BoostSolutions
We make your SharePoint life easier.

List Transfer 2.0

User Guide

Copyright

Our web site: http://www.boostsolutions.com

Contents

1. Introduction

SharePoint List Transfer can copy and move SharePoint documents or list items between lists, libraries or sites freely to help SharePoint end users easily transfer document and list items in SharePoint. And, the useful SharePoint web part can preserve the original information such as permissions, attachments, and authors and so on.

The user guide is used to instruct the users to configure and use the product.

For the latest copy of this and other guides, please visit the link provided:

http://www.boostsolutions.com/download-documentation.html

2. Installation

2.1 Product Files

After you download and unzip the List Transfer zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
List Transfer_v2_User Guide.pdf	User guide for List Transfer in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundtion\ BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\Classifier.ListTransfer\ BoostSolutions.ListTransfer14.2.wsp	A SharePoint solution package containing List Transfer files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Classifier.ListTransfer\ BoostSolutions.ListTransfer15.2.wsp	A SharePoint solution package containing List Transfer files and resources for SharePoint 2010 or SharePoint Foundation 2010.

Solutions\Classifier.ListTransfer\ Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install List Transfer, ensure your system meets the following requirements:

SharePoint 2013

| Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or above Mozilla Firefox Google Chrome

SharePoint 2010

Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or above Mozilla Firefox Google Chrome

2.3 Installation

Follow these steps to install List Transfer on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.
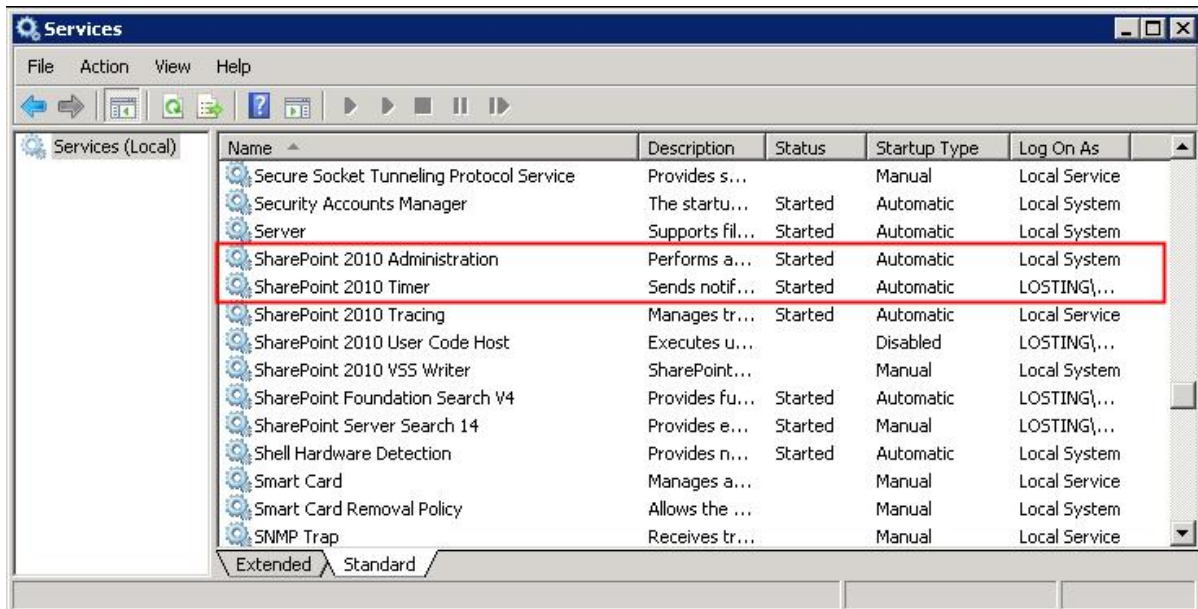
List Transfer must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration → System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.

- Member of the **Farm Administrators** group.

To install List Transfer on SharePoint server.

a. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.

b. Open the created folder and run the **Setup.exe** file.

> ### Note
>
> If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.

d. Review and accept the End-User License Agreement and click **Next**.

e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

> ***Note***
>
> If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

f.   Upon completion of the installation, details are displayed showing which web applications you product has been installed to.

g.   Click **Close** to finish the installation.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for List Transfer in **SharePoint 2010** by using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install List Transfer to SharePoint servers.

If you have installed BoostSolutions products before, please skip the steps of Foundation installation.

a.   Extract the files from the product zip pack to a folder on one SharePoint server.

b.   Open a command prompt and make sure your path is set with the SharePoint bin directory.

- **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

c.   Add the solution files to SharePoint in the STSADM command line tool.

stsadm -o addsolution -filename BoostSolutions.ListTransfer14.2.wsp

stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp

d.   Deploy the added solution with the following command:

stsadm -o deploysolution -name BoostSolutions.ListTransfer14.2.wsp -allowgacdeployment –url [virtual server url] –immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.wsp -allowgacdeployment –url [virtual server url] –immediate

e.   Wait for the deployment to complete. Check the final status of the deployment with this command:

stsadm -o displaysolution -name BoostSolutions.ListTransfer14.2.wsp

stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp

The result should contain a <Deployed> parameter for which the value is TRUE.

f.   In the STSADM tool, activate the features.

stsadm -o activatefeature -name BoostSolutions.ListManagement.ListTransfer –url [site collection url] –force

To remove List Transfer from SharePoint servers.

a.   Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.ListTransfer14.2.wsp -immediate -url [virtual server url]

b.   Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.ListTransfer14.2.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c.   Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.ListTransfer14.2.wsp

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is mainly designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, please DO NOT remove Foundation from the servers.

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.FoundationSetup14.1.wsp –immediate –url [virtual server url]

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp

2.7 Feature Activation

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

a. On the Site Actions menu **Site Actions ▾** click **Site Settings**.

b. Under **Site Collection Administration** click **Site collection features**.

c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

3. How to Use List Transfer

In document library

After activate List Transfer in site collection, these commands will appear in document library ribbon, and context menu on document.
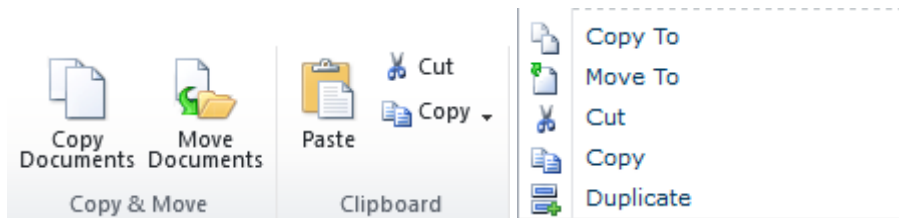
Copy Documents/Copy To: Copy the selected documents or files to the specified location.

Move Documents/Move To: Move the selected documents or files to the specified location.

**Paste**: Paste the documents or files in this document library.

Cut: Move the selected documents to clipboard, and paste to specified location.

Copy: Copy the selected documents to clipboard, and paste to specified location.

Duplicate: Make duplicate(s) of selected documents in this library.

In list

After activate List Transfer in site collection, these commands will appear in list ribbon, and context menu on item.
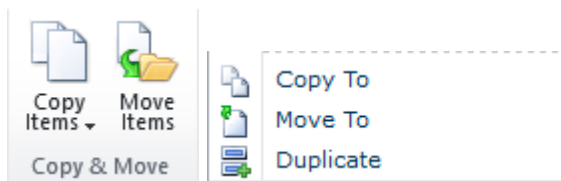
Copy Items/Copy To: Copy the selected items to another list.

Move Items/Move To: Move the selected items to another list.

Duplicate: Make duplicate(s) of selected items in this list.

3.1 Copy/Move Documents

SharePoint List Transfer provides the functions to copy or move documents between folders, document libraries, and different sites/site collections.

a.   In the document library, select documents which need to be copied.
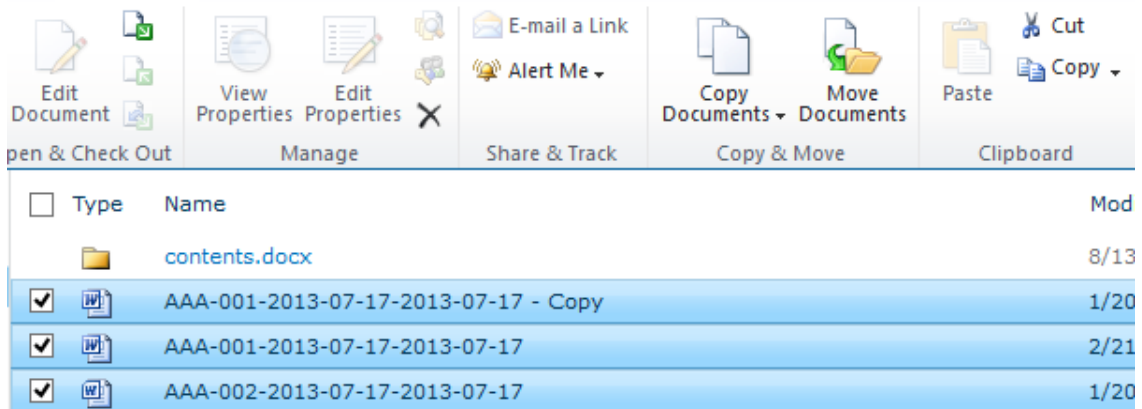
b.   And, click the **Copy Documents** (or **Move Documents**) on ribbon. It will show the following window:
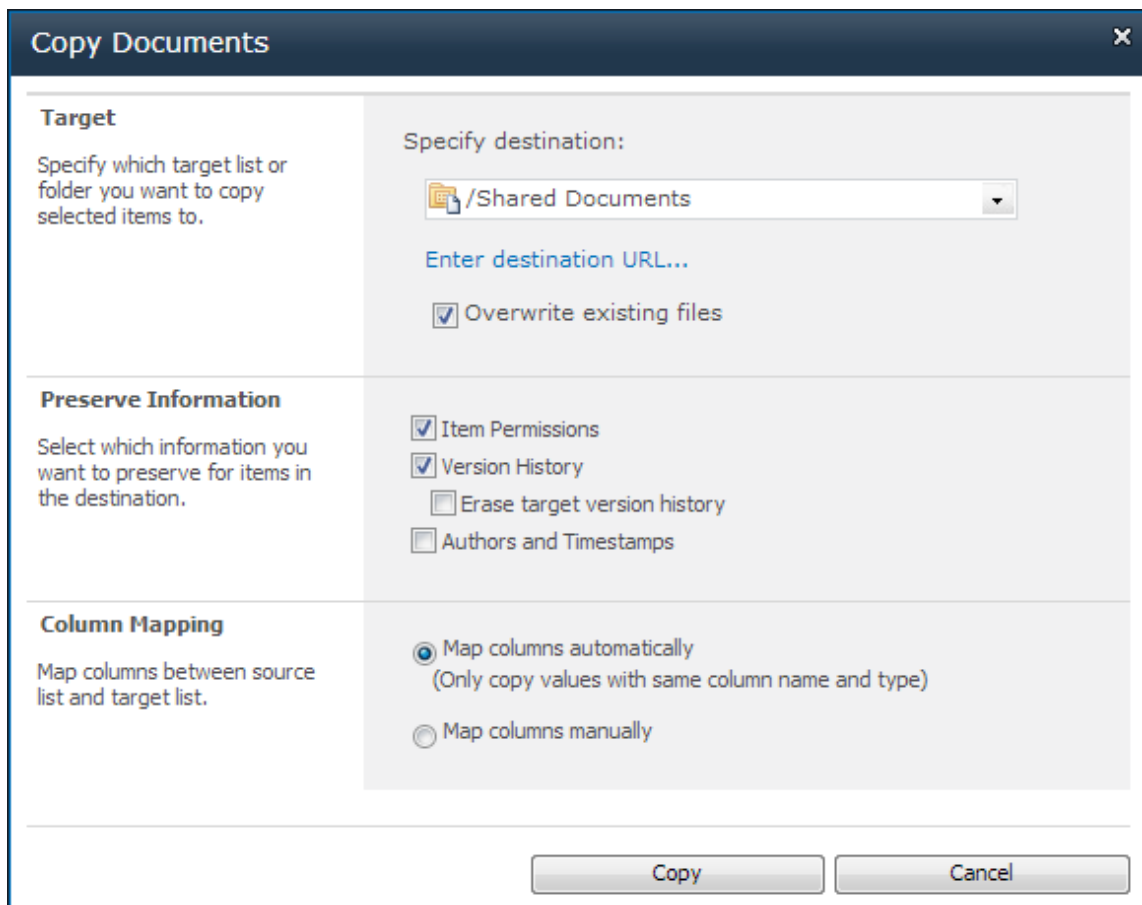
c.   In the **Target** section users can browse and select the target document library or folder to copy
      selected documents to.
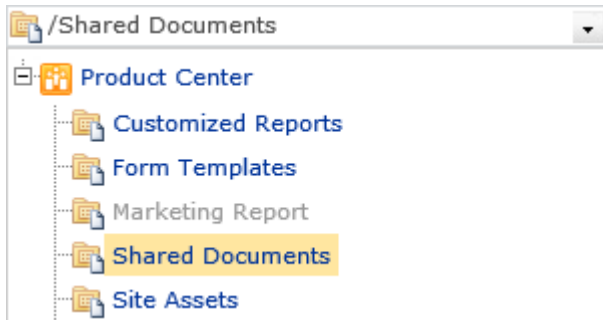
The option **Overwrite existing files** determines whether the original documents in the target
should be overwritten by the selected documents.
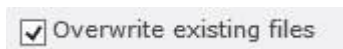
This option requires user have contribue permission on the target library.

The option Enter destination URL... is used to specify the target location within another site
collection. Click the link and you will see a text field where you can enter a list or folder URL:

Enter a valid URL and hit Check. An error message will be displayed if this application failed to
connect to a specific target location.

If everything is OK then the URL will be replaced by an underlined address.

d.   In the **Preserve Information** section, there are three options available for you to decide whether
      to preserve specific information.

Item Permissions: To preserve individual item permissions.

> ***Note***
>
> If you specified a different site collection as the destination, the Item Permission options will

be disabled.

Version History: To preserve version history.

> **Erase target version history**: When you move or copy a same document to the same library, you can select this option to remove the previous version history.

Authors and Timestamps: To preserve the creation and modification information (created, created by, modified and modified by)

This option requires user have full control permission on the target list. Otherwise, the option will be disabled.

Note

Above 3 options require user have full control permission on the target document library. Otherwise, the operation will be stopped.

---

e.   In the **Column Mapping** section there are two options to map columns when migrating documents.

Map columns automatically: Only copy values with same column name and type.

Map column manually: Manually map columns to target list.

The red asterisk indicates the required column in the source document library. About rules of column mapping, please visit: Column Mapping Rules.

f.   Click **Copy** (or **Move**) button. When the operation is finished, a window will pop-up as follows:
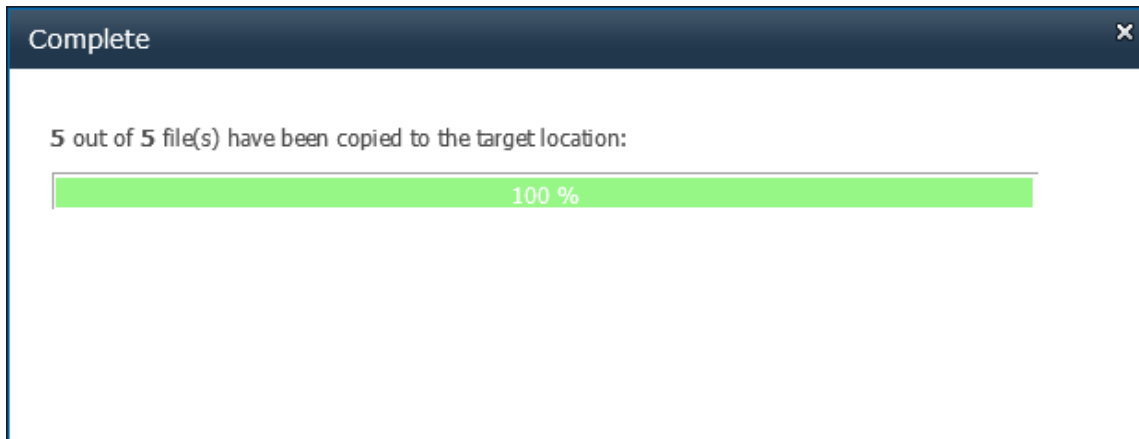
If there are any issues occur during the operation, the message will show in the window like this:
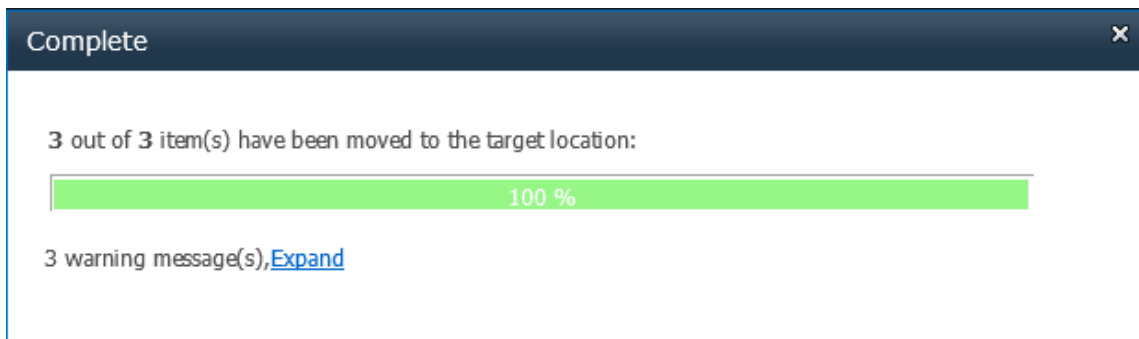
g.   Then, click **Go To Target** to enter the target document library. Or click **OK** to close this window.

FAQ

Sometimes, I find that the source document was not deleted when I moved a document.

1.   A source document may not be removed when the following conditions exist:

   •   The source document contains major versions
   •   The "Authors and Timestamps" option is selected

   Moving a document consists of two steps:

   a.   Copying a document and its information to the target library

   b.   Removing the source document

   In SharePoint, the "Author and Timestamp" of major versions cannot be copied to the target

document. In order to preserve this information, the source document will not be deleted after copying.

If you want to remove the source document, unselect the "Authors and Timestamps" option.

2. The second reason that causes this issue is insufficient permissions. "Delete item" permission is needed in the source list or library so that you can delete the source document.

3.2 Duplicate Document

You can quickly create a new document by duplicating a document through the **Duplicate** function. You can access this function by clicking **Duplicate** under the context menu.

a. In the list, select one document which you want to duplicate, and click the **Duplicate** command on the context menu.
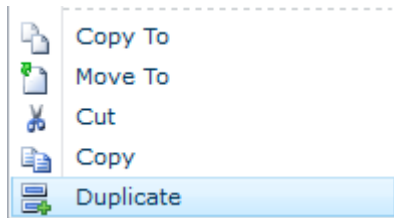
b. A copy of the document will be created and all metadata will be automatically filled in the same as the selected document.

3.3 Virtual Clipboards

You can also copy or move documents using the **virtual clipboard** function. The **source fields** and the **destination fields** will be mapped automatically.
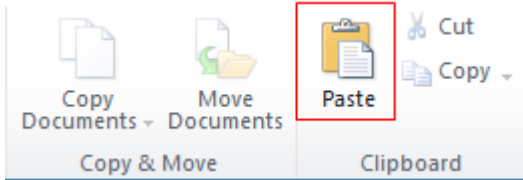
a. In the document library, select several documents. And click **Cut** or **Copy** on ribbon.
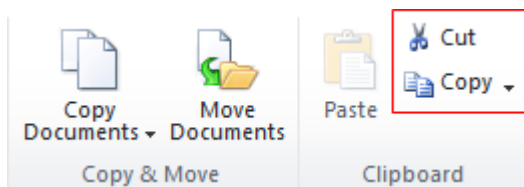
b.   Then, these notification will appear at the top right of your browser.

File(s) moved to clipboard! Or File(s) copied to clipboard!
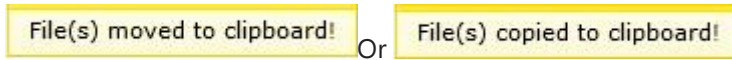
c.   And then, enter the target document library, click Paste on ribbon.

d.   Then the documents are copied or moved to this library.

The following shortcuts are supported:

Ctrl + Shift + X: Cut files to Clipboard

Ctrl + Shift + C: Copy files to Clipboard

Ctrl + Shift + V: Paste files

3.4 Copy/Move Item

SharePoint List Transfer provides the functions to copy or move items between folders, lists and different sites/site collections.

a.   In the list, select items which need to be copied. And, click the **Copy Items** (or **Move Items**) on ribbon. It will show the following window:

b. In the **Target** section users can browse and select the target list or folder to copy selected items to.
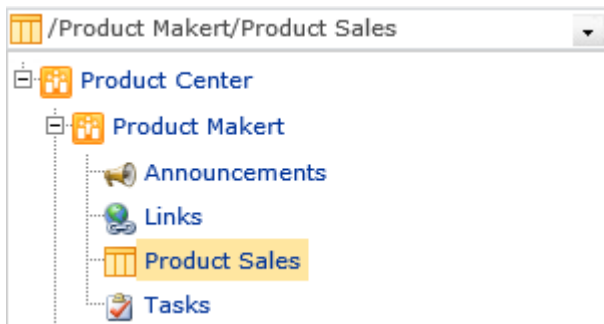
Or you can specify the destination by entering a URL, it allows you to enter another site collection URL.

Click the Enter destination URL... link and you will see a text field where you can enter a list or folder URL:

Enter a valid URL and hit Check. An error message will be displayed if this application failed to connect to a specific target location.

If everything is OK then the URL will be replaced by an underlined address.

Specify destination:

http://dc/Lists/Product   Check

Go back to tree view...

c.   In the **Preserve Information** section, there are three options available for you to decide whether to preserve specific information.

Preserve Information

Select which information you want to preserve for items in the destination.

☑ Item Permissions
☑ Version History
    ☑ Erase target version history
☑ Authors and Timestamps

Item Permissions: To preserve individual item permissions.

This option requires user have full control permission on the target list. Otherwise, the operation will be stopped.

> *Note*
>
> If you specified a different site collection as the destination, the Item Permission options will be disabled.

Version History: To preserve version history.

> **Erase target version history**: When you move or copy a same document to the same library, you can select this option to remove the previous version history.

Authors and Timestamps: To preserve the creation and modification information (created, created by, modified and modified by)

This option requires user have full control permission on the target list. Otherwise, the option will be disabled.

d.   In the **Column Mapping** section there are two options to map columns when migrating documents.

Column Mapping

Map columns between source list and target list.

◉ Map columns automatically
    (Only copy values with same column name and type)
○ Map columns manually

Map columns automatically: Only copy values with same column name and type.
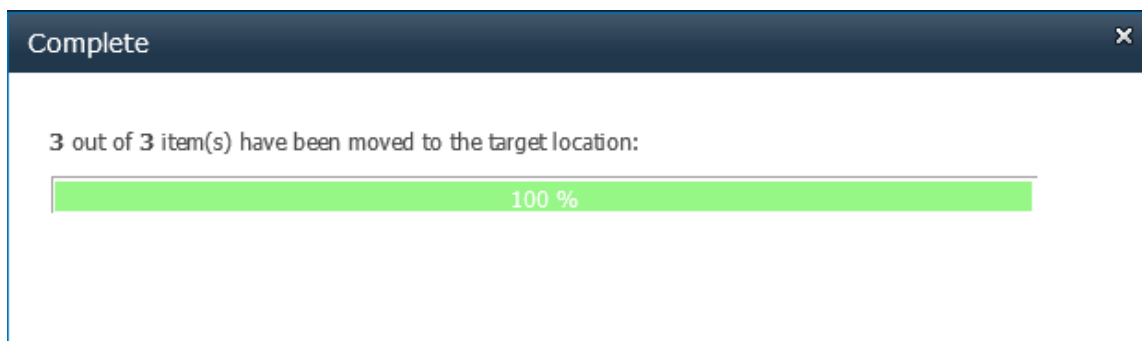
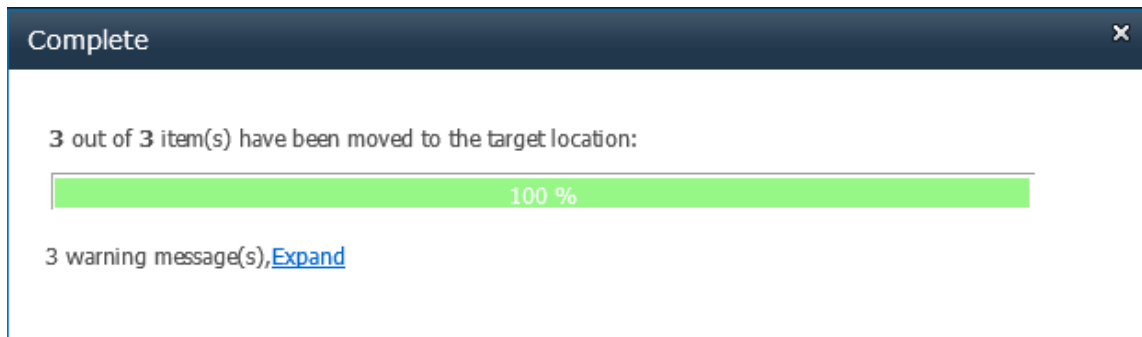**Map column manually:** Manually map columns to target list.

The red asterisk indicates the rquired column in the source list.

e.   Click **Copy** (or **Move**) button. When the operation is finished, a window will pop-up as follows:

If there are any issues occur during the operation, the message will show in the window like this:


f.   Then, click **Go To Target** to enter the target list. Or click **OK** to close this window.

3.5 Duplicate Item

You can quickly create a new item by duplicating an item through the **Duplicate Item** function. You can access this function by clicking **Duplicate** under the **Copy Items** menu.

c.   In the list, select an item which you want to duplicate, and click the **Duplicate** command on the ribbon.
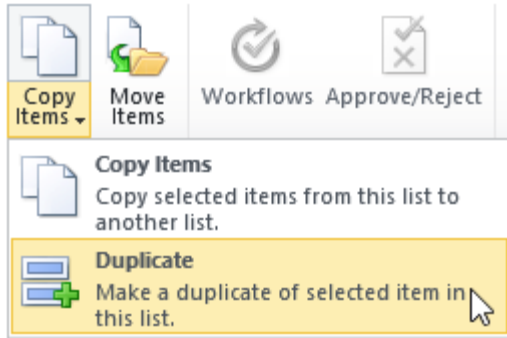
d.   A new item will be created and all fields will be automatically filled in the same as the selected item.

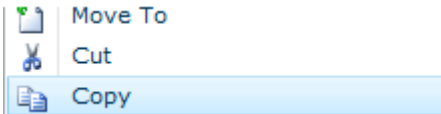e.   You only need to modify the fields which are different, then click **Save**.

3.6 Paste Documents to Zip File

This function enable users to paste documents to a zip file.

a.   Enter a document library, select the desired documents and click **Copy** or **Cut** on the Ribbon under the Documents tab.
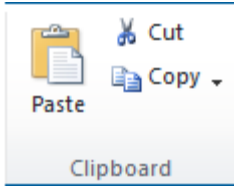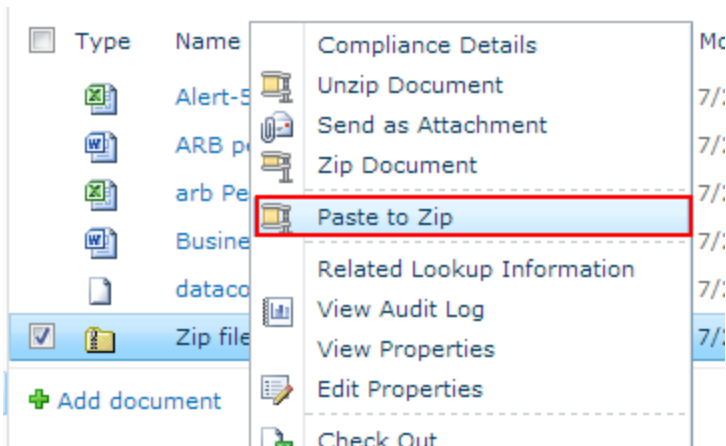
Or, select a desired document, click **Copy** or **Cut** in the item edit menu.

b. Select a zip file you want to paste the documents to.

c. In the edit menu, click **Paste to Zip** option.

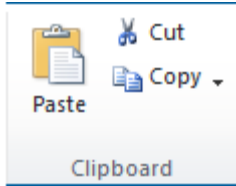d. Then the documents you selected will be pasted into the zip file.

> **Note**
>
> Paste to Zip function allows you to cross site collection to copy documents and paste them to zip.
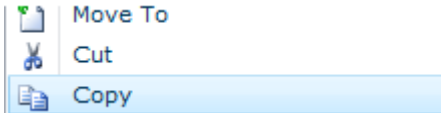
3.7 Add Documents as Attachment

This function enable users to paste documents as the item's attachments.

a. Enter a document library, select the desired documents and click **Copy** or **Cut** on the Ribbon under the Documents tab.

Or, select a desired document, click **Copy** or **Cut** in the item edit menu.

b.   Enter a list, and select an item which you want to attach the files.

c.   In the item edit menu, click **Paste as Attachment** option.
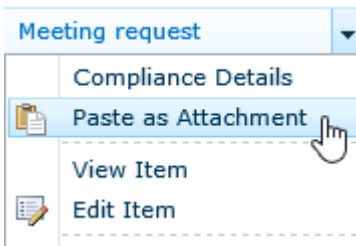
d.   Then the documents you selected will be pasted as item attachments.

3.8 List Transfer Settings

3.8.1 Default Options

Go to **Site Actions – Site Settings - BoostSolutions Software – List Transfer Settings.**

Here you can configure the default options for **Copy** and **Move** functions and logs on a specific site. Once you configure the options in this page, then all list and library in this site will obey the rules.

Preserve Item Permissions: Keep permissions while copying or moving documents or items.

Preserve Attachments (for items only): Keep attachments while copying or moving items. This option is only available for copying or moving items.

Preserve Version History (for documents only): Keep the version history while copying or moving documents.

Preserve Authors and Timestamps: Keep Created By, Modified By, Created and Modified values while copying or moving documents or items.

Preserve Document ID: Keep document ID while moving document to another location. Once you select this option, the document ID will be forced kept while moving documents.

3.8.2 Logging

Go to **Site Actions – Site Settings - BoostSolutions Software – List Transfer Settings.**

This section allows you to set the log options.

After enable the option, the error and warning message will be recorded in the SharePoint logs under this location:

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\LOGS

Open one log, and find List Transfer in Category field, then you can view the details.

3.8.3 Function Restriction

This setting allow you to specify if the product feature available on the list or library, and who can use copy or move features.

Go to **List Settings** – **General Settings** - **List Transfer Settings**.

To enable the product restriction on the list or library, select **Yes**; otherwise, select **No**.

There are 3 options to help you to decide which users can use product:

Allow all users: all user with sufficient permissions can use product in list or library.

Allow specified users: only the specified users can use product. For other users, the Copy/Move commands cannot be access on ribbon.

You can inprut users, sharepoint group and domain group.

Block specified users: All users except the specified ones can use product. For the specified users, the Copy/Move commands cannot be access on ribbon.

You can inprut users, sharepoint group and domain group.

3.9 Column Mapping Rules

This matrix illustrates the rules of column mapping while copy or move documents.

Source \ Target	Single line of text	Multiple lines of text	Choice	Number	Currency	Date and Time	Lookup	Yes/No	Person or Group	Hyperlink or Picture	Managed MetaData	External Data	Calculated
Single line of text	Y	Y	N	N	N	N	N	N	N	N	N	N	N
Multiple lines of text	N	Y	N	N	N	N	N	N	N	N	N	N	N
Choice	Y	Y	Y	N	N	N	N	N	N	N	N	N	N
Number	Y	Y	N	Y	N	N	N	N	N	N	N	N	N
Currency	Y	Y	N	N	Y	N	N	N	N	N	N	N	N
Date and Time	Y	Y	N	N	N	Y	N	N	N	N	N	N	N
Lookup	Y	Y	N	N	N	N	N	N	N	N	N	N	N
Yes/No	Y	Y	N	N	N	N	N	Y	N	N	N	N	N
Person or Group	Y	Y	N	N	N	N	N	N	Y	N	N	N	N
Hyperlink or Picture	N	Y	N	N	N	N	N	N	N	Y	N	N	N
Managed MetaData	Y	Y	N	N	N	N	N	N	N	N	Y	N	N
External Data	Y	Y	N	N	N	N	N	N	N	N	N	Y	N
Calculated	Y	N	N	N	N	N	N	N	N	N	N	N	N

4. Supported Libraries or Lists

List Transfer can work on following lists and document libraries.

Libraries: Asset Library, Document Library, Picture Library, Slide Library, Dashboard Library, Form Library, Report Library, Site Pages Library, Data Connection Library, Report Document Library and Record Library

Lists: Announcements, Tasks, Contacts, Custom List, Issue Tracking, Links, Project Task, Agenda, Calendar, Custom list in Datasheet, and Comments

5. Troubleshooting & Support

Troubleshooting FAQ:

http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true

Appendix 1: License Management

You can use List Transfer without entering any license code for a period of 30 days from when you first use it.

To use the product after expiration, you will need to purchase a license and register the product.

<u>Finding License Information</u>

a. Navigate to the **BoostSolutions Software Management** section in Central Administration. Then, click **License Management Center** link.

b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

    In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

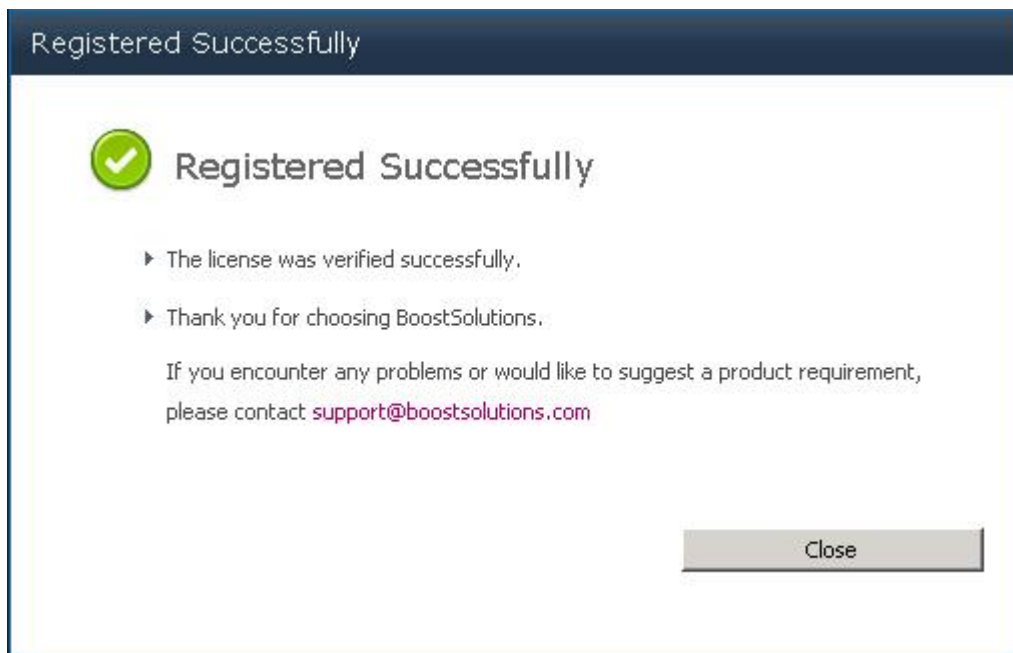c. Send the above information to us (<u>sales@boostsolutions.com</u>) to generate a license code.

<u>License Registration</u>

a.   When you receive a product license code, enter the **License Management Center** page.

b.   Click **Register** on the license page and a **Register or Update license** window will open.

c.   Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.

For more details on license management, see the BoostSolutions Foundation.