Introduktion

WorkPoint Data Transfer Import From CSV is a tool that is used to transfer data to SharePoint lists.

The tool supports adding new list items and update existing list items . Deleting existing list items is not supported.

The data to be transmitted, is read from the CSV files. In addition, there must be a configuration file for each SharePoint list to transfer data .

The tool can be used in two ways:

- ## Data transfer via a Windows scheduled task
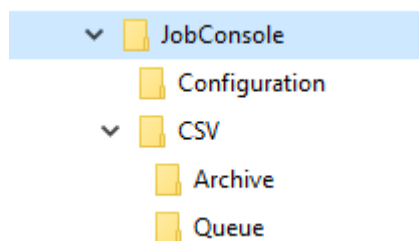
    In this mode, a Windows scheduled task is created which is set to run the program "WorkPointDataTransfer.JobConsole.exe".

    In the folder, where the WorkPointDataTransfer.JobConsole.exe is located in the file system, create a subfolder labeled **Configuration** and a subfolder labeled **CSV**.

    In the **configuration** folder, the **configuration** files are stored. Please refer to the configuration files section for details.

    In the CSV folder, create two subfolders labeled **Archive** and **Queue**.

    Place the CSV files, containing the data to be transferred, in the **Queue** folder. Refer to the "CSV files" section of this document for details.

    When the program runs, it will read and process the CSV files in the Queue folder. If an error occurs while processing the CSV file, the CSV file will be kept in the CSV folder. Otherwise, the CSV file will be deleted or moved to the folder Archive. Moving a CSV file to the archive folder, after a successful processing, is achieved by adding the "MoveToArchive" to the command line.

    If the program is run manually, a console window will open and display information about how the data transfer is progressing. This is useful for debugging.

Configuration files

- For each SharePoint list that you want to transfer data to, there must be a configuration file. The file is in XML format and must be named in the format "< SharePoint list name >.xml " , for example "Companies.xml" or "Projects.xml".

- Use the "WorkPointDataTransfer.Configurator.exe" to generate the configuration file. Please refer to the "Configuration program" section for details.

CSV files

Naming

- The CSV files used for data transfer must use the following naming convention:

  <SharePoint listname>_yyyy_MM_dd_HH_mm_ss_fff.csv

  yyyy = year, MM = month (01 - 12), dd = day (01 -31), HH = hour (00 - 23),
  mm = minutes (00 – 59), ss = seconds (00 - 59), fff = milliseconds (000 - 999)

  Examples:

  Companies_2015_06_16_13_20_15_000.csv
  Companies_2015_06_16_13_22_45_000.csv
  Projects_2015_06_16_17_12_03_000.csv

Content

- The first row must contain the field names, separated with a semicolon (;)
- Each row of field values must be separated with a semicolon (;) and each field value must be surrounded by quotation marks ("Value")
- If a field value should contain quotation marks as data, add a quotation mark before the quotation mark ("")
- If a field value does not contain any data, leave out the quotation marks.

The following SharePoint field types are supported:

SharePoint felttype	Bemærkning	Eksempel på værdier i CSV fil
AllDayEvent Attachments Boolean Recurrence CrossProjectLink	Boolean.	0, 1, false, true
Choice Note OutcomeChoice Text	Text.	Hello, This is a Test
ContentTypeId	Content type. Values can contain the name or the content type guid.	Active customers, Registered customers, {0x0100C2C291D883A44C449D5C696C6C993F69}
Currency Number	Number or decimal. Decimal values can be seperated with a . or a ,	35 89.456 12,67
DateTime	Date with or without timestamp.	03-06-2015, 12-11-2010 08:30:45
Guid	Guid.	{0x0100C2C291D883A44C449D5C696C6C993F69}

Lookup	*Lookup. If there are more than one lookup value, they must be separated with ;#	xxx, xxx_|_yyy, xxx_|_, _|_yyy xxx;#yyy, xxx_|_yyy;#xxx_|_
MultiChoice	Text. Multiple values must be separated with ;#	Dog Dog;#Cat;#Whale
URL	Link with description. Format: <url>, <Description>	http://www.workpoint.dk, WorkPoint
User	User. Multiple values must be separated with ;#	domain\aa domain\aa;#domain\bb

*) Lookup SharePoint field type:

In the configuration file it is specified, which fields in the field lookup list, in combination form a unique key. The value in the CSV file must match this key. If the key is composed of multiple fields, separate each match value with "_ | _ ".

Examples:

In the configuration file we have defined one key field; Key1

Correct values in the CSV file:
xxx   (in the lookup list there will be searched for: Key1 = xxx)
yyy   (in the lookup list there will be searched for: Key1 = yyy)

In the configuration file we have defined two key fields; Key1 and key2

Correct values in the CSV file:

xxx_|_yyy   (in the lookup list there will be searched for: Key1 = xxx and Key2 = yyy)
xxx_|_   (in the lookup list there will be searched for: Key1 = xxx and Key2 = <empty>)
_|_yyy   (in the lookup list there will be searched for: Key1 = <empty> and Key2 = yyy)

CSV file example:

MyText;MyInteger;MyDateTime;MyLookup;MyMultiLookup;MyMultiChoise;MyUser
"Test";"4";"01-10-2014 12:47:30";"xxx_|_yyy";"Value1;#Value2";"Dog;#Cat;#Whale";"domain\aa"
"Test""Test";"7";"16-12-2014 02:17:35";"xxx_|_zzz";"Value3";"Dog;#Cat;#Whale";"domain\bb"
"Hello";;;"qqq_|_ ";;"Dog;#Cat";

Configuration program

This program is used to generate configuration files to be used for data transfers.

The button "Load From XML File ..." fills in the various input fields based on an existing configuration that has been saved to an XML file.

The button "Save To XML File ..." saves a configuration as an XML file based on the values specified in the various input fields.

Input field	Description
Url	Specify the root URL to the SharePoint site.
Is SharePoint 365	Set a check mark here if it's a SharePoint 365 site.
ADFS Server	If the SharePoint sitet uses ADFS for authentication, insert the URL of the ADFS server here. Example https://adfs.wpudv365.com. Leave blank if ADFS is not used.
User Name	The username of an account that has the necessary access rights to the SharePoint site to perform the import/update operation.
Password	The corresponding password for the user.
Timeout In Seconds	Timeout in seconds used during data transfer.
Sequence Number	Specifies the order in which each individual configuration file is processed when a transfer is initiated. This ensures that list items referenced to a lookup field in another list, are not created before the

	referenced list item have been created. For example, a company must be created before a project that is part of the company can be created.
Create Site After List Item Created	Used when transferring data to the business module lists. - Yes: a site is created after the item is created - No: a site is not created after the item is created - Use Default: a site is created after the item is created if the business module site feature is activated for the current business module.
List Name	Select the list to transfer data to.
Field Info	Field mapping between the fields in the CSV file and fields in the SharePoint list are configured here.
External Field Name	Field name in the CSV file.
SharePoint Field Name	Field name in the SharePoint list.
Is Part Of Primary Key	Indicates whether the field is part of a key, so that elements in the CSV file and the SharePoint list can be uniquely identified.
Lookup List Field Name Keys	Is only relevant if the selected SharePoint field is a lookup field. Here you can specify which fields in the SharePoint lookup field list uniquely identify elements in the lookup list.