



# **Excel Import 3.0**

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## **User Guide**

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## 1. Introduction

SharePoint Excel Import allows business users to import any Excel spreadsheet (.xlsx, .xls, or .csv file) into SharePoint list and map data fields manually or automatically (by schedule). Also, it enables you to create a new SharePoint list directly from an Excel spreadsheet with field mapping.

It is possible to use SharePoint Excel Import to update any SharePoint list using an Excel file and keep your information up to date.

With Excel Import 2.0, you can send data both ways either by importing Excel Spreadsheet into SharePoint list or exporting list items or list views to an Excel file.

This user guide is used to instruct user on how to configure and use this product.

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

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

## 2. Installation

### 2.1 Product Files

After you download and unzip the Excel Import zip file from [www.boostsolutions.com](http://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.
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\Foundation\BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\ImportExcel\BoostSolutions.ExcelImportSetup12.3.wsp	A SharePoint solution package containing Excel Import files and resources for SharePoint 2007 or WSS 3.0.

Solutions\ImportExcel\BoostSolutions.ExcelImportSetup14.3.wsp	A SharePoint solution package containing Excel Import files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\ImportExcel\BoostSolutions.ExcelImportSetup15.3.wsp	A SharePoint solution package containing Excel Import files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\ImportExcel\Install.config	A file containing the configuration information for the installer.

## 2.2 Software Requirements

Before you install Excel Import, 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 greater 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 greater Mozilla Firefox Google Chrome

### SharePoint 2007

Operating System	Microsoft Windows Server 2003 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2008 R2
Server	Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007 Microsoft .NET Framework 2.0 or 3.0 <b>Note:</b> This product is not compatible with SPS 2003 and WSS v2
Browser	Microsoft Internet Explorer 6 or greater

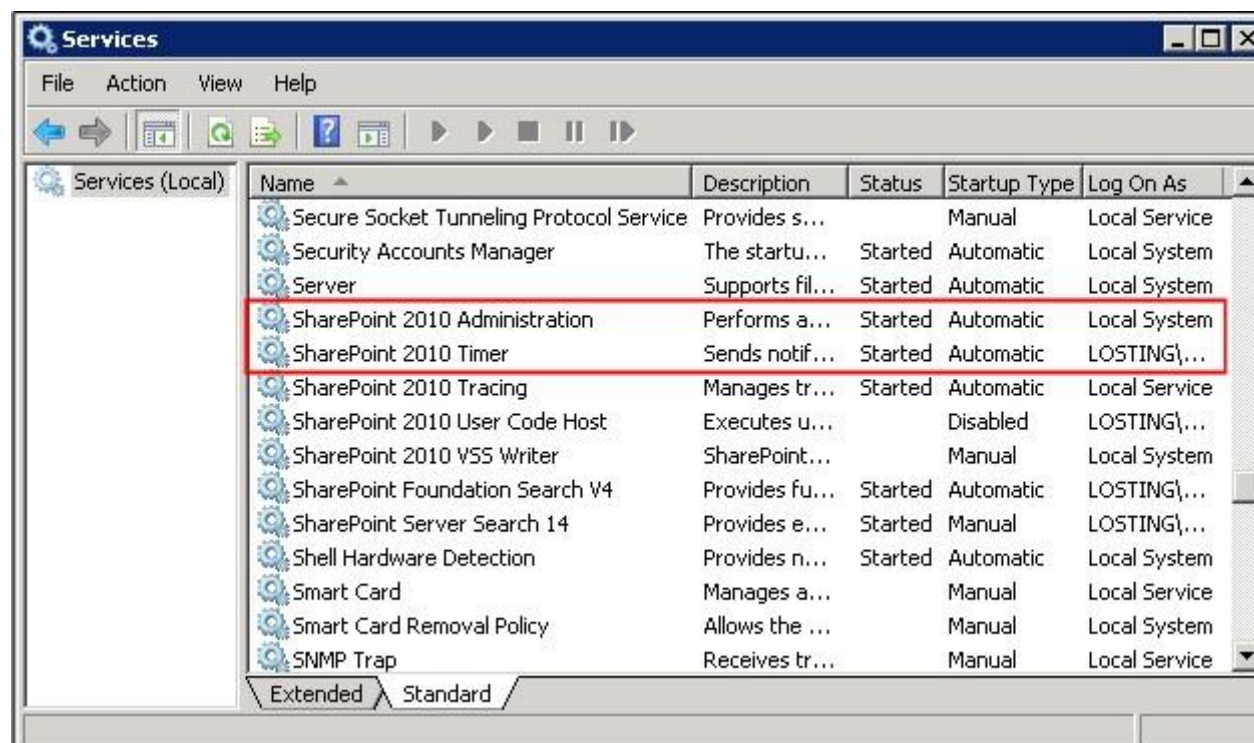
## 2.3 Installation

Follow these steps to install Excel Import on your SharePoint servers.

### Installation Preconditions

Before you install this product, please ensure these services are started on your SharePoint servers:

**SharePoint Administration** and **SharePoint Timer**.



Excel Import 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 Excel Import on SharePoint server.**

- a Download the zip file (\*.zip) of the product from the BoostSolutions website, then extract the file.
- b Open the unzipped 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 your product has been installed to. Click **Close**.

## **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 Excel Import 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 Excel Import on SharePoint server.

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

- 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 2013**

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

- **SharePoint 2010**

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

- **SharePoint 2007**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN\stsadm.exe

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

```
stsadm -o addsolution -filename BoostSolutions.ExcelImportSetup14.3.wsp
```

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

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.ExcellImportSetup14.3.wsp -allowgacdeployment -url [virtual server url] -immediate
```

```
stsadm -o addsolution -filename 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.ExcellImportSetup14.3.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 SharePointBoost.ImportExcel -url [site collection url] -force
```

```
stsadm -o activatefeature -name SharePointBoost.ImportExcel.TimerJob -url [virtual server url] -force
```

### **To remove Excel Import from SharePoint servers.**

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.ExcellImportSetup14.3.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.ExcellImportSetup14.3.wsp
```

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

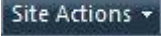
- c. Remove the solution from the SharePoint solutions storage:

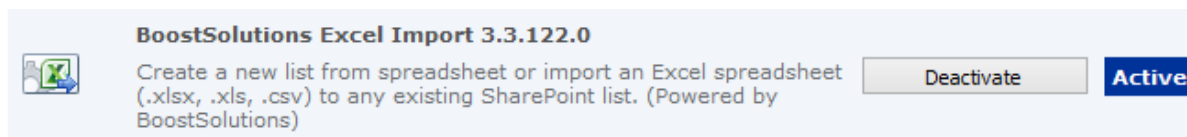
```
stsadm -o deletesolution -name BoostSolutions.ExcellImportSetup14.3.wsp
```

## 2.7 Feature Activation

### Activate feature in site collection

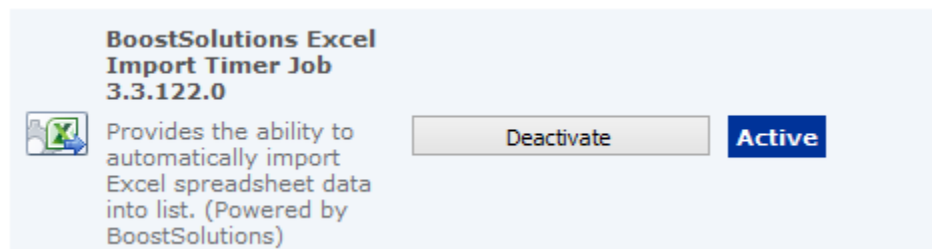
By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

- On the Site Actions menu  click **Site Settings**.
- Under **Site Collection Administration** click **Site collection features**.
- Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



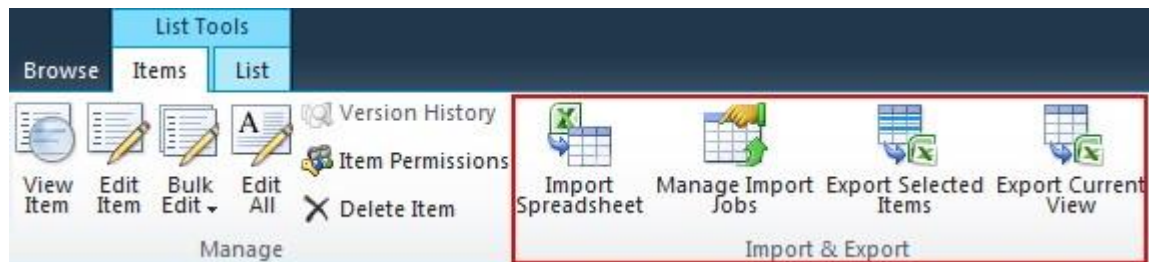
### Activate Excel Import's feature in Central Administration

- On the Quick Launch, click **Application Management**.
- On the Application Management page, under Manage Applications, click **Manage Web applications**.
- Select a web application you want to configure and click **Manage Features** on the ribbon.
- Find Excel Import's features and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



### 3. How to Use Excel Import

Once the Excel Import feature is activated an **Import & Export** group will be added to the SharePoint Ribbon.



- **Import Spreadsheet**

Import data or records from an Excel file to the current list.

- **Manage Import Jobs**

Create a job to auto update data from an Excel file to current list.

- **Export Selected Items**

Export the selected items to a spreadsheet.

- **Export Current View**

Export all items of the current view to an Excel file.

**Note**

Excel Import supports the following SharePoint lists: Announcement, Calendar, Contacts, Custom List, Discussion Board, Issue Tracking, Links, Project Tasks, Tasks, Blog Post, Blog Categories, Blog Comments, Meeting Attendee, Meeting Decision, Meeting Objectives, Meeting Things to Bring, Meeting Workspace Page.

#### 3.1 Import Spreadsheet Settings

When you import data or records from a spreadsheet to list, these settings need to be configured.

**Sheet**

Select data from the sheet which will be imported to the list.

## Column Mapping

Column mapping allows you to accurately map the spreadsheet data fields to SharePoint list columns.

This section will vary according to the importing mode you select.

## Filter

Specify the data range you want to import to the list.

## Import Options

Specify if you want to update list items with spreadsheet data and how to update.

## Recurring Schedule

This setting is only available when you create an import job to automatically import data.

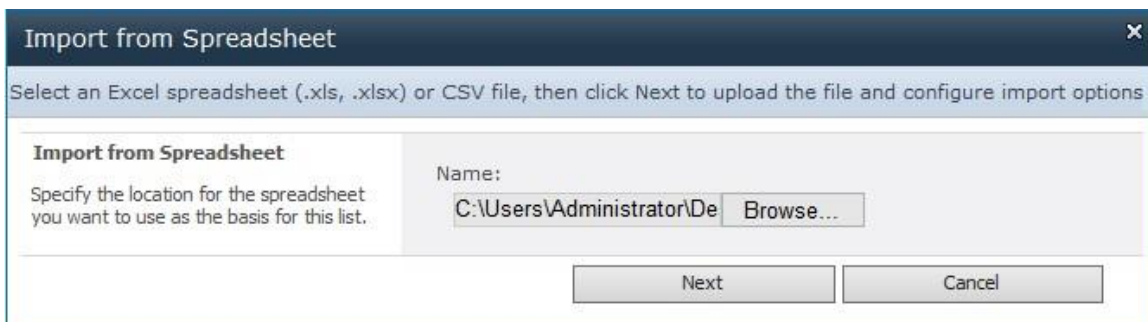
## 3.2 Import a Spreadsheet

To import a Spreadsheet, you must have at least Contribute permission level on the list or be a member of the default SharePoint Members group for the site.

- Enter the list that you want to import a spreadsheet from.
- On the Ribbon, click the **Items** tab, and then click **Import Spreadsheet** in the Import & Export group.



- In the **Import from Spreadsheet** dialog box, choose an Excel spreadsheet or CSV file. Click **Next** to upload the file.



- In the **Import Spreadsheet** dialog box you can configure import options.

Import Spreadsheet

Import Spreadsheet to This List

Import

Cancel

**Sheet**

Select one sheet which you want to import, then columns in that sheet will be automatically loaded.

Select Sheet:

Sheet1

☒ Skip header row in Excel

**Column Mapping**

Specify column mapping between Excel Sheet and this list. You can preview the Excel data in Sample Data column.

Columns in List	Columns in Excel	Sample Data
<input checked="" type="checkbox"/> Order Number *	Order Number	20120723001
<input checked="" type="checkbox"/> Order Date	Order Date	7/23/2012 12:00:00 AM
<input checked="" type="checkbox"/> Customer Number	Customer Number	LL-09
<input checked="" type="checkbox"/> Customer Name	Customer Name	Henry Lee
<input checked="" type="checkbox"/> Product Number	Product Number	TD032651
<input checked="" type="checkbox"/> Product Name	Product Name	WonderLED
<input checked="" type="checkbox"/> Unit Price	Unit Price	100
<input checked="" type="checkbox"/> Number	Number	200
<input checked="" type="checkbox"/> Mode of transport	Mode of transport	The supplier deliver
<input checked="" type="checkbox"/> Payment	Payment	Bank transfer
<input checked="" type="checkbox"/> Special Request	Special Request	
<input type="checkbox"/> Modified	Order Number	20120723001
<input type="checkbox"/> Created	Order Number	20120723001
<input type="checkbox"/> Created By	Order Number	20120723001
<input type="checkbox"/> Modified By	Order Number	20120723001

**Filter**

Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.

☐ Import from row to (Total rows of sheet: 41)

**Import Options**

Specify whether you want to check for duplicates when importing. A "key column" is one that uniquely identifies records between Excel and SharePoint list.  
**Note:** This option will only affect duplicate records, and unduplicated records will be added to this list.

☐ Check duplicate records when importing  
Key: Order Number

What action should be taken if duplicates found?  
☒ Skip duplicate records  
☐ Update duplicate records  
(Duplicate records will be skipped if key column is not unique)

Import

Cancel

- e. Once an Excel file is uploaded, the included sheets will be loaded and available for import. In the **Sheet** section, select a sheet which you want to import.

Use the Option **Skip header row in Excel** to decide whether or not to import the first row. This option is enabled by default and can be manually disabled if you don't have field titles in the first row or if you do not want to use the first row as field titles.

<p><b>Sheet</b></p> <p>Select one sheet which you want to import, then columns in that sheet will be automatically loaded.</p>	<p>Select Sheet:</p> <div>Sheet1 ▼</div> <p><input checked="" type="checkbox"/> Skip header row in Excel</p>
--	--

- f. In the **Column Mapping** section, select the columns in Excel and map them to list columns.

By default, the columns with the same name and type will be automatically selected and mapped whenever a sheet is loaded. Additionally, required columns will be marked with a red asterisk and selected automatically.

<p><b>Column Mapping</b></p> <p>Specify column mapping between Excel Sheet and this list. You can preview the Excel data in Sample Data column.</p>	<table border="1"> <thead> <tr> <th>Columns in List</th> <th>Columns in Excel</th> <th>Sample Data</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Order Number *</td> <td>Order Number ▼</td> <td>20120723001</td> </tr> <tr> <td><input checked="" type="checkbox"/> Order Date</td> <td>Order Date ▼</td> <td>7/23/2012 12:00:00 AM</td> </tr> <tr> <td><input checked="" type="checkbox"/> Customer Number</td> <td>Customer Number ▼</td> <td>LL-09</td> </tr> <tr> <td><input checked="" type="checkbox"/> Customer Name</td> <td>Customer Name ▼</td> <td>Henry Lee</td> </tr> <tr> <td><input checked="" type="checkbox"/> Product Number</td> <td>Product Number ▼</td> <td>TD032651</td> </tr> <tr> <td><input checked="" type="checkbox"/> Product Name</td> <td>Product Name ▼</td> <td>WonderLED</td> </tr> <tr> <td><input checked="" type="checkbox"/> Unit Price</td> <td>Unit Price ▼</td> <td>100</td> </tr> <tr> <td><input checked="" type="checkbox"/> Number</td> <td>Number ▼</td> <td>200</td> </tr> <tr> <td><input checked="" type="checkbox"/> Mode of transport</td> <td>Mode of transport ▼</td> <td>The supplier deliver</td> </tr> <tr> <td><input checked="" type="checkbox"/> Payment</td> <td>Payment ▼</td> <td>Bank transfer</td> </tr> <tr> <td><input checked="" type="checkbox"/> Special Request</td> <td>Special Request ▼</td> <td></td> </tr> </tbody> </table>	Columns in List	Columns in Excel	Sample Data	<input checked="" type="checkbox"/> Order Number *	Order Number ▼	20120723001	<input checked="" type="checkbox"/> Order Date	Order Date ▼	7/23/2012 12:00:00 AM	<input checked="" type="checkbox"/> Customer Number	Customer Number ▼	LL-09	<input checked="" type="checkbox"/> Customer Name	Customer Name ▼	Henry Lee	<input checked="" type="checkbox"/> Product Number	Product Number ▼	TD032651	<input checked="" type="checkbox"/> Product Name	Product Name ▼	WonderLED	<input checked="" type="checkbox"/> Unit Price	Unit Price ▼	100	<input checked="" type="checkbox"/> Number	Number ▼	200	<input checked="" type="checkbox"/> Mode of transport	Mode of transport ▼	The supplier deliver	<input checked="" type="checkbox"/> Payment	Payment ▼	Bank transfer	<input checked="" type="checkbox"/> Special Request	Special Request ▼	
Columns in List	Columns in Excel	Sample Data																																			
<input checked="" type="checkbox"/> Order Number *	Order Number ▼	20120723001																																			
<input checked="" type="checkbox"/> Order Date	Order Date ▼	7/23/2012 12:00:00 AM																																			
<input checked="" type="checkbox"/> Customer Number	Customer Number ▼	LL-09																																			
<input checked="" type="checkbox"/> Customer Name	Customer Name ▼	Henry Lee																																			
<input checked="" type="checkbox"/> Product Number	Product Number ▼	TD032651																																			
<input checked="" type="checkbox"/> Product Name	Product Name ▼	WonderLED																																			
<input checked="" type="checkbox"/> Unit Price	Unit Price ▼	100																																			
<input checked="" type="checkbox"/> Number	Number ▼	200																																			
<input checked="" type="checkbox"/> Mode of transport	Mode of transport ▼	The supplier deliver																																			
<input checked="" type="checkbox"/> Payment	Payment ▼	Bank transfer																																			
<input checked="" type="checkbox"/> Special Request	Special Request ▼																																				

The **Sample Data** field is used to preview Excel data in a specific column in real time before importing the Excel spreadsheet to SharePoint. Only the first row of data (not including the field titles row) will be shown.

When you toggle between different Excel columns, the value in the Sample Data field will change correspondingly. Thus you don't need to switch back and forth between the Excel file and SharePoint. This ensures that you insert the right information into the right place.

#### Note

All SharePoint columns are supported by Excel Import. However, if you select and map a Lookup column performance may be affected.

- g. In the **Filter** section, select the data range and import the data you need. If you deselect this option, all rows in the Excel sheet will be imported.

<b>Filter</b> Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.	<input checked="" type="checkbox"/> Import from row <input type="text" value="2"/> to <input type="text" value="40"/> (Total rows of sheet: 41 )
--	--

- h. In the **Import Options** section, specify if you want to update SharePoint list using an Excel file.

Before doing this, you need to enable the **Check duplicate records when importing** option.

Duplicate records can exist in both SharePoint list and Excel Sheet. In order to duplicate records, a **Key** has to be specified to identify duplicate records.

A key column is one that uniquely identifies records between Excel and SharePoint list (like an ID column).

#### Note

Only columns which have been selected in the Column Mapping section can be utilized as a Key column. Furthermore, Multiple lines of text column cannot be used as a key column.

<b>Import Options</b> Specify whether you want to check for duplicates when importing. A "key column" is one that uniquely identifies records between Excel and SharePoint list. <b>Note:</b> This option will only affect duplicate records, and unduplicated records will be added to this list.	<input checked="" type="checkbox"/> Check duplicate records when importing Key: <input type="text" value="Order Number"/>  What action should be taken if duplicates found? <input checked="" type="radio"/> Skip duplicate records <input type="radio"/> Update duplicate records (Duplicate records will be skipped if key column is not unique)
--	--

Once the **Check duplicate records when importing** option is enabled, there are two actions that can be taken if any duplicates are found when importing Excel to SharePoint.

- **Skip duplicate records**

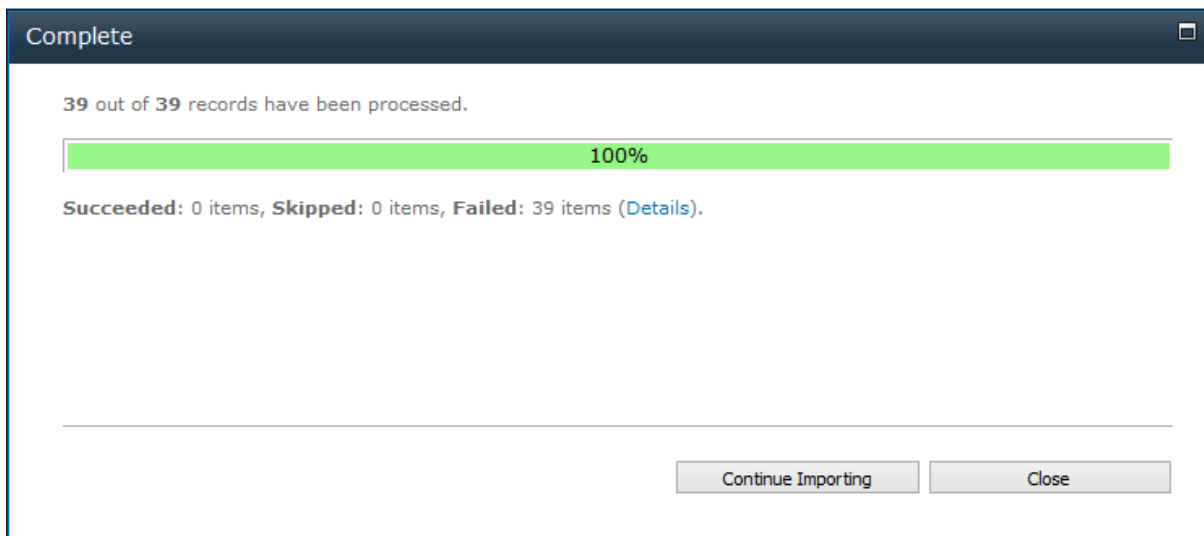
Data which has been detected as duplicate records in an Excel spreadsheet will be skipped when importing and the remaining data will be imported.

- **Update duplicate records**

Duplicate records will be filtered and then updated first. Secondly, Excel Import will replace information found in the duplicate records in SharePoint using the corresponding information from the Excel spreadsheet. Finally, the remaining data will be regarded as new records and imported accordingly.

- i. Click **Import** button.
- j. After the importing process finished, click **Continue Importing** button to keep import other sheets; otherwise, click **Close** button to exit.





### 3.3 Create a New List from Spreadsheet

To create a new list from an Excel Spreadsheet, you must have at least Design permission level for the site, or be a member of the default SharePoint Designer group for the site.

- a. In the **Site Action** menu, click **New List from Spreadsheet**.



- b. In the **New List from Spreadsheet** dialog box, you can choose an Excel spreadsheet or CSV file and configure import options.

**New List from Spreadsheet**

Select an Excel spreadsheet (.xls, .xlsx) or CSV file, then click Next to upload the file and configure import options.

**Name and Description**

Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name: Sales Order

Description: Sales order, created by Sales Manager using Excel Import.

**Import from Spreadsheet**

Specify the location for the spreadsheet you want to use as the basis for this list.

Name: C:\Users\Administrator\De Browse...

Next Cancel

- c. In the **Name and Description** section, enter the name that you want for the new list and a description, in the Description box, to help people understand the purpose of the list and what data it contains.
- d. Choose an Excel spreadsheet or CSV file and click **Next** to upload the file.
- e. In the **Import Spreadsheet** dialog box you can configure import options.

Import Spreadsheet

Import Spreadsheet to This List

Import

Cancel

Sheet

Select one sheet which you want to import, then columns in that sheet will be automatically loaded.

Select Sheet:

Sheet1

☒ Skip header row in Excel

Column Mapping

Specify column mapping between Excel Sheet and this list. You can preview the Excel data in Sample Data column.

Excel Header	Sample Data	Column Name	Column Type
<input checked="" type="checkbox"/> Order Number	20120723001	Order Number	Number
<input checked="" type="checkbox"/> Order Date	7/23/2012 12:00:00 AM	Order Date	Date and Time
<input checked="" type="checkbox"/> Customer Number	LL-09	Customer Number	Single line of text
<input checked="" type="checkbox"/> Customer Name	Henry Lee	Customer Name	Single line of text
<input checked="" type="checkbox"/> Product Number	TD032651	Product Number	Single line of text
<input checked="" type="checkbox"/> Product Name	WonderLED	Product Name	Single line of text
<input checked="" type="checkbox"/> Unit Price	100	Unit Price	Number
<input checked="" type="checkbox"/> Number	200	Number	Number
<input checked="" type="checkbox"/> Mode of transport	The supplier deliver	Mode of transport	Single line of text
<input checked="" type="checkbox"/> Payment	Bank transfer	Payment	Single line of text
<input checked="" type="checkbox"/> Special Request		Special Request	Single line of text

Link to Edit Menu

Specify a column which links to item with edit menu. The column type should be 'Single line of text'.

(None)

Filter

Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.

☐ Import from row

to

(Total rows of sheet: 41 )

Import

Cancel

- f. Once an Excel file is uploaded, the included sheets will be loaded and available for import. In the **Sheet** section, select a sheet which you want to import.

Use the Option **Skip header row in Excel** to decide whether or not to import the first row. This option is enabled by default and can be manually disabled if you don't have field titles in the first row or if you do not want to use the first row as field titles.

Sheet

Select one sheet which you want to import, then columns in that sheet will be automatically loaded.

Select Sheet:

Sheet1

☒ Skip header row in Excel

- g. In the **Column Mapping** section, select the columns you want to create.

When you open the Import Spreadsheet dialog box, all Excel Headers from the spreadsheet will be loaded automatically under the **Excel Header** and mapped with the **Column Name**. All checkboxes will be checked by default.

You can select or deselect the columns you wish to keep or remove. If you deselect the Excel header name, then the SharePoint column will not be created in the new SharePoint list. If you select the Excel header name, you have the option to change the default SharePoint column name and type; the SharePoint column will then be created in the new SharePoint list.

Excel Header	Sample Data	Column Name	Column Type
<input checked="" type="checkbox"/> Order Number	20120723001	Order Number	Number
<input checked="" type="checkbox"/> Order Date	7/23/2012 12:00:00 AM	Order Date	Date and Time
<input checked="" type="checkbox"/> Customer Number	LL-09	Customer Number	Single line of text
<input checked="" type="checkbox"/> Customer Name	Henry Lee	Customer Name	Single line of text
<input checked="" type="checkbox"/> Product Number	TD032651	Product Number	Single line of text
<input checked="" type="checkbox"/> Product Name	WonderLED	Product Name	Single line of text
<input checked="" type="checkbox"/> Unit Price	100	Unit Price	Number
<input checked="" type="checkbox"/> Number	200	Number	Number
<input checked="" type="checkbox"/> Mode of transport	The supplier deliver	Mode of transport	Single line of text
<input checked="" type="checkbox"/> Payment	Bank transfer	Payment	Single line of text
<input checked="" type="checkbox"/> Special Request		Special Request	Single line of text

#### Note

The following columns are currently supported in New List form Spreadsheet: Single line of text, Multiple line of text, Number, Currency, Yes/No, Data and Time, Person and Group, Hyperlink or Picture, and Choice.

- h. In the **Link to Edit Menu** section, specify a column which is used to link to item with edit menu. The column type must be a Single line of text.

Link to Edit Menu
Specify a column which links to item with edit menu. The column type should be 'Single line of text'.
Customer Number

- i. In the **Filter** section, select the data range and import the data you need. If you deselect this option, all rows in the Excel sheet will be imported.

Filter
Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.
<input type="checkbox"/> Import from row <input type="text"/> to <input type="text"/> (Total rows of sheet: 41 )

- j. Click **Import**.
- k. After importing process finished, click **Close** button to exit.

## 3.4 Import Spreadsheets Automatically

Excel Import enables you to import any Excel spreadsheet stored on remote file servers, SharePoint document library, etc., to SharePoint list automatically. You will need to create an import job first so that data will be imported based on a scheduled plan.

The remote file server can be accessed using FTP, HTTP or WebDAV. Here are some examples to connect to files using different protocols:

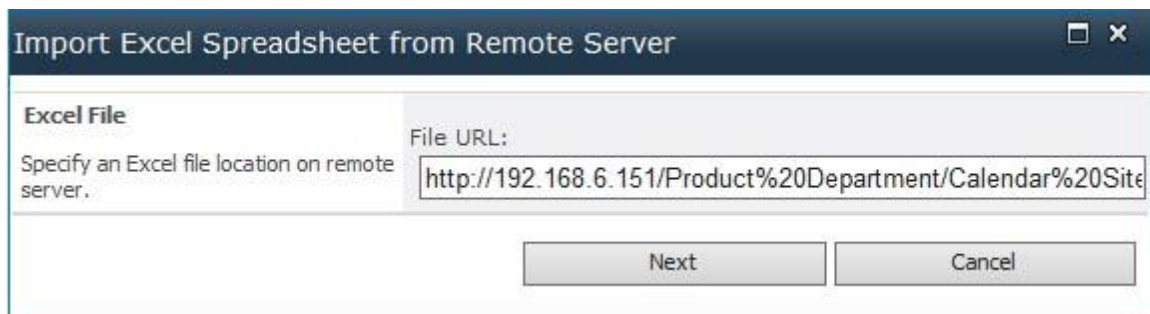
To access a file using FTP, enter this: <ftp://192.168.6.xxx:port/filename.xlsx>.

To access a file using HTTP, enter this: <http://192.168.6.xxx/filename.xlsx>.

To access a file using WebDAV, enter this: <webdav://192.168.6.xxx/filename.xlsx>.

### 3.4.1 Create new Import Job

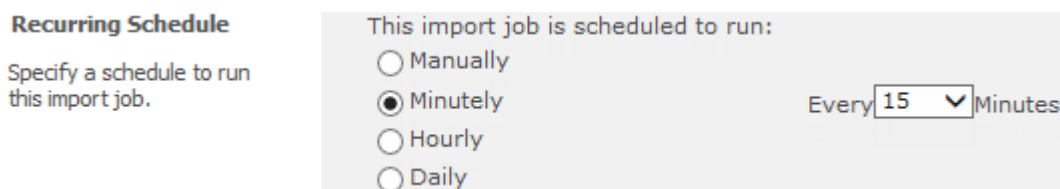
- a. Enter the list you want to create an import job for.
- b. In the Ribbon, click the **Items** tab and then click **Manage Import Jobs** in the Import & Export group.
- c. The **Manage Import Jobs** dialog box will appear. In this dialog box, click **Create New Import Job**.
- d. The **Import Excel Spreadsheet from Remote Server** dialog box will open. In this dialog box, enter the **File URL**.



- e. Click **Next**.
- f. You will see the **File System Requires Authentication** dialog box.  
Enter the correct User Name and the Password and click **Next** button.




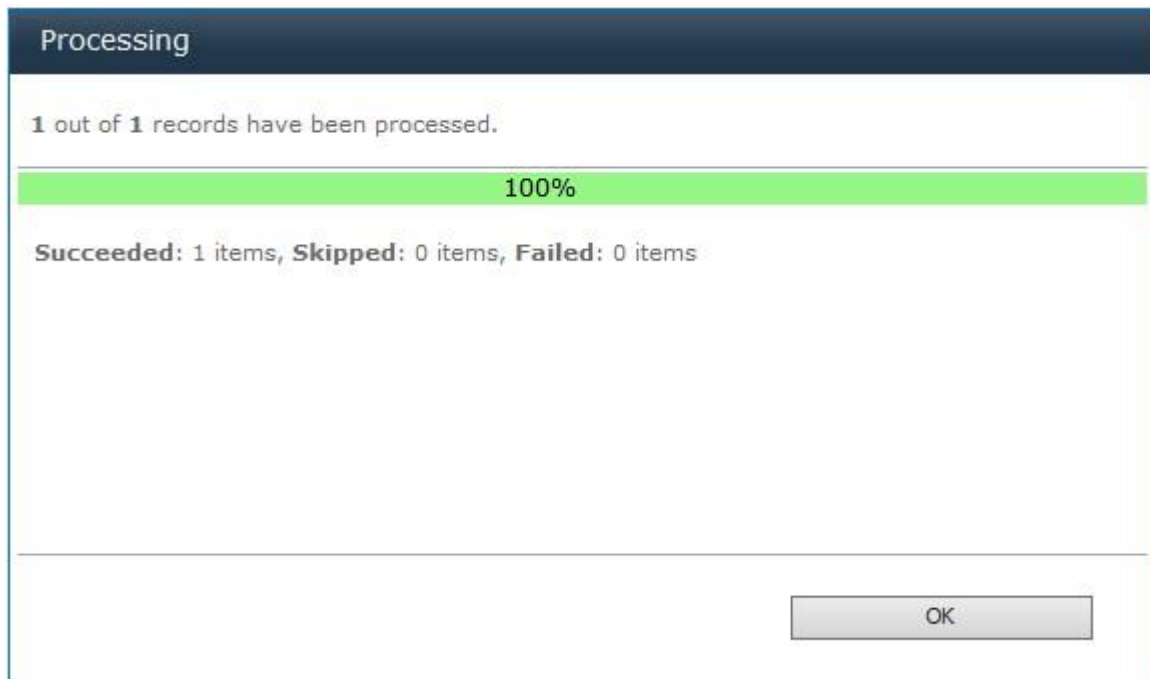
- g. You will enter the **Create New Import Job** dialog box.
- h. In the **Import Job Name** section, enter a name that you want for this import job.
- i. In the **Sheet** section, select the sheet you want to import. And select the **Skip header row in Excel** if you do not want to use the first row as field titles.
- j. In the **Column Mapping** section, select the column you want to import, and map the column as needed.
- k. In the **Filter** section, specify the row range of the selected Excel sheet to import to list.
- l. In the **Import Options** section, specify if you want to update SharePoint list using spreadsheet data.
- m. In the **Recurring Schedule** section, you can further specify the scheduler to run this import job automatically according to your needs (manually, every number of minutes or hours or days).



- n. Click **Save**.


### 3.4.2 Run a job

- a. In the Manage Import Jobs dialog box, find the job you want to run manually.
- b. Click  under the Action column.
- c. A Progressing dialog box will appear and any errors will be shown.




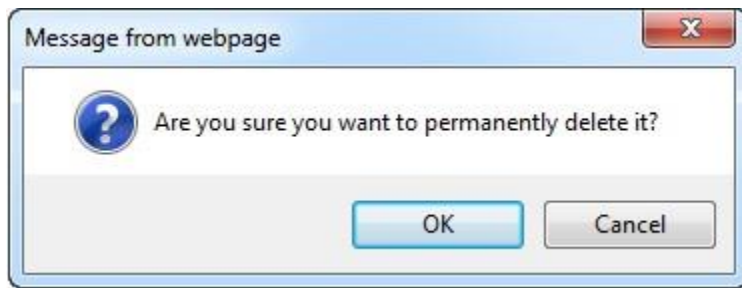
- d. Click **OK**. This window will close and you will return to the Manage Import Jobs dialog box.

### 3.4.3 Edit a job

- a. In the Manage Import Jobs dialog box, find the job you want to edit.
- b. Click  under the Action column.
- c. Change the settings that you want in the Edit Import Job dialog box.
- d. Click **Save**.

### 3.4.4 Delete a job

- a. In the manage Import Jobs dialog box, find the job you want to delete.
- b. Click  under the Action column.
- c. A message box will appear asking you to confirm the deletion.



- d. Click **OK** to confirm the deletion.

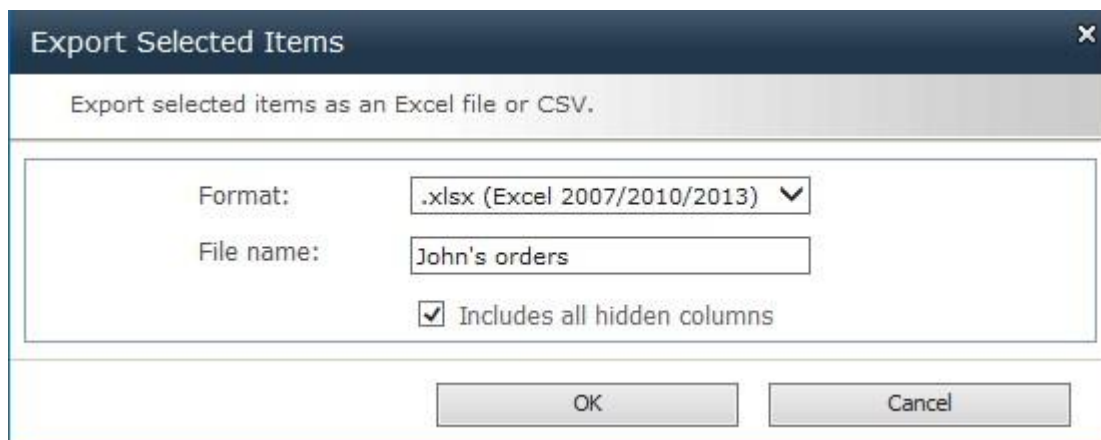
## 3.5 Export to Excel

In Excel Import, you can now select some items or select a view from a SharePoint List and export them as an Excel file, even if Microsoft® Excel is not installed on your machine (supports Excel 2003/2007/2010/2013).

**Date and Time** and **Number** will remain in the exported Excel file.

### 3.5.1 Export Selected Items

- a. Select the desired items in a list. Then click **Export Selected Items** on the ribbon.
- b. An **Export Selected Items** dialog box will appear.

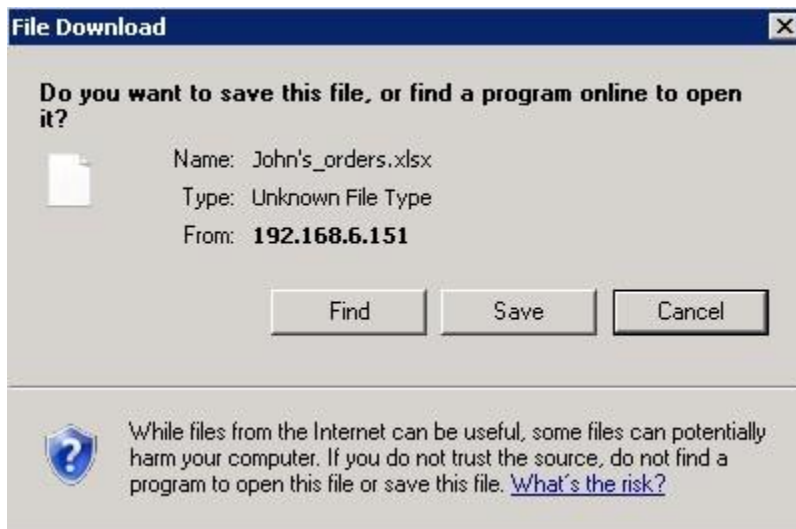


- c. In this window, choose the desired Excel **Format** and enter a **File name**.

Select the **Includes all hidden columns** option if you want to export the columns that do not display in the current view.

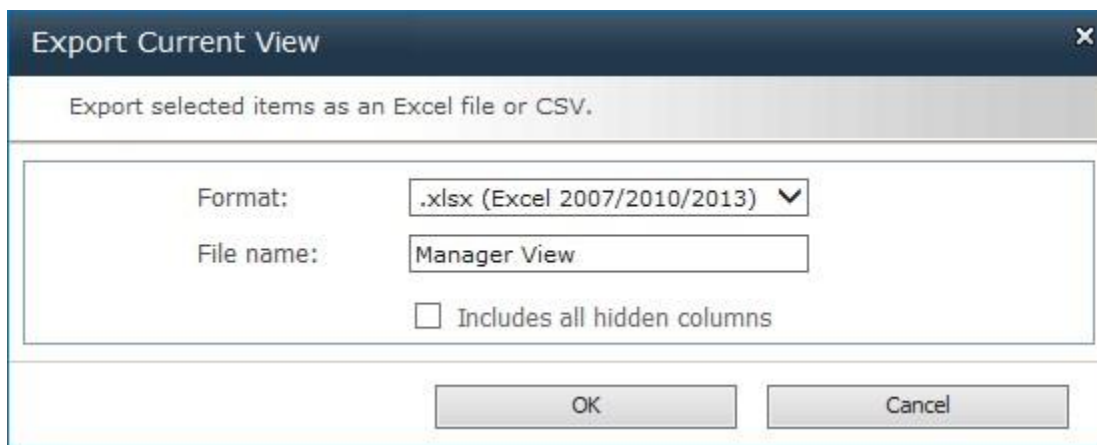
- d. Click **OK**.
- e. A file download dialog will appear. Click **Save** to save the file to your computer.





### 3.5.2 Export Current View

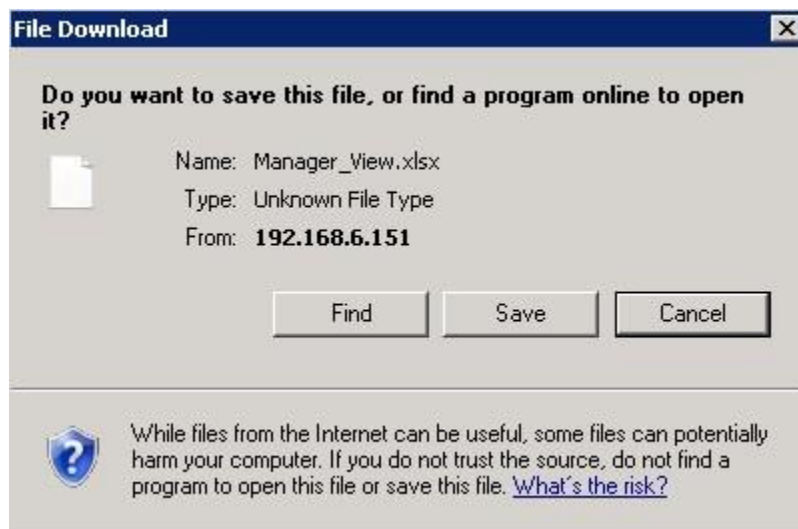
- a. Select the desired view in a list and click **Export Current View** on the ribbon.
- b. An **Export Current View** dialog box will appear.



In this window, choose the desired Excel **Format** and enter a **File name**.

You can select the **Includes all hidden columns** option if you want to export all columns that do not display in the current view.

- c. Click **OK**.
- d. A file download dialog will appear, click **Save** to save the file to your computer.



## 4. Troubleshooting & Support

**Troubleshooting FAQ:** <http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

**Contact Info:**

Product & Licensing Inquires: [sales@boostsolutions.com](mailto:sales@boostsolutions.com)

Technical Support (Basic): [support@boostsolutions.com](mailto:support@boostsolutions.com)

Request a New Product or Feature: [feature\\_request@boostsolutions.com](mailto:feature_request@boostsolutions.com)

**Live chat:**

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

## Appendix 1: License Management

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

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

### Finding License Information

- a. In the products main page, click the trial link and enter the **License Management Center**.
- b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

Download License Information

Download the license type information and send to sales@boostsolutions.com to get license.

**Choose a license type**

☒ Server License  
Server Code: e4c9171bd1aa49cea8903e0a7e0e812643f8360be a74459ca3bf6b2e0240f194

☐ Farm License  
Farm ID: {e4c9171b-d1aa-49ce-a890-3e0a7e0e8126}  
Number of Users: 24 user(s)

☐ Site Collection License  
Site Collection ID: 1316fb72-1436-41cf-949d-56ca6020320e Change  
Site Collection: http://pro-mac

Download Close

In order for BoostSolutions to create a license for you, you need to 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 ([sales@boostsolutions.com](mailto:sales@boostsolutions.com)) to generate a license code.

## **License Registration**

- 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.



The dialog box has a dark blue header with the text "Register or Update license". Below the header, the text "Please upload a license code file or enter the license code to activate the product." is displayed. There are two radio buttons: "Upload a license code file" (selected) and "Enter license code". The "Upload a license code file" option has a text input field and a "Browse..." button. The "Enter license code" option has a large text input field. At the bottom, there are two buttons: "Register" and "Close".

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



The dialog box has a dark blue header with the text "Registered Successfully". Below the header, there is a green checkmark icon followed by the text "Registered Successfully". Below this, there are two bullet points: "▶ The license was verified successfully." and "▶ Thank you for choosing BoostSolutions.". Below the bullet points, there is a paragraph of text: "If you encounter any problems or would like to suggest a product requirement, please contact [support@boostsolutions.com](mailto:support@boostsolutions.com)". At the bottom right, there is a "Close" button.

For more details on license management, see the [BoostSolutions Foundation](#).