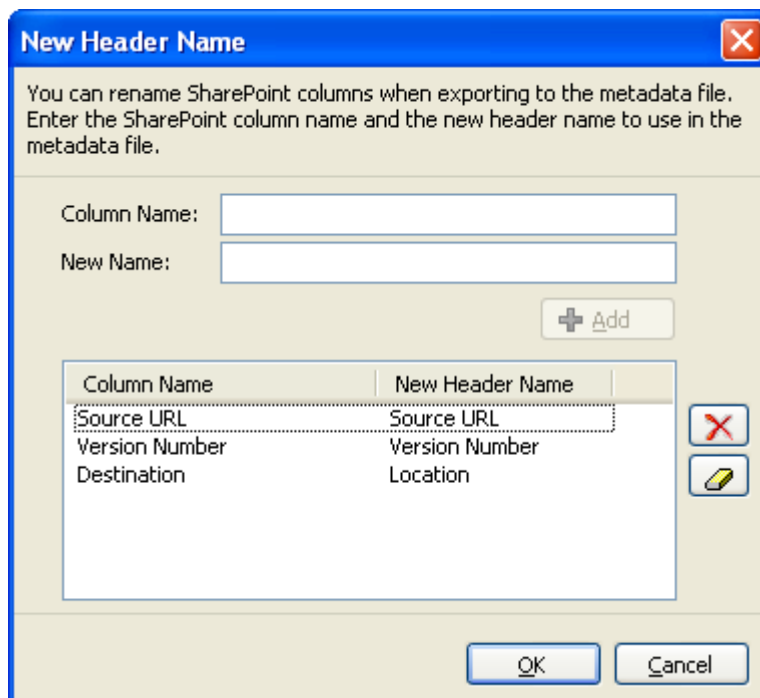
You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file.

Column Name:

New Name:

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number

- 7) You can specify SharePoint column name in Column Name textbox and new name for the SharePoint column in new name textbox. Click **OK**. For example, a SharePoint column named 'Department' in the source SharePoint list can be renamed as 'Location' when exporting the metadata files at run time.



New Header Name

You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file.

Column Name:

New Name:

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number
Destination	Location

CHAPTER 3 – Export SharePoint List contents using the browse option

SPListX Task Wizard

Step Number: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/MDB/XLS/XML)

Metadata file option:

- ☐ Store metadata files in the respective list folder location
- ☒ Use different metadata file location

Metadata file location: ...

☒ Create folder path if it does not exist ☐ Add to Favorites

Metadata file format:

☐ Export metadata Field Definitions as separate XML file along with the metadata file

Metadata file naming mask: (One file for each list) Edit...

☐ Create metadata file even when there are no records to export

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number
Destination	Destination

 Edit...

< Back Next > Finish Cancel

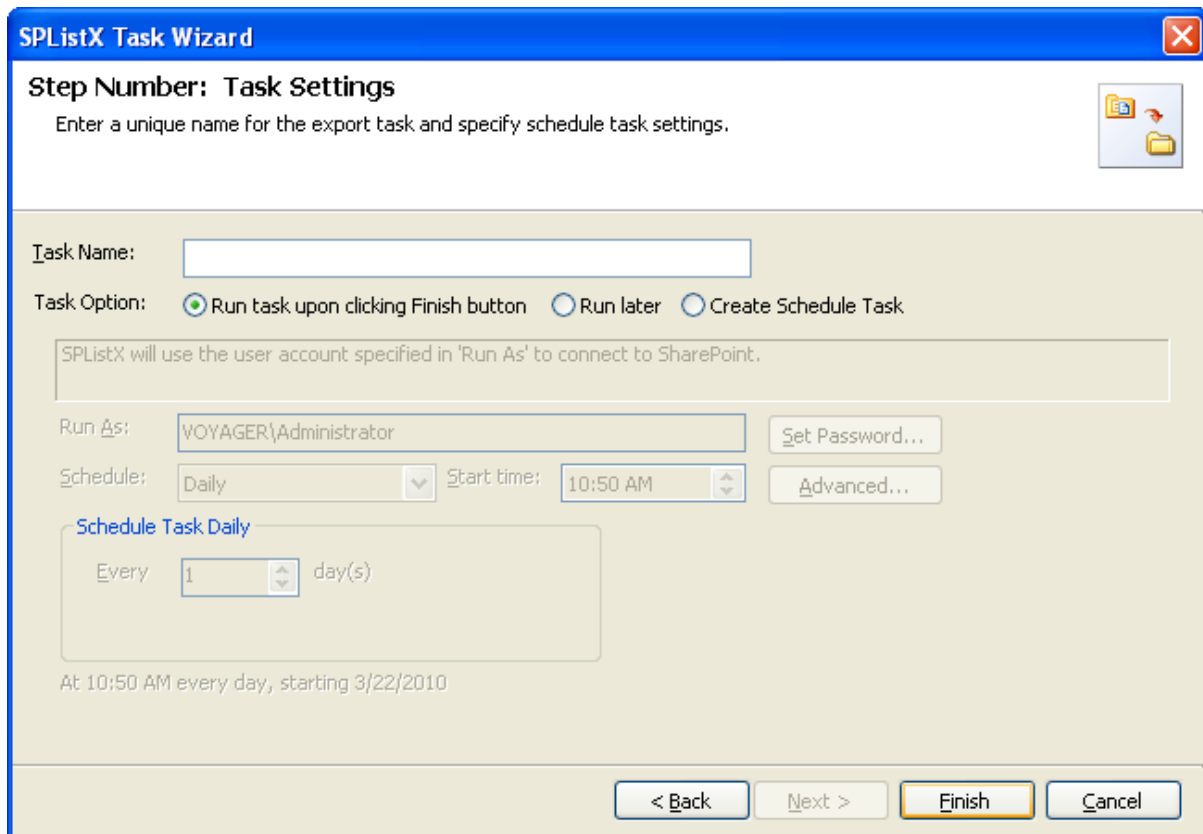
Select **Add to Favorites** checkbox to add the URL to File System favorites.

8) Click **Next** to proceed.

3.11 Task Settings

To specify the task name and schedule settings:

- 1) The **Task Settings** step appears as shown below



- 2) Enter a unique task name in **Task Name** textbox.
- 3) Select a **Task Option** from one of the following options:
 - a) **Run task upon clicking Finish button** - to run the task immediately after clicking Finish button
 - b) **Run later** - to run the task later as and when desired
 - c) **Create Schedule task** - to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the Run As user account specified in this export wizard step. The Run As account should be a valid Windows domain account.

CHAPTER 3 – Export SharePoint List contents using the browse option

SPListX Task Wizard

Step Number: Task Settings
Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option: ☐ Run task upon clicking Finish button ☐ Run later ☒ Create Schedule Task

SPListX will use the user account specified in 'Run As' to connect to SharePoint.

Run As:

Schedule:

Schedule Task Daily

Every day(s)

At 10:50 AM every day, starting 3/22/2010

< Back Next > Finish Cancel

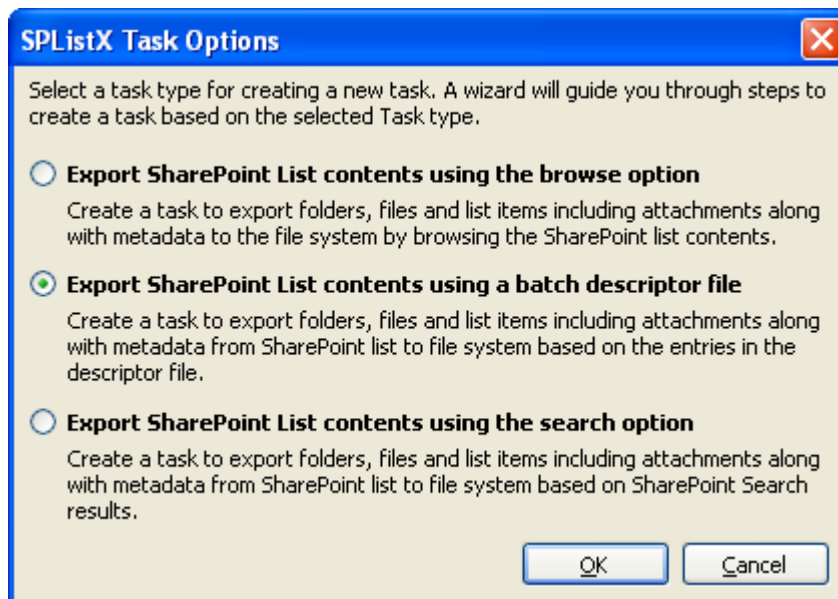
Click **Finish** button to create the task.

4 Export SharePoint List contents using a batch descriptor file

4.1 Create Task

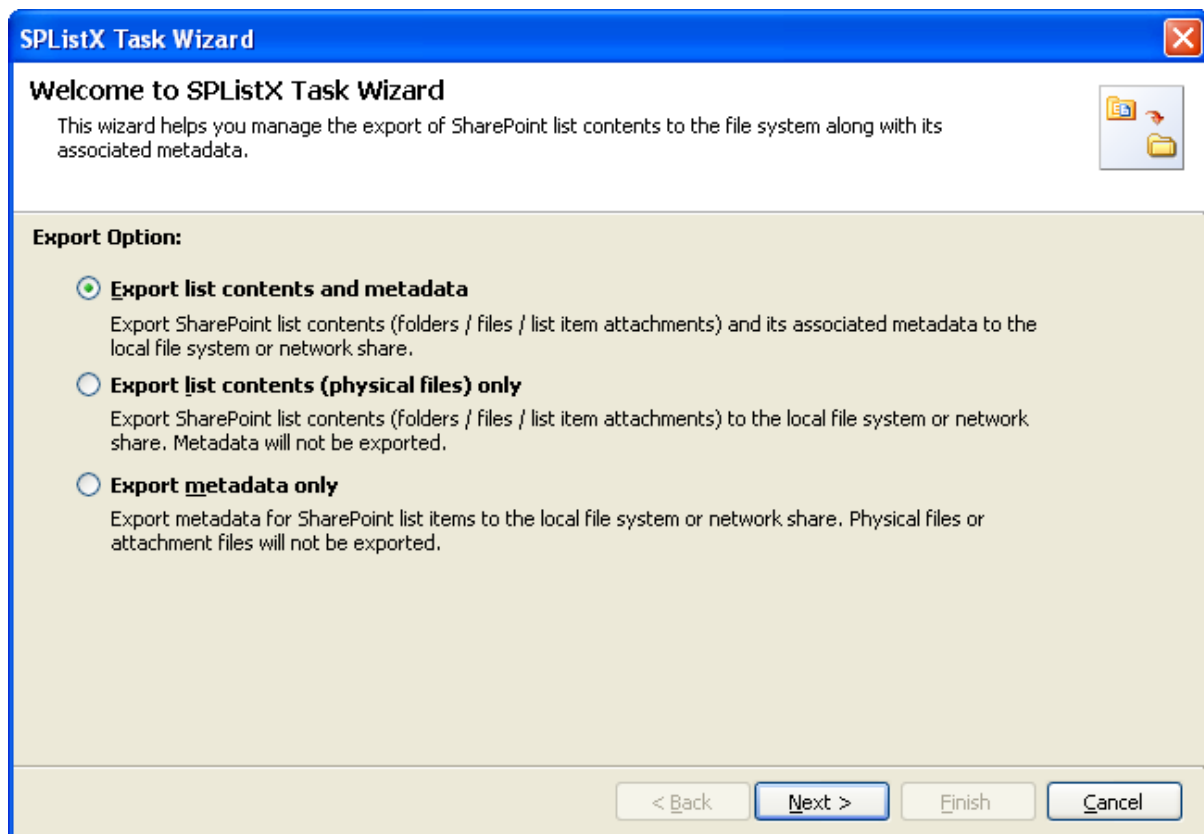
Create a task to export folders / files along with their list metadata from SharePoint Library to file system or network share based on the entries in the descriptor file. SPListX will process the files in the order in which they appear in the batch descriptor file.

- 1) **Select Export files and metadata using a batch descriptor file option in SPListX Task Options dialog as shown below and click OK.**



CHAPTER 4– Export SharePoint List contents using a batch descriptor file

2) The SPListX Task Wizard appears



- 3) Click **Next** button
- 4) Specify **Batch Descriptor File**
- 5) Specify **Version Options**
- 6) Specify **Column Settings Options**
- 7) Specify **Export Conditions**
- 8) Specify **Destination Folder Option**
- 9) Specify **File System Date Settings**
- 10) Specify **Metadata File Settings**
- 11) Specify **Task Settings**
- 12) Click **Finish** button to create the task.
- 13) Click **Back** button, to change any task settings.

4.2 Create Batch Descriptor File

The following section gives you the guidelines to create an external batch descriptor file for **Export SharePoint List contents using a batch descriptor file** task type.

- 1) The first row of the metadata file should contain the Field Names as headers.
- 2) The first field should be named as '**Path**' and second field should be named as '**Destination Path**'.

The other field names should be separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key: (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (Comma)	CSV Delimited
; (Semi-colon)	Delimited (;)
(asterisk)	Delimited ()

- 3) The first column of all the rows should contain the source URL of the list or folder or file or folder or list item. In other words, the source path should be either a SharePoint List URL (e.g., <http://vyapin/Shared Documents>) or sub-folder URL within SharePoint List (e.g., <http://vyapin/Shared Documents/sample folder1>) or file URL within the SharePoint List (e.g., <http://vyapin/shared documents/sample folder1/SampleDocument.doc>) or list item URL within the SharePoint List (e.g., http://vyapin/lists/cities/1_.000)
- 4) Use wildcard representations (*, and *.*) in order to export the list items from the source SharePoint list. Please see wildcard characters usage for this purpose:

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

Wildcard characters	Example	Description
.*	http://sharepoint/lists/Cities/.*	Exports all items from the source SharePoint list.
.(default)	http://sharepoint/shared documents/*.*	Exports all items and folders from the source SharePoint list.
.	http://sharepoint/lists/tasks/.	Exports list items available in the top level folders only.
*	http://sharepoint/lists/custom list/*	Exports folder structure only.

NOTE: For list items folder traversal option is not applicable.

- 5) The second column of all the rows should contain the destination folder location e.g., "C:\My Projects\" (or) \\FileServer\My Documents, where the exported item is to be stored.
- 6) Be consistent with the drive letters and UNC path when exporting folders, files and list item attachments from a SharePoint list. If you use local / mapped drives to export files or list item attachments, ensure the 'Destination Path' field has the corresponding local / mapped drive path (e.g., M:\My Documents). If you use shares to export file or list item attachments, ensure the 'Destination Path' field has the corresponding UNC path (e.g., \\Machine Name\Share Name).
- 7) For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "http://vyapin/Shared Documents/sample folder1". When using accent characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.
- 8) For Microsoft Excel file formats (XLS / XLSX), you do not have to enclose the field names and their corresponding values within double quotes.

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

Sample format of a CSV / TEXT batch descriptor file:

NOTE: Refer Point #2 for the separator to be used in the batch descriptor file

"Path", "Destination Path"

"http://vyapin/shared documents/Sample Brochure.doc", "C:\My Documents"

"http://vyapin/shared documents/sample folder1/*", "\\vyapinfo\ExportDocs\shared doc contents"

"http://vyapin/lists/*.*", "C:\My Sales\Lists Backup"

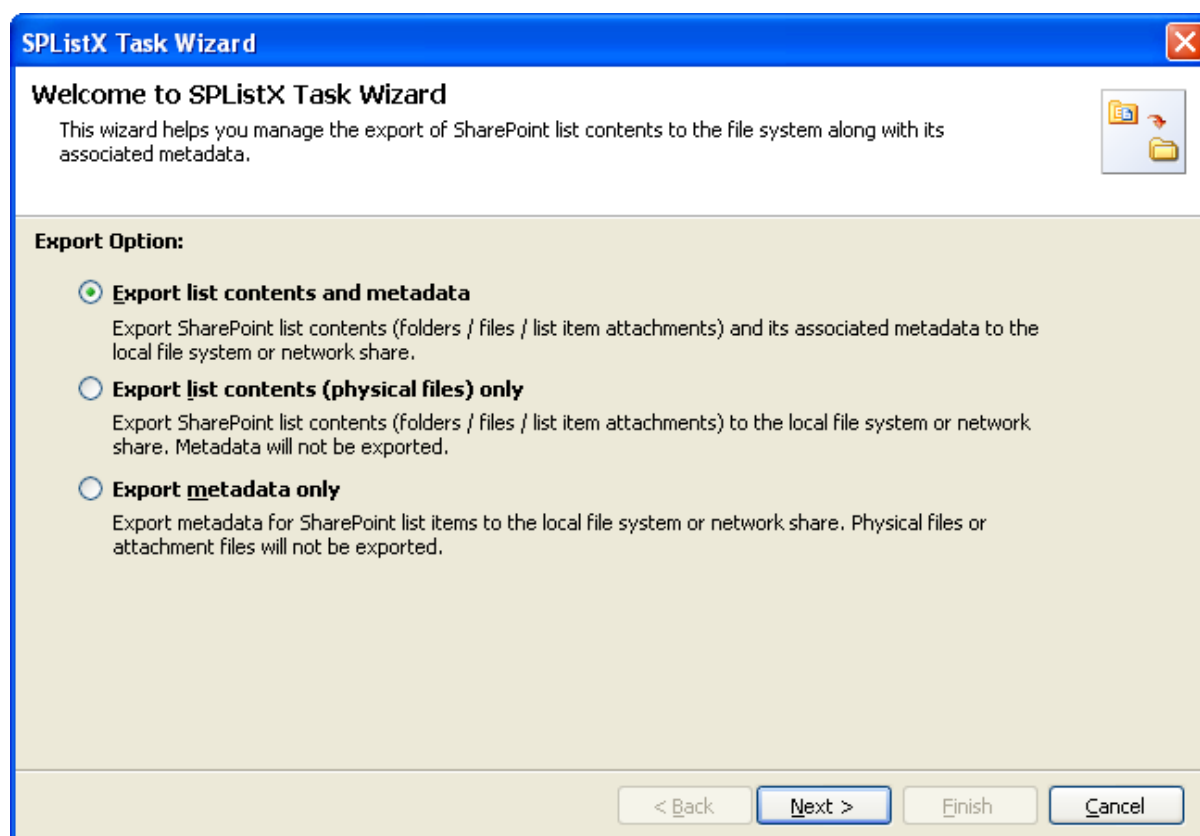
"http://Vyapin/lists/cities/*.*", "C:\My Cities\Backup"

4.3 Export Options

You can create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share. The export task enables users to select the export options in order to specify his requirements.

- A. Export list contents and metadata:** Export SharePoint list contents (folders/files/list item attachments) and its associated metadata to the local file system or network share.
- B. Export list contents (physical files) only:** Export SharePoint list contents (folders/files/list item attachments) to the local file system or network share. Metadata will not be exported.
- C. Export metadata only:** Export metadata for SharePoint list contents to the local file system or network share. Physical files or attachment files will not be exported.

1) The **Export Options** step appears as shown below:



Select the required export options. The wizard guides you with the steps accordingly.

4.4 Batch descriptor file

You can create a SPListX export task using a batch descriptor file that states the folders and list items to export from the SharePoint list along with the destination file system location to store the exported item. SPListX will export the folders, list items and associated metadata based on the sequential entries in the batch descriptor file.

- 1) The **Batch descriptor file** specification step appears as shown below:

SPListX Task Wizard

Step Number: Batch descriptor file

Specify batch descriptor file to use in order to export folders / list items and its associated metadata to the local file system or network share. Specify user credential to connect to SharePoint when running the export task.

File Name: ... ?

Sheet Name: ... View... Clear

SharePoint User Credentials:

☒ **Use currently logged on user context to connect to SharePoint**
Connect to SharePoint using the current Windows logon session.

☐ **Use the following credential to connect to SharePoint**
I would like to schedule this export task and connect to SharePoint using the specified credentials when running the task in unattended mode(schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose.

User Name: ...
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

Note: SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

< Back Next > Finish Cancel

- 2) Click (...) button to select the batch descriptor file. The descriptor file can be in any one of the following file formats - Comma delimited (**CSV**), Microsoft Excel (**XLS / XLSX**) or Text file (**TXT**).
- 3) Click ? to see a sample batch descriptor file (such as, Comma delimited (**CSV**) file, Excel (**XLS**) files).
- 4) The batch descriptor file will automatically be extracted once the file name is specified. If you are using Microsoft Excel based file format, then select the sheet name to use from the drop-down.

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- 5) Click (...) to add a hidden sheet name of the Excel file from the drop down.
- 6) **I would like to connect to SharePoint using the above credentials when running the task in unattended mode (schedule task). Store the above user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose** - In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

- 7) Select a stored profile name from the drop down or create a new profile for the current user context to connect to SharePoint to run the export task in unattended mode / scheduled run.
- 8) Click ... button to create new user profile.

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SPListX Task Wizard

Step Number: Batch descriptor file

Specify batch descriptor file to use in order to export folders / list items and its associated metadata to the local file system or network share. Specify user credential to connect to SharePoint when running the export task.

File Name: ... ?

Sheet Name: ... 1 row(s)

SharePoint User Credentials:

☐ Use currently logged on user context to connect to SharePoint
Connect to SharePoint using the current Windows login session.

☒ Use the following credential to connect to SharePoint
I would like to schedule this export task and connect to SharePoint using the specified credentials when running the task in unattended mode(schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet / Credential Manager for this purpose. ?

User Name: ...
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

Note: SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

Click **NEXT** to Proceed

4.5 Version Options

To selectively export list item versions to the destination file system location:

- 1) The **Version Options** step appears as shown below:

SPListX Task Wizard

Step Number: Version Options

Specify the list item versions to export. By default, latest version of the list item will be exported.

Version Options:

- ☐ Latest version only
- ☐ Export version range: Start: End:
- ☐ Export version date range: Start: End:
- ☒ All Versions

< Back Next > Finish Cancel

- 2) By default, **Latest version only** option is selected. Item version settings will be used for each of the list item exported from the list.
- 3) Select any one of the following version settings.
 - a) **Latest version only** - Export the latest list item version from the source.
 - b) **Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5
 - c) **Export version date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is Modified date of a list item.
 - d) **All versions** - Export all list item versions available in the source list.

4.6 Column Settings Options

To selectively export metadata columns from the SharePoint list:

- 1) The **Column Settings Options** step appears as shown below:

SPListX Task Wizard

Step Number: Column Settings Options

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☒ Export all user defined columns
- ☐ Export selected columns

<Type column names here>

Examples:

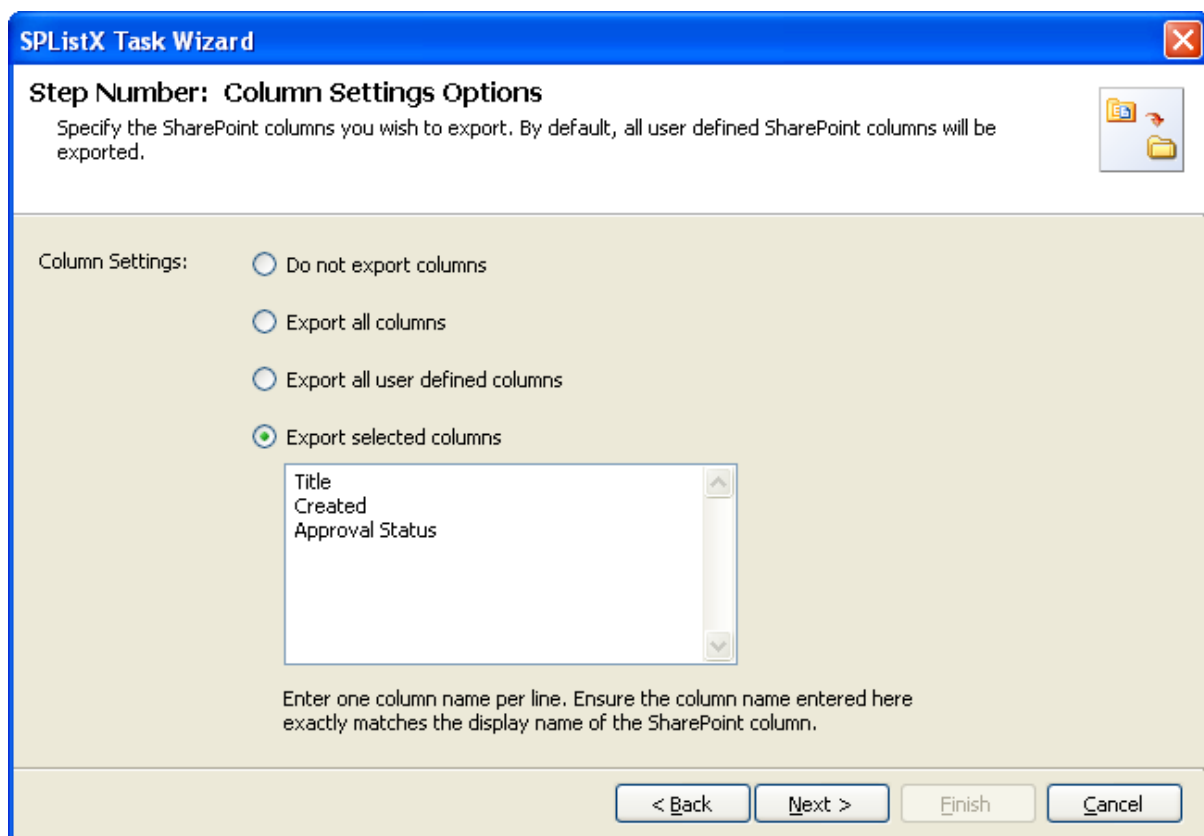
Title
Description
Author

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back Next > Finish Cancel

- 2) Select any one of the following metadata settings:
 - **Do not export columns** - This option does not export columns.
 - **Export all columns** - Exports all columns available in the source SharePoint list, including SharePoint system columns such as Created, Modified, Approval Status, etc.
 - **Export all user defined columns** - Exports all columns that are created by a SharePoint user
 - **Export selected columns** - Exports columns that are specified in the textbox

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The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard". The window has a blue title bar with a close button (X) in the top right corner. The main content area has a light beige background. At the top, the text "Step Number: Column Settings Options" is displayed in bold. Below this, a smaller line of text reads: "Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported." In the top right corner of the main area, there is a small icon showing a folder with a red arrow pointing into it. The "Column Settings:" section contains four radio button options: "Do not export columns", "Export all columns", "Export all user defined columns", and "Export selected columns". The "Export selected columns" option is selected, indicated by a green dot. Below these options is a text box containing the following text:
Title
Created
Approval Status
The text box has a vertical scrollbar on its right side. Below the text box, a line of text reads: "Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column." At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel". The "Next >" button is highlighted with a blue border.

SPListX Task Wizard

Step Number: Column Settings Options

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☐ Export all user defined columns
- ☒ Export selected columns

Title
Created
Approval Status

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

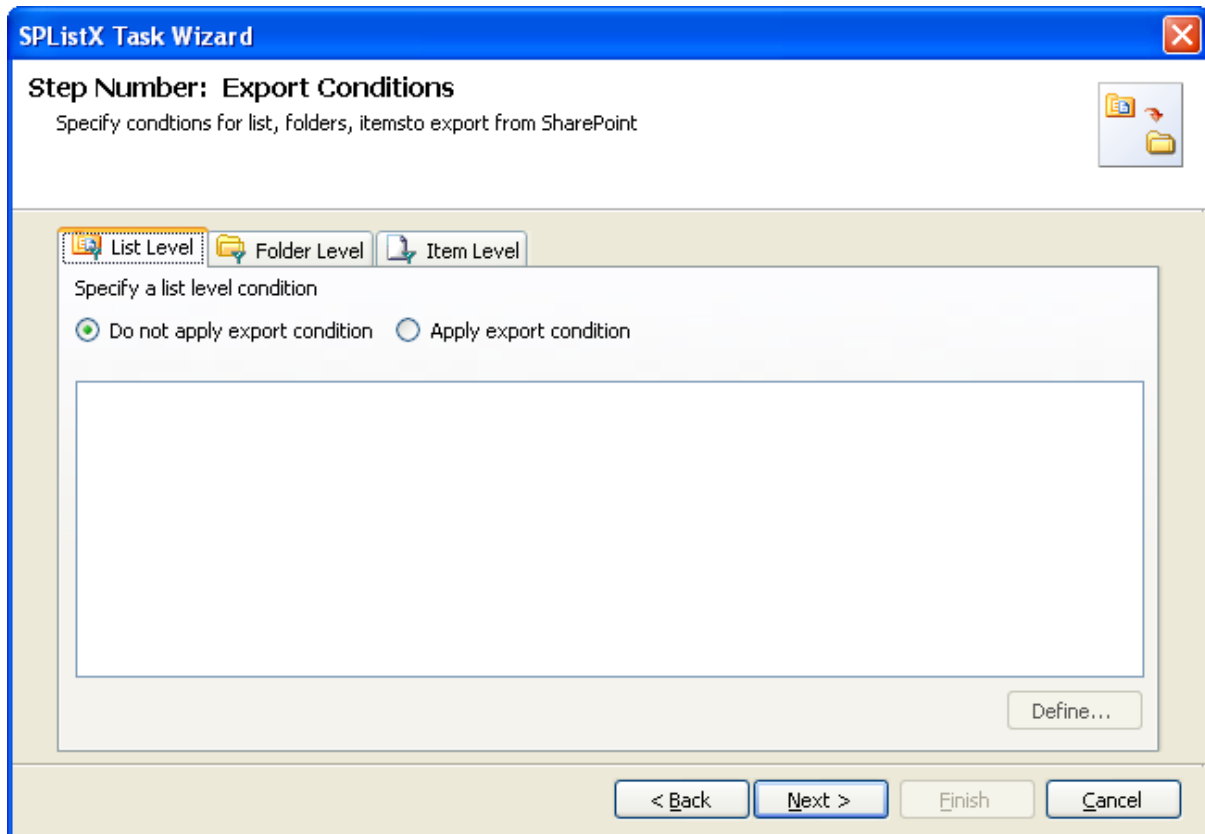
< Back Next > Finish Cancel

Click **Next** to proceed.

4.7 Export Conditions

SPListX can export folders, files and list items including attachments from SharePoint list based on certain export conditions. The conditions can be created by using SharePoint columns in the source list.

1) The **Export Conditions** step appears as shown below:



2) You can specify export conditions at three levels:

- List Level
- Folder Level
- List Item Level

3) List Level Conditions

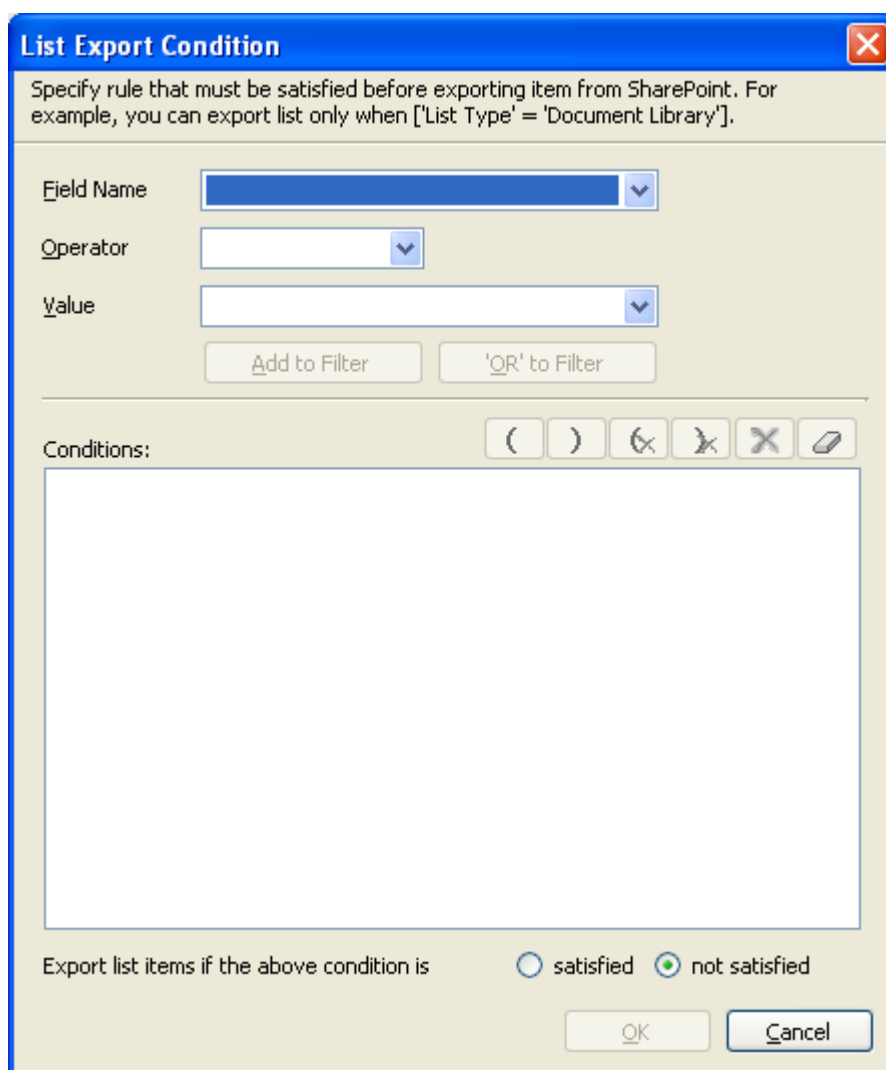
Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter lists.
- **Apply the following conditions** - The conditions specified will be used to filter lists taken for export from source SharePoint List.

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- 4) Click **Define** to specify the conditions

The **List Export Conditions Dialog** appears as shown below:



The screenshot shows a dialog box titled "List Export Condition" with a close button (X) in the top right corner. The dialog contains the following elements:

- A text box with the instruction: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library']."
- Three dropdown menus labeled "Field Name", "Operator", and "Value".
- Two buttons: "Add to Filter" and "'OR' to Filter".
- A section labeled "Conditions:" with a large empty text area for defining the condition. Above this area are icons for parentheses '(', ')', logical operators '&AND' and '&OR', and a delete icon (X).
- At the bottom, a label "Export list items if the above condition is" followed by two radio buttons: "satisfied" and "not satisfied" (which is selected).
- Two buttons at the bottom right: "OK" and "Cancel".

- 5) You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such as $=$, $<>$ to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

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List Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library'].

Field Name: Base Type

Operator: =

Value: Document Library

'AND' to Filter 'OR' to Filter

Conditions:

[Base Type] = 'Document Library'

Export list items if the above condition is ☐ satisfied ☒ not satisfied

OK Cancel

6) SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export.

7) Folder Level Conditions

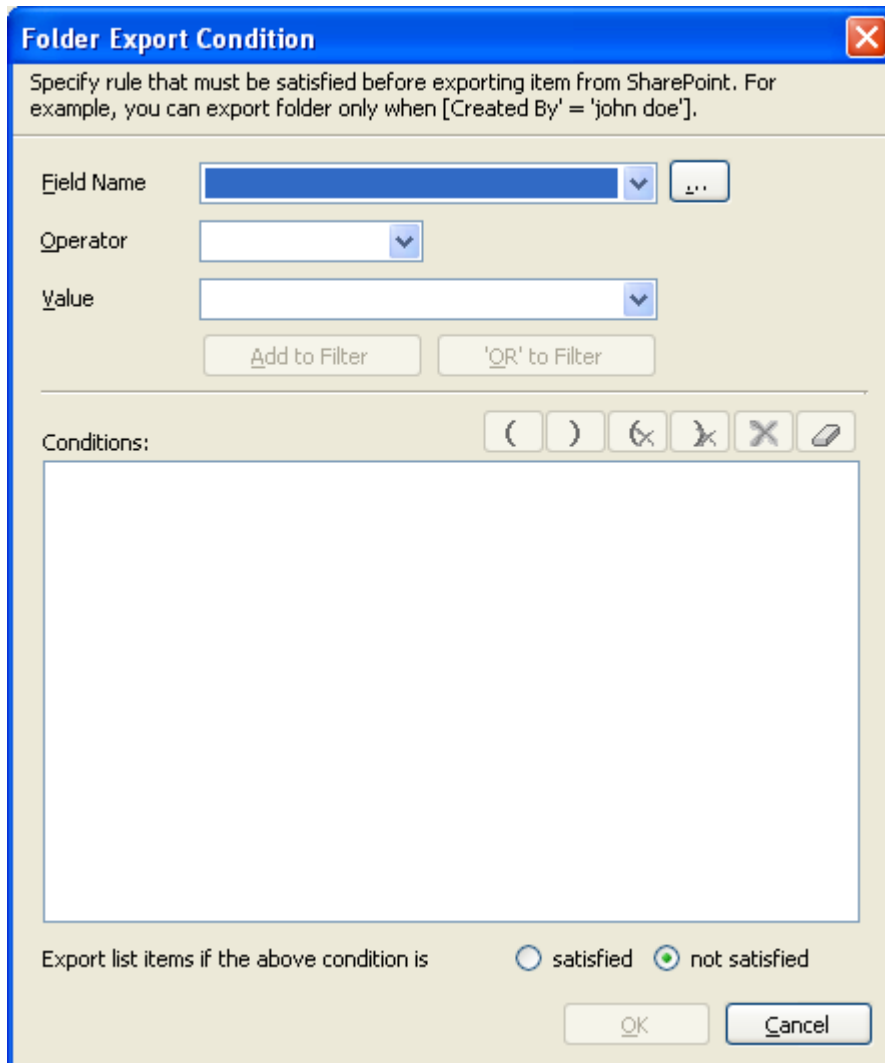
Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter folders.
- **Apply the following conditions** - The conditions specified will be used to filter folders taken for export from source SharePoint List.

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8) Click **Define** to specify the conditions

The **Folder Export Conditions Dialog** appears as shown below:



The **Folder Export Condition** dialog box is used to specify rules for exporting items from SharePoint. It features a title bar with a close button (X). Below the title bar, a text box explains the purpose: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'".

The main area contains three input fields: "Field Name" (a dropdown menu with a blue arrow and a (...) button to its right), "Operator" (a dropdown menu with a blue arrow), and "Value" (a dropdown menu with a blue arrow). Below these fields are two buttons: "Add to Filter" and "'OR' to Filter".

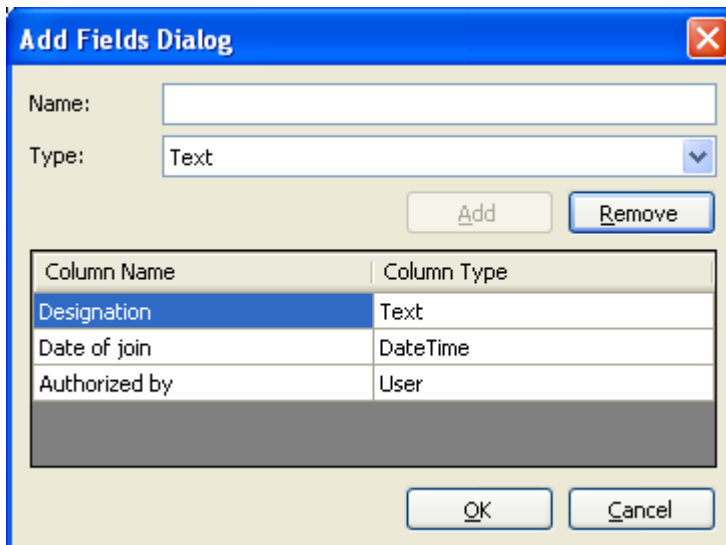
A section labeled "Conditions:" contains a large empty text area for defining conditions. Above this area is a row of icons: a left parenthesis "(", a right parenthesis ")", a delete icon (X), a copy icon, a paste icon, and an eraser icon.

At the bottom, there is a label "Export list items if the above condition is" followed by two radio buttons: "satisfied" and "not satisfied" (which is selected). At the very bottom are "OK" and "Cancel" buttons.

9) Click (...) button to add the SharePoint columns in Field Name dropdown.

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The Add Fields Dialog appears as shown below:



The screenshot shows the 'Add Fields Dialog' window. It has a title bar with a close button. Inside, there are two input fields: 'Name:' with an empty text box, and 'Type:' with a dropdown menu showing 'Text'. Below these are 'Add' and 'Remove' buttons. A table with two columns, 'Column Name' and 'Column Type', is present. The table contains three rows: 'Designation' with 'Text', 'Date of join' with 'DateTime', and 'Authorized by' with 'User'. The 'Designation' row is highlighted. At the bottom are 'OK' and 'Cancel' buttons.

Column Name	Column Type
Designation	Text
Date of join	DateTime
Authorized by	User

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

- 10)** You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

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Folder Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name: Created Date

Operator: <=

Value: 9/ 1/2009

'À' to Filter 'Ò' to Filter

Conditions:

[Created Date] > #9/1/2009#
AND [Created Date] <= #9/1/2009#

Export list items if the above condition is ☐ satisfied ☒ not satisfied

OK Cancel

11) SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

12) List Item Level Conditions

Same as Folder Level Conditions

13) Click **Next** to proceed.

4.8 Destination Folder Options

SPListX will create destination folders based on the following options given below.

- 1) The **Destination Folder options** specification wizard step appears as shown below:

SPListX Task Wizard

Step Number: Destination Folder Options
Specify folders settings to use when creating folders in file system.

Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No

Attachment Folder Tag:

Do you want to overwrite file if the file name already exists in destination location? ☐ Yes ☒ No

Alternate File Name Mask (Optional):

< Back Next > Finish Cancel

- 2) Select from the following options:

- a) **Do you want to create current timestamp folder under destination location?** - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).
- b) **Do you want to create top-level folder(s) included for export?** - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

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c) Do you want to create destination folder path if it does not exist? -

This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

d) Do you want to create a folder for the list or folder underneath, when its contents are empty? - This option creates the folder in the destination location, if the source list or folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

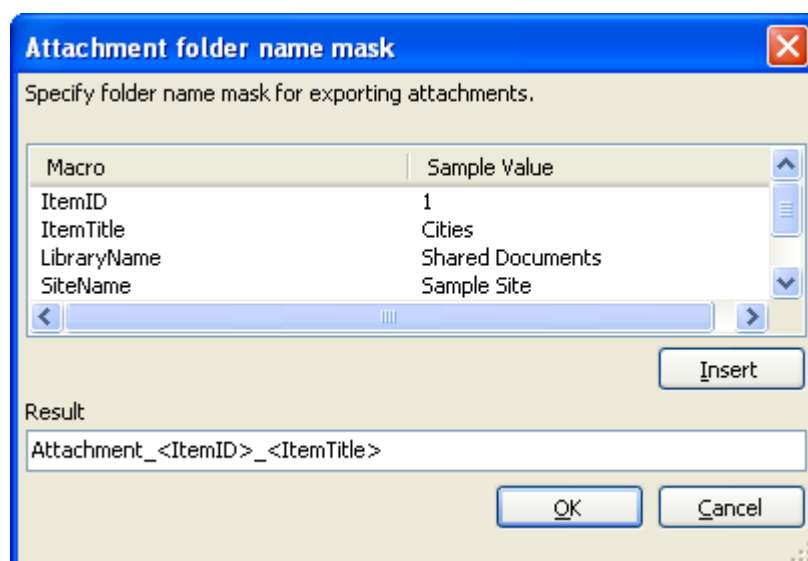
e) Do you want to create separate folder for storing attachments? - This option creates separate folder for storing attachments under the specified destination location by selecting the option (yes/No).

f) Do you want to overwrite file if the file name is already exist in destination location?

- i. Yes - Deletes the file from the destination location and exports the current source file.
- ii. (ii) No - Skips the file without overwriting the existing file with the same name.

3) You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



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Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.

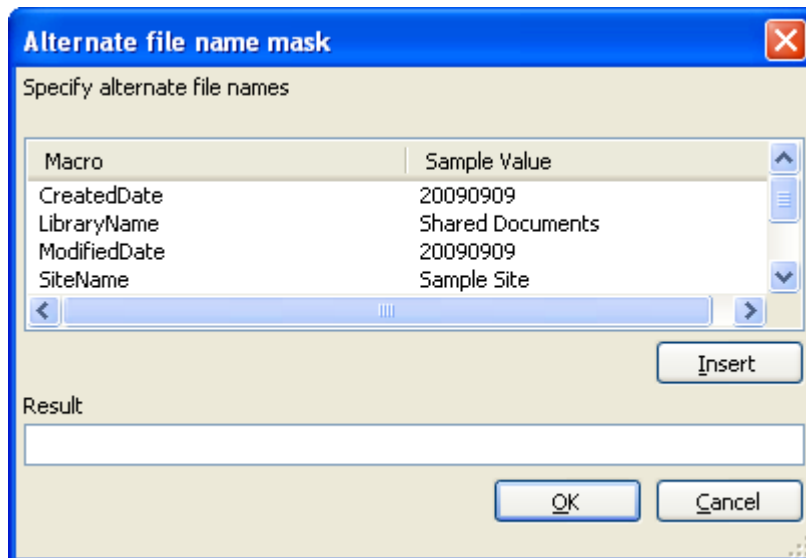
The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task1". The main heading is "Step Number: Destination Folder Options" with a subtitle "Specify folders settings to use when creating folders in file system." and a folder icon. The dialog contains several configuration options:

- "Do you want to create current timestamp folder under destination location?" with radio buttons for Yes and No (No is selected).
- "Do you want to create the top-level folder(s) included for export?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create destination folder path if it does not exist?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create a folder for the list or folder underneath, when its contents are empty" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create separate folder for storing attachments?" with radio buttons for Yes and No (Yes is selected).
- "Attachment Folder Tag:" followed by a text box containing "Attachment_<ItemID>_<ItemName>" and a browse button (three dots).
- "Do you want to overwrite file if the file name already exists in destination location?" with radio buttons for Yes and No (No is selected).
- "Alternate File Name Mask (Optional):" followed by an empty text box and a browse button (three dots).

At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

- 4) If you do not want to overwrite a file, if it already exists in the destination file system location, you can specify an alternate file name tag to be used for the exported file name. To select alternate file naming mask, click the button placed next to the alternate file tag name textbox. Alternate file name mask dialog appears as shown below:

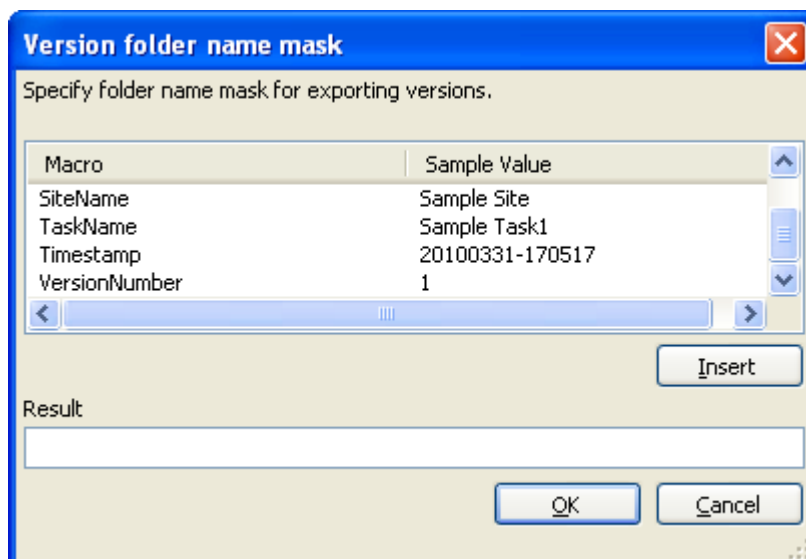
CHAPTER 4– Export SharePoint List contents using a batch descriptor file



Construct alternate file naming mask with the available mask provided in the dialog. Click OK to close the dialog. The constructed alternate file name mask will be placed in alternate file naming tag textbox. Files will be exported with the alternate naming mask.

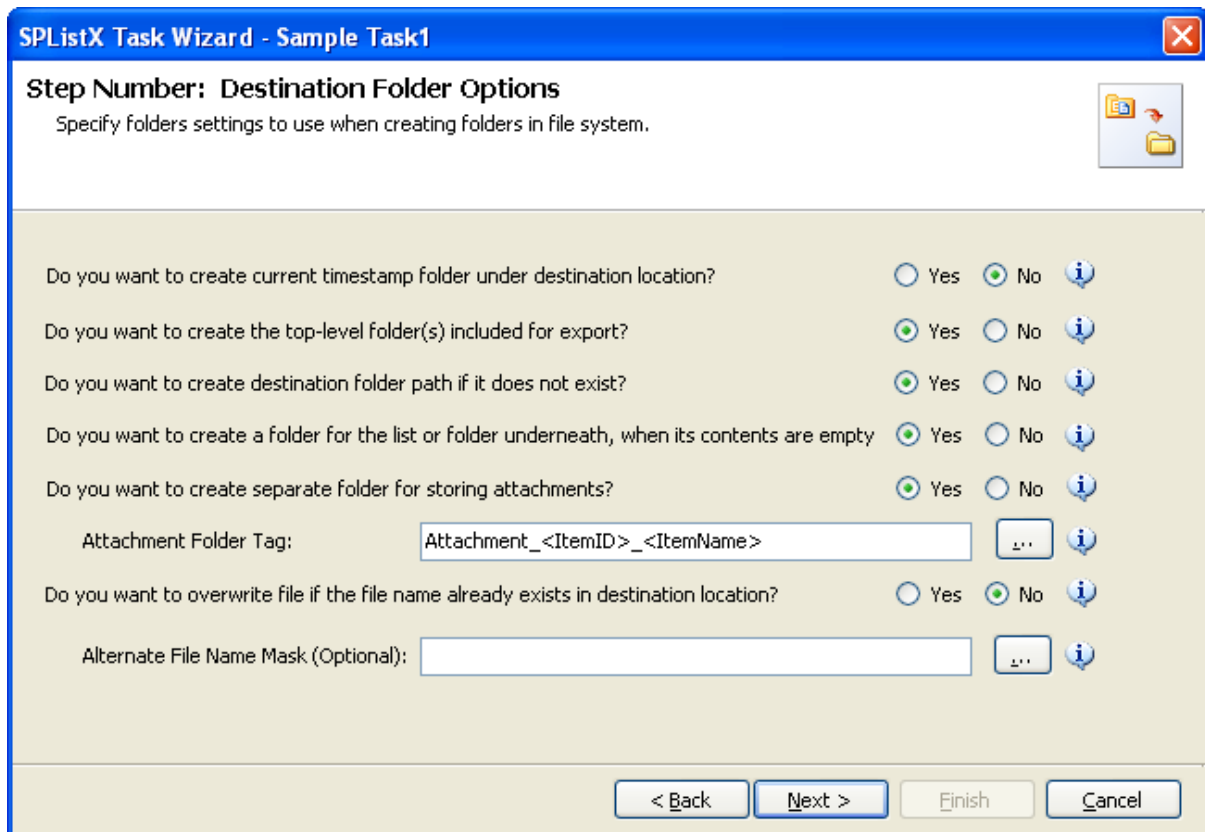
- 5) When selecting **All versions or Export version range** option, a version folder name must be provided in Version Folder Name textbox. You have the option to select a version folder name when exporting document versions. The version folder will be named based on the folder naming convention specified by the user.

To select version folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:




CHAPTER 4– Export SharePoint List contents using a batch descriptor file


Construct version folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in version folder naming tag textbox as shown below.





SPListX Task Wizard - Sample Task1


Step Number: Destination Folder Options
Specify folders settings to use when creating folders in file system.



Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No 


Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No 



Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No 

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No 

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No 

Attachment Folder Tag:  

Do you want to overwrite file if the file name already exists in destination location? ☐ Yes ☒ No 

Alternate File Name Mask (Optional):  

< Back Next > Finish Cancel

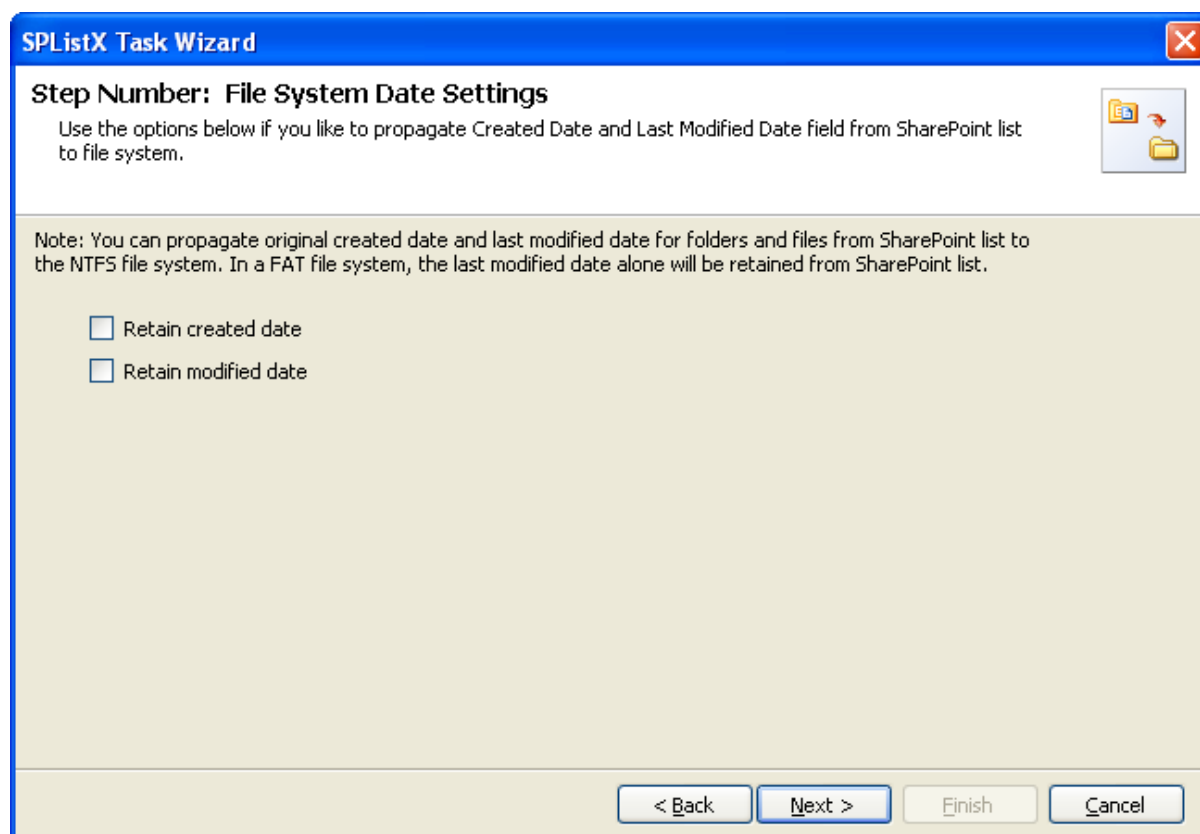
When exporting document versions, a new folder with the name specified in the textbox will be created as a sub-folder in the folder hierarchy and the respective versions will be exported to the corresponding version folder. For example if "VersionHistory<VersionNumber>" is entered in the textbox, the respective document versions will be stored in folders such as "VersionHistory1", "VersionHistory1.1", "VersionHistory2" etc.

6) Click Next to proceed.

4.9 File System Date Settings

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:

1) The File System Date Settings wizard step appears as shown below:



2) Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

- a) Retain created date** - Carry forward / propagate *Created Date* field from the source folders, files and list item attachments to the Windows file system.
- b) Retain modified date** - Carry forward / propagate *Last Modified Date* field from the source folders, files and list item attachments to the Windows file system.

NOTE: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source. Click **Next** to proceed.

4.10 Metadata File Settings

To specify the metadata file location where the folder and list metadata is to be exported, follow the steps given below:

1) The **Metadata File Settings** step appears as shown below:

SPListX Task Wizard

Step Number: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/MDB/XLS/XML)

Metadata file option:

- ☐ Store metadata files in the respective list folder location
- ☒ Use different metadata file location

Metadata file location: ...

☒ Create folder path if it does not exist ☐ Add to Favorites

Metadata file format:

☐ Export metadata Field Definitions as separate XML file along with the metadata file

Metadata file naming mask: Edit...

☐ Create metadata file even when there are no records to export

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number

 Edit...

< Back Next > Finish Cancel

2) Specify a folder path where the selected list items metadata are to be exported. You can also click browse ('...') button to launch folder browser dialog.

NOTE: Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

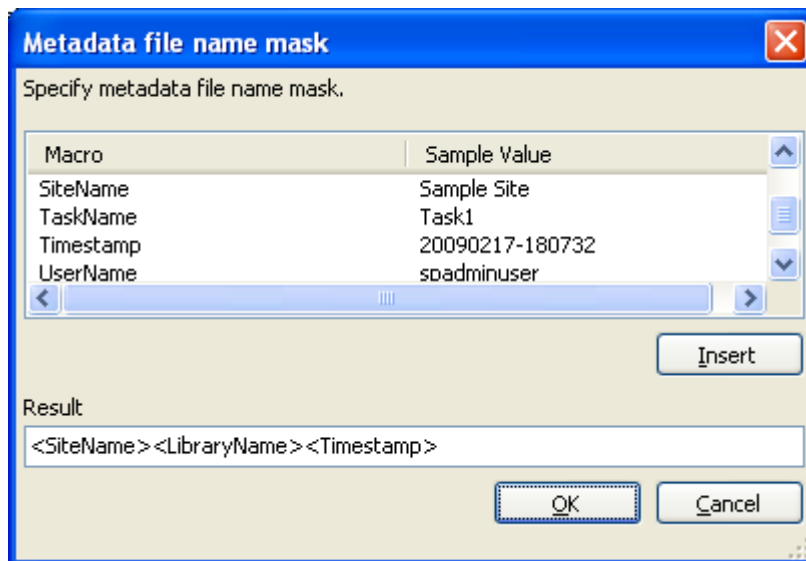
3) Select a metadata file format using one of the following options:

- a) **Comma delimited (CSV)** - Export metadata column values in comma separated values (CSV) file format.
- b) **Microsoft Access (MDB)** - Export metadata column values in Microsoft Access database format.

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- c) **Microsoft Excel (XLS)** - Export metadata column values in Microsoft Excel format.
 - d) **Extensible Mark-up Language (XML)** - Export metadata column values in XML format.
- 4) Select a metadata file naming mask to use when creating the metadata file. Metadata file will be named based on the selected file naming options.

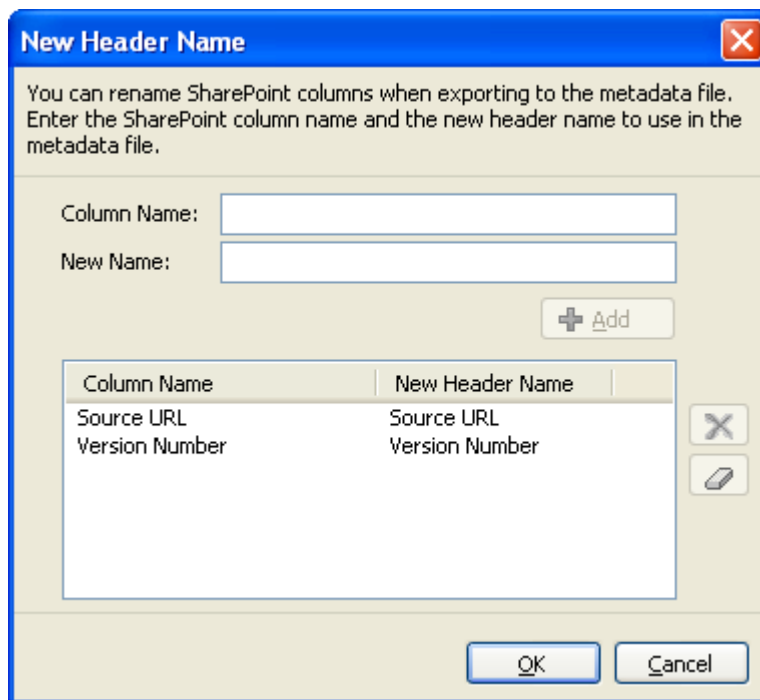
To select metadata file naming mask, click the button placed next to the metadata file naming mask text box. This dialog appears as shown below:



Construct metadata file name along with the available name mask provided in the dialog. Click OK to close the dialog. The constructed file name mask will be placed in metadata file naming mask textbox as shown above. The metadata file will be named using the resultant mask value.

- 5) By default, an empty metadata file will not be created. If you want to create an empty metadata file, then select
- "Create metadata file even when there are no list items" option.
- 6) You can specify new column names when generating the metadata file in the file system location. To use this feature, specify the new header names by clicking the Edit button. A New Header Dialog appears as shown below:

CHAPTER 4– Export SharePoint List contents using a batch descriptor file



New Header Name

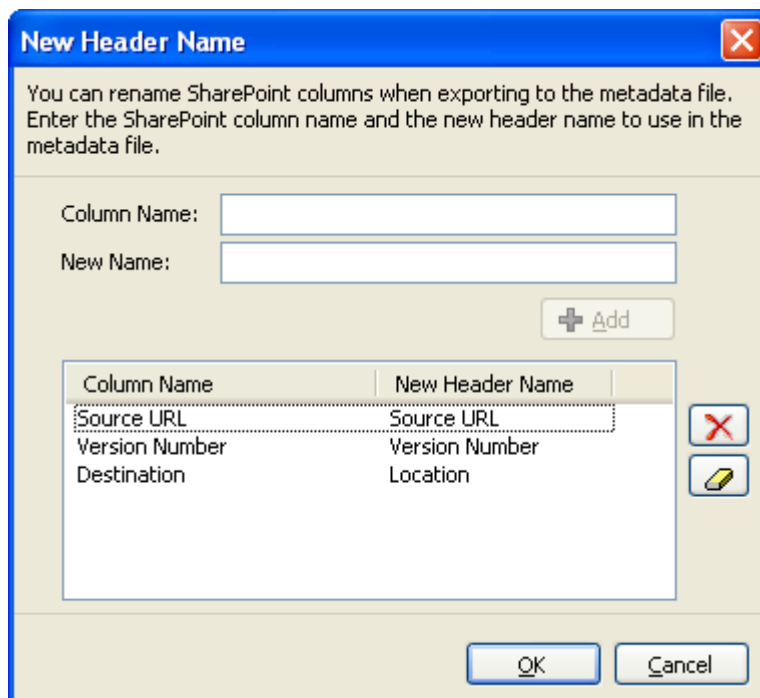
You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file.

Column Name:

New Name:

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number

- 7) You can specify SharePoint column name in Column Name textbox and new name for the SharePoint column in new name textbox. Click **OK**. For example, a SharePoint column named 'Department' in the source SharePoint list can be renamed as 'Location' when exporting the metadata files at run time.



New Header Name

You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file.

Column Name:

New Name:

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number
Destination	Location

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

SPListX Task Wizard

Step Number: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/MDB/XLS/XML)

Metadata file option:

- ☐ Store metadata files in the respective list folder location
- ☒ Use different metadata file location

Metadata file location: ...

☒ Create folder path if it does not exist ☐ Add to Favorites

Metadata file format:

☐ Export metadata Field Definitions as separate XML file along with the metadata file *i*

Metadata file naming mask: (One file for each list) Edit...

☐ Create metadata file even when there are no records to export

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number
Destination	Destination

 Edit...

< Back Next > Finish Cancel

Select **Add to Favorites** checkbox to add the URL to File System favorites.

8) Click Next to proceed.

4.11 Task Settings

To specify the task name and schedule settings:

- 1) **The Task Settings** step appears as shown below

SPListX Task Wizard

Step Number: Task Settings

Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option: ☒ Run task upon clicking Finish button ☐ Run later ☐ Create Schedule Task

SPListX will use the user account specified in 'Run As' to connect to SharePoint.

Run As:

Schedule: Start time:

Schedule Task Daily

Every day(s)

At 10:50 AM every day, starting 3/22/2010

- 2) Enter a unique task name in **Task Name** textbox.
- 3) Select a **Task Option** from one of the following options:
 - a) **Run task upon clicking Finish button** - to run the task immediately after clicking Finish button
 - b) **Run later** - to run the task later as and when desired
 - c) **Create Schedule task** - to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the Run As user account specified in this export wizard step. The Run As account should be a valid Windows domain account.

CHAPTER 4– Export SharePoint List contents using a batch descriptor file

SPListX Task Wizard

Step Number: Task Settings
Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option: ☐ Run task upon clicking Finish button ☐ Run later ☒ Create Schedule Task

SPListX will use the user account specified in 'Run As' to connect to SharePoint.

Run As:

Schedule: Start time:

Schedule Task Daily

Every day(s)

At 10:50 AM every day, starting 3/22/2010

< Back Next > Finish Cancel

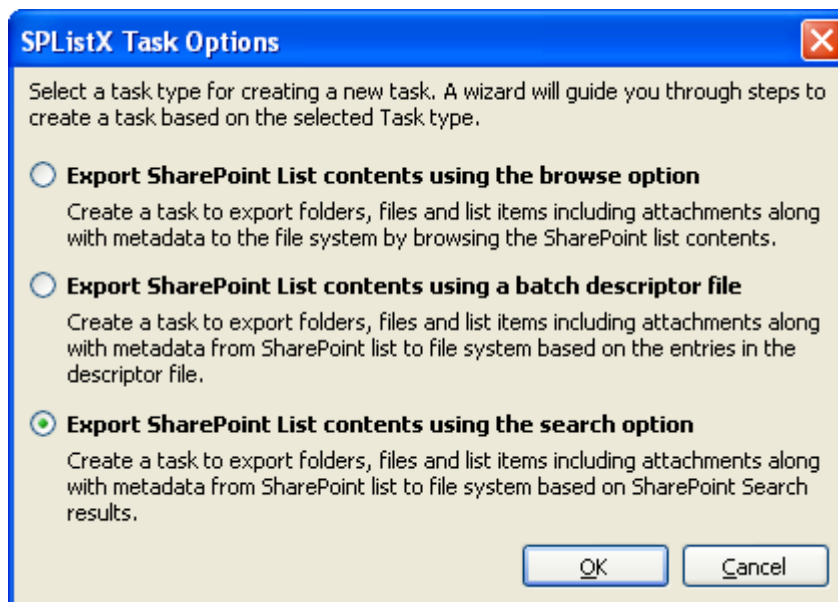
By Clicking the Finish button create the task.

5 Export SharePoint List contents using the search option

5.1 Create Task

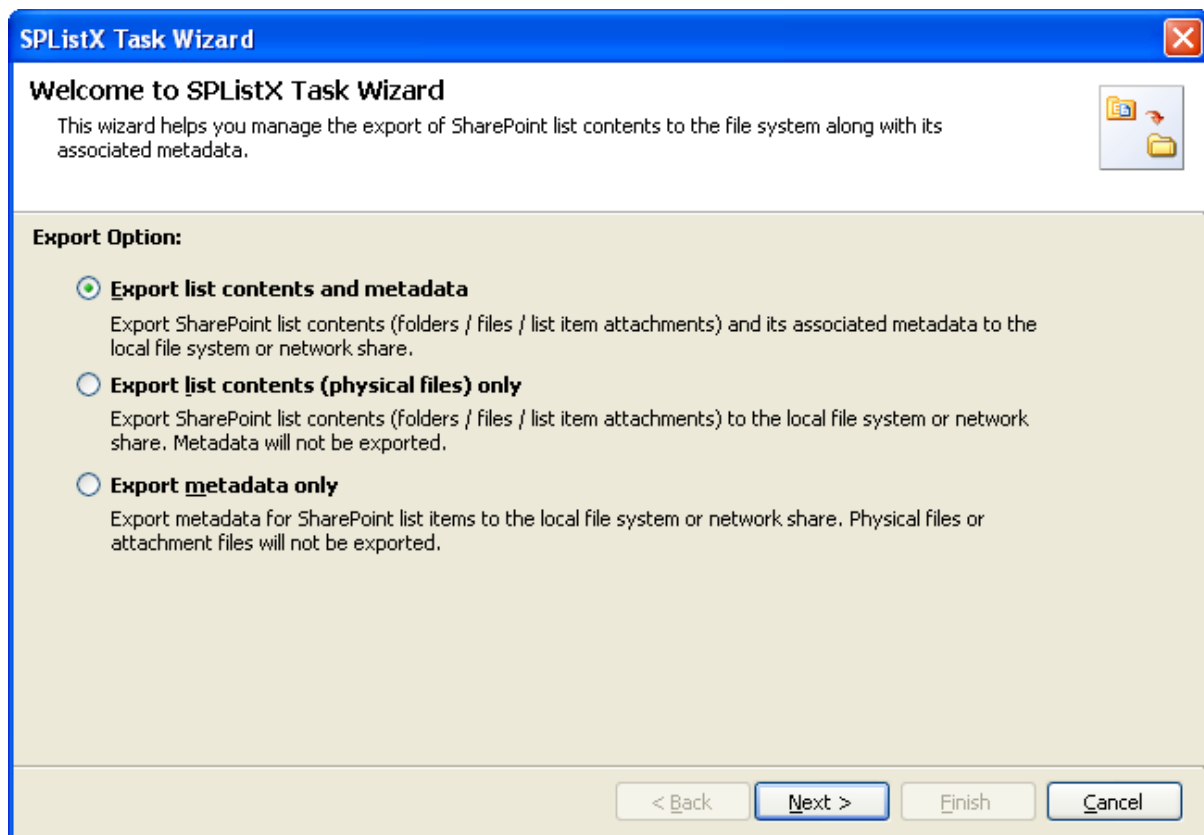
To create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share:

- 1) **Select Export SharePoint List contents using the search option** in **SPListX Task Options** dialog as shown below and click **OK**.



CHAPTER 5 – Export SharePoint List contents using the search option

2) The **SPListX Task Wizard** appears as shown below



3) Click **Next** button

4) Specify **SharePoint User Credential**

5) Specify **SharePoint URL Settings**

6) Specify **Search Conditions**

7) Specify **Version Options**

8) Specify **Column Settings Options**

9) Specify **Export Conditions**

10) Add **Destination folder option**

11) Specify **Metadata File Settings**

12) Specify **File System Date Settings**

13) Specify **Task Settings**

14) Click **Finish** button to create the task, or click **Back** button to change the task settings.

5.2 Create Search Batch Descriptor File

The following section gives you the guidelines to create an external batch descriptor file for **Export SharePoint List contents using the search option** task type.

- 1) The first row of the metadata file should contain the Field Names as headers.
- 2) The first field should be named as '**Path**' and second field should be named as '**Destination Path**'.

The other field names should be separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key: (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSV Delimited
; (semi-colon)	Delimited (;)
* (asterisk)	Delimited(*)

- 3) The first column of all the rows should contain the source URL of the list or folder or file or folder or list item. In other words, the source path should be either a SharePoint List URL (e.g., <http://vyapin/Shared Documents>) or sub-folder URL within SharePoint List (e.g., <http://vyapin/Shared Documents/sample folder1>) or file URL within the SharePoint List (e.g., <http://vyapin/shared documents/sample folder1/SampleDocument.doc>) or list item URL within the SharePoint List (e.g., http://vyapin/lists/cities/1_.000)

CHAPTER 5 – Export SharePoint List contents using the search option

- 4) The second column of all the rows should contain the destination folder location e.g., "C:\My Projects\" (or) \\FileServer\My Documents, where the exported item is to be stored.
- 5) Be consistent with the drive letters and UNC path when exporting folders, files and list item attachments from a SharePoint list. If you use local / mapped drives to export files or list item attachments, ensure the 'Destination Path' field has the corresponding local / mapped drive path (e.g., M:\My Documents). If you use shares to export file or list item attachments, ensure the 'Destination Path' field has the corresponding UNC path (e.g., \\Machine_Name\Share_Name).
- 6) For **CSV** and **TXT** formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "http://vyapin/Shared Documents/sample folder1". When using accent characters such as [á é í ó] in folder / file names, the **CSV / TXT** metadata file must be in UNICODE encoded format.
- 7) For Microsoft Excel file formats (**XLS / XLSX**), you do not have to enclose the field names and their corresponding values within double quotes.

Sample format of a CSV / TEXT batch descriptor file:

NOTE: Refer Point #2 for the separator to be used in the batch descriptor file

"Path", "Destination Path"

"http://vyapin/shared documents/Sample Brochure.doc", "C:\My Documents"

"http://vyapin/shared documents/sample folder1/*", "\\vyapinfs\ExportDocs\shared doc contents"

"http://vyapin/lists/*.\"", "C:\My Sales\Lists Backup"

"http://vyapin/lists/cities/*.\"", "C:\My Cities\Backup"

5.3 SharePoint User Credential

Specify the user credential to connect to SharePoint when running the export task in unattended mode (schedule task).

1) The **SharePoint User Credential** step appears as shown below:

SPListX Task Wizard

Step Number: SharePoint User Credentials

Specify user credential to connect to SharePoint when running the export task.

SharePoint User Credential:

☒ **Use currently logged on user context to connect to SharePoint**
Connect to SharePoint using the current Windows logon session.

☐ **Use the following credential to connect to SharePoint**
I would like to schedule this export task and connect to SharePoint using the specified credentials when running the task in unattended mode(schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet for this purpose.

User name:

(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

Note: SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

< Back Next > Finish Cancel

2) Specify the user's credentials to connect to the SharePoint using the options given below.

- a) **Use currently logged on user context to connect to SharePoint** - Connect to SharePoint URL using the currently logged on user context
- b) **Use the following credential to connect to SharePoint** - Connect to the SharePoint URL using a different user context. Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>**, **UserName@DomainName**, **UserName** and its corresponding password. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

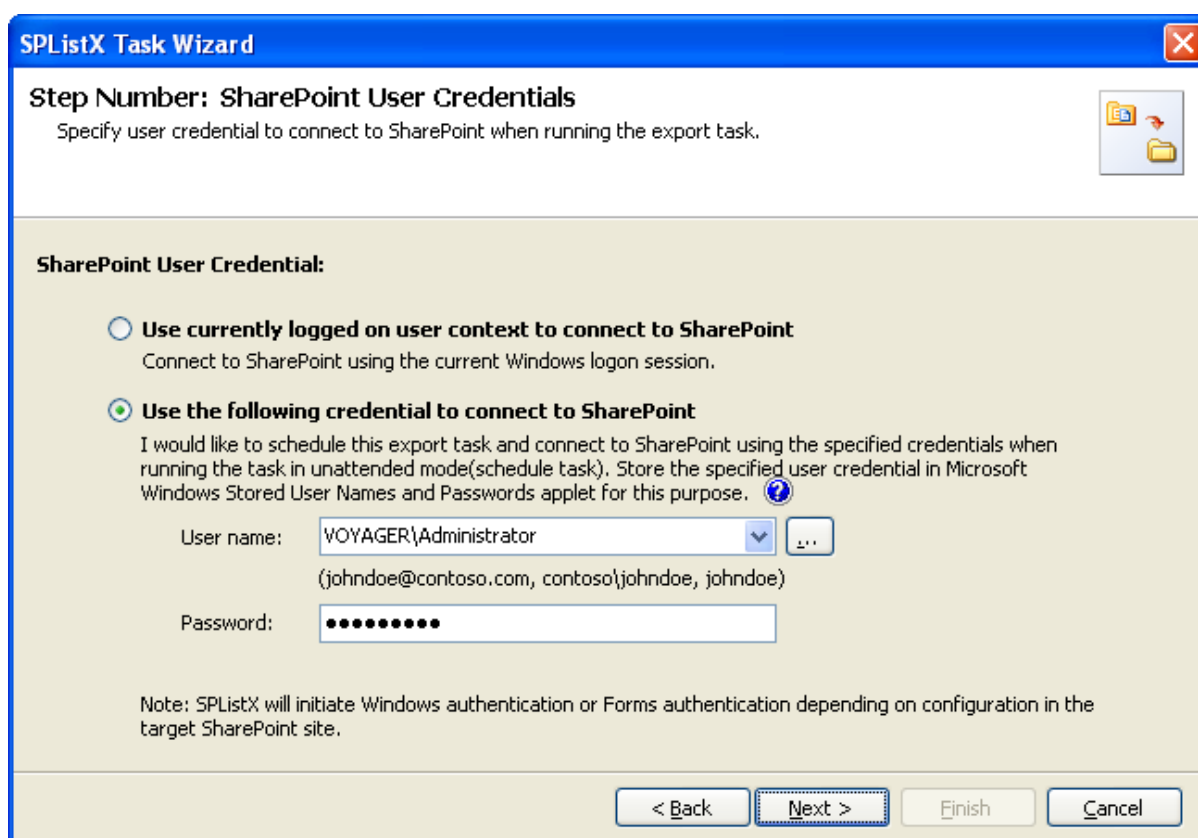
CHAPTER 5 – Export SharePoint List contents using the search option

In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

3) Click ... button to create new user profile.





SPListX Task Wizard

Step Number: SharePoint User Credentials
Specify user credential to connect to SharePoint when running the export task.

SharePoint User Credential:

☐ **Use currently logged on user context to connect to SharePoint**
Connect to SharePoint using the current Windows logon session.

☒ **Use the following credential to connect to SharePoint**
I would like to schedule this export task and connect to SharePoint using the specified credentials when running the task in unattended mode(schedule task). Store the specified user credential in Microsoft Windows Stored User Names and Passwords applet for this purpose. ?

User name:  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

Note: SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

Click **Next to proceed.**

5.4 Search URL Settings

You can specify the URLs to search using a batch file or select the URL using the browse button. The URLs to search narrow down the search results. For each searched URL, you can export to a different export location, if necessary.

1) The **Search URL Settings** step appears as shown below:

SPListX Task Wizard

Step Number: Search URL Settings

Specify batch descriptor file to use in order to search for list items OR Specify a SharePoint URL of a site / list / folder location from which you wish to search for list items and export to file system.

☒ **Batch File**

Sheet Name:

☐ **URL**


Destination:

Items to search:

Source	Destination
--------	-------------

< Back Next > Finish Cancel

2) If you choose **Batch File** option:

- a) **Click** (...) button to select the batch descriptor file. The descriptor file can be in any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLS / XLSX) or Text file (TXT).
- b) **Click**  to see a sample batch descriptor file (such as, Comma delimited (CSV) file, Excel (XLS) files).
- c) The external metadata file will be automatically extracted, once the file name is specified. If you are using Microsoft Excel based file format, then select the sheet name to use from the drop-down.
- d) **Click** (...) to add a hidden sheet name Excel file in drop down.

The screenshot shows the 'SPListX Task Wizard' dialog box, specifically the 'Step Number: Search URL Settings' screen. The title bar is blue with the text 'SPListX Task Wizard' and a close button. Below the title bar, the step number and title are displayed. A descriptive text box explains the purpose: 'Specify batch descriptor file to use in order to search for list items OR Specify a SharePoint URL of a site / list / folder location from which you wish to search for list items and export to file system.' To the right of this text is a small icon showing a folder with a red arrow pointing to it. The main area of the dialog is divided into two sections. The first section, 'Batch File', is selected with a radio button. It contains a text box for the batch file path ('D:\Common Data\Batch File.csv'), a 'Sheet Name' dropdown, and buttons for 'View...', 'Clear', and '1 row(s)'. The second section, 'URL', is unselected. It contains a text box for the URL, a 'Destination' text box with the path 'C:\Documents and Settings\All Users\SPListX\Export', and an 'Add' button. Below these sections is a table titled 'Items to search:' with columns 'Source' and 'Destination'. The table is currently empty. To the right of the table are three icons: a pencil, a cross, and a trash can. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

SPListX Task Wizard

Step Number: Search URL Settings

Specify batch descriptor file to use in order to search for list items OR Specify a SharePoint URL of a site / list / folder location from which you wish to search for list items and export to file system.

☒ **Batch File** D:\Common Data\Batch File.csv ... ?

Sheet Name: ... View... Clear 1 row(s)

☐ **URL** ...

Destination: C:\Documents and Settings\All Users\SPListX\Export ...

Add

Items to search:

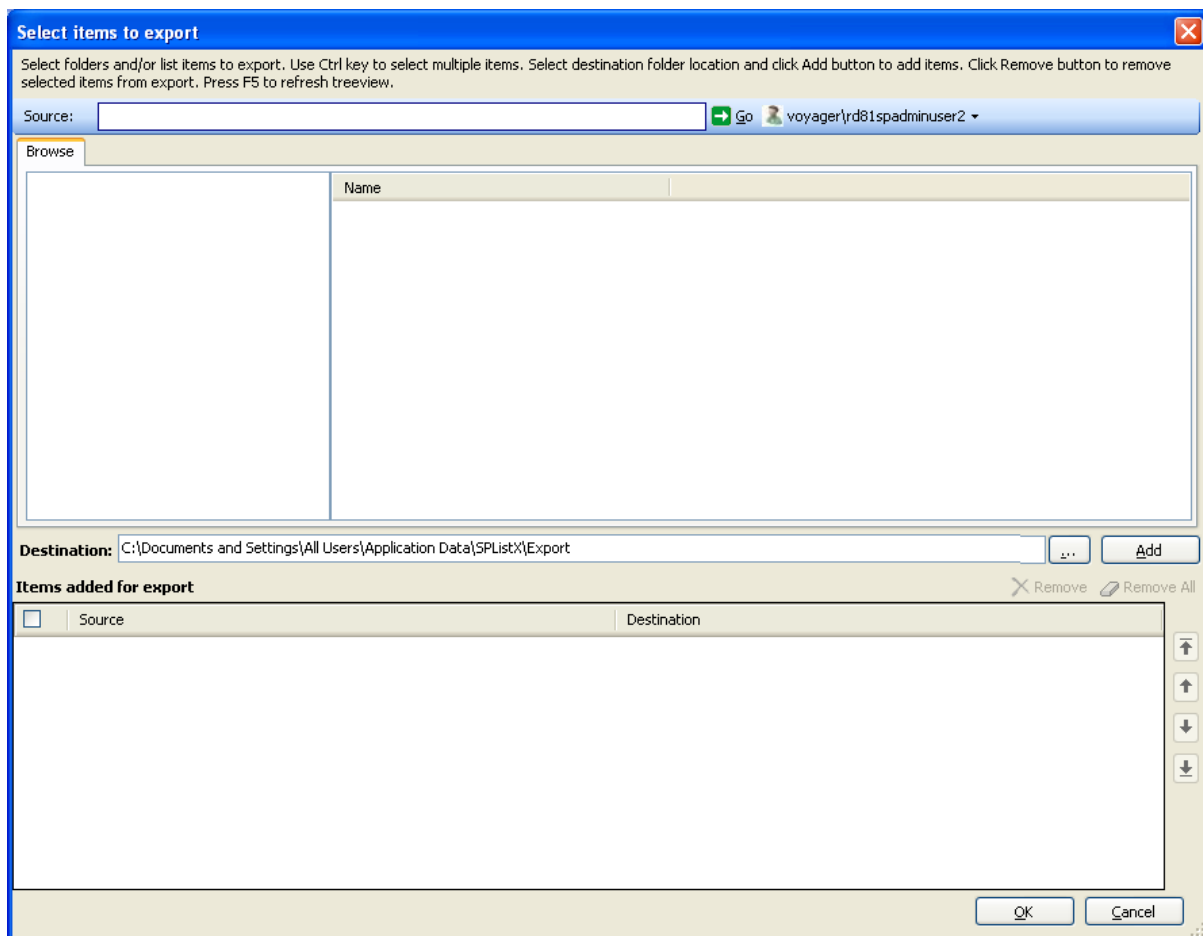
Source	Destination
--------	-------------

< Back Next > Finish Cancel

3) If you choose URL option:

- a) Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site or list location in the URL textbox.
- b) Specify a valid Destination path in destination textbox and then click **ADD** button to add the items.
- c) Click (...) to add the list from select items dialog.
- d) The **Select items to export** dialog appears as shown below:

CHAPTER 5 – Export SharePoint List contents using the search option



Select items to export dialog contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select site collection lists to search.

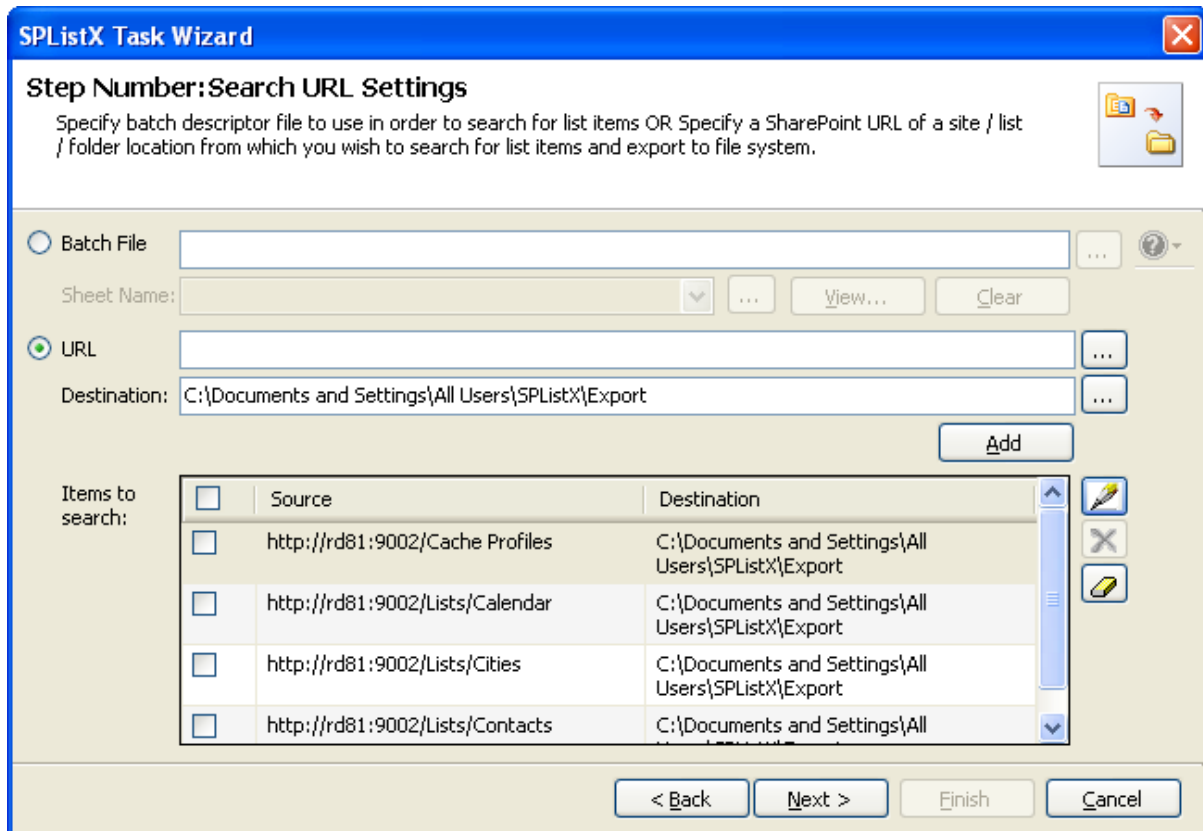
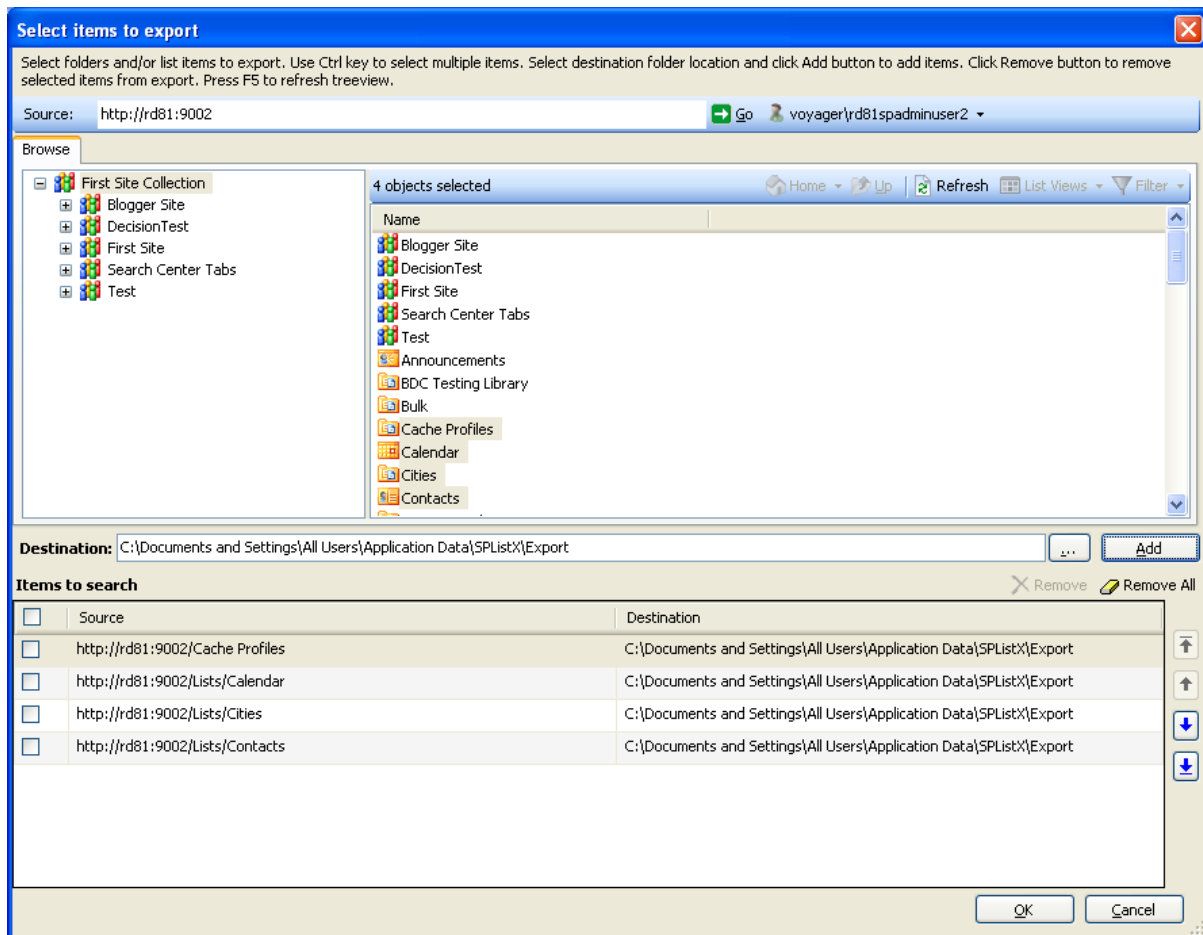
Specify a valid SharePoint URL in the source textbox and click Go button. SPListX will load the tree view of the source location.

Select a destination location using browse option or enter the destination location path in the textbox and click **Add** button to search for selected lists.

Click **OK** button to proceed or click **Cancel** to discard the changes.

Items to search contains top level site, sub-sites, document library and lists added for search as shown below:

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5.5 Search Conditions

SPListX will search for list items in SharePoint list based on search conditions. The conditions can be created using SharePoint Managed properties.

1) The Search Conditions step appears as shown below:

SPListX Task Wizard

Step Number: Search Conditions
Specify search rules that must be satisfied to export list items from SharePoint.

All of these words: Any of these words:
The Exact phrase: None of these words:
Result Type: Scope:

Narrow the search
Property: ...
Operator: Logical operator: ☒ And ☐ Or
Value: Add

Property restrictions: X

2) Define search keywords in appropriate textboxes to search for the content indexed at Farm level. For example, search for the keyword "SharePoint" in "The Exact Phrase text box"

CHAPTER 5 – Export SharePoint List contents using the search option

SPListX Task Wizard

Step Number: Search Conditions
Specify search rules that must be satisfied to export list items from SharePoint.

All of these words: Any of these words:
The Exact phrase: None of these words:
Result Type: Scope:

Narrow the search
Property: ...
Operator: Logical operator: ☒ And ☐ Or
Value: Add
Property restrictions: X
Search Tuner... Trial Search...

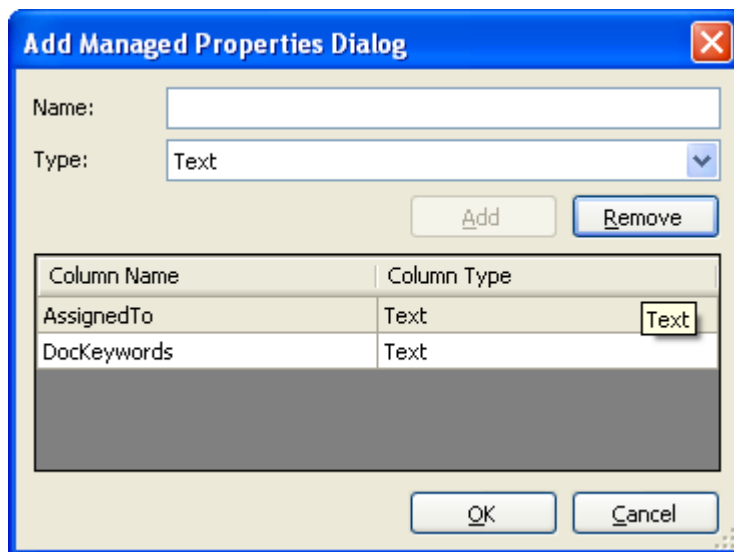
< Back Next > Finish Cancel

Result Type - Result Type will narrow down the search results. By default, SPListX will search for all list items of all list types. For ex, If you want to narrow down your search results only for documents, select "All Documents" type in result type.

Scope - Scopes will narrow down the search results returned to search query. It can be either shared (Farm level) or locally defined (Site level). Scopes can be defined by specifying different rules using custom metadata on content source.

- 3) Click (...) button to add the SharePoint managed properties in properties drop-down. The Add Managed Properties Dialog as shown below:

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Specify the managed property name in Name textbox and select the data type of the column in SharePoint from Type drop-down.

Before adding managed properties, Please ensure the followings:

- i) Specified managed property exists in Shared Services Provider.
- ii) Data type matches exactly.

Click **Add** button to add the managed property to the property drop-down.

Click **Remove** button to remove the columns from the property drop-down.

- 4) You can specify the conditions by selecting the property name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed by using logical operator 'AND' or 'OR'.

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The screenshot shows the 'SPListX Task Wizard' window, specifically the 'Step Number: Search Conditions' step. The window has a blue title bar and a close button in the top right corner. Below the title bar, the step number and title are displayed, followed by a description: 'Specify search rules that must be satisfied to export list items from SharePoint.' To the right of the description is a small icon of a folder with a red arrow pointing to it. The main area of the dialog is divided into several sections. The first section contains four input fields: 'All of these words:' with the text 'microsoft sharepoint', 'Any of these words:' (empty), 'The Exact phrase:' (empty), and 'None of these words:' (empty). Below these are 'Result Type:' set to 'All Results' and 'Scope:' (empty). The second section, 'Narrow the search', includes a 'Property:' dropdown set to 'Author', an 'Operator:' dropdown set to '=', and a 'Value:' text box containing 'John Doe'. To the right of the 'Value' box is an 'Add' button. Below the 'Value' box is a 'Logical operator:' section with radio buttons for 'And' (selected) and 'Or'. The third section, 'Property restrictions:', contains a text box with the query '[Content Type] = 'Document' AND [Author] = 'John Doe''. To the right of this text box are two buttons: a red 'X' button and a yellow pencil button. Below the text box are two buttons: 'Search Tuner...' and 'Trial Search...'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

SPListX Task Wizard

Step Number: Search Conditions

Specify search rules that must be satisfied to export list items from SharePoint.

All of these words: Any of these words:

The Exact phrase: None of these words:

Result Type: Scope:

Narrow the search

Property: ...

Operator: Logical operator: ☒ And ☐ Or

Value:

Property restrictions:

- 5) You can fine tune the search results by clicking **Search Tuner** button.

The Search Tuner dialog appears as shown below:

The screenshot shows the 'Search Tuner' dialog box. It has a blue title bar and a close button in the top right corner. The main area contains several sections. The first section, 'Search options:', has two radio buttons: 'Search across all content in the index' and 'Search across the current site and all of its subsites' (selected). The second section, 'Properties:', has three checkboxes: 'Trim duplicate search results' (checked), 'Include stemming results' (unchecked), and 'Include only relevance results' (checked). The third section, 'Search results:', has two radio buttons: 'Process items only (recommended)' (selected) and 'Process all results'. At the bottom is a checkbox 'Perform keyword search, if advanced search is not enabled' which is checked. At the bottom right are two buttons: 'OK' and 'Cancel'.

Search Tuner

By default, search will start from current site and its contents. Select properties to include in search query and specify what results to include.

Search options: ☐ Search across all content in the index ☒ Search across the current site and all of its subsites

Properties: ☒ Trim duplicate search results ☐ Include stemming results ☒ Include only relevance results

Search results: ☒ **Process items only (recommended)** ☐ Process all results

☒ Perform keyword search, if advanced search is not enabled

a) Search Options:

Search across all content in the index - SPListX will search for list items content, properties across all the content indexed at farm level.

Search across the current site and all of its sub-site - By default, SPListX will search for list items contents and properties at current site and underneath. Current site indicates that site URL specified.

b) Properties:

Trim duplicate search results - This option will remove the duplicate item Urls from search results.

Include stemming results - This option will not include the stemming results. If you enable stemming, search results will bring back words related to search keywords.

For ex: If you search for keyword "run". Search results will bring back words matches like "runs","running".

Include only relevance results - This option will include only relevance results in search results. Relevance will bring the search results closely related to the search query.

c) Search results:

Process only items (recommended) - This option will search for list items only.

Process all results - This option will include all list view URLs, site URLs in search results. But, export process engine will ignore the site URLs, List view URLs for export.

d) Perform keyword search, if advanced search is not enabled

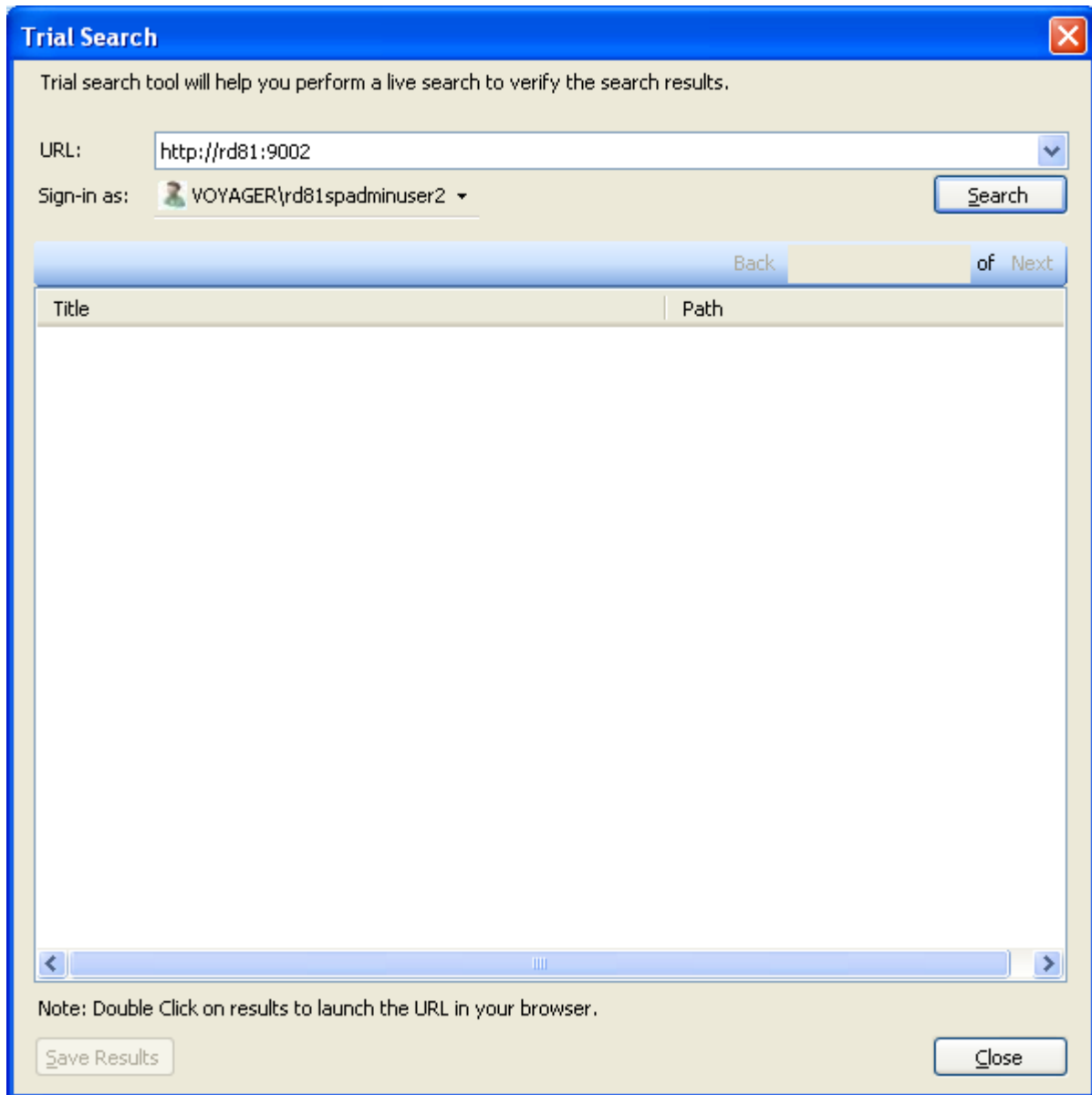
In WSS 3.0, advanced search is not enabled. If you want to perform search for the WSS 3.0 sites, SPListX will ignore all the **properties, scopes and result types** specified in **search query**. Keyword search query is framed based on the keywords specified in All Keywords textbox, Any Keywords textbox, Exact Phrase textbox.

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Click **OK** to proceed.

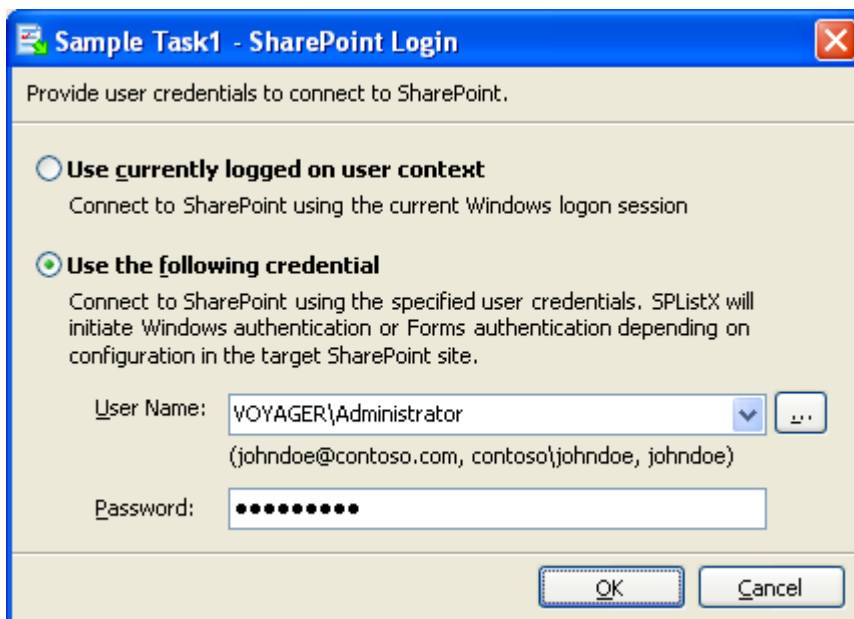
- 6) Click **Trial Search** button to invoke Trial Search tool. The Trial Search tool will help you perform a live search against the keywords and help you verify the search results.

The Trial Search Dialog appears as shown below:



- a) Select URL from the **URL** drop-down.
- b) The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

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Sample Task1 - SharePoint Login

Provide user credentials to connect to SharePoint.

☐ **Use currently logged on user context**
Connect to SharePoint using the current Windows logon session

☒ **Use the following credential**
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

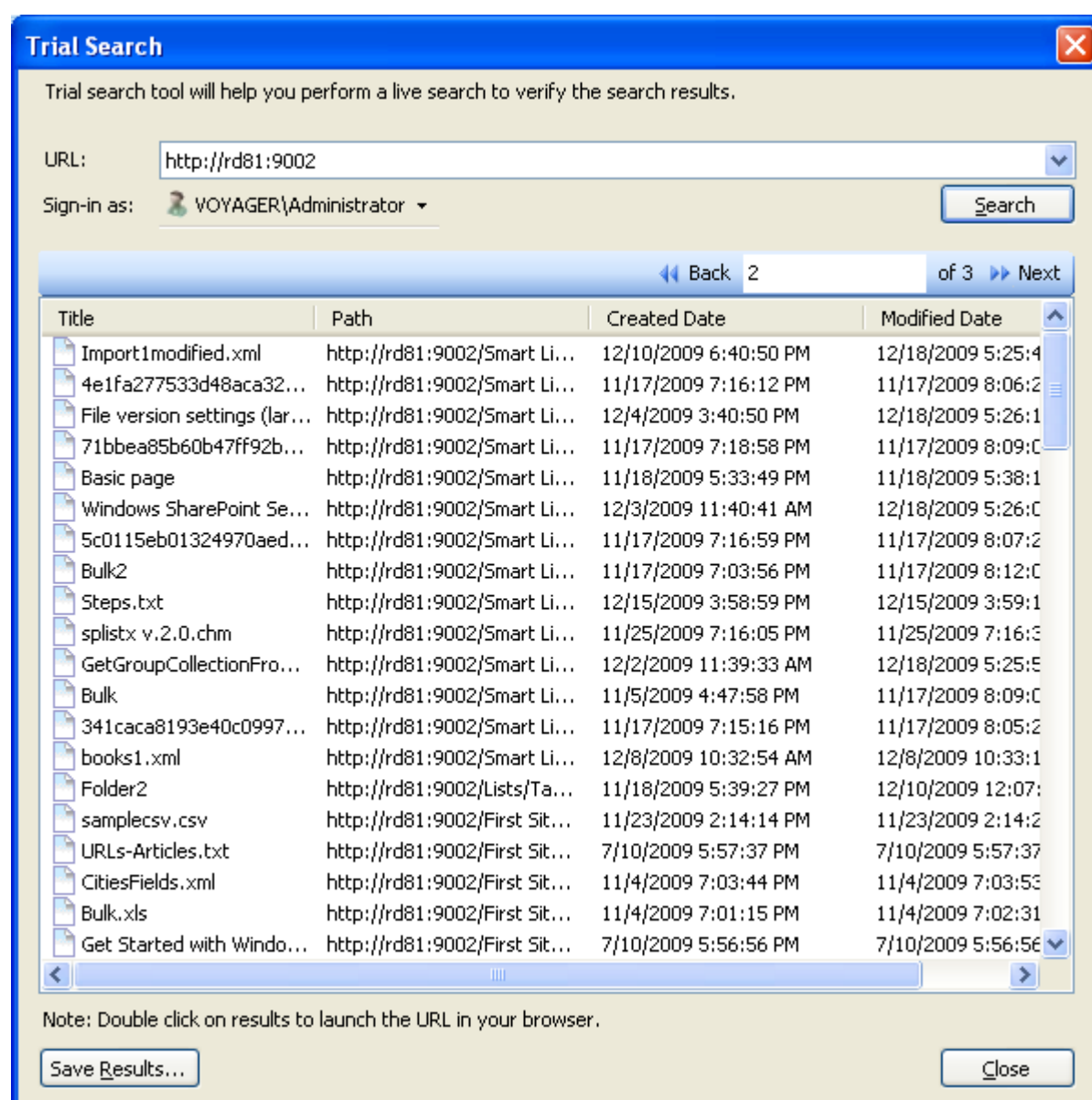
User Name: VOYAGER\Administrator
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password: ●●●●●●●●●●

OK Cancel

- c) Click **Search** button to perform search.

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Click **Save Results** button to save the search results in CSV or Excel format.

Click **Close button** to close the dialog.

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SPListX Task Wizard

Step Number: Search Conditions
Specify search rules that must be satisfied to export list items from SharePoint.

All of these words: Any of these words:

The Exact phrase: None of these words:

Result Type: Scope:

Narrow the search

Property: ...

Operator: Logical operator: ☒ And ☐ Or

Value:

Property restrictions:

8) Click Next to proceed.

5.6 Version Options

To selectively export list item versions to the destination file system location:

1) The **Version Options** step appears as shown below:

SPListX Task Wizard

Step Number: Version Options

Specify the list item versions to export. By default, latest version of the list item will be exported.

Version Options:

- ☐ Latest version only
- ☐ Export version range: Start: End:
- ☐ Export version date range: Start: End:
- ☒ All Versions

< Back Next > Finish Cancel

2) By default, **Latest version only** option is selected. Item version settings will be used for each of the list item exported from the list.

3) Select any one of the following version settings.

- a) **Latest version only** - Export the latest list item version from the source.
- b) **Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5
- c) **Export version date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is **Modified date** of a list item.
- d) **All versions** - Export all list item versions available in the source list.

5.7 Column Settings Options

To selectively export metadata columns from the SharePoint list:

1) **The Column Settings Options** step appears as shown below:

SPListX Task Wizard

Step Number: Column Settings Options

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☒ Export all user defined columns
- ☐ Export selected columns

<Type column names here>

Examples:

Title
Description
Author

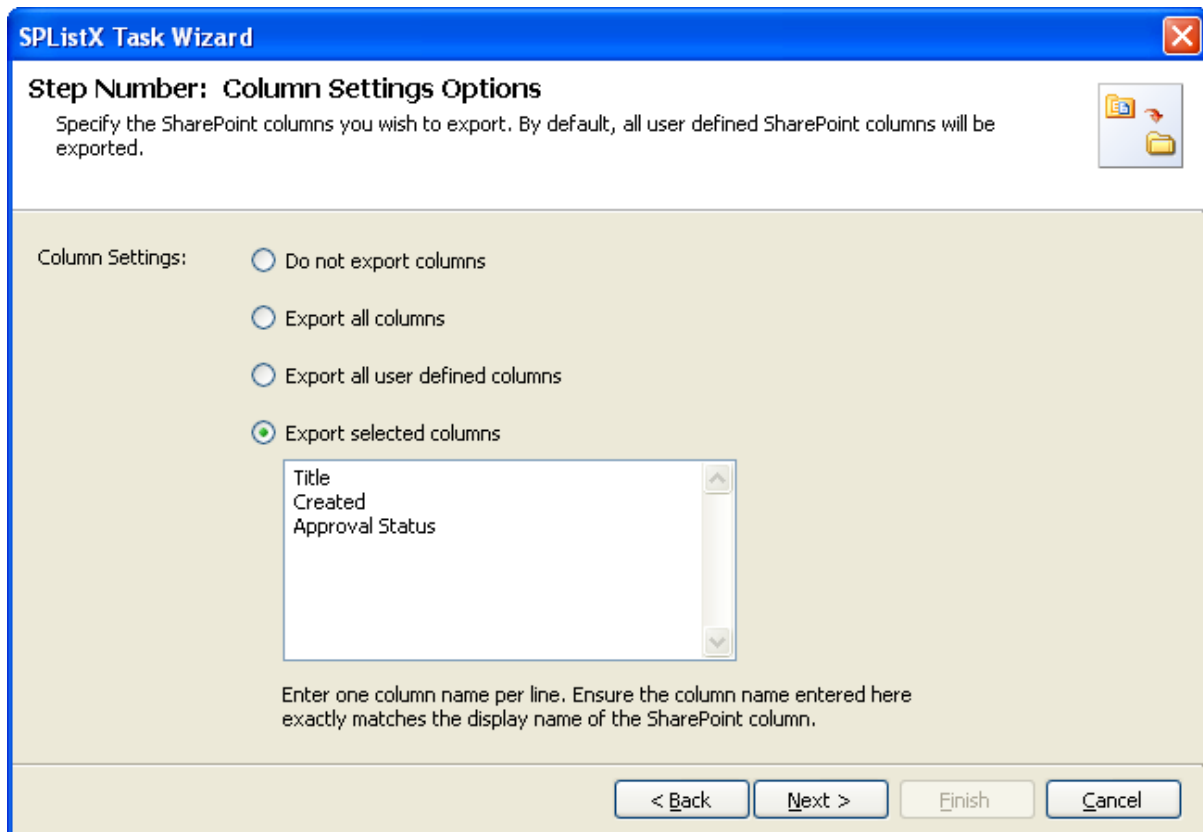
Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back Next > Finish Cancel

2) Select any one of the following metadata settings:

- **Do not export columns** - This option does not export columns.
- **Export all columns** - Exports all columns available in the source SharePoint list, including SharePoint system columns such as Created, Modified, Approval Status, etc.
- **Export all user defined columns** - Exports all columns that are created by a SharePoint user
- **Export selected columns** - Exports columns that are specified in the textbox

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The screenshot shows the 'SPListX Task Wizard' window. The title bar is blue with the text 'SPListX Task Wizard' and a close button. The main area has a light beige background. At the top, it says 'Step Number: Column Settings Options' followed by the instruction: 'Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.' There is a small icon of a folder with a red arrow pointing to it. Below this, under 'Column Settings:', there are four radio button options: 'Do not export columns', 'Export all columns', 'Export all user defined columns', and 'Export selected columns'. The 'Export selected columns' option is selected. Below the radio buttons is a text box containing the text: 'Title', 'Created', and 'Approval Status'. Below the text box is the instruction: 'Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.' At the bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

SPListX Task Wizard

Step Number: Column Settings Options

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☐ Export all user defined columns
- ☒ Export selected columns

Title
Created
Approval Status

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

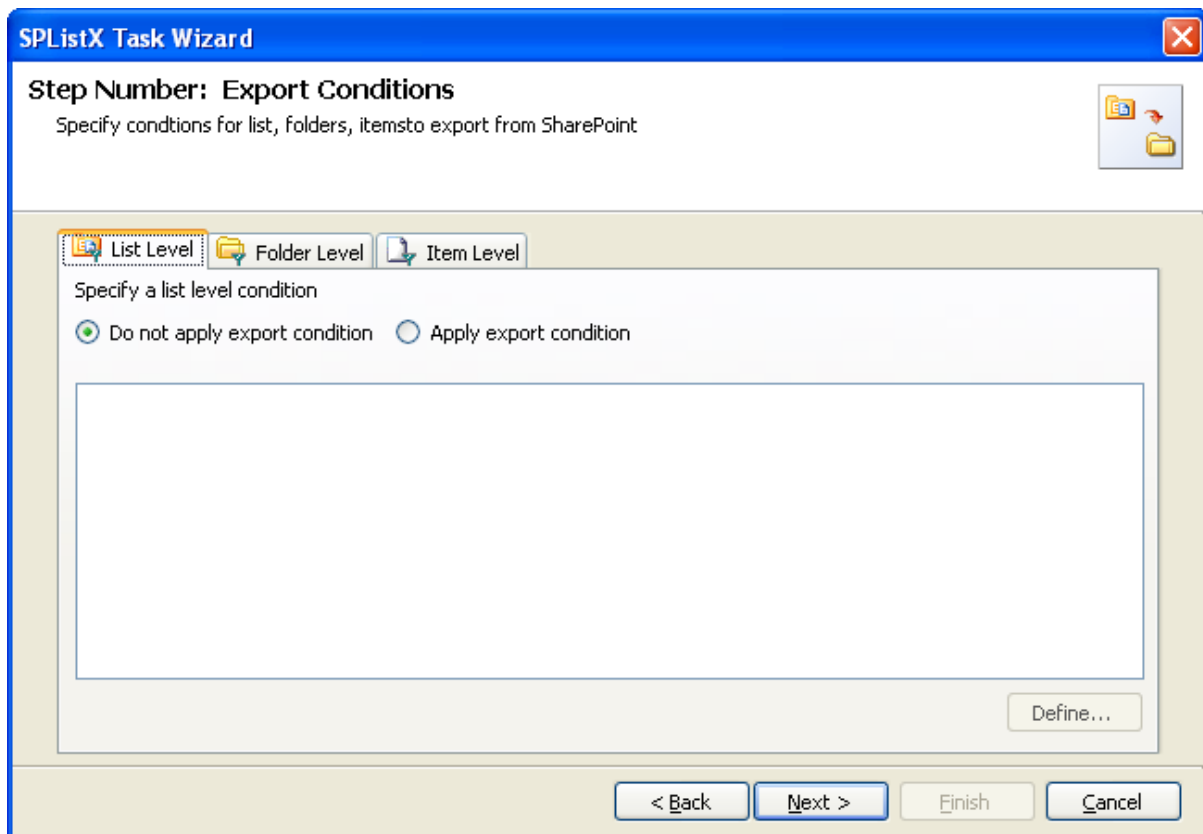
< Back Next > Finish Cancel

Click Next to proceed.

5.8 Export Conditions

SPListX can export folders, files and list items including attachments from SharePoint list based on certain export conditions. The conditions can be created by using SharePoint columns in the source list.

1) **The Export Conditions** step appears as shown below:



2) You can specify export conditions at **three levels**:

- List Level
- Folder Level
- List Item Level

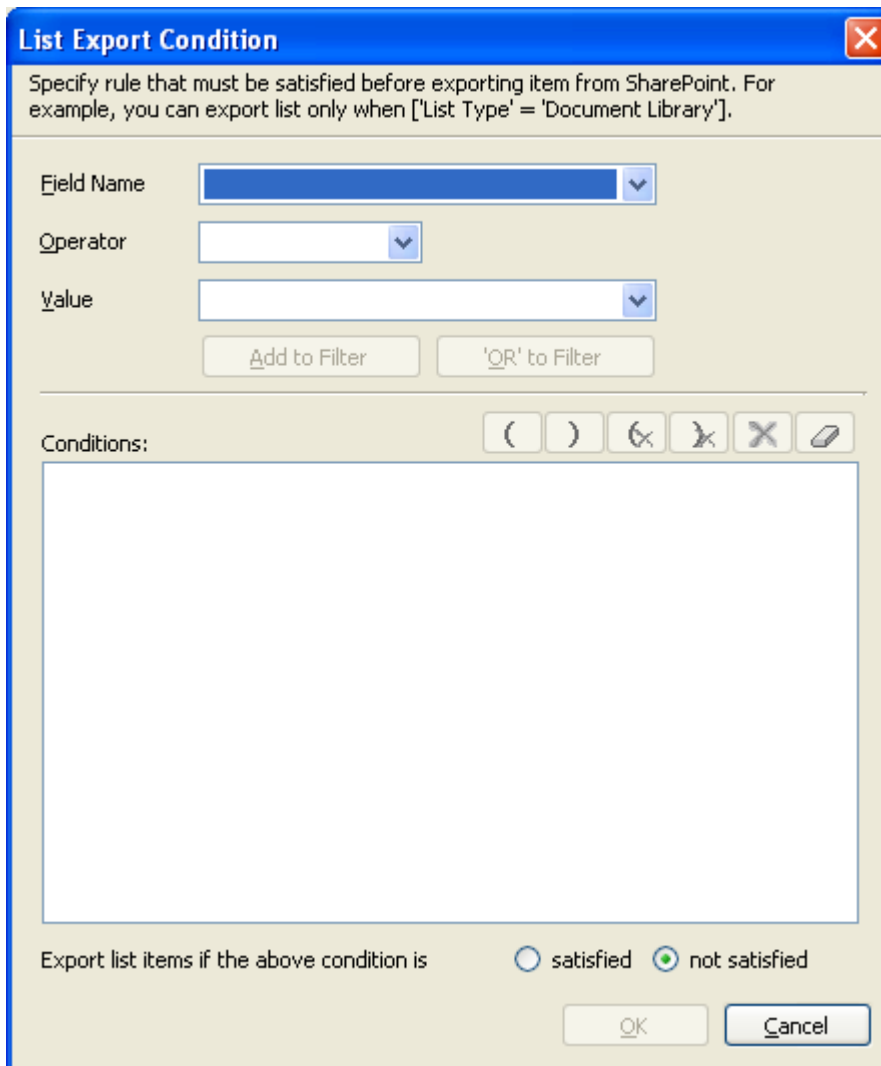
3) **List Level Conditions**

Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter lists.
- **Apply the following conditions** - The conditions specified will be used to filter lists taken for export from source SharePoint List.

4) Click **Define** to specify the conditions

The **List Export Conditions Dialog** appears as shown below:



The **List Export Condition** dialog box is used to specify rules for exporting items from SharePoint. It features a title bar with a close button (X). The main area contains a text box with the instruction: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library']." Below this, there are three dropdown menus: **Field Name**, **Operator**, and **Value**. Under these dropdowns are two buttons: **Add to Filter** and **'OR' to Filter**. A horizontal line separates this section from the **Conditions:** section, which includes a toolbar with icons for parentheses, logical operators (AND, OR), and a delete icon. Below the toolbar is a large empty text area for constructing the condition. At the bottom, there is a label "Export list items if the above condition is" followed by two radio buttons: **satisfied** and **not satisfied** (which is selected). The dialog concludes with **OK** and **Cancel** buttons.

5) You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such as `=`, `<>` to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

List Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library'].

Field Name: Base Type

Operator: =

Value: Document Library

'AND' to Filter 'OR' to Filter

Conditions:

- [Base Type] = 'Document Library'

Export list items if the above condition is ☐ satisfied ☒ not satisfied

OK Cancel

6) SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export.

7) Folder Level Conditions

Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter folders.
- **Apply the following conditions** - The conditions specified will be used to filter folders taken for export from source SharePoint List.

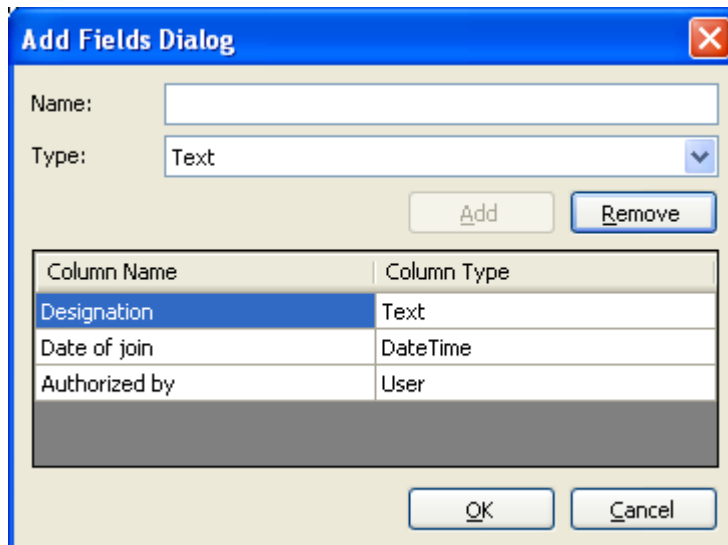
8) Click Define to specify the conditions

The Folder Export Conditions Dialog appears as shown below:

The screenshot shows the 'Folder Export Condition' dialog box. At the top, there is a title bar with a close button. Below the title bar, a text box explains the purpose: 'Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By' = 'john doe']'. The main area contains three input fields: 'Field Name' with a dropdown menu and a button to add fields (...), 'Operator' with a dropdown menu, and 'Value' with a dropdown menu. Below these fields are two buttons: 'Add to Filter' and '&OR' to Filter'. A 'Conditions:' section follows, featuring a large empty text area and a set of icons for logical operations: parentheses, AND, OR, NOT, and a delete icon. At the bottom, there is a label 'Export list items if the above condition is' followed by two radio buttons: 'satisfied' and 'not satisfied' (which is selected). Finally, there are 'OK' and 'Cancel' buttons.

- 9) Click (...) button to add the SharePoint columns in Field Name dropdown. The Add Fields Dialog appears as shown below:

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Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type drop-down**.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

- 10)** You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

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Folder Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name: Created Date

Operator: <=

Value: 9/ 1/2009

'AND' to Filter 'OR' to Filter

Conditions:

- [Created Date] > #9/1/2009#
- AND [Created Date] <= #9/1/2009#

Export list items if the above condition is ☐ satisfied ☒ not satisfied

OK Cancel

11) SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

12) List Item Level Conditions

Same as Folder Level Conditions

13) Click **Next** to proceed.

5.9 Destination Folder Options

SPListX will create destination folders based on the following options given below.

- 1) **The Destination Folder options** specification wizard step appears as shown below:

SPListX Task Wizard

Step Number: Destination Folder Options
Specify folders settings to use when creating folders in file system.

Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No

Attachment Folder Tag:

Do you want to overwrite file if the file name already exists in destination location? ☐ Yes ☒ No

Alternate File Name Mask (Optional):

< Back Next > Finish Cancel

- 2) **Select from the following options:**

- a) **Do you want to create current timestamp folder under destination location?** - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).
- b) **Do you want to create top-level folder(s) included for export?** - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

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c) Do you want to create destination folder path if it does not exist? -

This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

d) Do you want to create a folder for the list or folder underneath, when its contents are empty? - This option creates the folder in the destination location, if the source list or folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

e) Do you want to create separate folder for storing attachments? - This option creates separate folder for storing attachments under the specified destination location by selecting the option (yes/No).

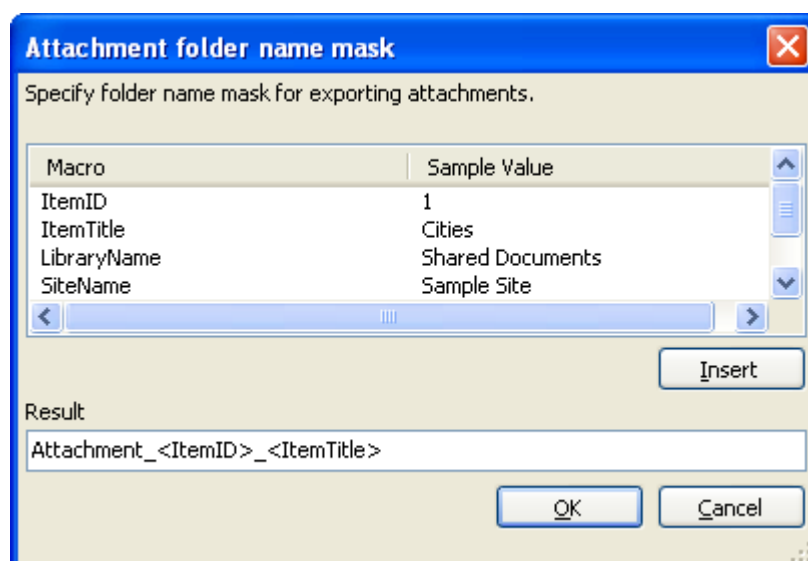
f) Do you want to overwrite file if the file name is already exist in destination location?

(i) Yes - Deletes the file from the destination location and exports the current source file.

(ii) No - Skips the file without overwriting the existing file with the same name.

- 3)** You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



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Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.

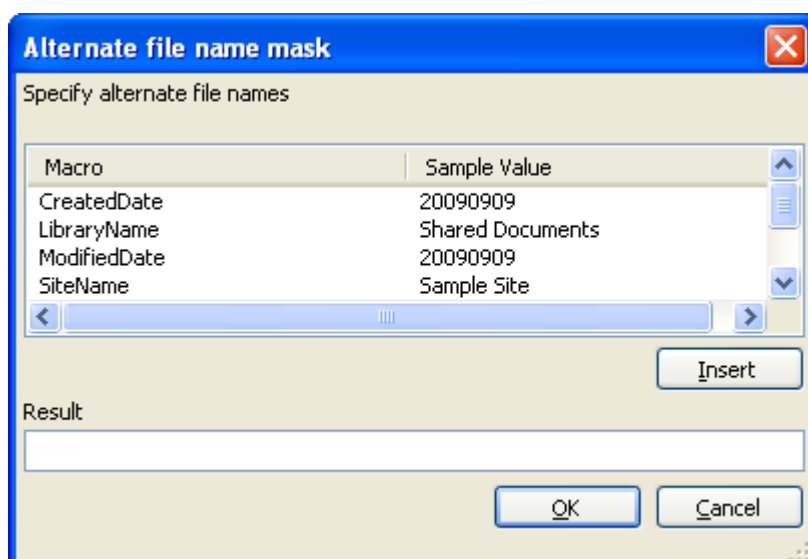
The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task1". The main heading is "Step Number: Destination Folder Options" with a subtitle "Specify folders settings to use when creating folders in file system." and a folder icon. The dialog contains several configuration options:

- "Do you want to create current timestamp folder under destination location?" with radio buttons for Yes and No (No is selected).
- "Do you want to create the top-level folder(s) included for export?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create destination folder path if it does not exist?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create a folder for the list or folder underneath, when its contents are empty" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create separate folder for storing attachments?" with radio buttons for Yes and No (Yes is selected).
- "Attachment Folder Tag:" followed by a text box containing "Attachment_<ItemID>_<ItemName>" and a browse button (three dots).
- "Do you want to overwrite file if the file name already exists in destination location?" with radio buttons for Yes and No (No is selected).
- "Alternate File Name Mask (Optional):" followed by an empty text box and a browse button (three dots).

At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

- 4) If you do not want to overwrite a file, if it already exists in the destination file system location, you can specify an alternate file name tag to be used for the exported file name. To select alternate file naming mask, click the button placed next to the alternate file tag name textbox. Alternate file name mask dialog appears as shown below:

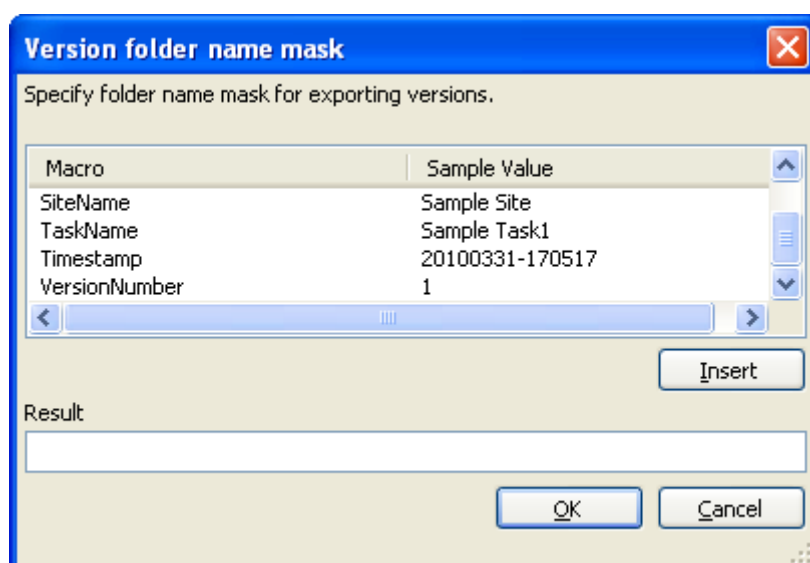
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Construct alternate file naming mask with the available mask provided in the dialog. Click OK to close the dialog. The constructed alternate file name mask will be placed in alternate file naming tag textbox. Files will be exported with the alternate naming mask.

5) When selecting all versions or Export version range option, a version folder name must be provided in Version Folder Name textbox. You have the option to select a version folder name when exporting document versions. The version folder will be named based on the folder naming convention specified by the user.

To select version folder naming mask, click the button placed next to the attachment folder tag name text box. This dialog appears as shown below:



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Construct version folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in version folder naming tag textbox as shown below.

The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task1". The main heading is "Step Number: Destination Folder Options" with a subtitle "Specify folders settings to use when creating folders in file system." There is a folder icon in the top right corner. The dialog contains several configuration options:

- "Do you want to create current timestamp folder under destination location?" with radio buttons for Yes and No (No is selected).
- "Do you want to create the top-level folder(s) included for export?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create destination folder path if it does not exist?" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create a folder for the list or folder underneath, when its contents are empty" with radio buttons for Yes and No (Yes is selected).
- "Do you want to create separate folder for storing attachments?" with radio buttons for Yes and No (Yes is selected).
- "Attachment Folder Tag:" followed by a text box containing "Attachment_<ItemID>_<ItemName>" and a browse button (...).
- "Do you want to overwrite file if the file name already exists in destination location?" with radio buttons for Yes and No (No is selected).
- "Alternate File Name Mask (Optional):" followed by an empty text box and a browse button (...).

At the bottom, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

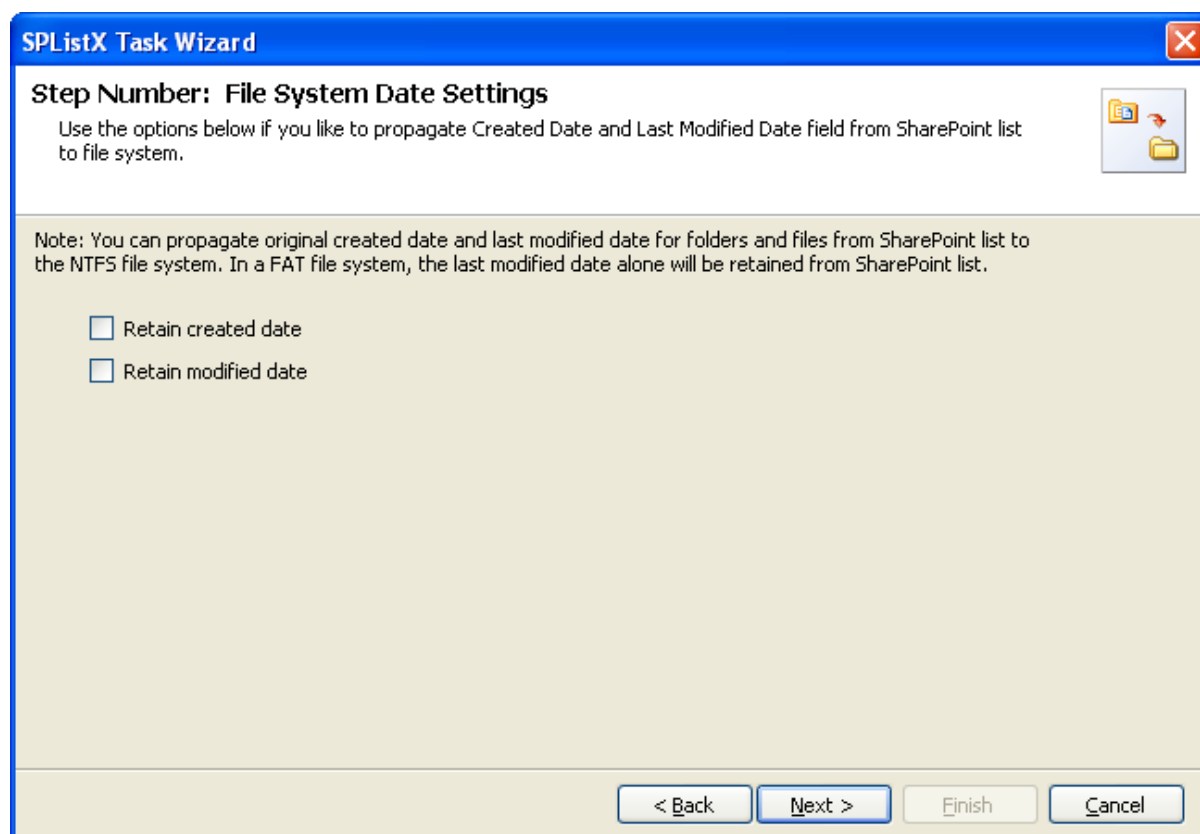
When exporting document versions, a new folder with the name specified in the textbox will be created as a sub-folder in the folder hierarchy and the respective versions will be exported to the corresponding version folder. For example if "VersionHistory<VersionNumber>" is entered in the textbox, the respective document versions will be stored in folders such as "VersionHistory1", "VersionHistory1.1", "VersionHistory2" etc.

6) Click Next to proceed.

5.10 File System Date Settings

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:

1) The File System Date Settings wizard step appears as shown below:



2) Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

- a) Retain created date** - Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.
- b) Retain modified date** - Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system

NOTE: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

5.11 Metadata File Settings

To specify the metadata file location where the folder and list metadata is to be exported, follow the steps given below:

1) The **Metadata File Settings** step appears as shown below:

SPListX Task Wizard

Step Number: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/MDB/XLS/XML)

Metadata file option:
☐ Store metadata files in the respective list folder location
☒ Use different metadata file location

Metadata file location:
D:\Vyapin Products Workspace\SPListX\Export
☒ Create folder path if it does not exist ☐ Add to Favorites

Metadata file format:
Microsoft Excel (XLS)
☐ Export metadata Field Definitions as separate XML file along with the metadata file

Metadata file naming mask:
(One file for each list)
<ListName> <Timestamp>
☐ Create metadata file even when there are no records to export

New header names:
(Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number

< Back Next > Finish Cancel

2) Specify a folder path where the selected list items metadata are to be exported. You can also click browse ('...') button to launch folder browser dialog.

NOTE: Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

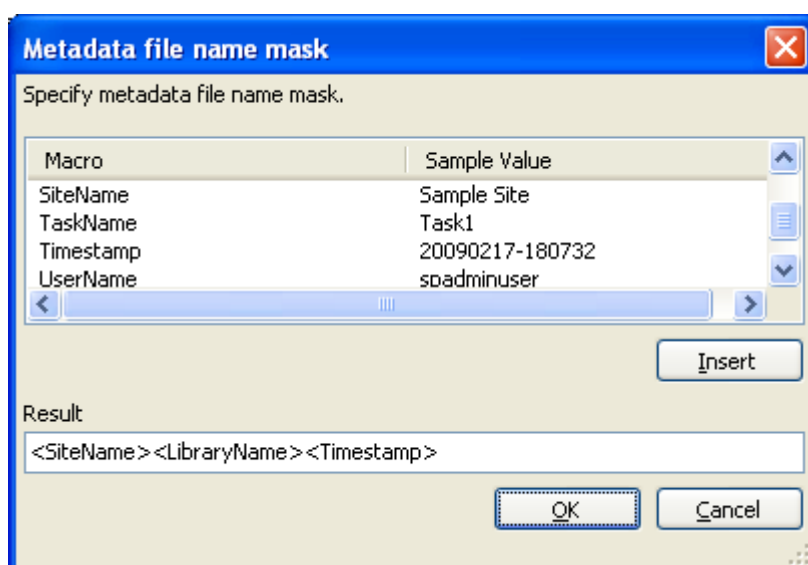
3) **Select a metadata file format** using one of the following options:

- a) **Comma delimited (CSV)** - Export metadata column values in comma separated values (CSV) file format.
- b) **Microsoft Access (MDB)** - Export metadata column values in Microsoft Access database format.

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- c) **Microsoft Excel (XLS)** - Export metadata column values in Microsoft Excel format.
 - d) **Extensible Mark-up Language (XML)** - Export metadata column values in XML format.
- 4) **Select a metadata file naming mask** to use when creating the metadata file. Metadata file will be named based on the selected file naming options.

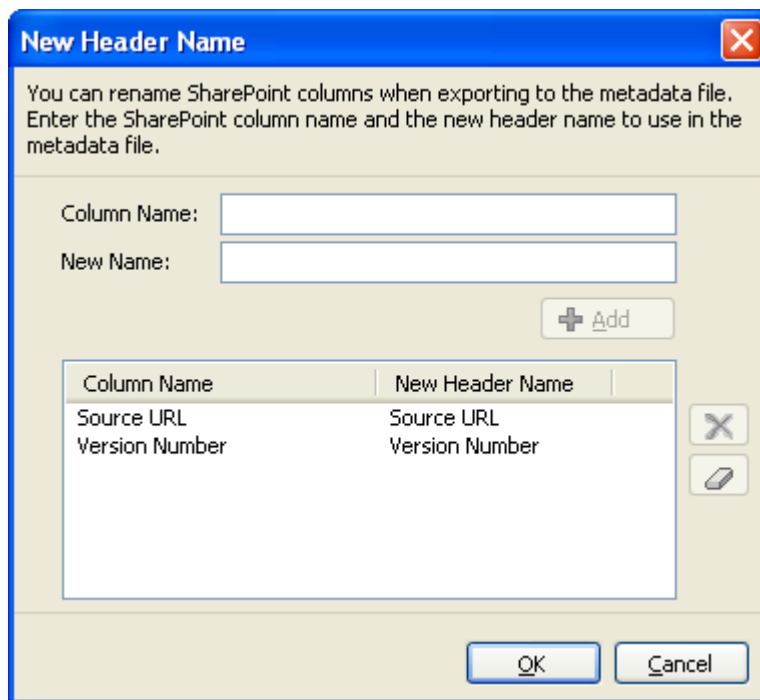
To select metadata file naming mask, click the button placed next to the metadata file naming mask text box. This dialog appears as shown below:



Construct metadata file name along with the available name mask provided in the dialog. Click OK to close the dialog. The constructed file name mask will be placed in metadata file naming mask textbox as shown above. The metadata file will be named using the resultant mask value.

- 5) By default, an empty metadata file will not be created. If you want to create an empty metadata file, then select "Create metadata file even when there are no list items" option.
- 6) You can specify new column names when generating the metadata file in the file system location. To use this feature, specify the new header names by clicking the Edit button. A New Header Dialog appears as shown below:

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New Header Name

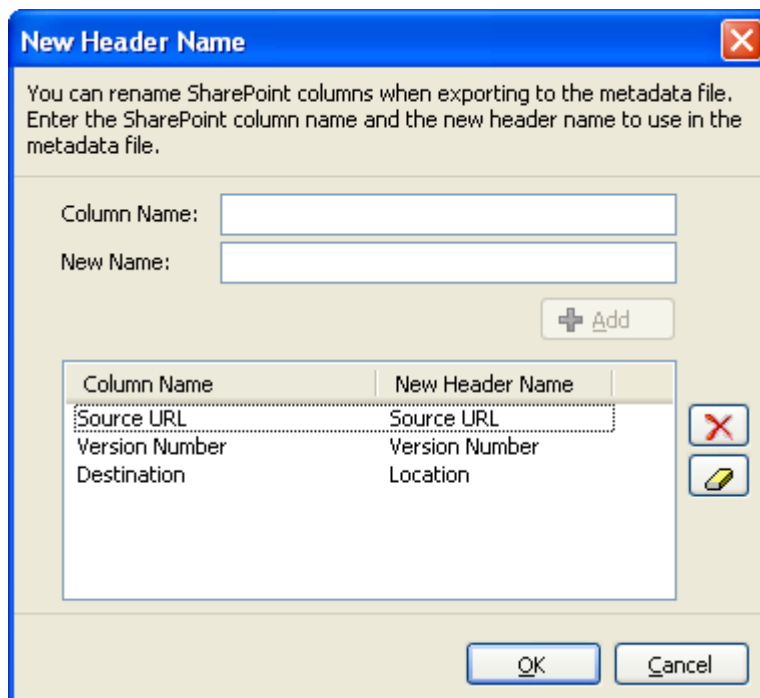
You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file.

Column Name:

New Name:

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number

- 7) You can specify SharePoint column name in Column Name textbox and new name for the SharePoint column in new name textbox. Click **OK**. For example, a SharePoint column named 'Department' in the source SharePoint list can be renamed as 'Location' when exporting the metadata files at run time.



New Header Name

You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file.

Column Name:

New Name:

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number
Destination	Location

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SPListX Task Wizard

Step Number: Metadata File Settings
Specify destination path to store metadata file and export file format (CSV/MDB/XLS/XML)

Metadata file option:

- ☐ Store metadata files in the respective list folder location
- ☒ Use different metadata file location

Metadata file location:

☒ Create folder path if it does not exist ☐ Add to Favorites

Metadata file format:

☐ Export metadata Field Definitions as separate XML file along with the metadata file

Metadata file naming mask: (One file for each list)

☐ Create metadata file even when there are no records to export

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number
Destination	Destination

< Back Next > Finish Cancel

Select Add to Favorites checkbox to add the URL to File System favorites.

8) Click **Next** to Proceed.

5.12 Task Settings

To specify the task name and schedule settings:

1) **The Task Settings step** appears as shown below

SPListX Task Wizard

Step Number: Task Settings

Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option: ☒ Run task upon clicking Finish button ☐ Run later ☐ Create Schedule Task

SPListX will use the user account specified in 'Run As' to connect to SharePoint.

Run As:

Schedule: Start time:

Schedule Task Daily

Every day(s)

At 10:50 AM every day, starting 3/22/2010

< Back Next > Finish Cancel

2) **Enter a unique task name** in Task Name textbox.

3) **Select a Task Option** from one of the following options:

- a) **Run task upon clicking Finish button** - to run the task immediately after clicking Finish button
- b) **Run later** - to run the task later as and when desired
- c) **Create Schedule task** - to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the Run As user account specified in this export wizard step. The Run As account should be a valid Windows domain account.

CHAPTER 5 – Export SharePoint List contents using the search option

SPListX Task Wizard

Step Number: Task Settings
Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option: ☐ Run task upon clicking Finish button ☐ Run later ☒ Create Schedule Task

SPListX will use the user account specified in 'Run As' to connect to SharePoint.

Run As:

Schedule:

Schedule Task Daily

Every day(s)

At 10:50 AM every day, starting 3/22/2010

< Back Next > Finish Cancel

To create the task, click **Finish** button.

5.13 Working with Search Results

Disclaimer: The information below can be specific to particular SharePoint environmental issues. The workarounds may or may not be suitable for your environment. Please consult your SharePoint Administrator before performing any changes to your SharePoint production environment.

Protocol handler that crawls the SharePoint content will not populate `ows_Modified_x0020_By` (Text) or the `ows_ModifiedBy` (Text), `ows_created_x0020_By` (Text) crawled property.

1) How to map **LastModifiedBy** and **CreatedBy** field to crawled field?

- Open Central administration -> Shared Services -> SharedServicesX (X being the number of the shared services provider for the site you are creating a mapping) -> search settings -> metadata property mappings.
- Click **"ModifiedBy"** to edit the properties.
- Make sure "Include values from all crawled properties mapped" is selected.
- Click "Add Mapping" and select the "Office" category from the dropdown list.
- Look for a property named "OFFICE: 8", click "OK".
- Click "Add Mapping" and select the "ows_Last_x0020_Modified (text)" from the ALL categories dropdown list, Click "OK".
- Make sure the box is checked "Allow this property to be used in scopes", click "OK".
- Click **"CreatedBy"** to edit the properties.
- Make sure "Include values from a single crawled property based on the order specified" is selected.
- Click "Add Mapping" and select the "Office" category from the dropdown list.
- Look for a property named "OFFICE:4", click "OK".
- Click "Add Mapping" and select the "ows_Created_x0020_By (text)" from the ALL categories dropdown list, Click "OK".
- Make sure the box is checked "Allow this property to be used in scopes", click "OK".

CHAPTER 5 – Export SharePoint List contents using the search option

Shared Services Administration: SharedServices1 > Search Settings > Managed Properties > Edit Managed Property

Edit Managed Property - CreatedBy

Use this page to view and change the settings of this property.

Name and type Type a name for this property, and select the type of information you want to store in this property.	Property name: * <input type="text" value="CreatedBy"/> Description: <input type="text"/> The type of information in this property: Text
Content using this property This section displays the number of items found with this property.	Number of items found with this property: more than 1000
Mappings to crawled properties A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.	<input type="radio"/> Include values from all crawled properties mapped <input checked="" type="radio"/> Include values from a single crawled property based on the order specified Crawled properties mapped to this managed property: <div><div>Office:4(Text) ows_Created_x0020_By(Text)</div><div>Move Up Move Down Add Mapping Remove Mapping</div></div>
Use in scopes Indicates whether this property will be available for use in defining search scopes.	<input checked="" type="checkbox"/> Allow this property to be used in scopes

2) How crawling will affect export process of search results?

For example, if you performed search for the search query, Author='John Doe' using Trial search Dialog search results contains 1205 records approximately and save the search results. During export process search results count may increase to 1250 records approximately this is due to the incremental crawling of the content source.

3) How to avoid the "System.Services.TimeoutException" during export process of search results in SPListX?

During frequent usage of SharePoint, SharePoint Search services cannot serve the search request within the stipulated time therefore; SharePoint search server itself throws a System.ServiceProcess.TimeoutException. To avoid this exception, we strongly recommend you to perform search export process during off-peak hours.

4) How stemming will help you to get related search results?

Stemming will bring back words closely related to the query terms i.e. inflectional variants for most languages, but for some languages derivational variants as well.

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For example, sample search queries with search results.

S.No.	Search Keywords	Search Results
1.	Run	In addition to exact match, it will bring back matches on "runs", "ran", "running".
2.	Page	In addition to exact match, it will bring back matches on "pages", "paged", and "paging".

5) How to enable stemming in MOSS 2007?

- Go to the search page; enter any query to return the search results page. For ex: enter keyword 'sharepoint' in anykeywords text box.
- Under Site Actions, select 'Edit page'.
- Locate the 'Search Core Results' web part (usually in the bottom zone).
- From the Edit button, select 'Modify shared web part'.
- In the task pane that appears on the right hand side, under 'Results Query Options', select 'Enable Search Term Stemming' checkbox.

NOTE: If stemming is switched on, it will increase your index size and potentially impact search performance.

6) What is meant by Trimming Duplicate Search Results?

To specify whether duplicate list item URLs should be removed from search results.

7) How to view duplicate search results in MOSS 2007?

- Go to the search page; enter any query to return the search results page. For example: enter keyword 'sharepoint' in any keywords text box.
- Under Site Actions, select 'Edit page'
- Locate the 'Search Core Results' web part (usually in the bottom zone)
- From the Edit button, select 'Modify shared web part'
- In the task pane that appears on the right hand side, under 'Results Query Options', check the box labelled ' Remove Duplicate Results '.

8) How to enable advanced search in WSS 3.0?

Install SQL Search Server Express Edition 2008 in WSS 3.0 SharePoint Server.

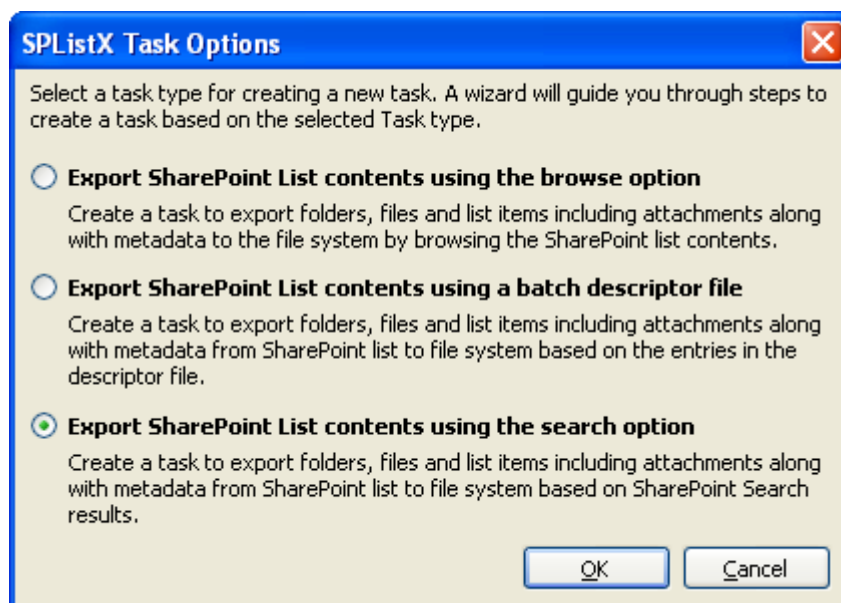
Steps for crawling the content:

- Navigate to the central admin site.
- Click Shared Services Administration -> Search Settings -> Content sources and crawl schedules.
- Create Content Source and add the site URLs to be crawled and start full crawl of the content source.

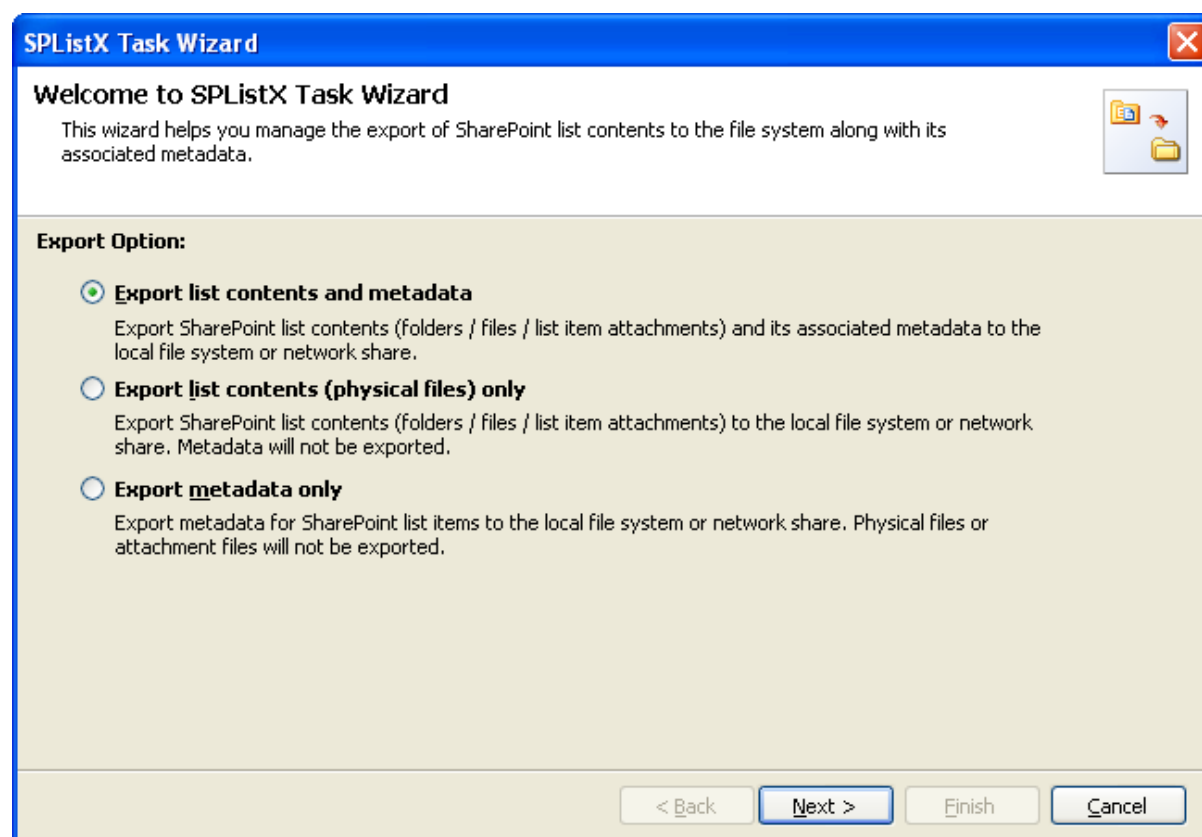
5.14 How to Create Batch File Using Search Results

Steps for creating batch file using search results

- 1) **Select Export SharePoint List contents using the search option in SPListX Task Options** dialog as shown below and click **OK**.



2) The SPListX Task Wizard appears as shown below:



Click **Next** button.

3) Specify Search URL Settings

4) Specify Search Conditions

CHAPTER 5 – Export SharePoint List contents using the search option

SPListX Task Wizard

Step Number: Search Conditions
Specify search rules that must be satisfied to export list items from SharePoint.

All of these words: Any of these words:

The Exact phrase: None of these words:

Result Type: Scope:

Narrow the search

Property: ...

Operator: Logical operator: ☒ And ☐ Or

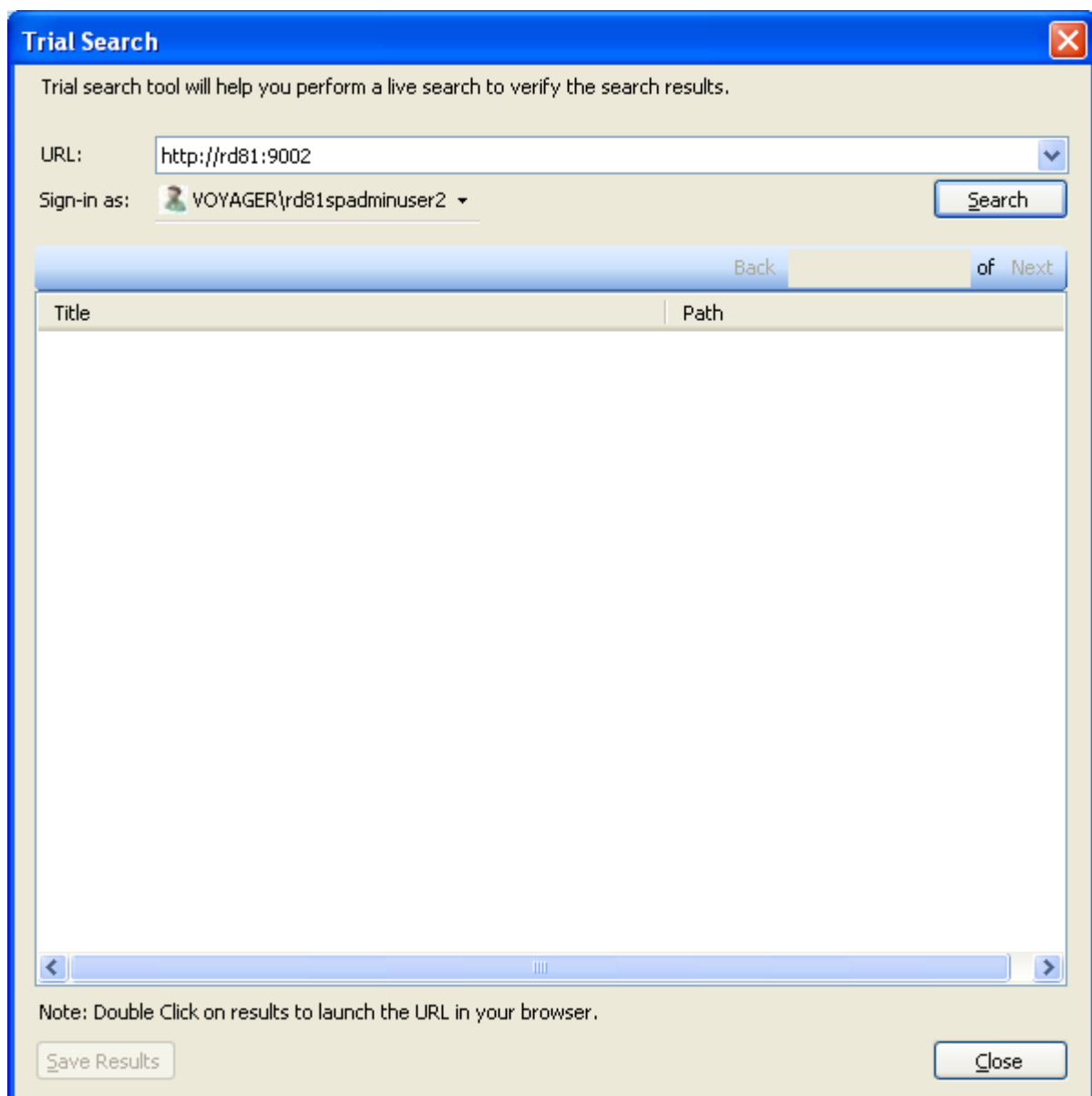
Value:

Property restrictions:

Click **Trial Search** button to invoke Trial Search tool. The Trial Search tool will help you perform a live search against the query and help you verify the search results.

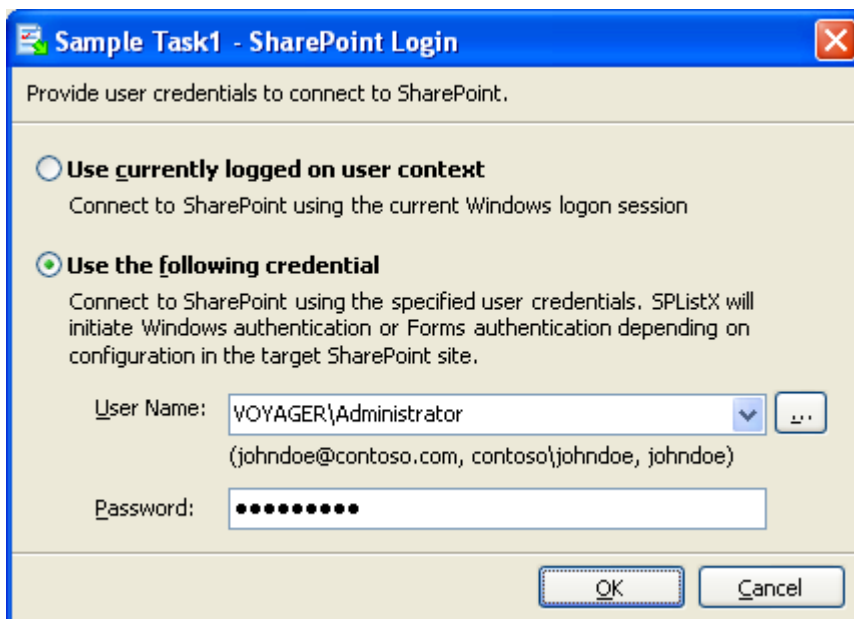
CHAPTER 5 – Export SharePoint List contents using the search option

The Trial Search Dialog appears as shown below:



- a) Select URL from the **URL** drop-down.
- b) The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

CHAPTER 5 – Export SharePoint List contents using the search option



Sample Task1 - SharePoint Login

Provide user credentials to connect to SharePoint.

☐ **Use currently logged on user context**
Connect to SharePoint using the current Windows logon session

☒ **Use the following credential**
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

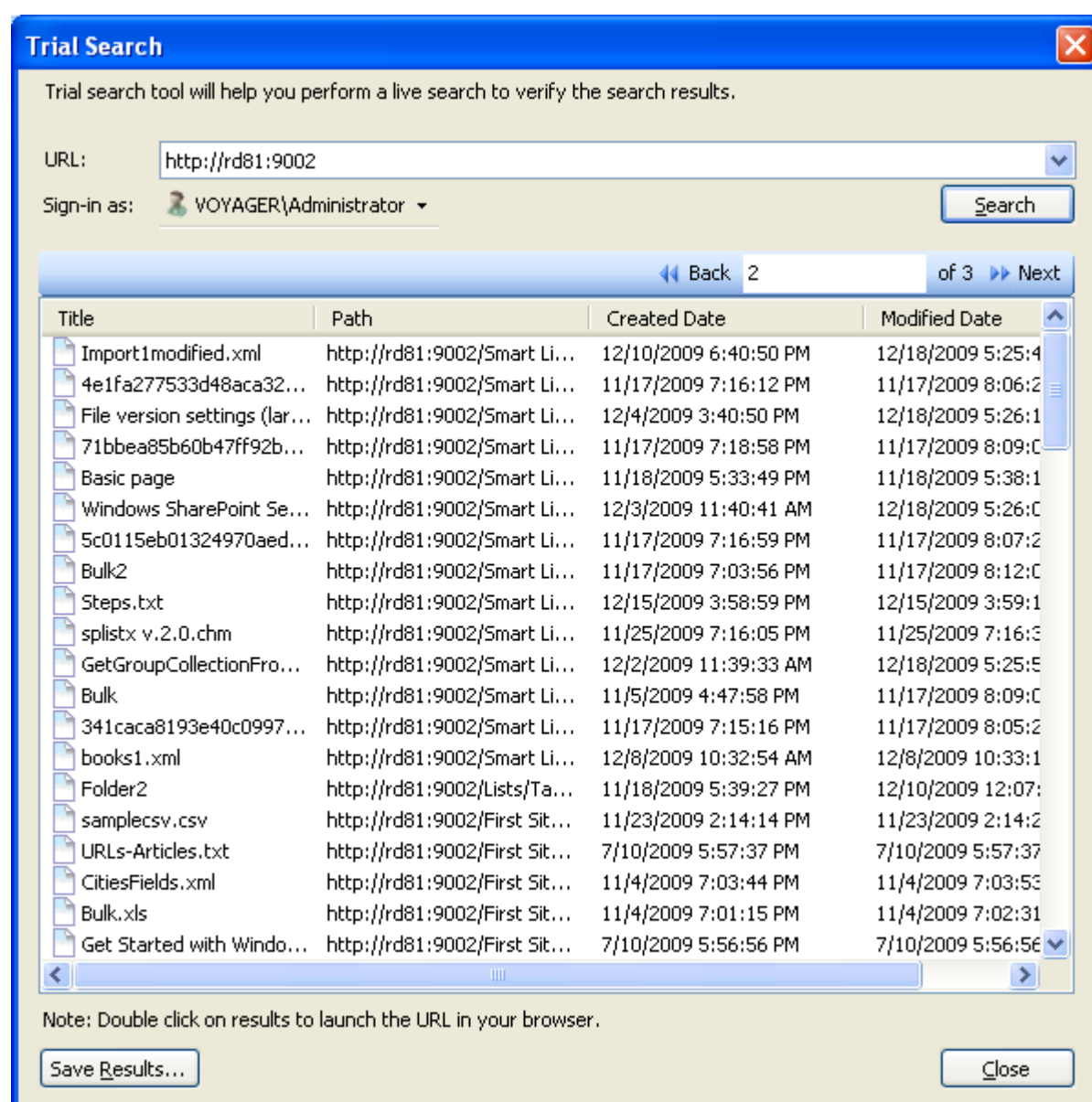
User Name: VOYAGER\Administrator
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password: ••••••••

OK Cancel

c) Click **Search** button to perform search.

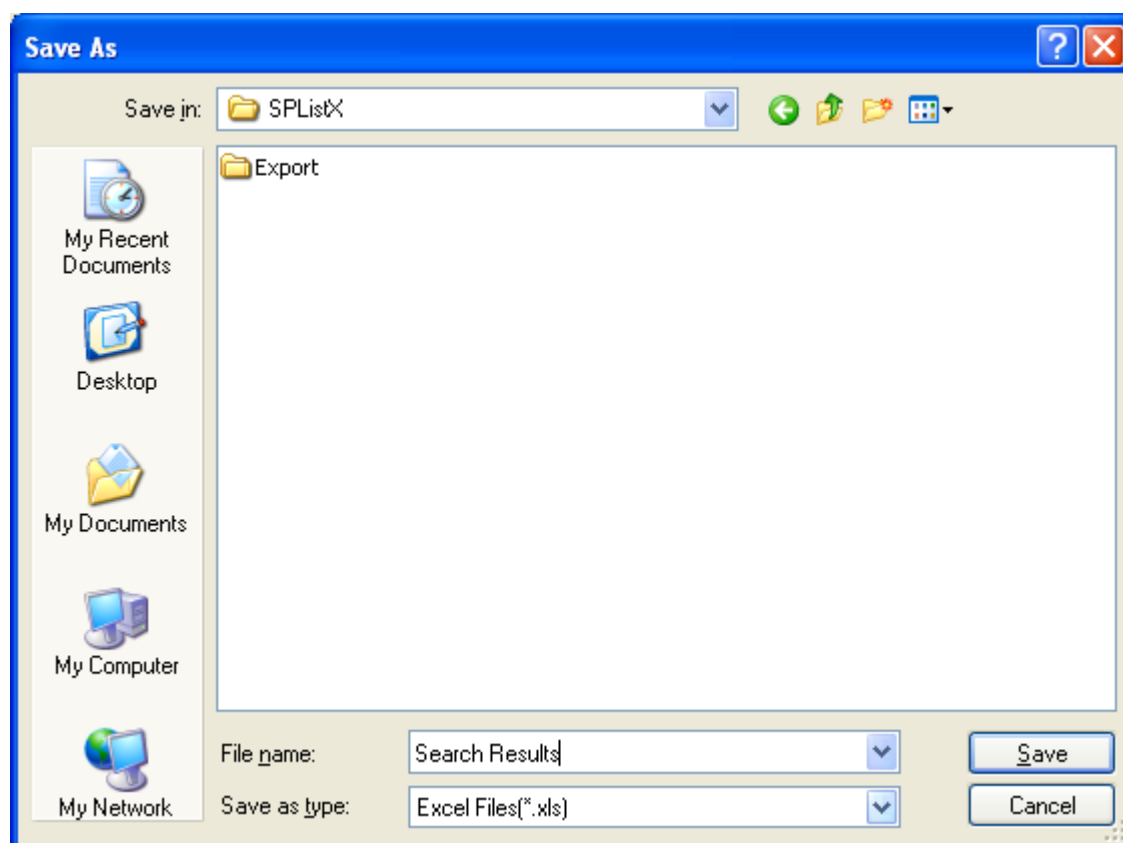
CHAPTER 5 – Export SharePoint List contents using the search option



Click **Save Results** button to save the search results.

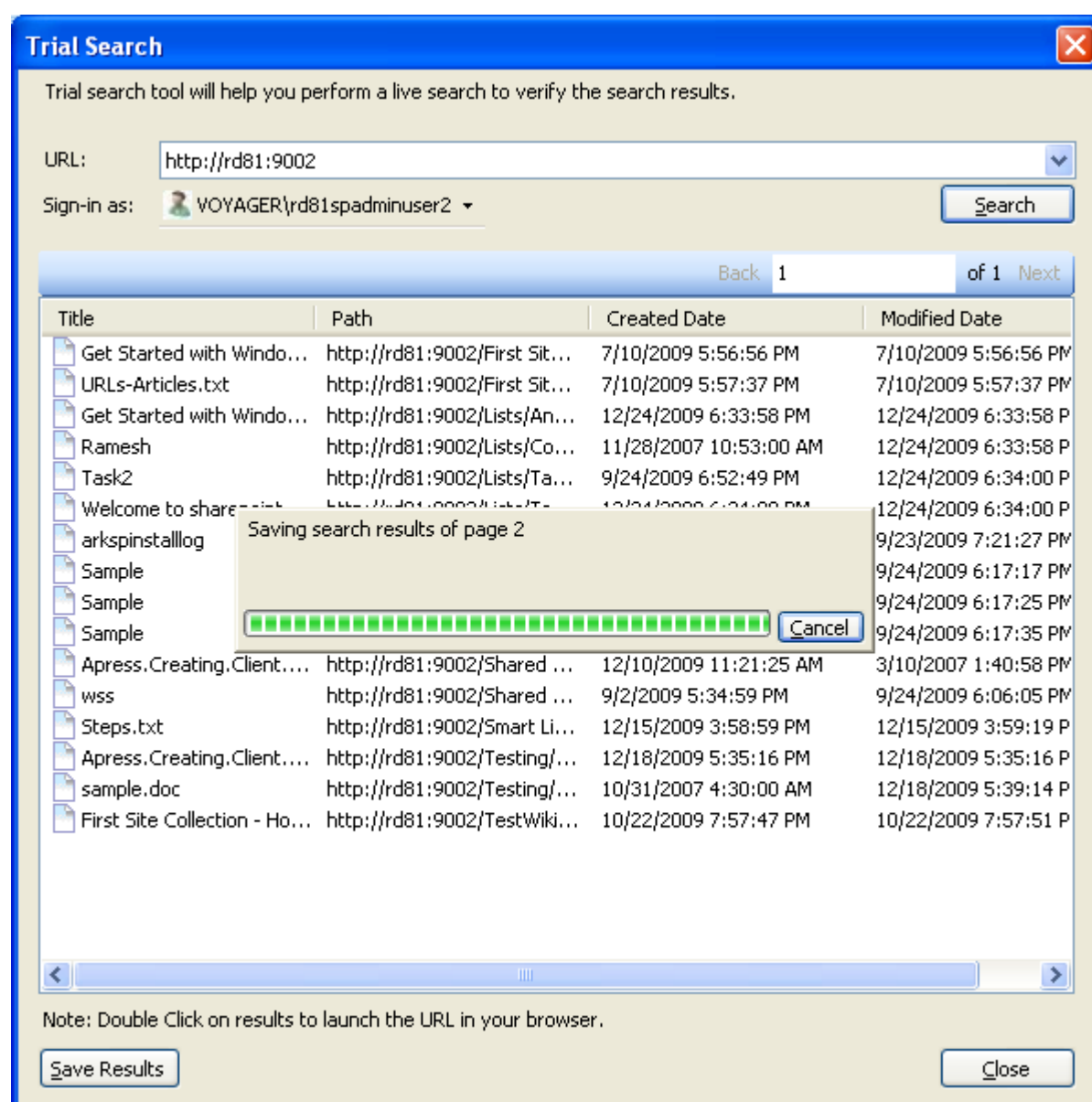
CHAPTER 5 – Export SharePoint List contents using the search option

- The **Save As** dialog appears as shown below

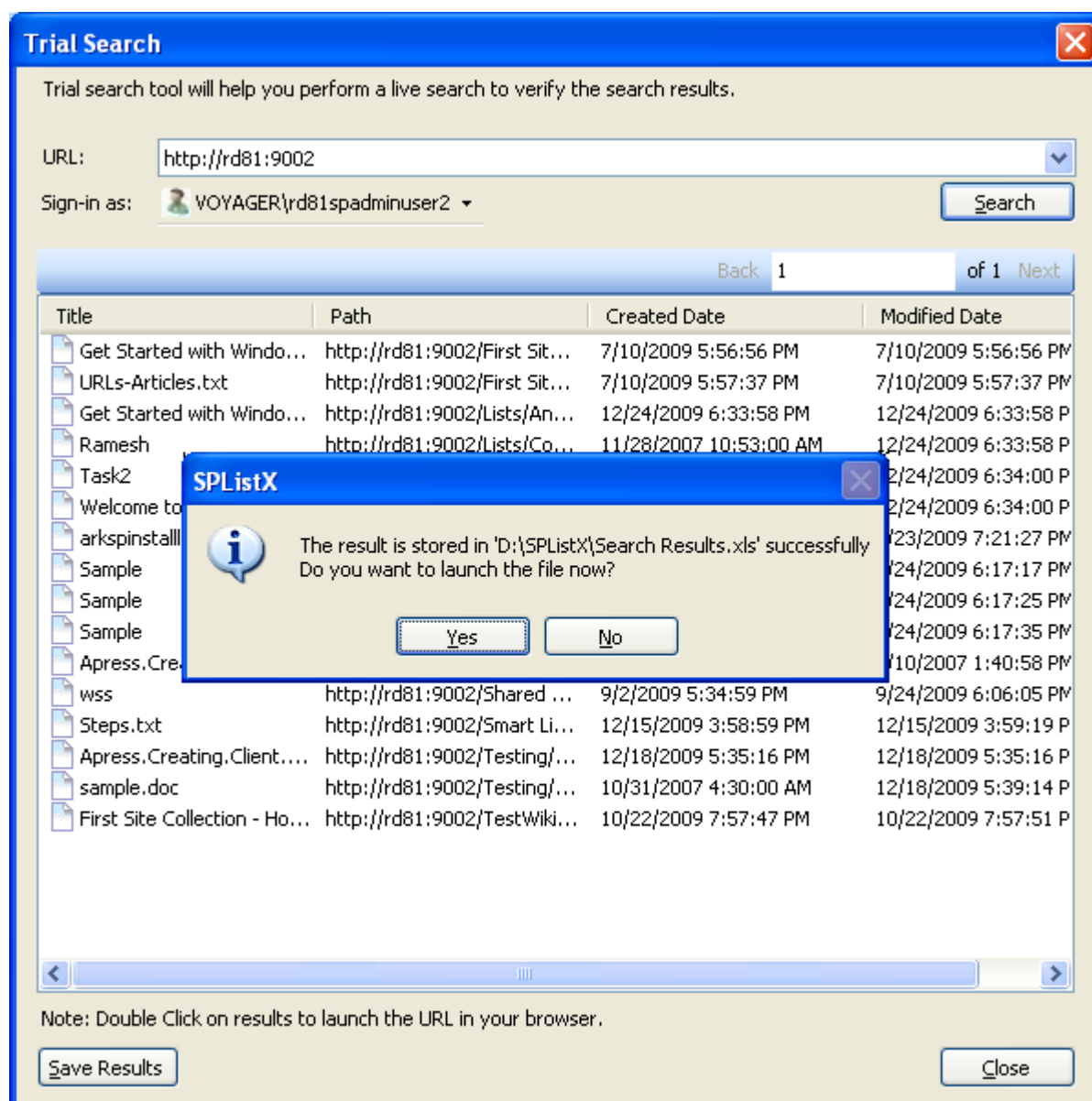


- Specify file name and Click OK button.
- While saving search results the Trial search dialog appears like this:

CHAPTER 5 – Export SharePoint List contents using the search option



CHAPTER 5 – Export SharePoint List contents using the search option



Click **yes** to launch the file.

Click **Close** button to close the dialog.

5) Sample Search Result format in CSV

"Title", "Path", "Created Date, Modified Date

"Purchase","http://vyapin/Purchase document/purchase
report.xls","2/11/2009","2/15/2009"

"Marketing","http://vyapin/Purchase
document/marketing.ppt","2/11/2009","2/15/2009"

CHAPTER 5 – Export SharePoint List contents using the search option

"Account Report","http://vyapin/Purchase document/Account Report.xls","2/11/2009","2/15/2009"

6) Steps to modify the search results.

(i) Remove the Columns created date, modified date, title from the file.

(ii) Add Destination Path Column and specify the file path.

Sample Batch file format for CSV

"Path", "Destination Path"

"http://http://vyapin/Purchase document/purchase report.xls","C:\My Documents"

"http://http://vyapin/Purchase document/marketing.ppt","\\vyapinfo\ExportDocs\shared doc contents"

"http://http://vyapin/Purchase document/Account Report.xls", "C:\My Sales\Lists Backup"

7) Create a task to Export SharePoint List contents using a batch descriptor file

6 References

6.1 Error Messages and Resolution

You may notice one or more of the error messages given below when using SPLiX to connect to SharePoint and perform an export. This is not an exhaustive compilation of all error messages, but an attempt to include as many known error messages and how to resolve the errors. Please refer Troubleshooting section for more information.

Error Message	Resolution
The remote server returned an error: (407) Proxy Authentication Required.	Enable the Bypass proxy server for local addresses option available at LAN Settings of Internet Options of Internet Explorer Browser.
Unable to establish existence of the account specified.	The user account specified in the scheduled task should be a trusted domain user account.
Source folder or file not found	Ensure that the given Source Path is valid and available. Invalid or unavailable source paths will result in this error.
Unable to locate list with the specified URL	Ensure that the given source list URL is valid and exists.
Unable to locate destination folder with	Ensure that the given destination folder

CHAPTER 6 – References

the specified path	location is valid and exists.
The file is checked out or locked for editing by user	This error may occur when reading a file in SharePoint, if the given file is checked out and exclusively locked by another user.
The Microsoft Jet database engine cannot open the file '<file name>'. It is already opened exclusively by another user, or you need permission to view its data.	Ensure that the specified file is not currently in use / open by any other application or user. Close the file and try again (or) close and re-launch SPListX application.
The 'Microsoft.ACE.OLEDB.12.0' provider is not registered on the local machine.	Ensure that the machine running SPListX has either Microsoft Office 2007 Suite or Office 2007 System Driver (Data Connectivity Components) installed.
Export Condition failed	Ensure that the specified column in export condition exists in the source SharePoint List.
Ignored Export Condition not satisfied	The list / folder / list item does not satisfy the export condition specified in the task settings. SPListX will log this message in the Activity log and the list / folder / list item will be skipped for export.
Cannot export the column '<Column name>' values, since the column could not be found in the SharePoint List"	Ensure that the specified column in export metadata for specific columns exists in SharePoint List.
Search Condition failed	Ensure that the specified managed property in search condition exists in the source SharePoint service provider.

6.2 Troubleshooting

If and when a problem arises, please forward the following files to support@vyapin.com to revert back to you with a solution. These files will be available where SPListX is installed.

- 1) *Error log file* - e.g., <Application Data Folder>\SPListX\Log\SPListXErrorLog.txt
- 2) For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name under TaskHistory folder.
 - a) *Activity log file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\logs\ActivityLog.txt
 - b) *Error log file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\logs\ActivityErrors.txt
 - c) *Metadata log file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\logs\MetadataErrors.txt
 - d) *SPListX error log file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\logs\SPListXErrorLog.txt
 - e) *Task settings file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\settings\Details.xml
 - f) *Library settings file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\settings\LibrarySettings.xml
 - g) *Process details file* - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20060522-183919\settings\ListItemProcessCount.xml

NOTE: <Application Data Folder> is the common area where SPListX tasks and task history will be stored in the machine running SPListX. The <Application Data Folder> specified at the time of installing SPListX can be found from the Help -> About screen. The default path of <Application Data Folder> is as follows:

- a) Windows XP, Windows Server 2003 - C:\Documents and Settings\All Users\Document
- b) Windows 7/ Vista, Windows Server 2008 - C:\Users\Public\Documents

6.3 How to Uninstall SPListX?

When you create SharePoint export tasks in SPListX, the application creates Windows Scheduled Tasks (to run the export tasks at the specified time interval) where SPListX is installed. Export task results for every task run instance is also maintained in the computer as application files.

When you uninstall SPListX through Control Panel - Add / Remove Programs applet, Windows Installer program will remove only the application files from your machine. But, the application related files created by SPListX remain in the computer. In order to remove SPListX worker files completely, the uninstall wizard provides a set of cleanup options to perform the cleanup operation based your selection.

Use this wizard to cleanup the files that are created by SPListX for SharePoint 2010 application selectively and uninstall SPListX completely from the machine.

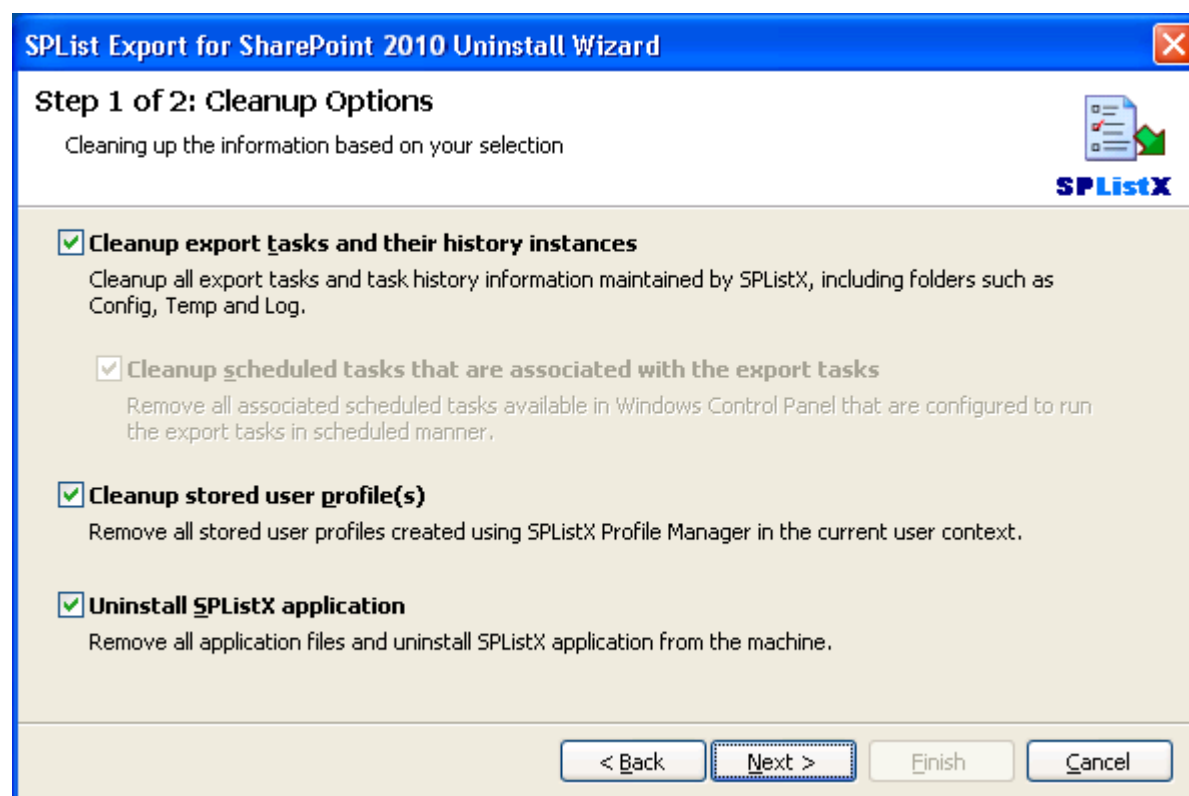
- 1) **Launch the uninstall wizard by clicking Start -> Programs -> SPListX for SharePoint 2010 -> SPListX Uninstall Wizard.**

The **SPListX Uninstall Wizard** dialog will be shown as below:



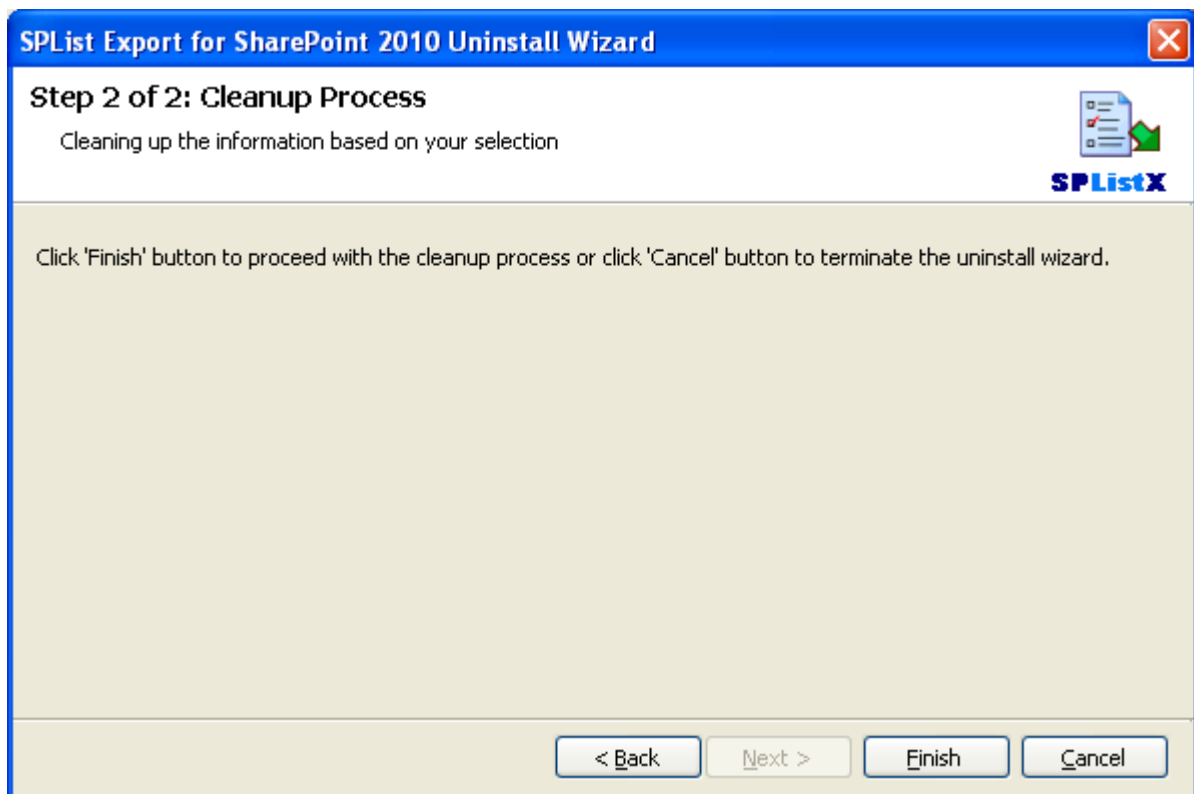
Click Next to proceed.

2) Select required cleanup options as shown below:



Click **Next** to proceed.

3) Confirm the cleanup and/or uninstall process.



Click **Finish** to run cleanup and/or uninstall process. Click **Cancel** to close the wizard.

- 4) Once the file cleanup process is complete, the uninstall wizard will automatically run Windows Installer program to remove SPListX application from the machine, if you have selected the cleanup option **Uninstall SPListX application in the wizard**.

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