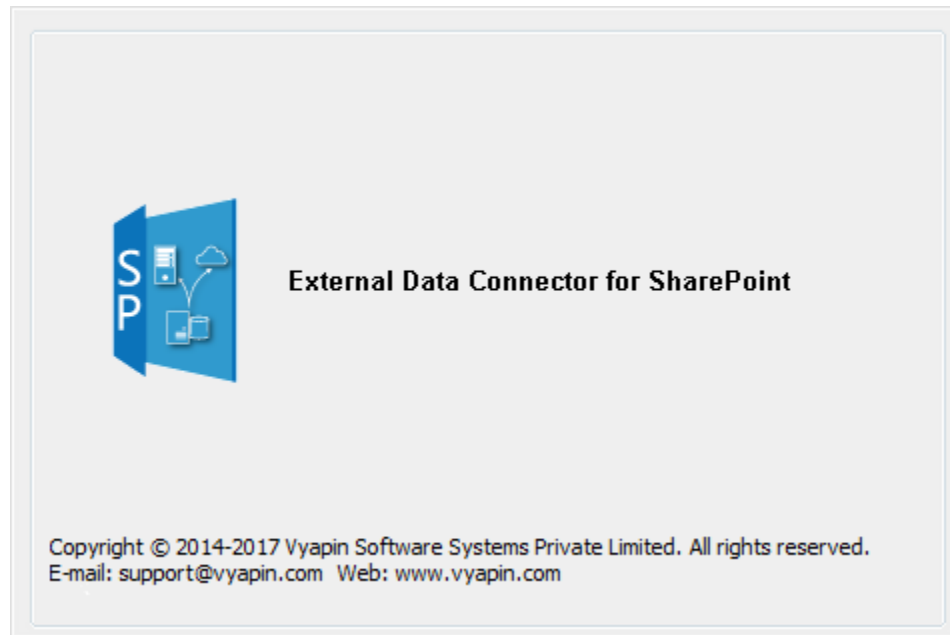


External Data Connector for SharePoint



Last Updated: July 2017

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External Data Connector Introduction

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About External Data Connector

External Data Connector for SharePoint imports data from multiple external data sources, including Databases, SharePoint, CSV and Excel files, and integrates them into SharePoint Lists and Document Libraries. It supports databases such as SQL Server, MS Access, Oracle and any ODBC compliant database and file sources such as XLSX and CSV. The product can integrate data into all versions of SharePoint including Office 365. The product can also be used to sync/update lists in two different versions of SharePoint, for example, updating lists from SharePoint on-premises to SharePoint Office 365.

The External Data Connector for SharePoint facilitates:

1. Integration of external data from multiple sources into SharePoint Lists / Libraries and vice versa.
2. Apply metadata from external data sources to documents in SharePoint library.
3. Synchronization of SharePoint and external data through field/column mappings.
4. Automatic creation of new columns and mappings while creating new lists using imported data.
5. Creation of scheduled connections for automatic import and synchronization of external data into SharePoint Lists and Libraries.

How to purchase?

You can purchase External Data Connector for SharePoint from our website <http://www.vyapin.com/>. Please contact our Sales department at sales@vyapin.com for sales and price related queries.

For your purchase convenience, we have signed up with resellers in USA & Europe. You may contact one of our resellers listed below:

USA	Europe
FastSpring	BTSoftware BV

Please visit our website [Purchase](#) section to view the updated list of software resellers.

Technical support

Technical support is available through e-mail. Send your questions to support@vyapin.com.

We make every effort to respond to your request on the same day you send in your e-mail. Please allow up to 24 hours for our technical support team to revert to you.

System Requirements

Software:

Windows 10 / 8.1 / 8 / 7 / Vista / XP (or) Windows Server 2012 / 2012 R2 / 2008 / 2008 R2 / 2003 with the latest service packs and .NET Framework 4.0 or higher.

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.

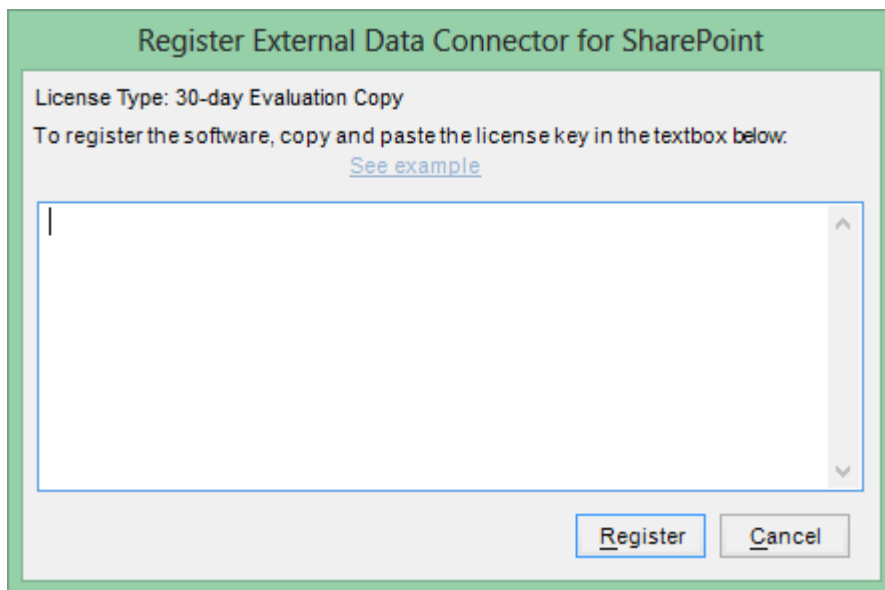


Image 1 - Activate screen

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).

- Copy the license key sent to you through email and paste 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

External Data Connector Features

[Connection Manager](#)

[Change Application Data Folder Location](#)

[Create a New Connection](#)

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[External Data Connector Tools](#)

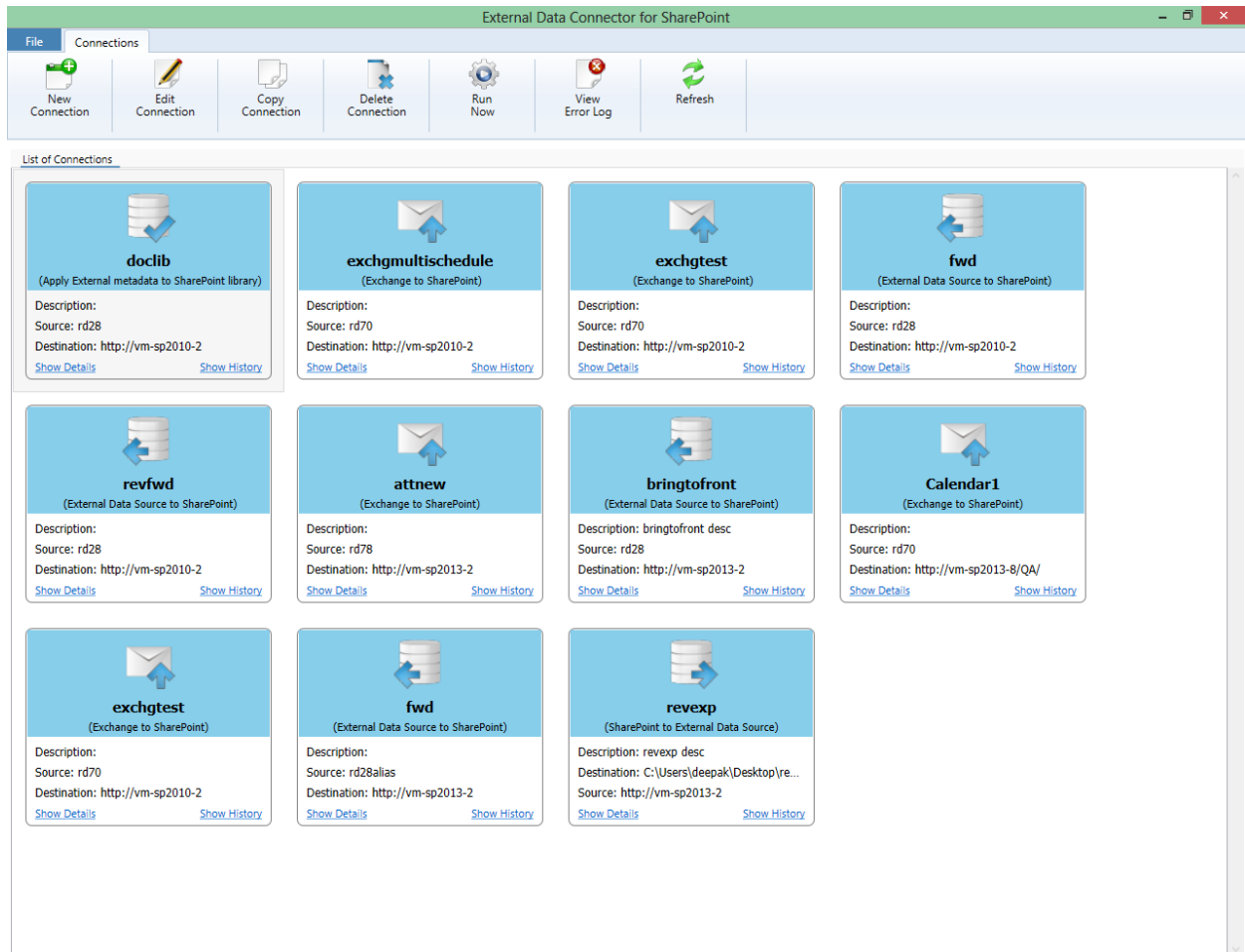
[External Data to SharePoint](#)

[SharePoint to External Data](#)

[External Data to SharePoint Library](#)

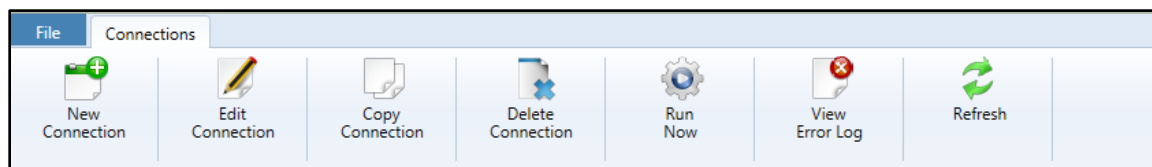
Connection Manager - Introduction

External Data Connector for SharePoint uses a connection oriented interface to manage synchronization between data source and SharePoint. External Data Connector Connection Manager is the main application window which will help you manage connection and their corresponding history. It also provides menus and tools to work with the connections in a simple and elegant manner.



Standard menu bar:

Standard menu bar contain all the actions to work with a External Data Connector connection.



Connections pane:

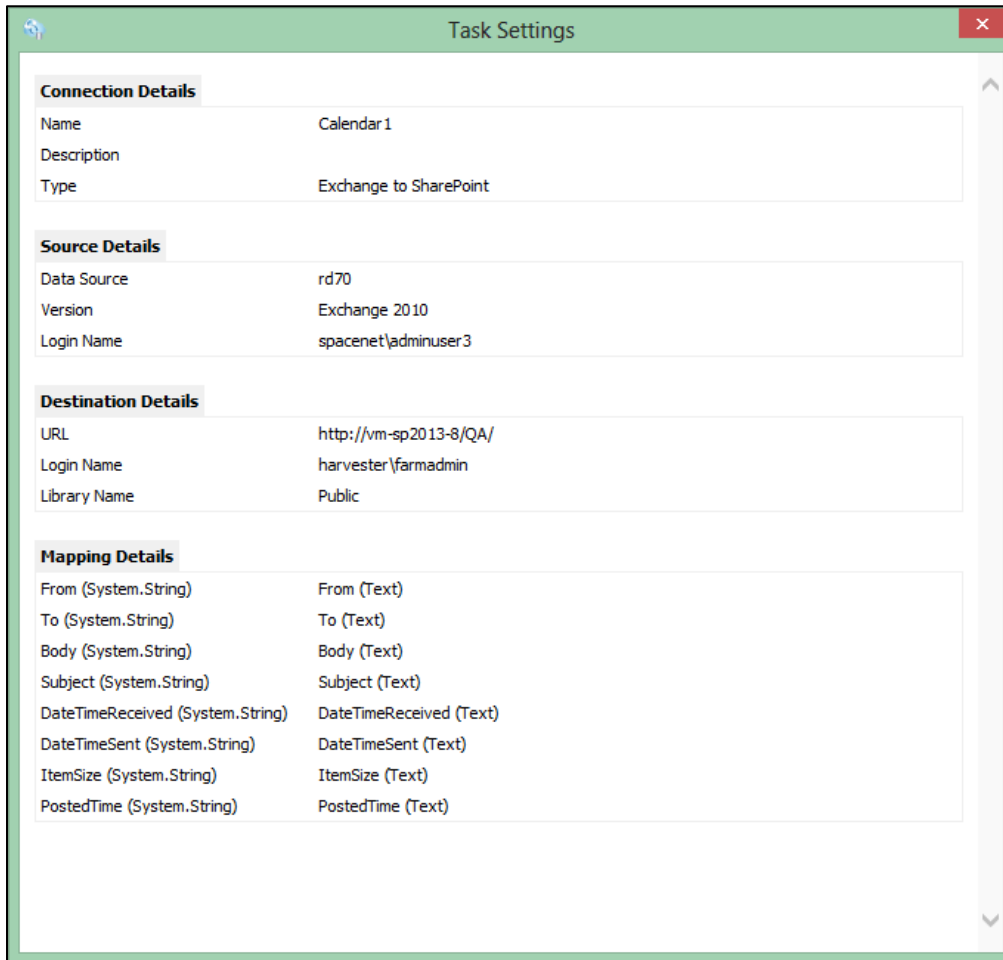
Connections pane contains all the connections created by the user. Connection related operations such as Edit Connection, Copy Connection, Delete Connection and Run Now can be performed based on the selected connection in the Connections pane.

The screenshot displays a 'List of Connections' pane with eight connection cards arranged in a 2x4 grid. Each card contains an icon, a name, a type, a description, source, destination, and two action links: 'Show Details' and 'Show History'.

Name	Type	Description	Source	Destination
doclib	(Apply External metadata to SharePoint library)		rd28	http://vm-sp2010-2
exchgmultischedule	(Exchange to SharePoint)		rd70	http://vm-sp2010-2
exchgtest	(Exchange to SharePoint)		rd70	http://vm-sp2010-2
fwd	(External Data Source to SharePoint)		rd28	http://vm-sp2010-2
revfwd	(External Data Source to SharePoint)		rd28	http://vm-sp2010-2
attnew	(Exchange to SharePoint)		rd78	http://vm-sp2013-2
bringtofront	(External Data Source to SharePoint)	bringtofront desc	rd28	http://vm-sp2013-2
Calendar1	(Exchange to SharePoint)		rd70	http://vm-sp2013-8/QA/

Connection details pane:

Connection Details pane will be displayed on clicking the Show Details on the selected connection. It displays the details about the currently selected Connection in Connections pane.



The screenshot shows a 'Task Settings' dialog box with a green header and a red close button. The dialog is divided into four sections: Connection Details, Source Details, Destination Details, and Mapping Details. Each section contains a table of key-value pairs.

Connection Details	
Name	Calendar 1
Description	
Type	Exchange to SharePoint

Source Details	
Data Source	rd70
Version	Exchange 2010
Login Name	spacenet\adminuser3

Destination Details	
URL	http://vm-sp2013-8/QA/
Login Name	harvester\farmadmin
Library Name	Public

Mapping Details	
From (System.String)	From (Text)
To (System.String)	To (Text)
Body (System.String)	Body (Text)
Subject (System.String)	Subject (Text)
DateTimeReceived (System.String)	DateTimeReceived (Text)
DateTimeSent (System.String)	DateTimeSent (Text)
ItemSize (System.String)	ItemSize (Text)
PostedTime (System.String)	PostedTime (Text)

Connection history pane:

Connection History pane will be displayed on clicking the Show History on the selected connection. It maintains every Connection run information. It displays the required information about Connection result, start time, end time, elapsed time, error log and activity log.

Task History - Calendar1					
Start Time	End Time	Elapsed Time	Result	Error Log	Activity Log
11/27/2014 15:27:32	11/27/2014 15:27:48	00:00:16	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:38:57	11/27/2014 15:39:16	00:00:19	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:46:27	11/27/2014 15:46:28	00:00:01	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:46:54	11/27/2014 15:46:54	00:00:00	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:47:33	11/27/2014 15:58:25	00:10:52	Sync Canceled	View Error Log	View Activity Log
11/27/2014 16:18:31	11/27/2014 16:20:56	00:02:25	Sync Completed	View Error Log	View Activity Log
11/27/2014 16:25:10	11/27/2014 16:29:50	00:04:40	Sync Completed	View Error Log	View Activity Log
11/27/2014 16:45:25	11/27/2014 16:55:36	00:10:11	Sync Canceled	View Error Log	View Activity Log
11/27/2014 18:00:05	11/27/2014 18:00:07	00:00:02	Sync Canceled	View Error Log	View Activity Log

On selecting the View Activity Log link in Connection history pane, a window will appear which displays the statistics summary of the corresponding instance like shown below.

Activity Log Viewer

View synchronization statistics and results

Connection Name: Remarks:

Start Time: End Time: Elapsed Time:

Connection Statistics

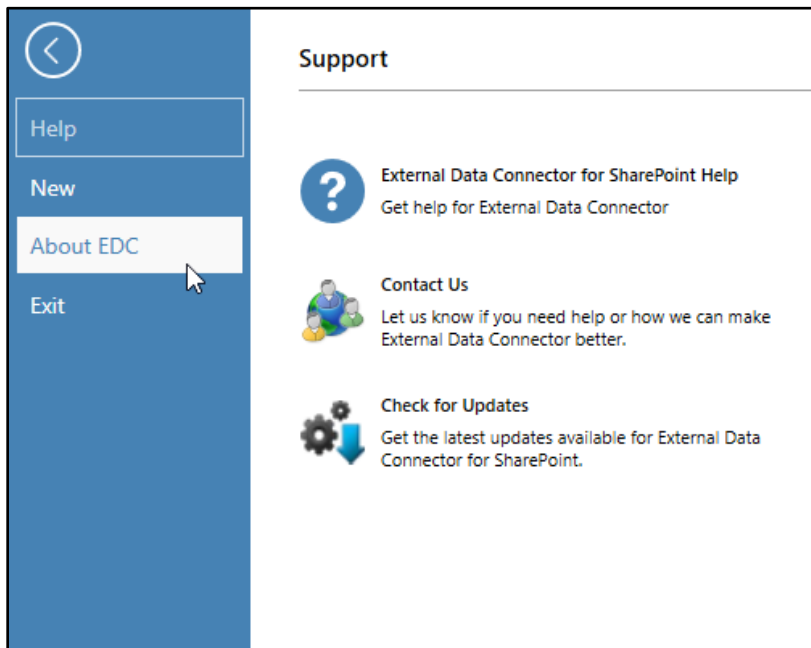
Property	Value
Total Records in source	4
Number of records to add	2
Actual number of added records	2
Number of records to modify	0
Actual number of modified records	0
Number of records to delete	2
Actual number of deleted records	2

Close

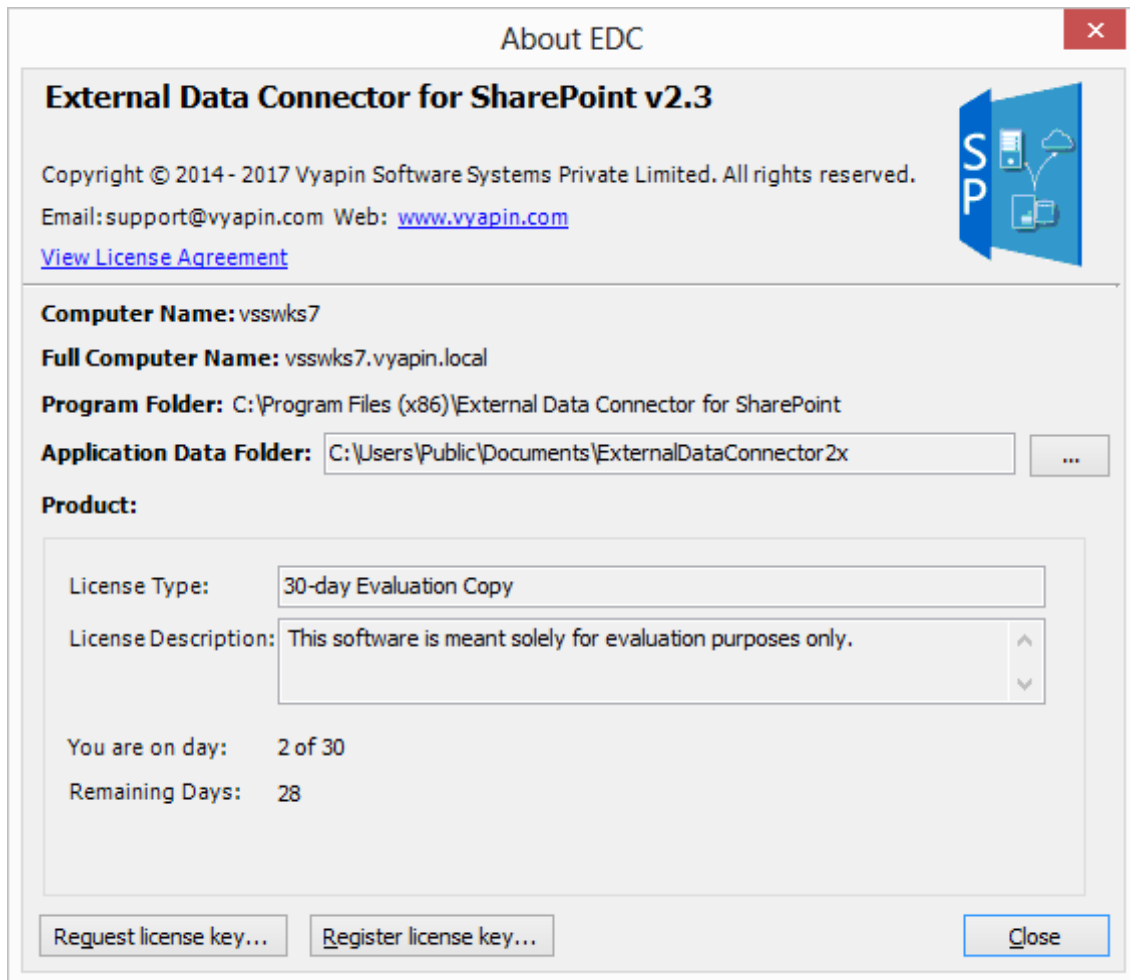
Change Application Data folder location

External Data Connector allows you to change Application Data folder location, where External Data Connector connections and related settings, and error logs are stored, at any time after installing External Data Connector software. To change the Application Data folder location, perform the following steps given below:

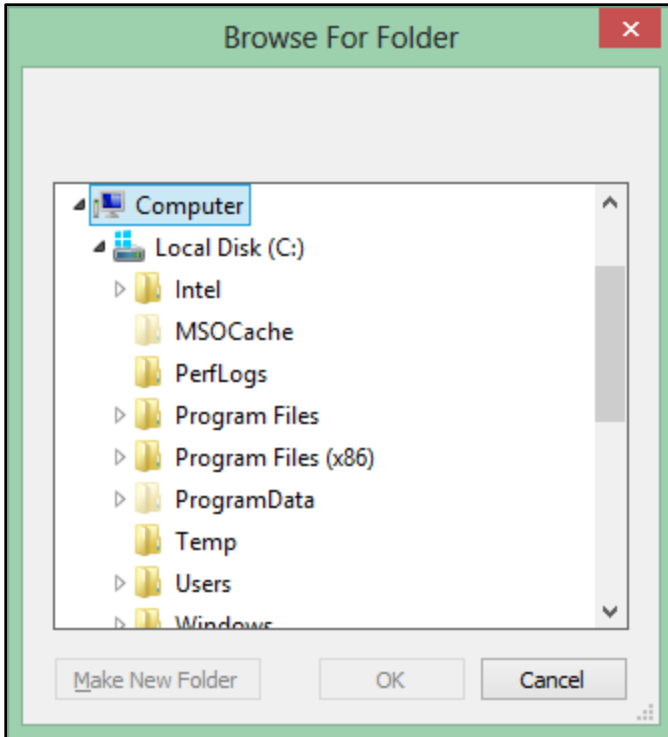
1. Select **About EDC...** from **File** menu



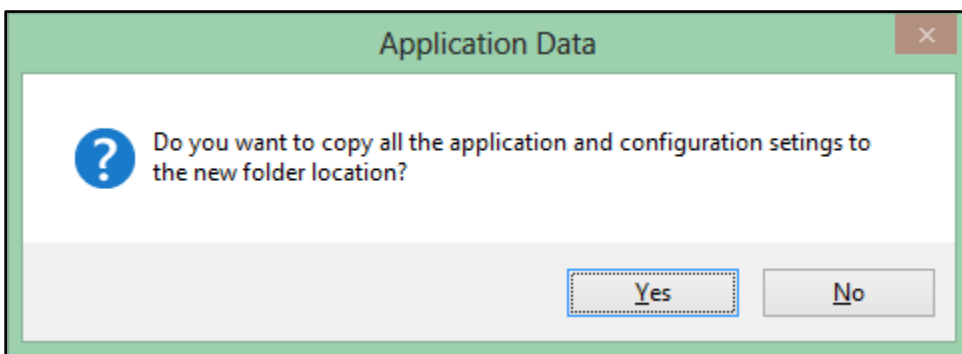
2. The **About EDC** dialog appears as shown below:



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



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

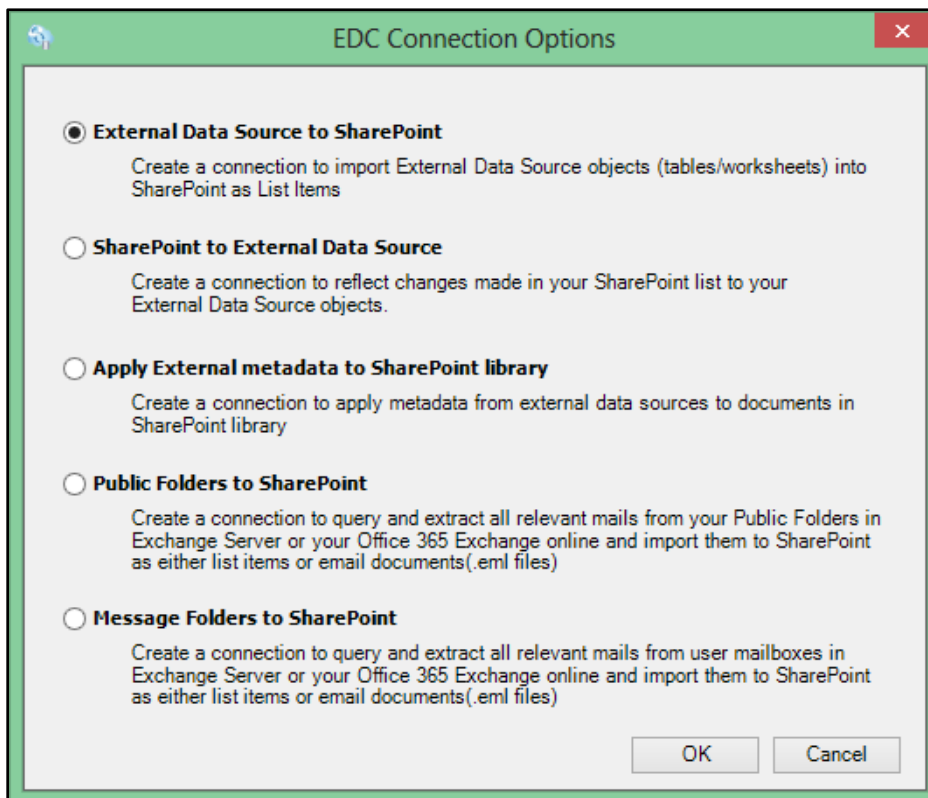


6. Click the desired action (Yes/No) to proceed. External Data Connector will use the new Application Data folder location henceforth.

Create a New Connection

You can create a connection to integrate data from various external data sources such as Databases, SharePoint, CSV, XLSX into SharePoint 2013, SharePoint 2010, and SharePoint Online in Office 365.

1. Select the type of integration from the **EDC Task Options** screen which appears on clicking **New Connection** in External Data Connector main screen.



2. Click the link below for more information:
 - Create a connection to integrate data from [External Data Source to SharePoint](#)
 - Create a connection to integrate data from [SharePoint to External Data Source](#)
 - Create a connection to integrate data from [Apply External Data to SharePoint Library](#)
 - Create a connection to integrate data from [Message Folders to SharePoint to SharePoint](#)
 - Create a connection to integrate data from [Public Folders to SharePoint to SharePoint](#)

Edit An Existing Connection

To edit an existing connection:

1. Select a connection from **Connections** pane
2. Click **Edit Connection** from main screen

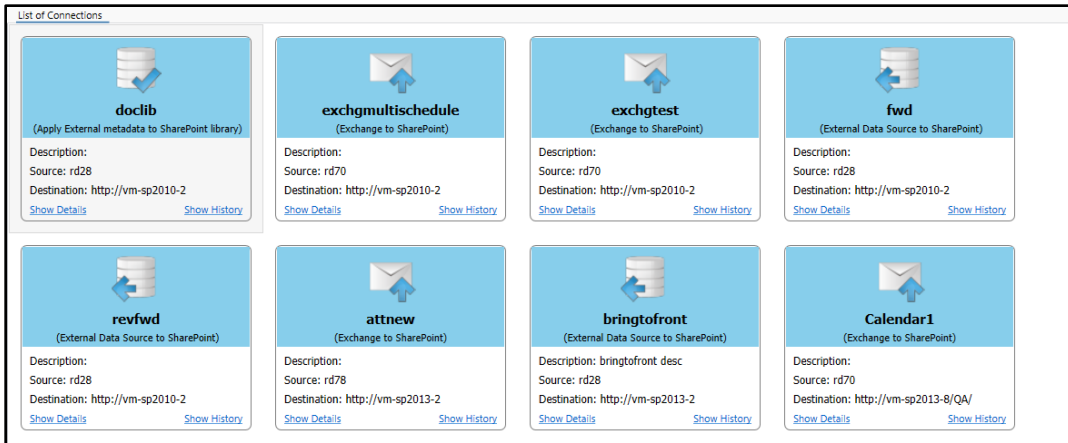


3. External Data Connector Connection Wizard will load the selected connection settings and appears as seen in Create New Connection wizard. However, some of the options may be disabled when editing a connection.
4. Click the link below for more information:
 - Edit a connection to integrate data from [External Data Source to SharePoint](#)
 - Edit a connection to integrate data from [SharePoint to External Data Source](#)
 - Edit a connection to integrate data from [Apply External metadata to SharePoint Library](#)
 - Edit a connection to integrate data from [Message Folders to SharePoint](#)
 - Edit a connection to integrate data from [Public Folders to SharePoint](#)

Delete an Existing Connection

To delete an External Data Connector connection:

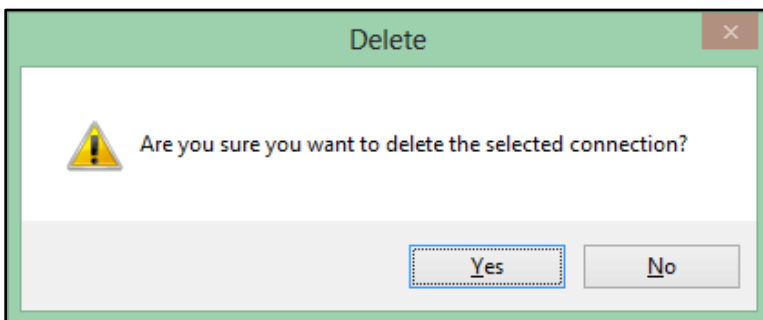
1. Select a connection from **Connections** pane



2. Click **Delete Connection** from main screen.



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

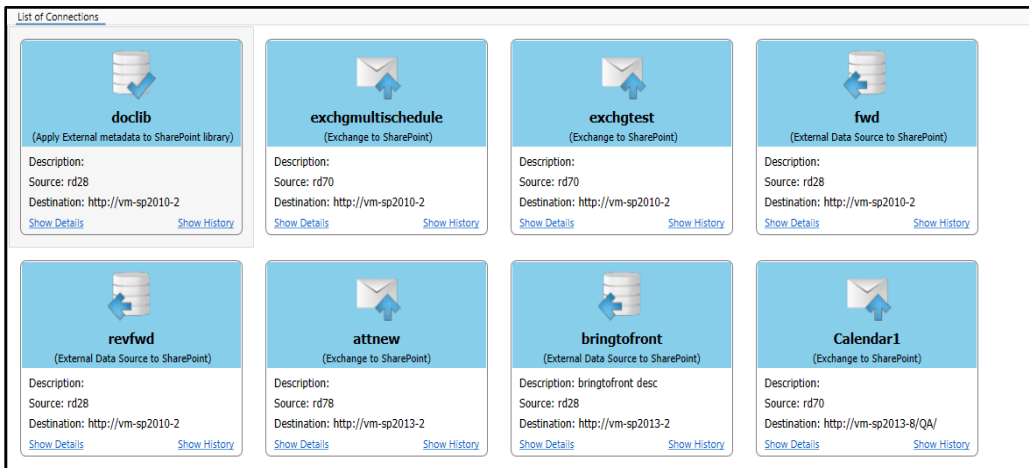


Note: Deleting a connection will permanently delete the selected connection and its history items.

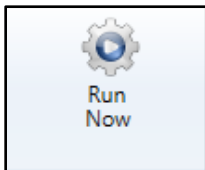
Run a Connection

External Data Connector 'Run Now' feature allows the user to instantiate a connection any time after the connection has been created. To run a connection:

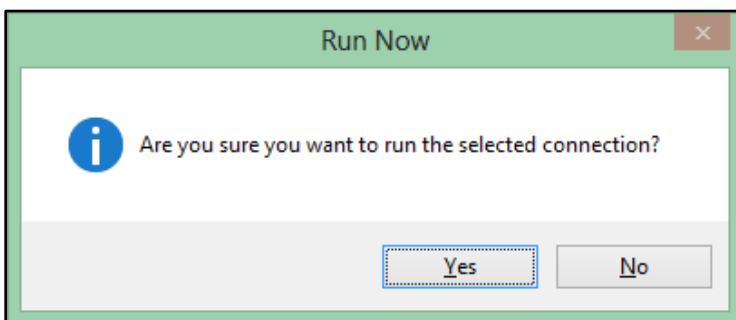
1. Select a connection from **Connections** pane



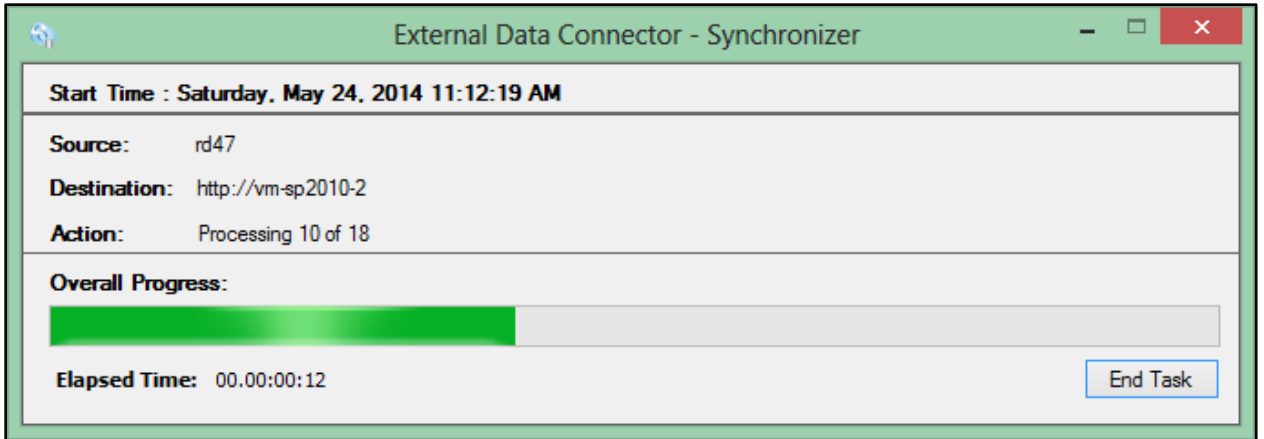
2. Click **Run Now** from main screen.



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



4. The current process of connection will be reported in a new dialog as shown below:

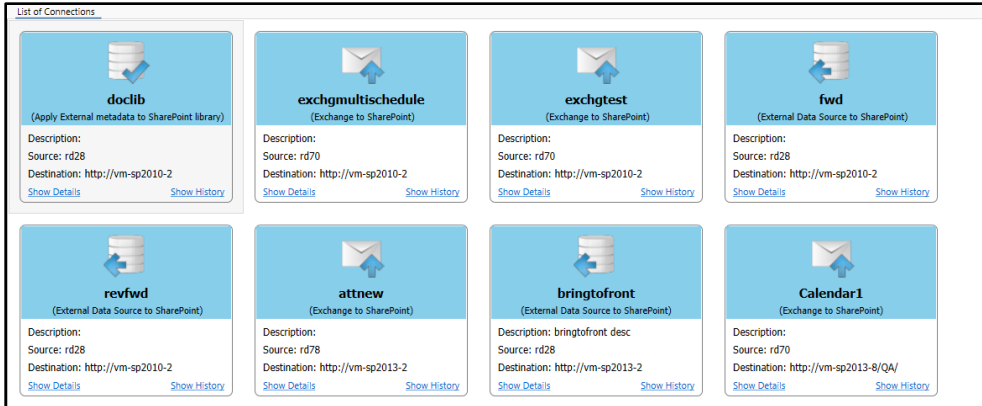


5. Once the sync is complete, a new entry will be added in **Connection History** section, where you can view the integration activity performed when the connection ran last.

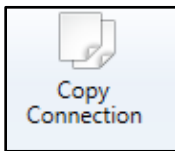
Copy an Existing Connection

To copy or create a new connection from an existing External Data Connector connection:

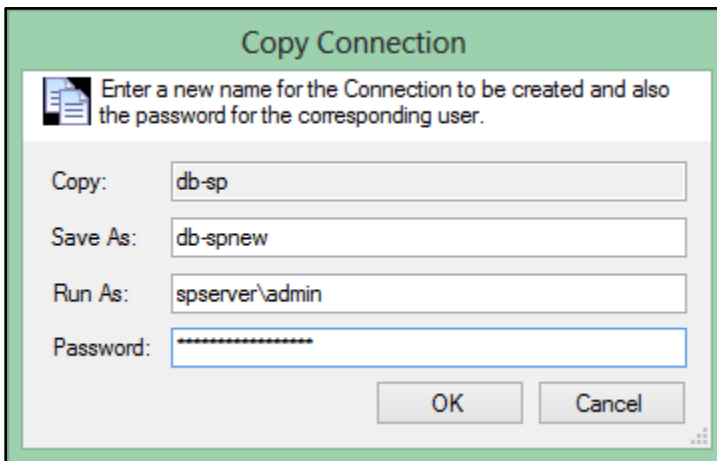
1. Select a connection from **Connections** pane



2. Click **Copy Connection** from main screen.



3. In Copy Connection dialog, enter a new connection name in **Save As** text-box, specify a **Run As** account and password (if applicable) and Click **OK** to create a new connection with the same integration settings specified in the selected connection.



External Data Connector Tools

[Query Builder](#)

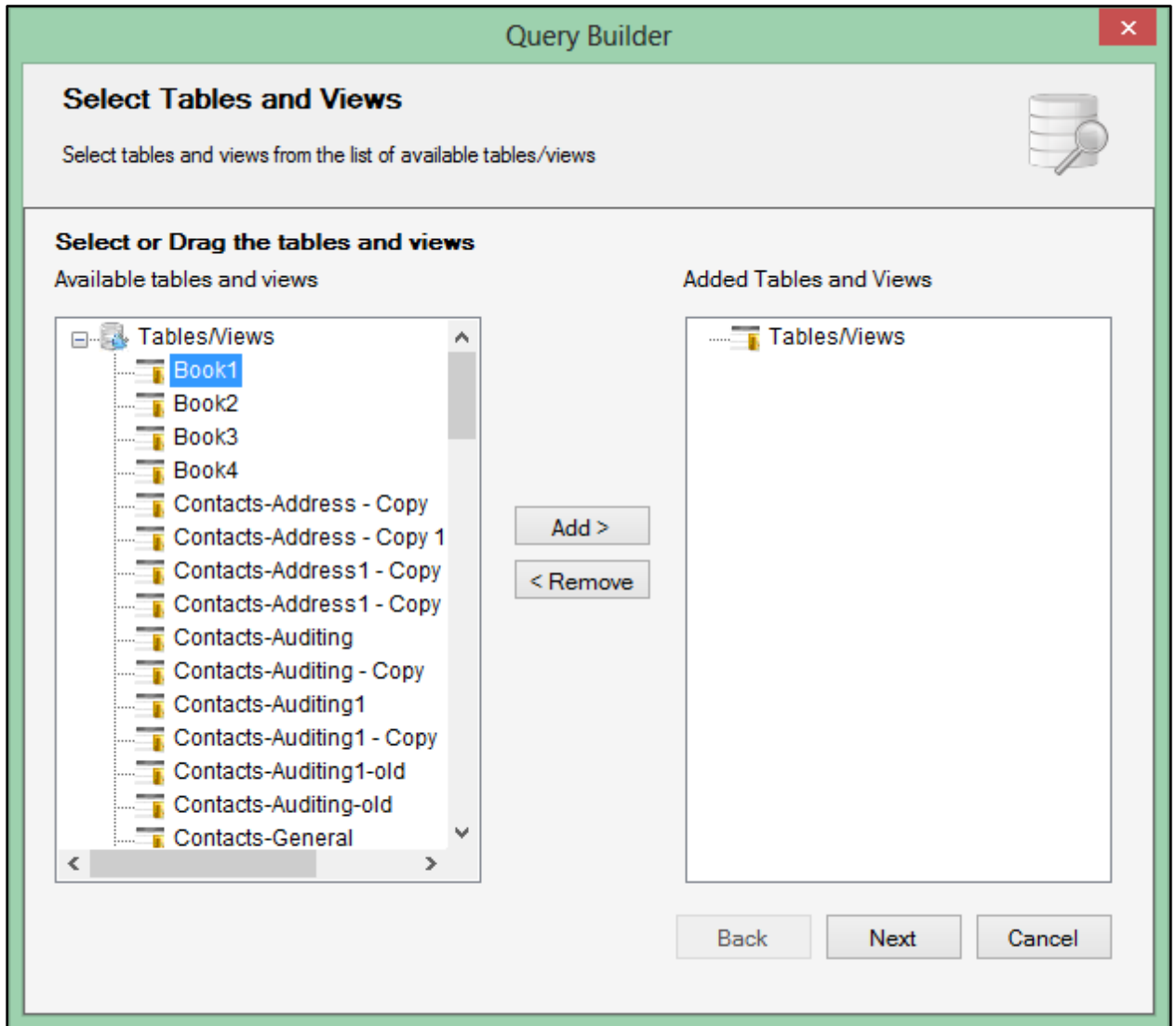
[Profile Manager](#)

[View Error Log](#)

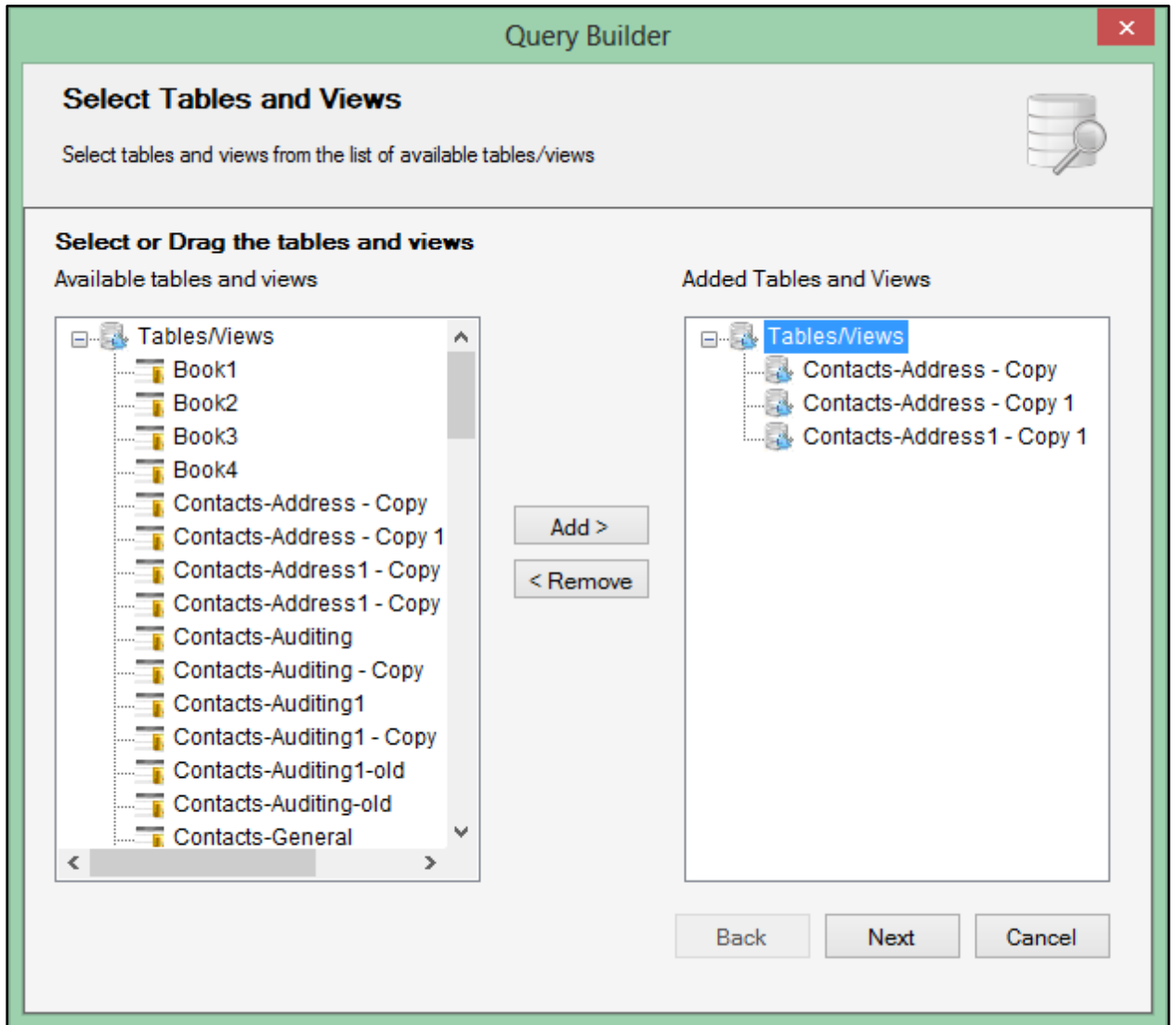
Query Builder

To read or filter data from data source, you have to specify a query statement. You can manually enter the query or use the **Query Builder** tool to generate the query. Using the built-in query builder, you can build queries on tables in databases without having to write complex SQL queries.

1. The Query builder will fetch all the tables from the data source based on the details given and will appear as shown below:



2. Select the tables from which the data should be read and click **Next**.



3. You can specify multiple JOIN conditions to merge tables/views from the list of tables selected. Select tables names and column names from the dropdown given. You can select the type of **JOIN** from the list of options given,
 - Inner Join
 - Left Join
 - Right Join

After the JOIN conditions are specified, query builder will appear as shown below, Click **Next** to proceed.

Query Builder

Merge tables/views

Specify conditions to join or merge tables/views

Select conditions to merge tables / views:

Left Table/View Name:
Contacts-Address - Copy

Right Table/View Name:
Contacts-Address1 - Copy 1

Left Column Name:
Object Name

Right Column Name:
Object Name

Join Type:
 Inner Join
 Left Join
 Right Join

Join Operator:
 And
 Or

Add ?

Inner Join [Contacts-Address - Copy 1] ON [Contacts-Address - Copy].[Object Name] = [Contacts-Address - Copy 1].[Object Name]
Left Join [Contacts-Address1 - Copy 1] ON [Contacts-Address - Copy].[Object Name] = [Contacts-Address1 - Copy 1].[Object Name]

Back Next Cancel

- Specify filter conditions if needed, based on the column name and column value. Click **Next** to proceed.

The image shows a 'Query Builder' dialog box with a 'Filter Conditions' section. The dialog has a title bar with 'Query Builder' and a close button. Below the title bar, the 'Filter Conditions' section has a subtitle 'Specify conditions to filter records' and a database icon. The main area contains a 'Filter Condition' section with four dropdown menus: 'Select Table/View' (Contacts-Address - Copy), 'Select Column' (Object Name), 'Select Value' (John Bradshaw), and 'Filter Operator' (OR). An 'Add' button is located to the right of the 'Filter Operator' dropdown. Below the 'Filter Condition' section, a text box displays the generated SQL filter: 'Where [Contacts-Address - Copy].[Object Name] = 'Anderson' OR [Contacts-Address - Copy].[Object Name] = 'John Bradshaw''. At the bottom of the dialog are three buttons: 'Back', 'Next', and 'Cancel'.

Query Builder

Filter Conditions
Specify conditions to filter records

Filter Condition

Select Table/View :
Contacts-Address - Copy

Select Column :
Object Name

Select Value :
John Bradshaw

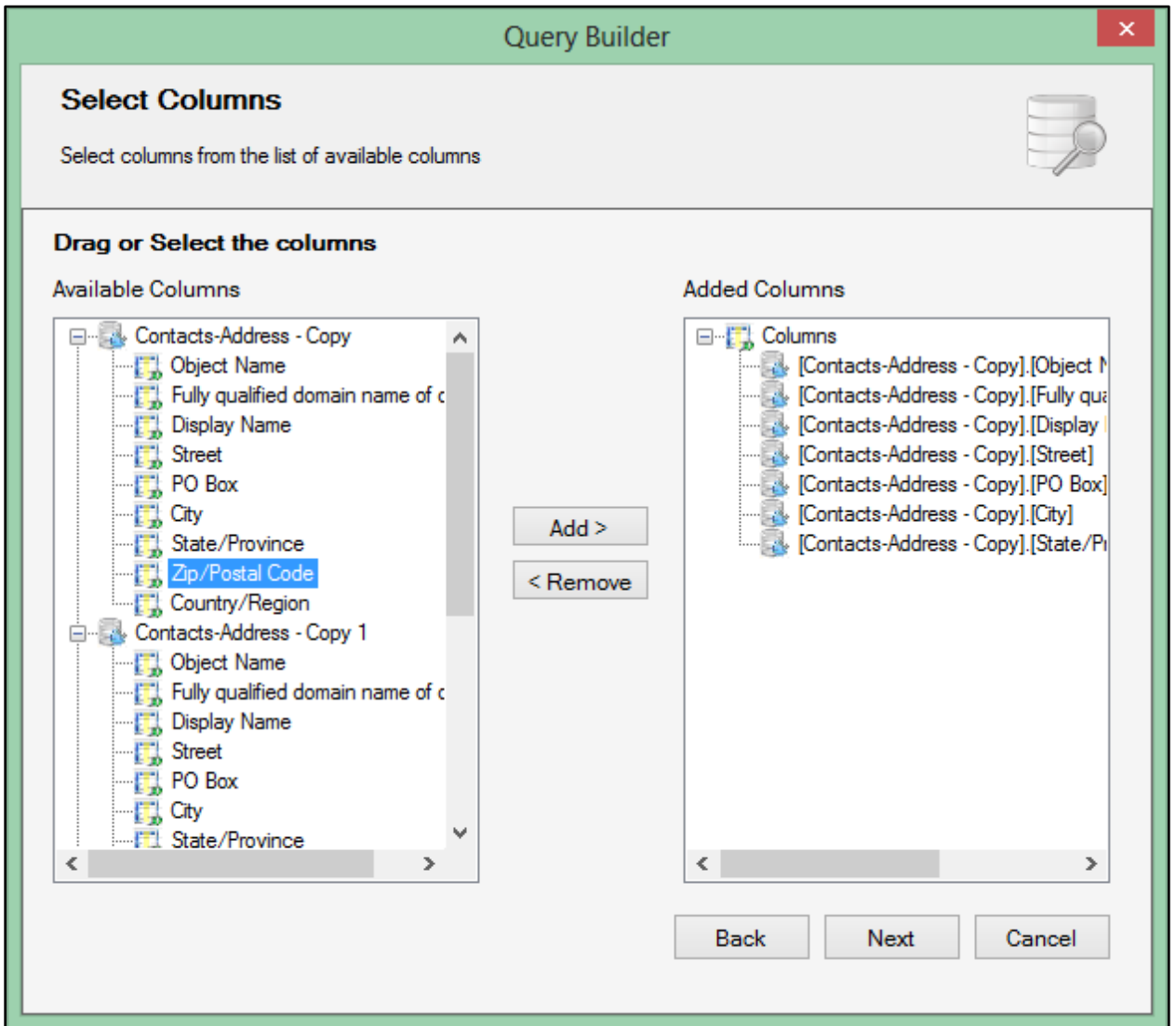
Filter Operator:
OR

Add

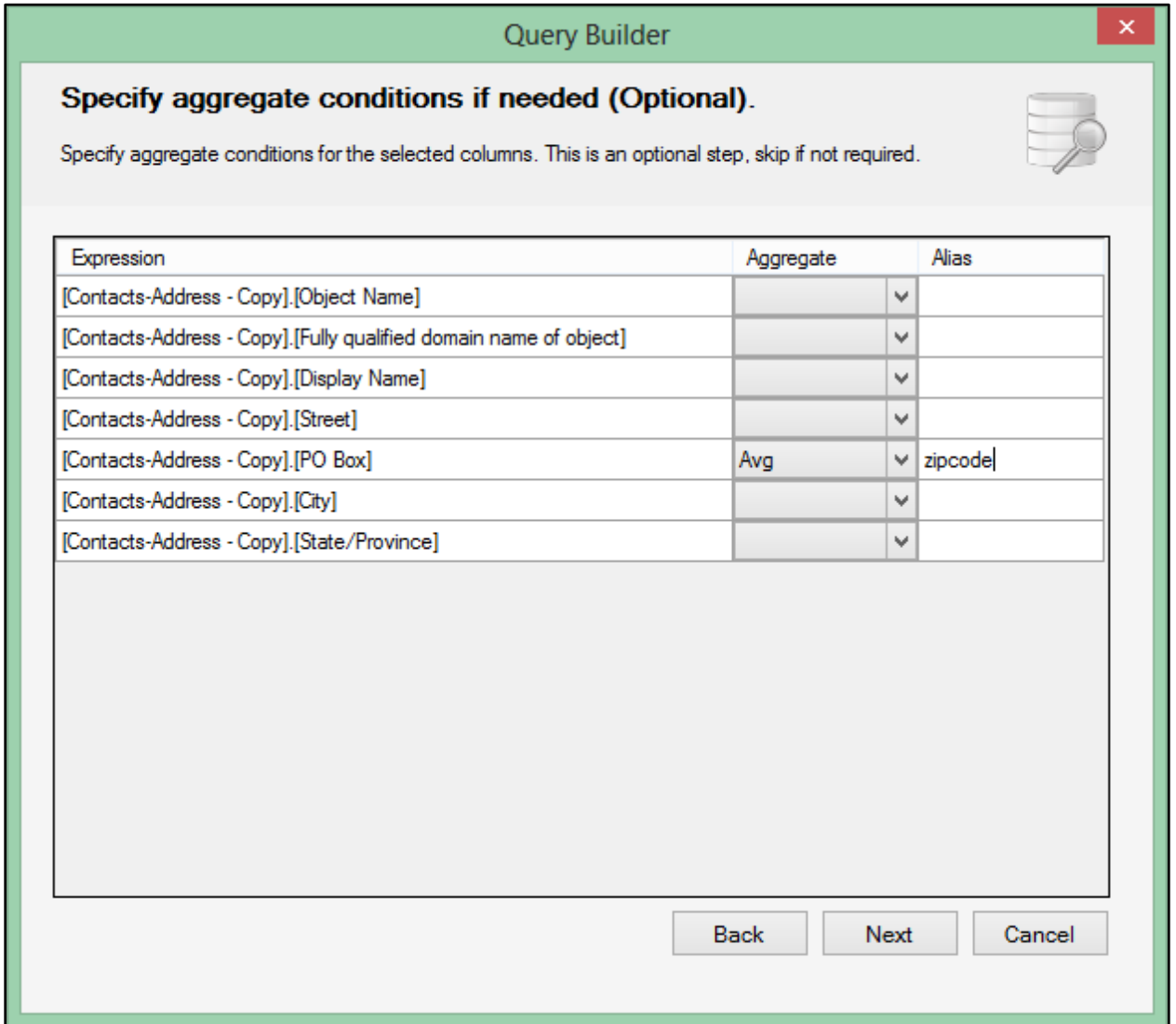
Where [Contacts-Address - Copy].[Object Name] = 'Anderson' OR [Contacts-Address - Copy].[Object Name] = 'John Bradshaw'

Back Next Cancel

5. Select the columns which should be included in the query. External Data Connector will fetch values only from the selected columns. By default, all column values will be fetched from data source.



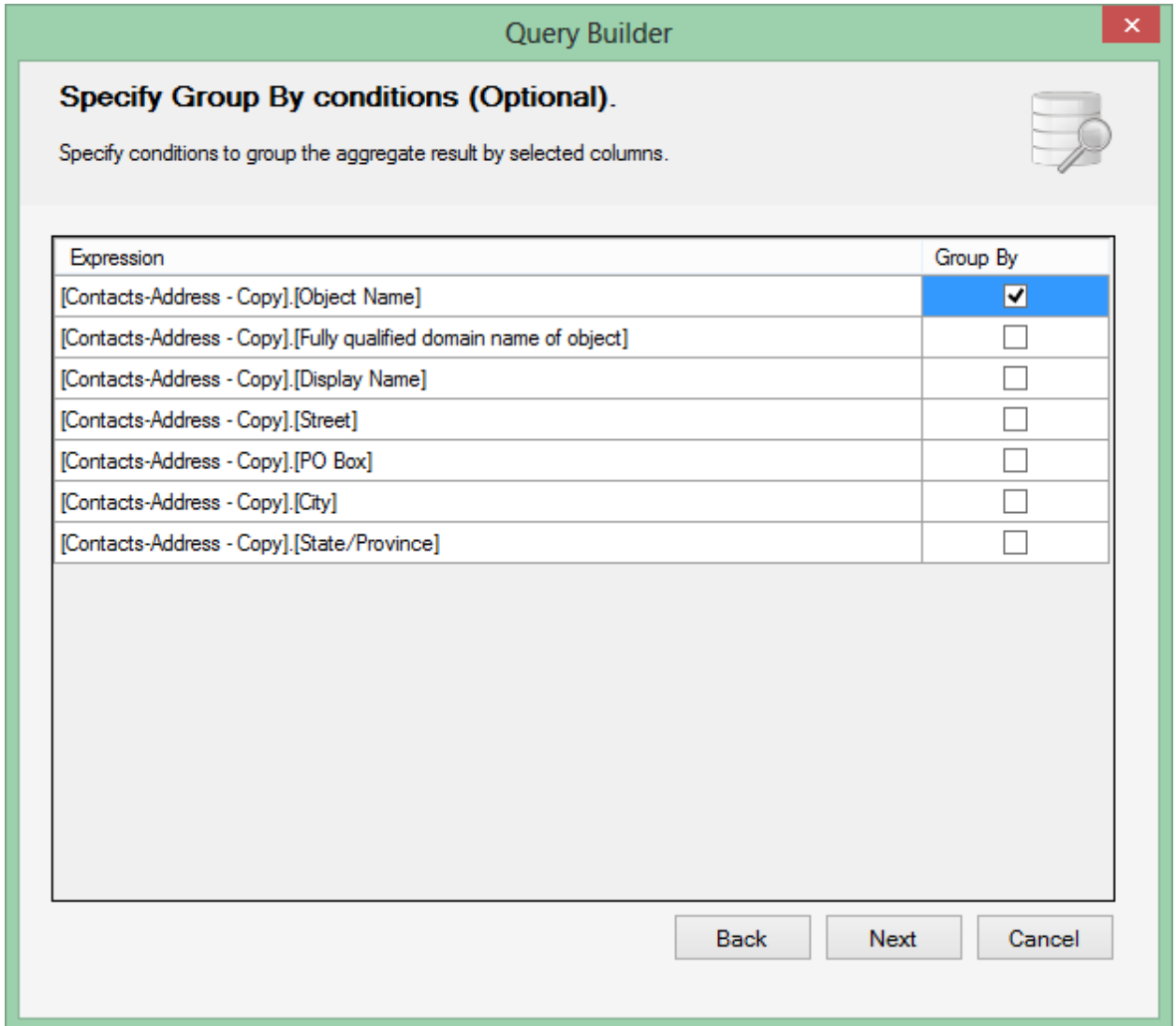
- To retrieve aggregated results from multiple tables, you can specify aggregate conditions, for the selected columns like shown below. This is an optional step, skip if not required.



The screenshot shows a 'Query Builder' dialog box with a green title bar and a close button (X) in the top right corner. The main heading is 'Specify aggregate conditions if needed (Optional)'. Below the heading is a descriptive text: 'Specify aggregate conditions for the selected columns. This is an optional step, skip if not required.' To the right of this text is an icon of a database cylinder with a magnifying glass. The central part of the dialog is a table with three columns: 'Expression', 'Aggregate', and 'Alias'. The table contains seven rows of data. The first five rows have empty 'Aggregate' and 'Alias' cells. The sixth row has 'Avg' in the 'Aggregate' column and 'zipcode' in the 'Alias' column. The seventh row has empty 'Aggregate' and 'Alias' cells. Below the table is a large empty rectangular area. At the bottom of the dialog are three buttons: 'Back', 'Next', and 'Cancel'.

Expression	Aggregate	Alias
[Contacts-Address - Copy].[Object Name]		
[Contacts-Address - Copy].[Fully qualified domain name of object]		
[Contacts-Address - Copy].[Display Name]		
[Contacts-Address - Copy].[Street]		
[Contacts-Address - Copy].[PO Box]	Avg	zipcode
[Contacts-Address - Copy].[City]		
[Contacts-Address - Copy].[State/Province]		

7. Aggregate functions often need an added **GROUP BY** statement. The **GROUP BY** statement is used in conjunction with the aggregate functions to group the result-set by one or more columns.



8. You can also specify **ORDER BY** conditions to sort the result-set by one or more columns. Click **Next** to proceed.

The screenshot shows a dialog box titled "Query Builder" with a close button in the top right corner. The main heading is "Specify Order By conditions (Optional)" and a sub-heading reads "Specify conditions to order the aggregate result. This is an optional step, skip if not required." To the right of the sub-heading is an icon of a database cylinder with a magnifying glass. Below this is a table with three columns: "Expression", "Sort Type", and "Sort Order". The table contains seven rows of address-related expressions, all with "Ascending" sort type and sort orders 1 through 7. At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

Expression	Sort Type	Sort Order
[Contacts-Address - Copy].[Object Name]	Ascending	1
[Contacts-Address - Copy].[Fully qualified domain name of object]	Ascending	2
[Contacts-Address - Copy].[Display Name]	Ascending	3
[Contacts-Address - Copy].[Street]	Ascending	4
[Contacts-Address - Copy].[PO Box]	Ascending	5
[Contacts-Address - Copy].[City]	Ascending	6
[Contacts-Address - Copy].[State/Province]	Ascending	7

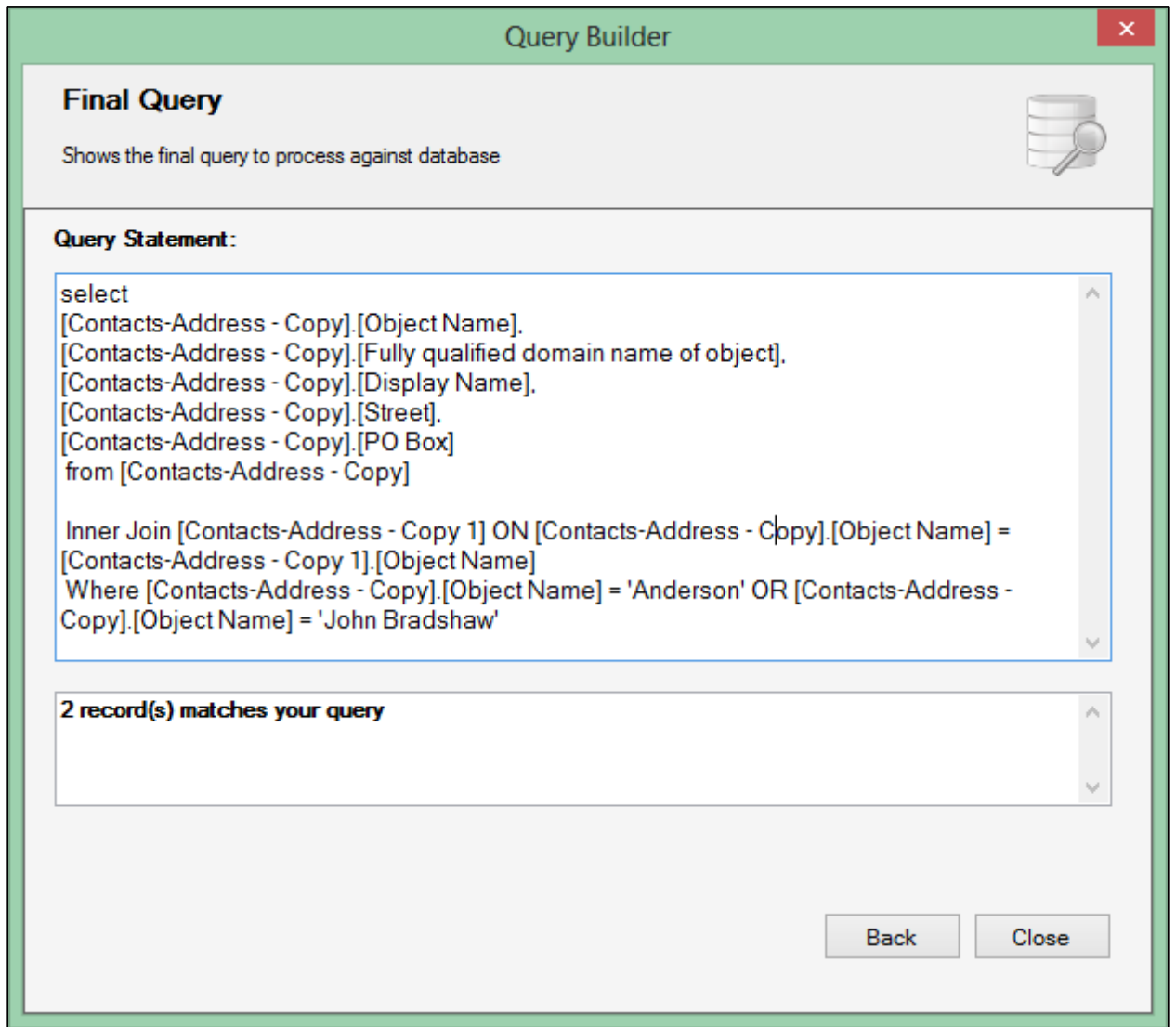
- The **Summary** step shows all the conditions specified so far. Click **Next** to generate query for the specified conditions, or click **Back** to edit the conditions.

The screenshot shows a window titled "Query Builder" with a "Summary" tab. Below the title bar, there is a sub-header "Summary" and a description "Shows all the conditions which are specified". A database icon is visible in the top right corner. The main content is a table with two columns: "Conditions" and "Values".

Conditions	Values
Selected Tables	Contacts-Address - Copy Contacts-Address - Copy 1 Contacts-Address1 - Copy 1
Selected Columns	[Contacts-Address - Copy].[Object Name] [Contacts-Address - Copy].[Fully qualified domain name of object] [Contacts-Address - Copy].[Display Name] [Contacts-Address - Copy].[Street] [Contacts-Address - Copy].[PO Box] [Contacts-Address - Copy].[City] [Contacts-Address - Copy].[State/Province]
Filter	[Contacts-Address - Copy].[Object Name] = 'Anderson' OR [Contacts-Address - Copy].[Object Name] = 'John Bradshaw'
Join Conditions	Inner Join [Contacts-Address - Copy 1] [Contacts-Address - Copy].[Object Name] = [Contacts-Address - Copy 1].[Object Name] Left Join [Contacts-Address1 - Copy 1] [Contacts-Address - Copy].[Object Name] = [Contacts-Address1 - Copy 1].[Object Name]

At the bottom of the window, there are three buttons: "Back", "Next", and "Cancel". The "Next" button is highlighted with a blue border.

10. The **Final Query** step display the generated query from the specified conditions. Click **Close** to use the generated query for integration, or click **Back** to edit the conditions.



Profile Manager

You can create a user profile in Windows Stored User Names and Passwords applet, in order to specify the user context to run External Data Connector integration connections.

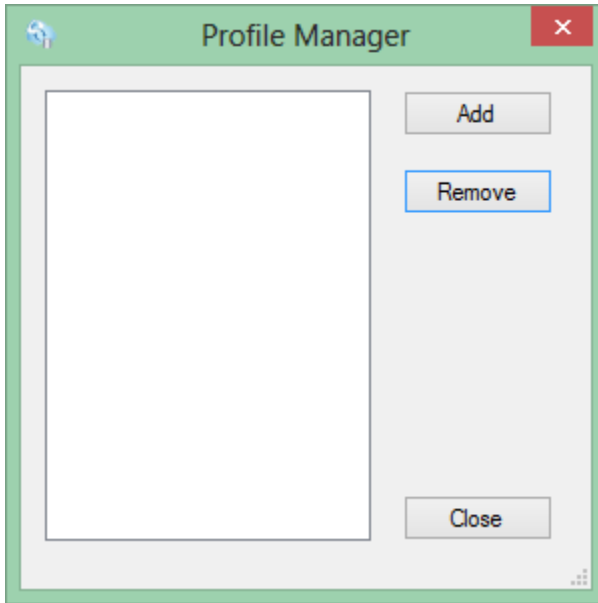
The stored user profile persists for all subsequent logon sessions on the same computer where External Data Connector is installed. The stored user profiles are visible to other logon sessions on the same computer.

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

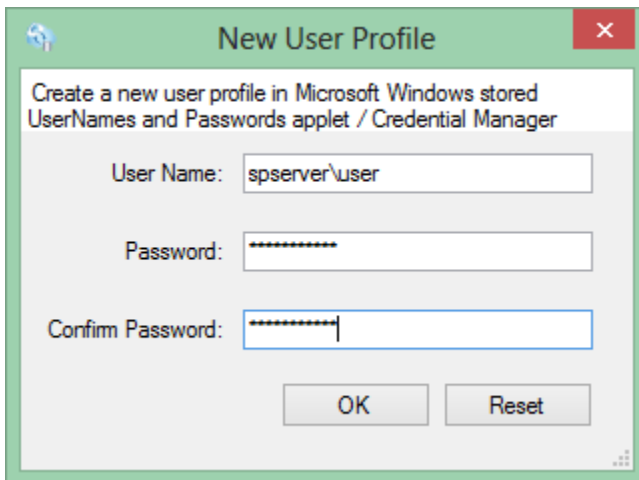
The stored user profile is a generic credential of Windows Stored User Names and Passwords applet and can be used by External Data Connector application only. The credential information is stored securely in an 256 bit encrypted format in Windows Stored User Names and Passwords applet.

1. In order to create a External Data Connector stored user profile, Click on ... button while specifying authentication details for SharePoint or external data source in connection creation.

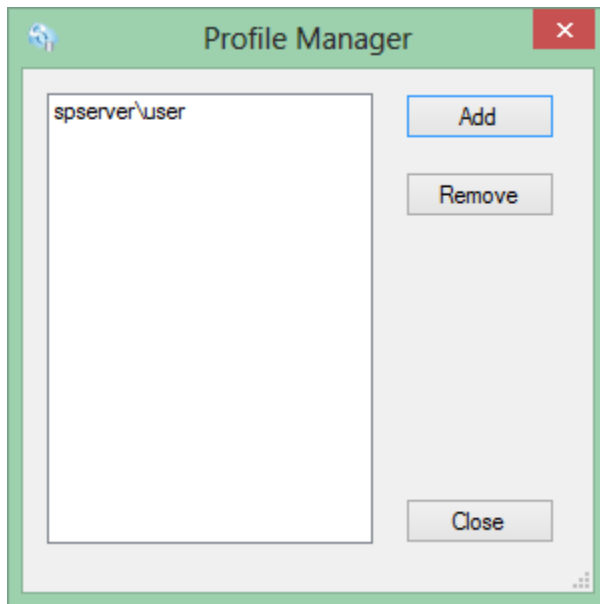
2. The Profile Manager dialog will be shown as below:



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



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 External Data Connector application in order to connect to the SharePoint or Data Source environment.

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

6. Additional References:

Behavior of stored user names and passwords

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

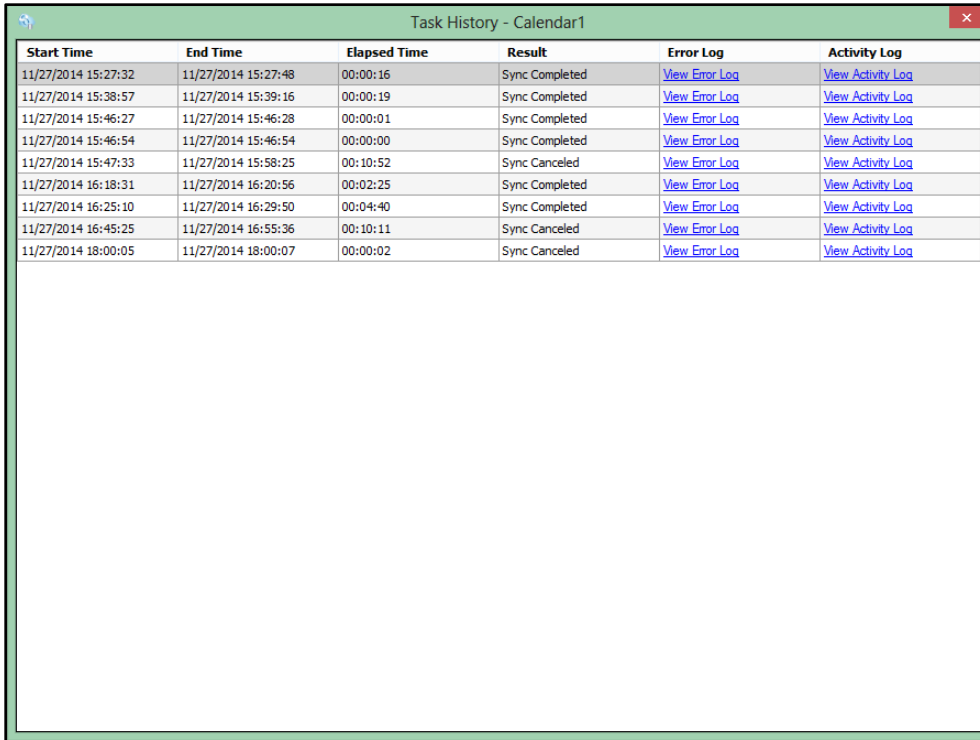
Stored User Name and Password Best practices

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

View Activity Log

To view the activity log of External Data Connector perform the steps given below:

1. Click **View Activity Log** from the connection history pane.



The screenshot shows a window titled "Task History - Calendar1" with a table of task execution details. The table has six columns: Start Time, End Time, Elapsed Time, Result, Error Log, and Activity Log. The data rows show various task instances with their respective start and end times, elapsed times, and results (Sync Completed or Sync Canceled). Each row includes links for "View Error Log" and "View Activity Log".

Start Time	End Time	Elapsed Time	Result	Error Log	Activity Log
11/27/2014 15:27:32	11/27/2014 15:27:48	00:00:16	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:38:57	11/27/2014 15:39:16	00:00:19	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:46:27	11/27/2014 15:46:28	00:00:01	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:46:54	11/27/2014 15:46:54	00:00:00	Sync Completed	View Error Log	View Activity Log
11/27/2014 15:47:33	11/27/2014 15:58:25	00:10:52	Sync Canceled	View Error Log	View Activity Log
11/27/2014 16:18:31	11/27/2014 16:20:56	00:02:25	Sync Completed	View Error Log	View Activity Log
11/27/2014 16:25:10	11/27/2014 16:29:50	00:04:40	Sync Completed	View Error Log	View Activity Log
11/27/2014 16:45:25	11/27/2014 16:55:36	00:10:11	Sync Canceled	View Error Log	View Activity Log
11/27/2014 18:00:05	11/27/2014 18:00:07	00:00:02	Sync Canceled	View Error Log	View Activity Log

2. On selecting the **View Activity Log** link in Connection history pane, a window will appear which displays the statistics summary of the corresponding instance like shown below.

The screenshot shows the 'Activity Log Viewer' window. At the top, it says 'View sync statistics and sync results'. Below this, there are several input fields: 'Connection Name' is 'reverse', 'Remarks' is 'Sync Completed', 'Start Time' is '04-Aug-14 6:05:07 PM', 'End Time' is '04-Aug-14 6:05:13 PM', and 'Elapsed Time' is '00:00:06'. A 'Connection Statistics' tab is active, displaying a table with the following data:

Property	Value
Total Records in source	4
Number of records to add	2
Actual number of added records	2
Number of records to modify	0
Actual number of modified records	0
Number of records to delete	2
Actual number of deleted records	2

A 'Close' button is located at the bottom right of the window.

External Data Source to SharePoint

[Create a Connection](#)

[Edit a Connection](#)

Create a Connection

Step 1 : [Source SharePoint Location](#)

Step 2 : [Destination SharePoint Location](#)

Step 3 : [List Details](#)

Step 4 : [Data Source Summary](#)

Step 5 : [File Contents](#)

Step 6 : [Column Mapping](#)

Step 7 : [Configure Connection Startup](#)

External Data Source

To specify an External Data Source, from which you wish to integrate with a SharePoint site, perform the steps given below:

1. The **External Data Source** step appears as shown below:

External Data Source to SharePoint

Select the external data source
Specify the data source details which contains the details to create list items

Data source: Microsoft SQL Server (SQL Client) ▼

Server name:

Log on to the server

Use Windows Authentication

Use Server Authentication

User Name: ▼ ...

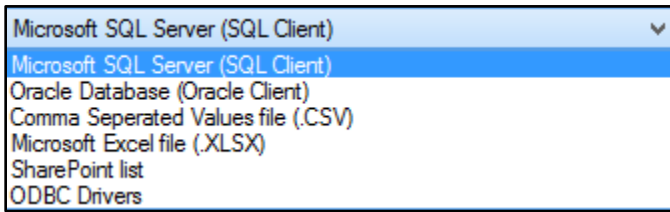
Password:

Connect to a database

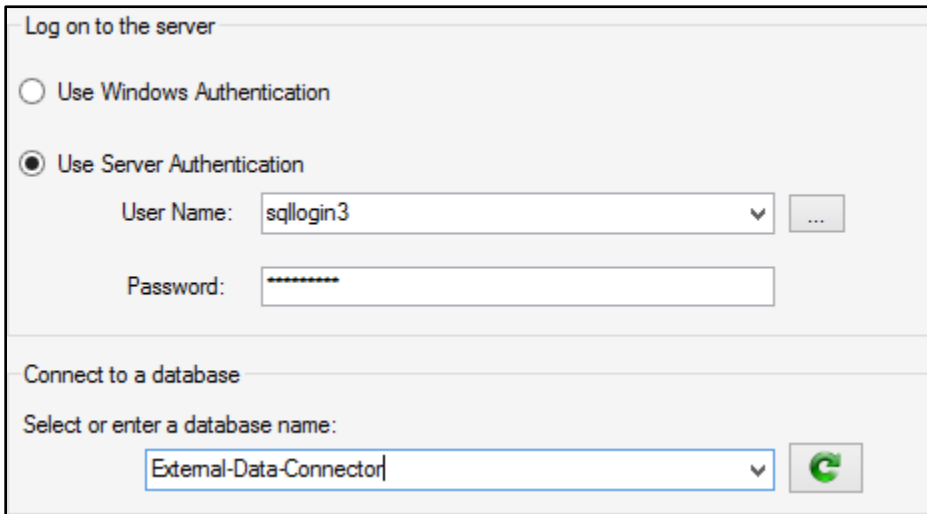
Select or enter a database name: ▼

Back Next Finish Cancel

2. Select a data source from the list of available data sources in the dropdown:



3. The login and other details will be displayed according to data source selected.
4. If the selected data source is a database, specify the login and other database details like shown below:



5. If the selected data source is a file like XLSX, CSV etc, specify the location of a file. The location can also be from a network shared drive.

6. If the selected data source is another SharePoint list, specify the source list details like URL of the site, list name, and authentication details in their respective fields to proceed. The above mentioned details are show below:

SharePoint Details:

URL:

Authentication Type:

Use the following credential to connect to SharePoint:

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

Password:

Source List:

Destination SharePoint location

To specify a SharePoint URL of a site, in which you wish to integrate data from an external data source, perform the steps given below:

1. The **Destination SharePoint location** step appears as shown below:

The screenshot shows a dialog box titled "External Data Source to SharePoint" with a close button (X) in the top right corner. The main heading is "Select destination SharePoint location" and the instruction below it is "Specify the URL of a SharePoint list to create list items from external data source". There is a green checkmark icon in the top right corner of the main area. The "URL:" field contains "http://vm-sp2010-2". Under "SharePoint user credential:", the "Authentication type:" dropdown is set to "Windows Authentication". Below that, the instruction "Use the following credential to connect to SharePoint:" is followed by a "User Name:" dropdown containing "spserver\user" and a "Password:" field containing "*****". A list of suggestions "(johndoe@contoso.com, contoso\johndoe, johndoe)" is visible below the user name field. At the bottom of the dialog are four buttons: "Back", "Next", "Finish", and "Cancel".

2. Specify a valid SharePoint URL in the URL textbox. External Data Connector will load all the lists from the specified SharePoint site, if the site URL and authentication is valid.
3. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below :

a. Specify the Authentication Type

- Windows Authentication
- Forms Authentication
- Office 365 Cloud based identity
- Federated Authentication

b. Specify the user credentials

Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: \Username@DomainName, Username and its corresponding password. External Data Connector will initiate Windows authentication or Forms authentication depending on configuration in the destination SharePoint site. Click Next button to proceed.

External Data Connector will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet / Credential Manager for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created.

Click ... button to create new user profile. [Click here](#) to view the details about Profile Manager dialog.

Select Federated Identity in Authentication Type combo to connect to a SharePoint site (SharePoint On-premise or SharePoint Online) using federated identity configured using ADFS. Also, select this option to connect to Office 365 SharePoint Online configured using federated identity provider.

To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.onmicrosoft.com).

External Data Source to SharePoint

Select destination SharePoint location
Specify the URL of a SharePoint list to create list items from external data source

URL:

SharePoint user credential:

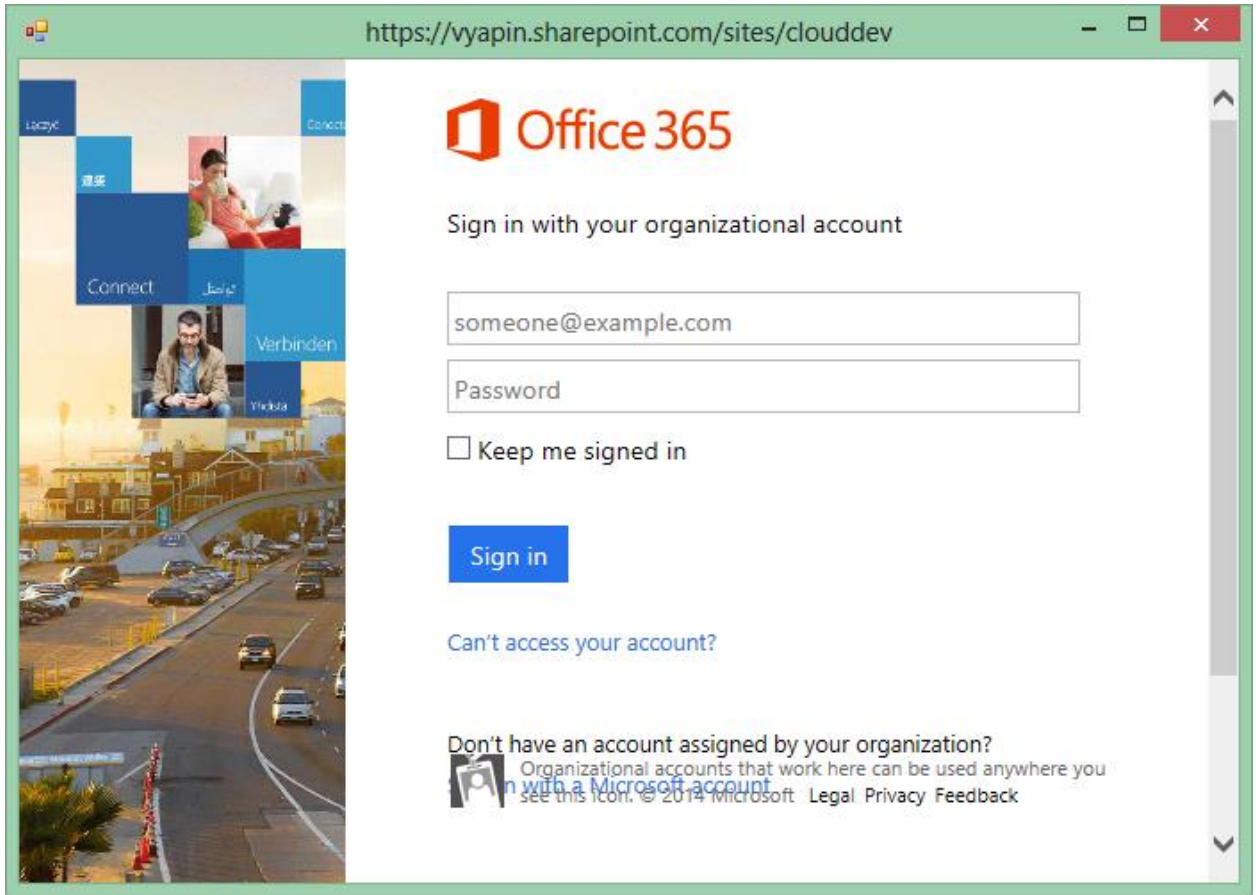
Authentication type:

Use the following credential to connect to SharePoint:

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

Password:

Upon clicking Next button to proceed, you will be prompted for credential (username and password) as shown below:



Provide ID and Password in the respective textboxes and click **Sign in** button to proceed.

List details

To specify the list to add list items from data source, or publish the data to a document library or export to a drive, perform the steps given below:

1. The **List details** step appears as shown below:

The screenshot shows a dialog box titled "External Data Source to SharePoint" with a close button in the top right corner. The main heading is "Specify the list details to add/publish items" and the instruction below it is "Select a list to add list items or specify a list name to add items from data source". There is a green checkmark icon in the top right of the main area.

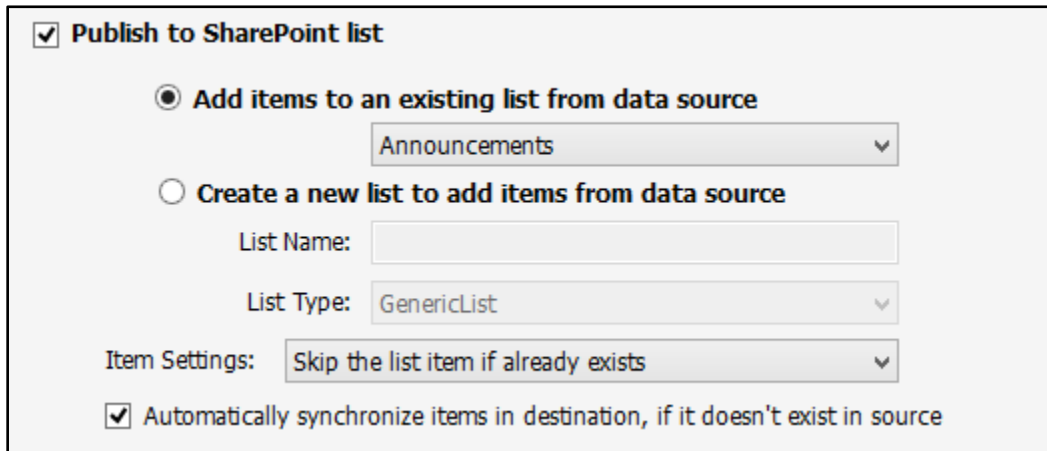
The dialog is divided into three main sections, each with a checked checkbox:

- Publish to SharePoint list:**
 - Add items to an existing list from data source**
 - List: Announcements
 - Create a new list to add items from data source**
 - List Name: [Empty text box]
 - List Type: GenericList
 - Item Settings: Skip the list item if already exists
 - Automatically synchronize items in destination, if it doesn't exist in source
- Publish to SharePoint library:**
 - Web URL: http://vm-sp2010-2
 - Library Name: Shared Documents
 - File Name and Format: publishFile .CSV
 - Item Settings: Skip the list item if already exists
- Export to drive:**
 - Export Path: D:\data\exportedFile.html
 - Save As button

At the bottom of the dialog are four buttons: Back, Next, Finish, and Cancel.

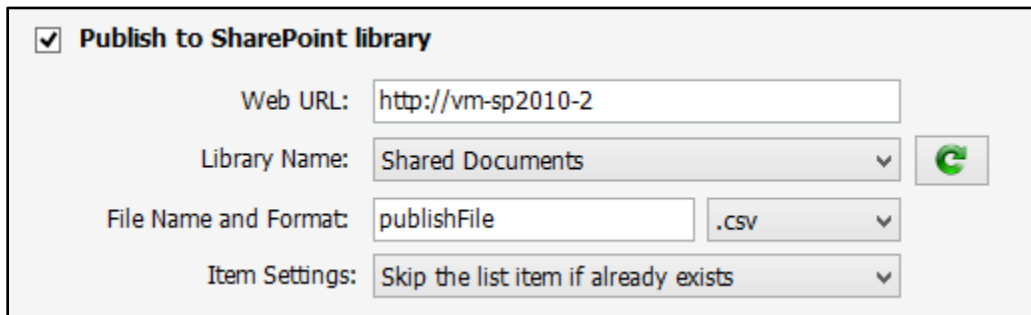
2. If the data from external data source has to be published in a list as list items, select the **Publish to list** option. Specify the list in which the items has to be added and also specify the action which has to be performed, if the list item already exists in the list. Also, select the option given if the External

Data Connector has to synchronize automatically, if the data doesn't exist in data source in subsequent runs. The above mentioned settings are shown below:



The screenshot shows a configuration panel for 'Publish to SharePoint list'. It includes a checked checkbox for the main title. Below it, there are two radio button options: 'Add items to an existing list from data source' (selected) and 'Create a new list to add items from data source'. The first option has a dropdown menu set to 'Announcements'. The second option has input fields for 'List Name' (empty) and 'List Type' (set to 'GenericList'). Below these is an 'Item Settings' dropdown set to 'Skip the list item if already exists'. At the bottom, there is a checked checkbox for 'Automatically synchronize items in destination, if it doesn't exist in source'.

3. If the data from the data source has to be published to a document library as a metadata file, select the Publish to library option. Specify the other details like URL of the site to publish, library name, list item settings to avoid redundant items, file name and file format. The file can be published in XLSX, CSV and HTML formats. The above settings mentioned are shown below:



The screenshot shows a configuration panel for 'Publish to SharePoint library'. It starts with a checked checkbox for the main title. Below are several fields: 'Web URL' (http://vm-sp2010-2), 'Library Name' (Shared Documents) with a dropdown and a green 'E' icon, 'File Name and Format' (publishFile) with a dropdown set to '.CSV', and 'Item Settings' (Skip the list item if already exists) with a dropdown.

4. If the data from the data source has to be exported to any networked storage including local drive or web folders as a metadata file, select the Export to drive option. Specify the location and format of the file to export by clicking on Save As button. The above settings are shown below:

Export to drive:

Export Path:

External Data Source Summary

If the selected data source is a database, data source summary step will be displayed which shows the **Connection string** to use with the Database and the **SELECT** statement to query against the Database.

1. The **External Data Source summary** step appears as shown below:

External Data Source to SharePoint

External Data Source summary
Shows the summary of external data source to be imported

External Data Provider: Microsoft SQL Server (SQL Client)

Connection String:
Data Source=rd28; Initial Catalog=External-Data-Connector; User ID=sqllogin3;

Query Statement:

Manual

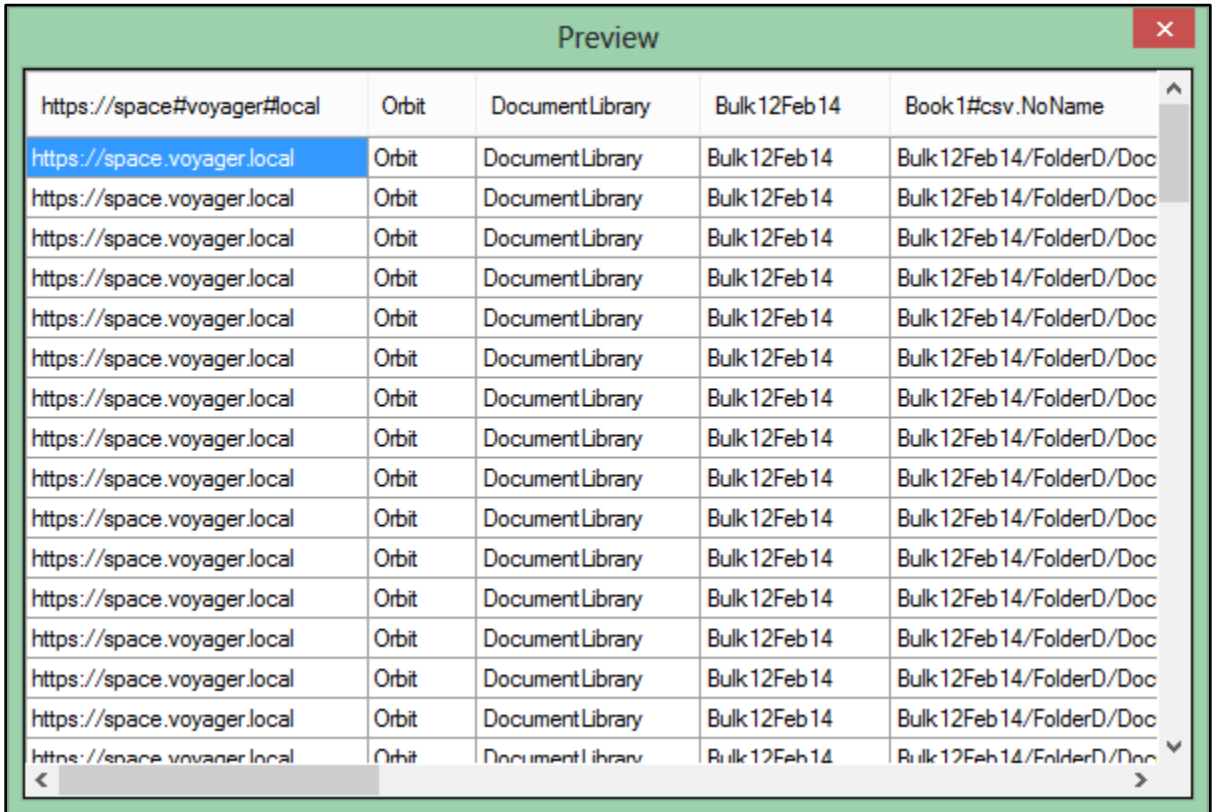
Using Query Builder

Buttons: Back, Next, Finish, Cancel

2. Use the **Manual** query textbox, if the **SELECT** statement to filter the data source is known.
3. Or use **Using Query builder** option by clicking on the **Query Builder** button to form the **SELECT** statement based on the requirement.

Refer [Query Builder](#) for more information.

- The entered **Connection string** and **SELECT** statement can be verified by clicking on the Verify button. The result will be shown as below:



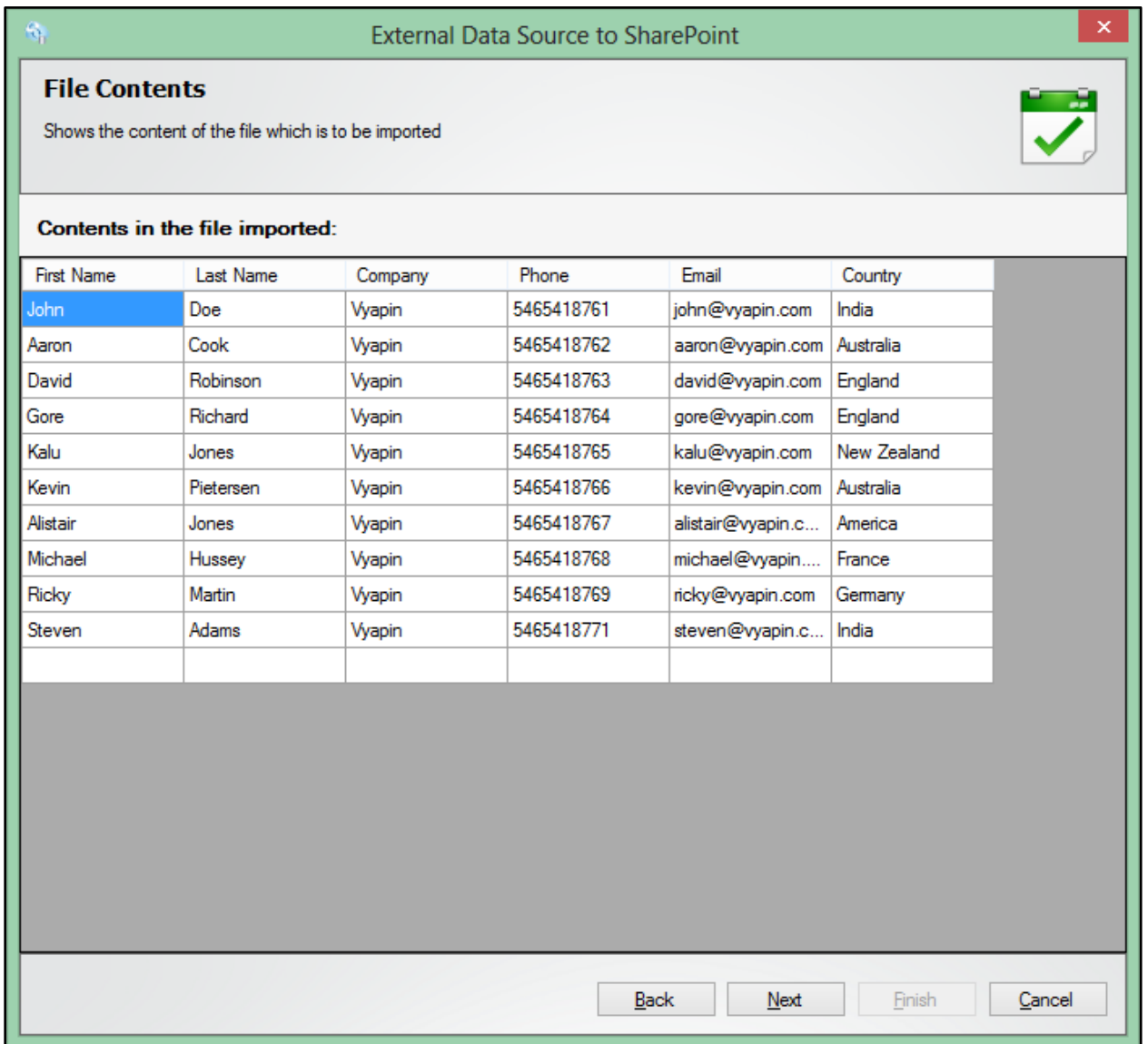
The screenshot shows a 'Preview' window with a table of data. The table has 5 columns: URL, Orbit, DocumentLibrary, Bulk12Feb14, and Book1#csv.NoName. The second row is highlighted in blue.

https://space#voyager#local	Orbit	DocumentLibrary	Bulk12Feb14	Book1#csv.NoName
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc
https://space.voyager.local	Orbit	DocumentLibrary	Bulk12Feb14	Bulk12Feb14/FolderD/Doc

File Contents

If the selected data source is a XLSX, CSV or a HTML file, the **File Contents** step will appear, which show the contents of the file to be imported.

1. **File Contents** step will appear as shown below:



External Data Source to SharePoint

File Contents
Shows the content of the file which is to be imported

Contents in the file imported:

First Name	Last Name	Company	Phone	Email	Country
John	Doe	Vyapin	5465418761	john@vyapin.com	India
Aaron	Cook	Vyapin	5465418762	aaron@vyapin.com	Australia
David	Robinson	Vyapin	5465418763	david@vyapin.com	England
Gore	Richard	Vyapin	5465418764	gore@vyapin.com	England
Kalu	Jones	Vyapin	5465418765	kalu@vyapin.com	New Zealand
Kevin	Pietersen	Vyapin	5465418766	kevin@vyapin.com	Australia
Alistair	Jones	Vyapin	5465418767	alistair@vyapin.c...	America
Michael	Hussey	Vyapin	5465418768	michael@vyapin....	France
Ricky	Martin	Vyapin	5465418769	ricky@vyapin.com	Germany
Steven	Adams	Vyapin	5465418771	steven@vyapin.c...	India

Back Next Finish Cancel

Column Mapping

External Data Connector allows you to map metadata properties between data source and a SharePoint list

1. **Column Mapping** step will appear as shown below:

External Data Source to SharePoint

Column mapping
Select column from SharePoint list to match with a column in external data source

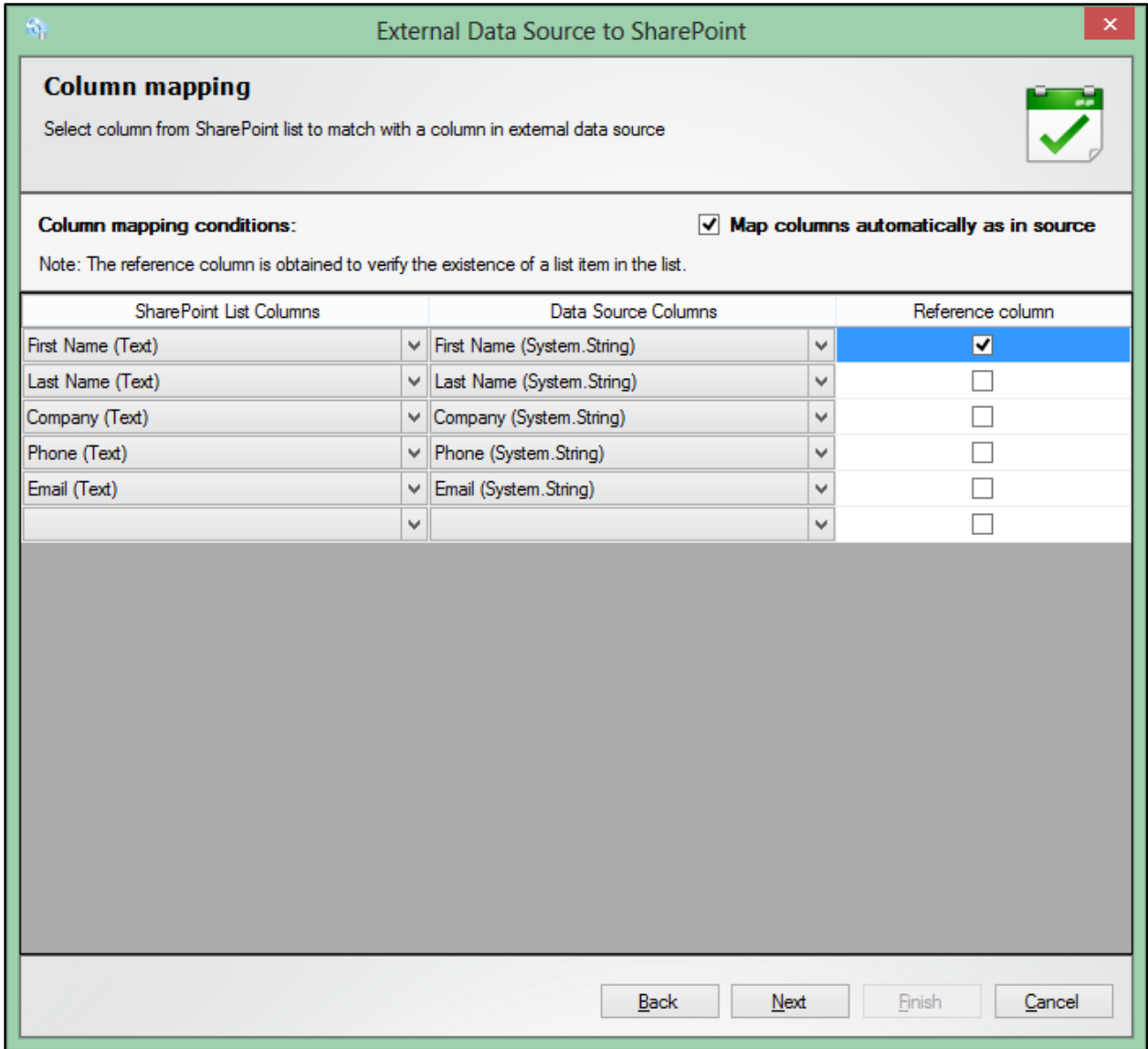
Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

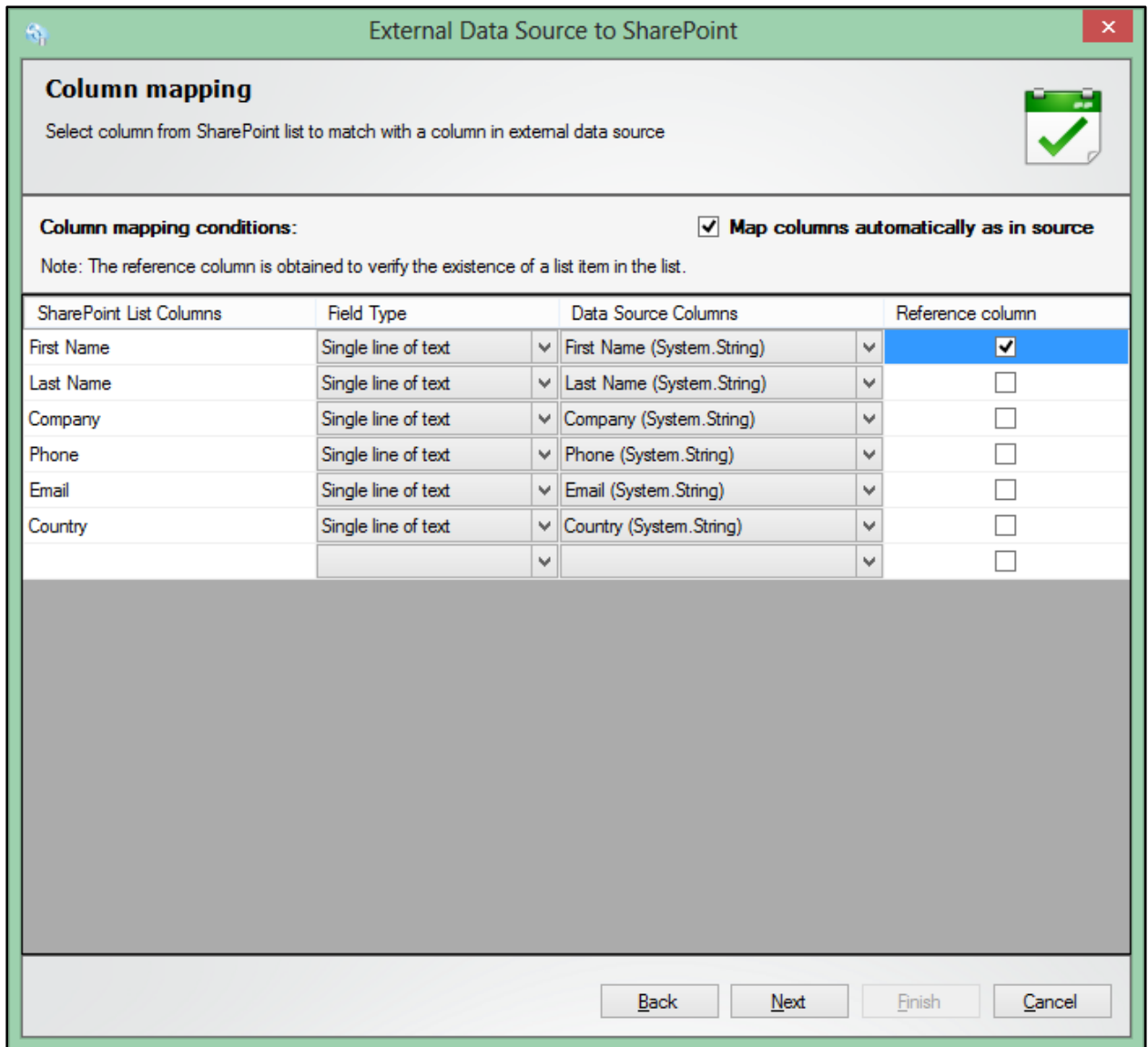
SharePoint List Columns	Data Source Columns	Reference column
▼	▼	<input type="checkbox"/>

Back Next Finish Cancel

2. External Data Connector can automatically map columns for you if needed. Select **Map columns automatically as in source** to automate mapping. Column mapping will be done based on the column name.



3. If the selected list to add items is a new list, new columns will be created in the list if auto-mapping option is selected. You can also select the type of column to be created in the list.



- Specify at-least one reference column, to avoid adding duplicate items in the list. External Data Connector will read the reference column value, query them against the list and if the item exists in the list, action specified in the list item settings will be performed (Skip, Update, Overwrite or Add).

Note: If 'Create a new list' option is selected for integration, columns of type single/multiple line of text, Number, Date and time and Yes/No can be created.

Configure Connection Startup

To specify the connection name and trigger settings for the External Data Connector connection, perform the steps given below

1. **Configure Connection startup** step will appear as shown below:

The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Configure Connection startup" with a sub-heading "Enter a unique name for the Connection and specify trigger settings." and an envelope icon with a blue arrow. The dialog contains the following fields and options:

- Connection Name:** taskName
- Description:** this is an interactive task
- Trigger Options:**
 - Run now
 - Schedule
- Connect as:**
 - User Profile:**
 - Source: voyager\adminuser1
 - Destination: voyager\xfamadmin_sp13-1
- Schedule Settings:**
 - Schedule: Daily
 - Start Time: 03:07 PM
 - Schedule Daily: Every 1 day(s)

At the bottom of the dialog are four buttons: Back, Next, Finish, and Cancel.

2. Enter a unique connection name in **Connection Name** textbox.
3. Select a Trigger Option from one of the following options given below:
 - **Run now** - to run the connection immediately after clicking Finish button
 - **Schedule** - To create a Windows scheduled task. External Data Connector will create a schedule connection in the Windows Scheduled Tasks with the given settings.

4. You can also specify location to an executable or a script to execute once the sync gets completed, if needed.

Program/Script (Optional)

When you create a connection, you can specify an action that will occur, once the sync process gets completed.

Edit Connection

Edit connection is similar to creating a connection, except that a few settings cannot be altered as stated below.

1. The External Data Connector Connection Wizard appears as shown below:

The screenshot shows a wizard window titled "External Data Source to SharePoint". The main heading is "Select the external data source" with a sub-instruction: "Specify the data source details which contains the details to create list items". The "Data source" dropdown is set to "Microsoft SQL Server (SQL Client)". The "Server name" field is empty. Under "Log on to the server", "Use Windows Authentication" is selected. Under "Connect to a database", there is a dropdown for "Select or enter a database name:" and a green refresh button. At the bottom are "Back", "Next", "Finish", and "Cancel" buttons.

2. Specify the URL of the SharePoint site and authentication details in [Destination SharePoint location](#)
3. Specify [External Data source](#) details.
4. Specify [List Details](#) to add/publish items.

5. In [Data Source summary](#) you can edit the query statement to read data from Data Source.
6. [File Contents](#) will display the content to be imported if the selected data source is a XLSX, CSV or a HTML file.
7. Specify [Column Mapping](#) conditions.
8. In [Configure Connection startup](#) edit mode, the connection name cannot be altered.
9. Click **Finish** button to save the connection settings, or click **Back** button to go to the previous step.

SharePoint to External Data Source

[Create a Connection](#)

[Edit a Connection](#)

Create a Connection

Step 1 : [Source SharePoint Location](#)

Step 2 : [External Data Source](#)

Step 3 : [Column Mapping](#)

Step 4 : [Configure Connection Startup](#)

Source SharePoint location

To specify a SharePoint URL of a site, from which you wish to integrate data to an external data source, perform the steps given below:

1. The Source SharePoint location step appears as shown below:

The screenshot shows a Windows-style dialog box titled "SharePoint to External Data Source". The main heading is "Select source SharePoint location" with a sub-instruction: "Specify the URL of a SharePoint list to create/update records in external data source". A green checkmark icon is in the top right corner. The "URL:" field contains "http://vm-sp2010-2". Below this is a "SharePoint User Credentials" section with a dropdown for "Authentication type" set to "Windows Authentication". Underneath, it says "Use the following credential to connect to SharePoint:" followed by "User Name:" with a dropdown showing "spserver\user" and a "..." button. Below that, the email "(johndoe@contoso.com, contoso\johndoe)" is displayed. The "Password:" field is masked with asterisks. The "Source List:" section has a dropdown showing "testlistrunnow" and a refresh icon. At the bottom, there are four buttons: "Back", "Next", "Finish", and "Cancel".

- Specify a valid SharePoint URL and authentication details in the given fields. On clicking the refresh button, External Data Connector will load all the lists from the specified SharePoint site. Select a desired list and proceed.

The screenshot shows a dialog box titled "SharePoint to External Data Source" with the subtitle "Select source SharePoint location". Below the subtitle is the instruction "Specify the URL of a SharePoint list to create/update records in external data source".

The "URL:" field contains the text "http://vm-sp2010-2".

The "SharePoint User Credentials:" section includes:

- "Authentication type:" set to "Windows Authentication".
- "Use the following credential to connect to SharePoint:" section with:
 - "User Name:" set to "spserver\user".
 - "Password:" field containing "*****".

The "Source List:" section has a dropdown menu showing "Announcements". A green refresh icon (a circular arrow) is highlighted with an orange square border.

At the bottom of the dialog are four buttons: "Back", "Next", "Finish", and "Cancel".

3. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below :

- a. **Specify the Authentication Type**

- Windows Authentication
- Forms Authentication
- Office 365 Cloud based identity
- Federated Authentication

- b. Specify the user credentials

Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: \,UserName@DomainName, UserName and its corresponding password.

External Data Connector will initiate Windows authentication or Forms authentication depending on configuration in the destination SharePoint site. Click Next button to proceed.

External Data Connector will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet / Credential Manager for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created.

Click ... button to create new user profile. [Click here](#) to view the details about Profile Manager dialog.

Select Federated Identity in Authentication Type combo to connect to a SharePoint site (SharePoint On-premise or SharePoint Online) using federated identity configured using ADFS. Also, select this option to connect to Office 365 SharePoint Online configured using federated identity provider.

To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., [johndoe@vyapin.onmicrosoft.com](#)).

SharePoint to External Data Source

Select source SharePoint location

Specify the URL of a SharePoint list to create/update records in external data source

URL:

SharePoint User Credentials:

Authentication type:

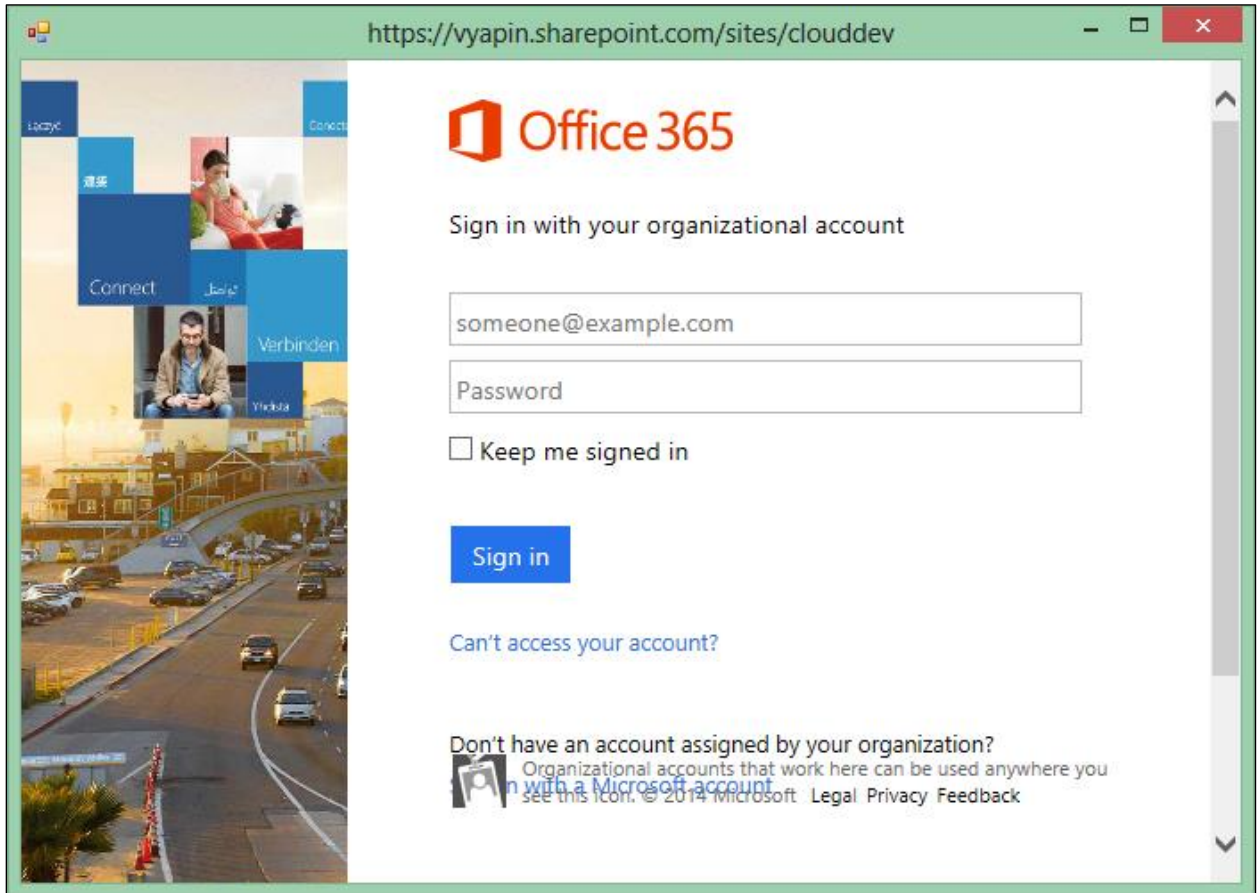
Use the following credential to connect to SharePoint:

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

Password:

Source List:

Upon clicking Next button to proceed, you will be prompted for credential (username and password) as shown below:



Provide ID and Password in the respective textboxes and click **Sign in** button to proceed.

External Data Source

To specify an External Data Source, which you wish to integrate with a SharePoint site, perform the steps given below:

1. The **External Data Source** step appears as shown below:

SharePoint to External Data Source

Select the external data source
Specify the data source in which the records has to be added

Data source: Microsoft SQL Server (SQL Client)

Server name:

Log on to the server

Use Windows Authentication

Use Server Authentication

User Name: ...

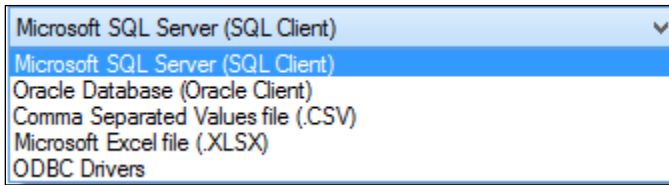
Password:

Connect to a database

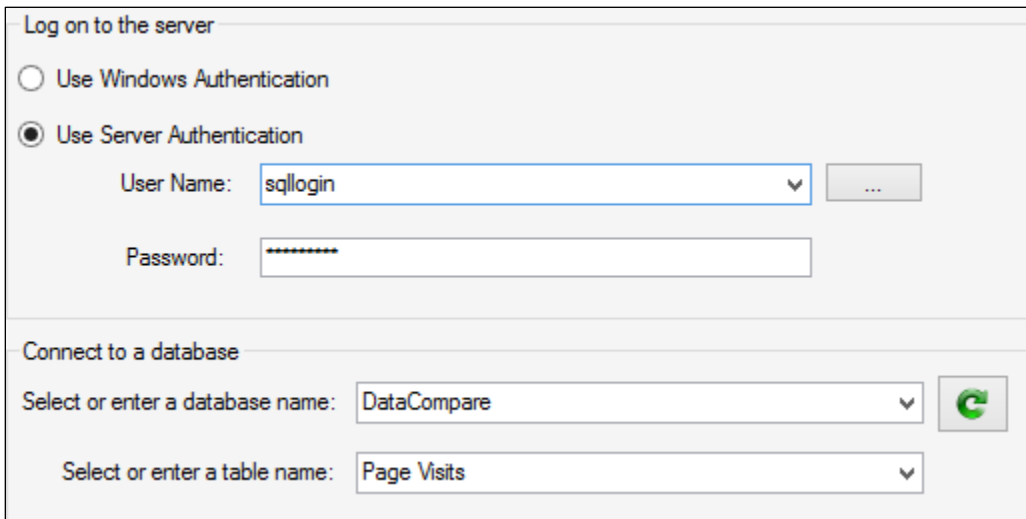
Select or enter a database name:

Select or enter a table name:

2. Select a data source from the list of available data sources in the dropdown:



3. The login and other details will be displayed according to data source selected.
4. If the selected data source is a database, specify the login and other database details like shown below:

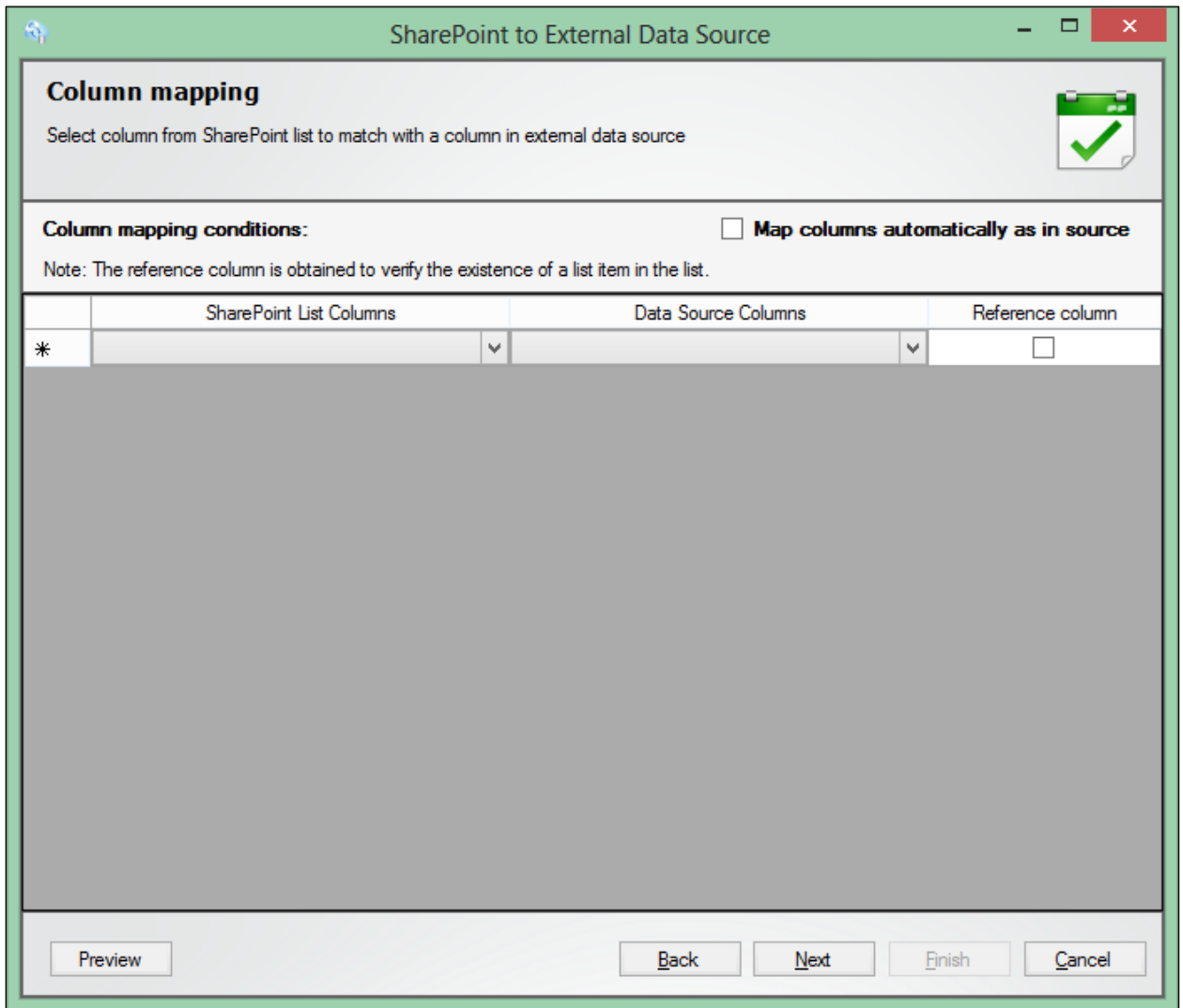
A screenshot of a configuration form with a light gray background. The form is divided into two sections. The first section is titled "Log on to the server" and contains two radio buttons: "Use Windows Authentication" (unselected) and "Use Server Authentication" (selected). Below the radio buttons are two input fields: "User Name:" with a dropdown menu showing "sqllogin" and a small "..." button to its right, and "Password:" with a text box containing seven asterisks. The second section is titled "Connect to a database" and contains two input fields: "Select or enter a database name:" with a dropdown menu showing "DataCompare" and a small green "C" icon to its right, and "Select or enter a table name:" with a dropdown menu showing "Page Visits".

5. If the selected data source is a file like XLSX, CSV etc, specify the location of a file. The location can also be from a network shared drive.

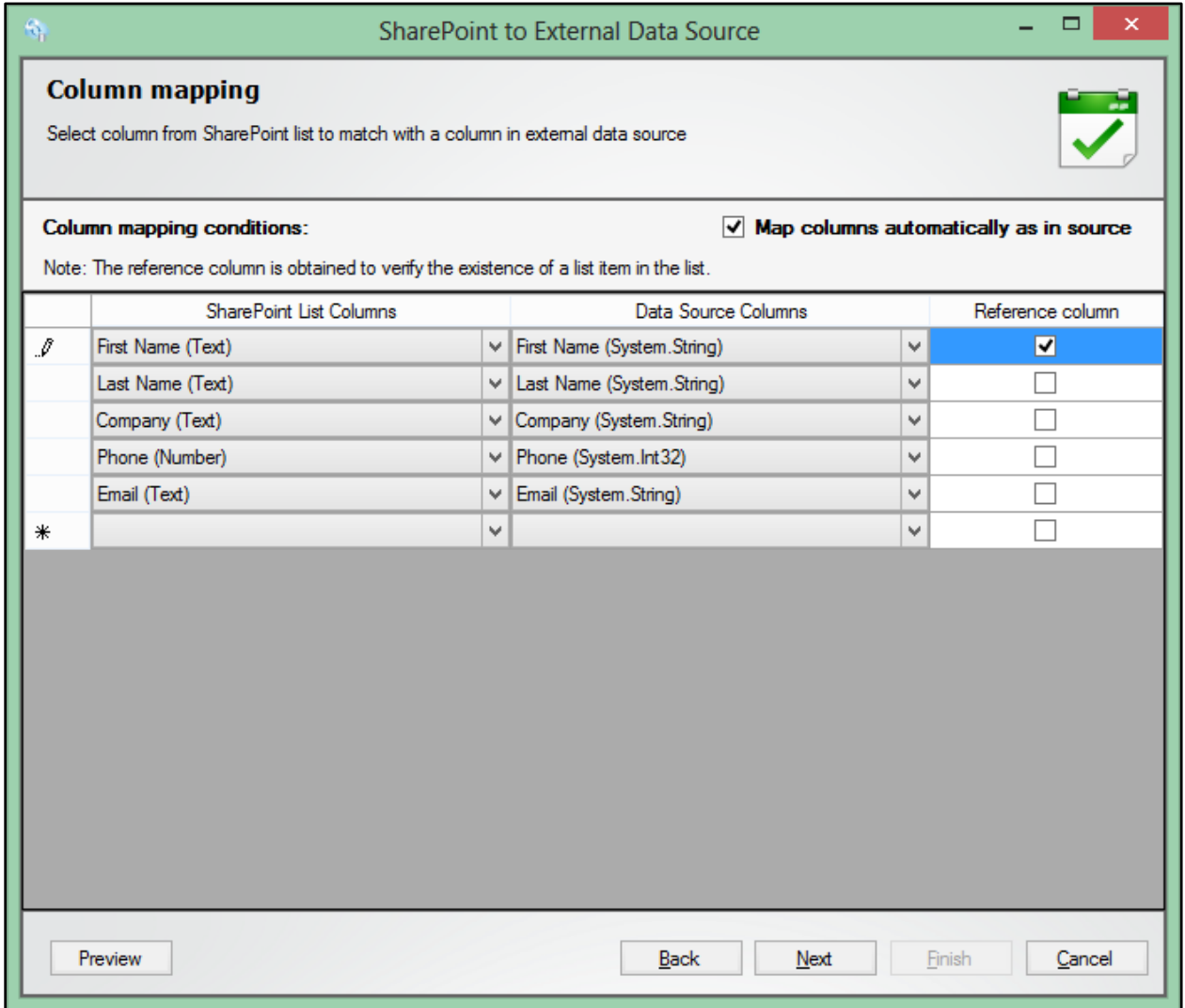
Column Mapping

External Data Connector allows you to map metadata properties between data source and a SharePoint list.

1. **Column Mapping** step will appear as shown below:



- External Data Connector can automatically map columns for you if needed. Select **Map columns automatically as in source** to automate mapping. Column mapping will be done based on the column name.



- Specify at-least one reference column, to proceed the operation. External Data Connector will use this column value to find the records to be added or deleted from data source.
- On clicking the **Preview** button, External Data Connector shows the list of records to be added, deleted and modified in the data source.

The image shows a software window titled "Summary" with a close button in the top right corner. Below the title bar, the text "Records Summary" is displayed, followed by the description "Shows the summary of records which are to be added/modified/deleted from data source". A note below states: "Note: This shows the current status of the records. This may vary on subsequent scheduled runs".

There are three tabs: "Records to be added" (which is selected), "Records to be modified", and "Records to be deleted". Below the tabs is a table with the following data:

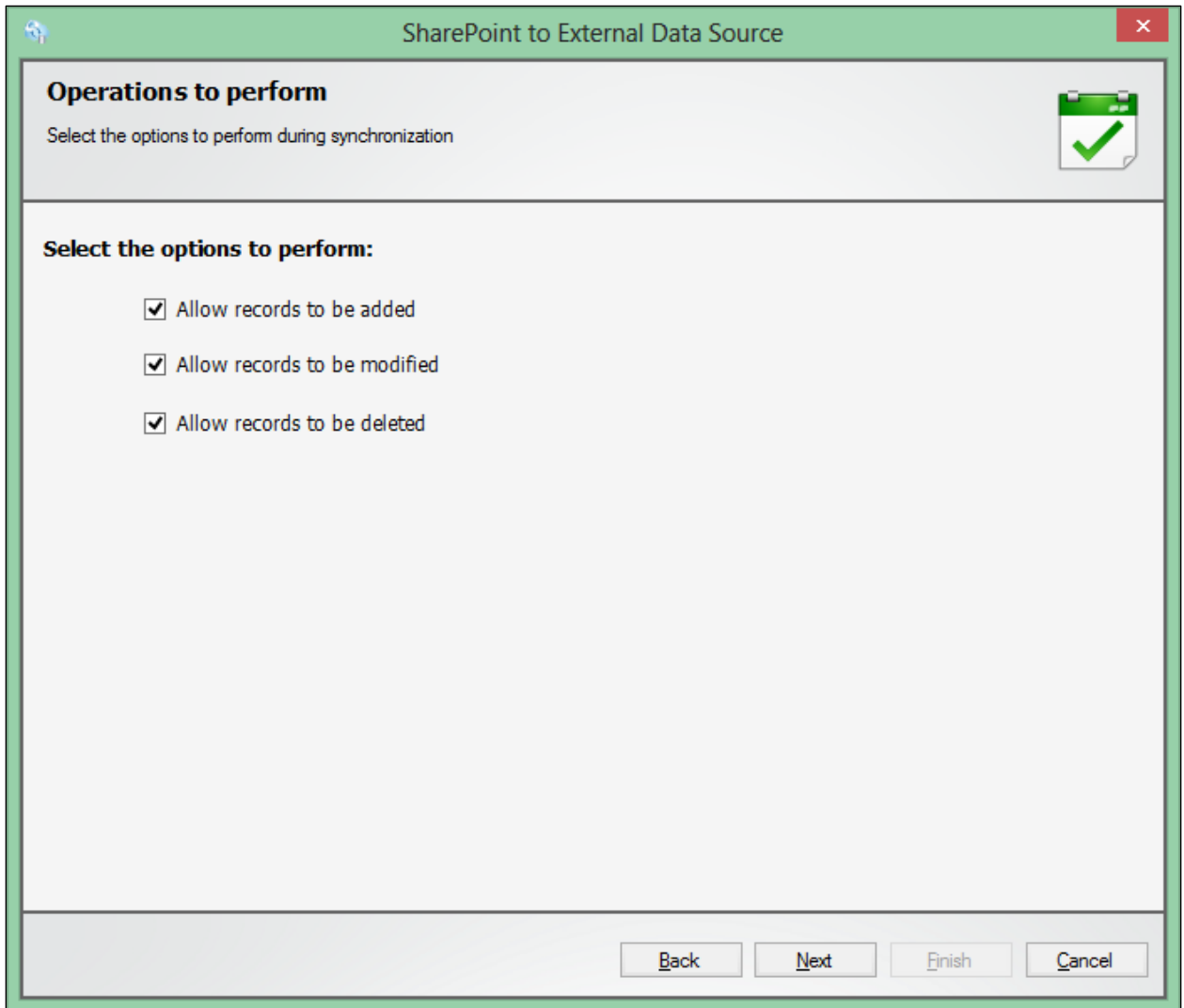
First Name	Last Name	Company	Phone	Email	datetime	choice	multichoi
Bruce	Wayne	ABC Inc.	546,546,546	john@abc.com			

The table has a scrollbar at the bottom, and a "Close" button is located in the bottom right corner of the window.

Operations to perform

Using this window, you can disable certain options like Add / Update / Delete on moving records from SharePoint to External Data Source.

1. **Operations to perform** step will appear as shown below:



2. Select the options which you want to perform or unselect the options which you don't want to, and then click **Next**.

Configure Connection Startup

To specify the connection name and schedule settings for the External Data Connector connection, perform the steps given below

1. **Configure Connection startup** step will appear as shown below:

The screenshot shows a dialog box titled "SharePoint to External Data Source" with a close button in the top right corner. The main heading is "Configure Connection startup" with a sub-instruction: "Enter a unique name for the connection and specify trigger settings." There is a database icon with a blue arrow pointing right. The form contains the following fields and options:

- Connection Name:** revexp
- Description:** revexp desc
- Trigger Options:**
 - Run now
 - Schedule
- Connect to Data Source as:**
 - User Profile:** (empty)
 - Destination:** (empty)
 - Source:** (empty)
- Schedule Settings:**
 - Schedule:** Daily
 - Start Time:** 03:14 PM
 - Schedule Daily:** Every 1 day(s)

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

2. Enter a unique connection name in **Connection Name** textbox.
3. Select a Trigger Option from one of the following options given below:
 - **Run now** - to run the connection immediately after clicking Finish button
 - **Schedule** - To create a Windows scheduled task. External Data Connector will create a schedule connection in the Windows Scheduled Tasks with the given settings.

Edit Connection

Edit connection is similar to creating a connection, except that a few settings cannot be altered as stated below.

1. The External Data Connector Connection Wizard appears as shown below:

SharePoint to External Data Source

Select source SharePoint location

Specify the URL of a SharePoint list to create/update records in external data source

URL:

SharePoint User Credentials:

Authentication type:

Use the following credential to connect to SharePoint:

User Name: ...

(johndoe@contoso.com, contoso\johndoe)

Password:

Source List:

2. Specify the URL of the SharePoint site and authentication details in [Source SharePoint location](#).
3. Specify [External Data source](#) details.

4. Specify [Column Mapping](#) conditions.
5. In [Configure Connection startup](#) edit mode, the connection name cannot be altered.
6. Click **Finish** button to save the connection settings, or click Back button to go to the previous step.

Apply External metadata to SharePoint Library

[Create a Connection](#)

[Edit a Connection](#)

Create a Connection

Step 1 : [External Data Source](#)

Step 2 : [Destination SharePoint Location](#)

Step 3 : [Data source summary](#)

Step 4 : [File Contents](#)

Step 5 : [Column Mapping](#)

Step 6 : [Create new columns](#)

Step 7 : [Configure Connection Startup](#)

External Data Source

To specify an External Data Source, from which you wish to integrate with a SharePoint site, perform the steps given below:

1. The **External Data Source** step appears as shown below:

External Data Source to SharePoint

Select the external data source
Specify the data source details which contains the details to create list items

Data source: Microsoft SQL Server (SQL Client) ▼

Server name:

Log on to the server

Use Windows Authentication

Use Server Authentication

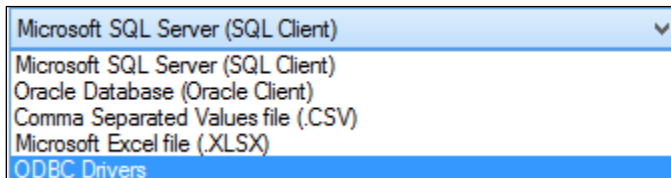
User Name: ▼ ...

Password:

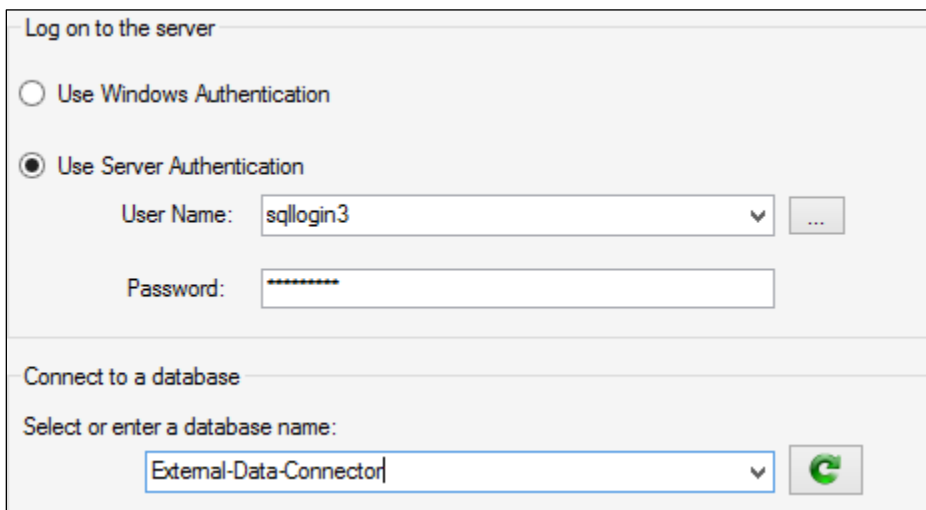
Connect to a database

Select or enter a database name: ▼

2. Select a data source from the list of available data sources in the dropdown:



3. The login and other details will be displayed according to data source selected.
4. If the selected data source is a database, specify the login and other database details like shown below:

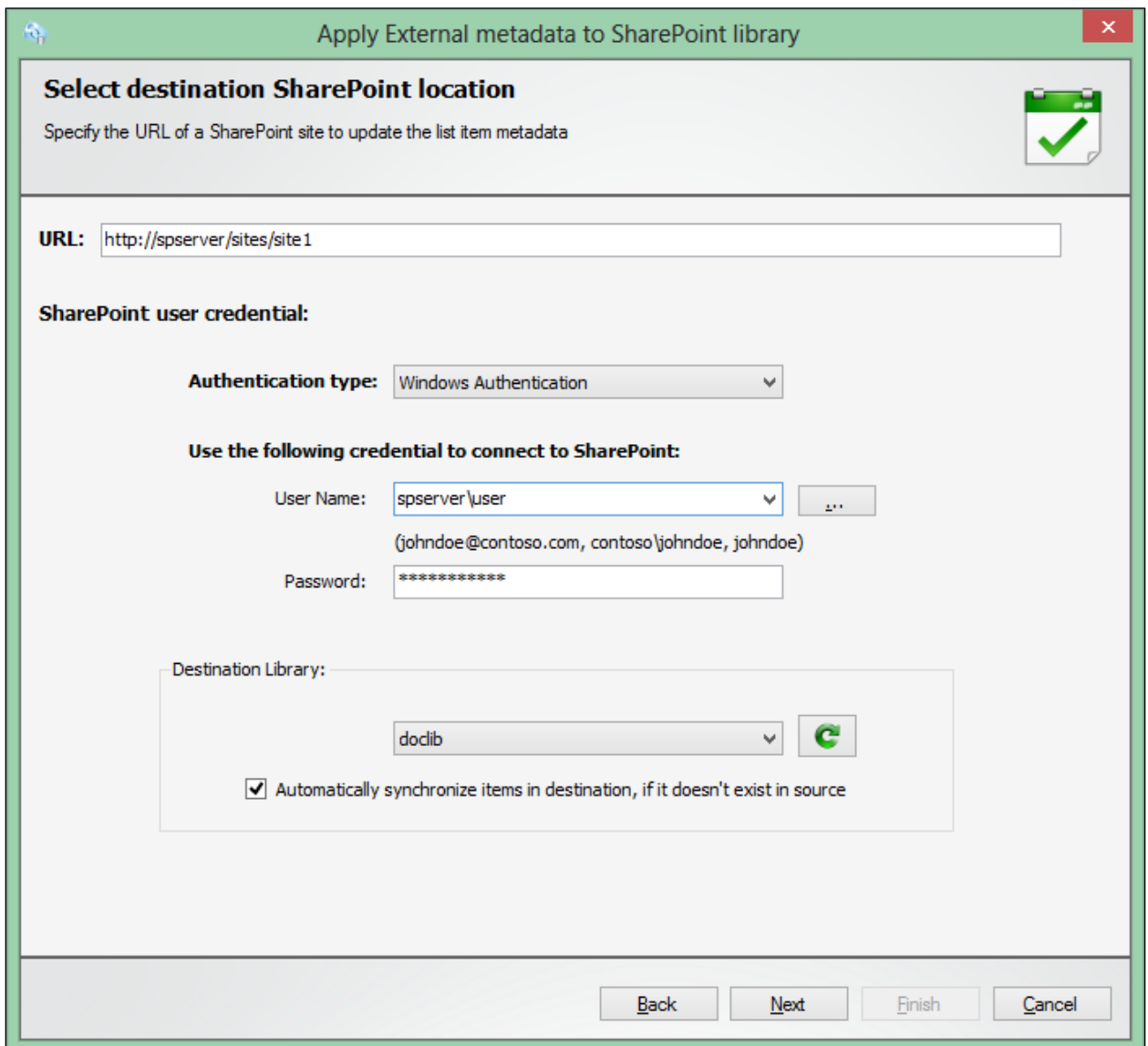
A screenshot of a "Log on to the server" dialog box. The dialog has a title bar and two sections. The first section, "Log on to the server", contains two radio buttons: "Use Windows Authentication" (unselected) and "Use Server Authentication" (selected). Below the "Use Server Authentication" radio button are two input fields: "User Name:" with a dropdown menu showing "sqllogin3" and a browse button "...", and "Password:" with a text box containing seven asterisks. The second section, "Connect to a database", contains a label "Select or enter a database name:" and a dropdown menu showing "External-Data-Connector" and a green refresh button.

5. If the selected data source is a file like XLSX, CSV etc, specify the location of a file. The location can also be from a network shared drive.

Destination SharePoint location

To specify a SharePoint URL of a site, in which you wish to integrate data from an external data source, perform the steps given below:

1. The **Destination SharePoint Location** step appears as shown below:



The screenshot shows a dialog box titled "Apply External metadata to SharePoint library" with a close button (X) in the top right corner. The main heading is "Select destination SharePoint location" and the instruction below it is "Specify the URL of a SharePoint site to update the list item metadata". A green checkmark icon is in the top right of the main area.

URL:

SharePoint user credential:

Authentication type:

Use the following credential to connect to SharePoint:

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

Password:

Destination Library:

Automatically synchronize items in destination, if it doesn't exist in source

Buttons at the bottom:

2. Specify a valid SharePoint URL in the URL textbox. On clicking the **Refresh** button, External Data Connector will load all the lists from the specified SharePoint site, if the site URL and authentication is valid.
3. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below:
 - a. **Specify the Authentication Type**
 - Windows Authentication
 - Forms Authentication
 - Office 365 Cloud based identity
 - Federated Authentication
 - b. Specify the user credentials

Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: \,UserName@DomainName, UserName and its corresponding password. External Data Connector will initiate Windows authentication or Forms authentication depending on configuration in the destination SharePoint site. Click Next button to proceed.

External Data Connector will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet / Credential Manager for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created.

Click ... button to create new user profile. [Click here](#) to view the details about Profile Manager dialog.

Select Federated Identity in Authentication Type combo to connect to a SharePoint site (SharePoint On-premise or SharePoint Online) using federated identity configured using ADFS. Also, select this option to connect to Office 365 SharePoint Online configured using federated identity provider.

To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.onmicrosoft.com).

Apply External metadata to SharePoint library

Select destination SharePoint location

Specify the URL of a SharePoint site to update the list item metadata

URL:

SharePoint user credential:

Authentication type:

Use the following credential to connect to SharePoint:

User Name:

Password:

Destination Library:

Automatically synchronize items in destination, if it doesn't exist in source

Data Source summary

If the selected data source is a database, data source summary step will be displayed which shows the **Connection string** to use with the Database and the **SELECT** statement to query against the Database.

1. The **External Data Source Summary** step appears as shown below:

External Data Source to SharePoint

External Data Source summary
Shows the summary of external data source to be imported

External Data Provider: Microsoft SQL Server (SQL Client)

Connection String:
Data Source=rd28; Initial Catalog=External-Data-Connector; User ID=sqllogin3;

Query Statement:

Manual

Using Query Builder

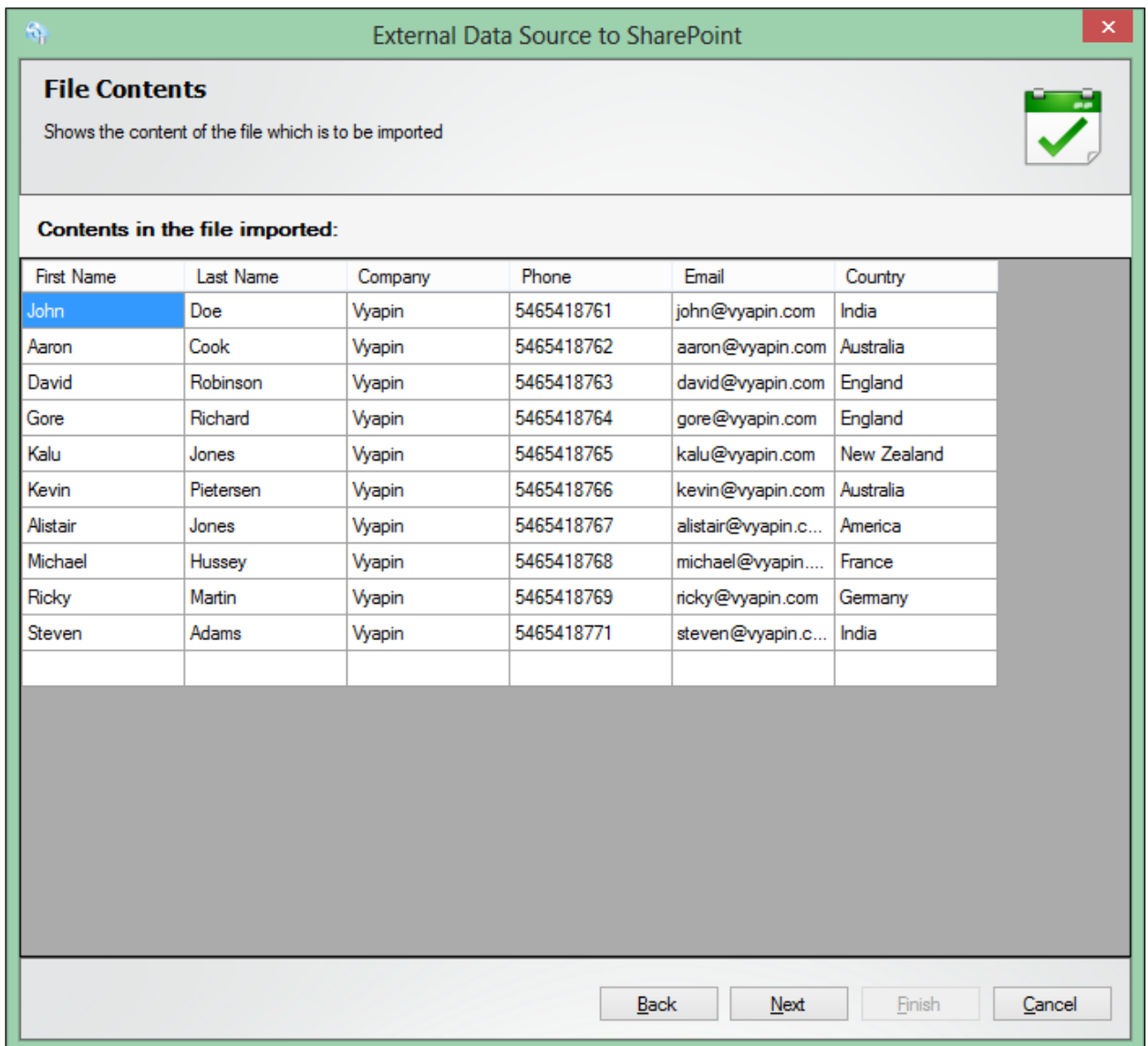
Back Next Finish Cancel

2. Use the **Manual** query textbox, if the **SELECT** statement to filter the data source is known.

File Contents

If the selected data source is a XLSX or a CSV file, the **File Contents** step will appear, which show the contents of the file to be imported.

1. **File Contents** step will appear as shown below:



External Data Source to SharePoint

File Contents
Shows the content of the file which is to be imported

Contents in the file imported:

First Name	Last Name	Company	Phone	Email	Country
John	Doe	Vyapin	5465418761	john@vyapin.com	India
Aaron	Cook	Vyapin	5465418762	aaron@vyapin.com	Australia
David	Robinson	Vyapin	5465418763	david@vyapin.com	England
Gore	Richard	Vyapin	5465418764	gore@vyapin.com	England
Kalu	Jones	Vyapin	5465418765	kalu@vyapin.com	New Zealand
Kevin	Pietersen	Vyapin	5465418766	kevin@vyapin.com	Australia
Alistair	Jones	Vyapin	5465418767	alistair@vyapin.c...	America
Michael	Hussey	Vyapin	5465418768	michael@vyapin....	France
Ricky	Martin	Vyapin	5465418769	ricky@vyapin.com	Germany
Steven	Adams	Vyapin	5465418771	steven@vyapin.c...	India

Back Next Finish Cancel

Column Mapping

External Data Connector allows you to map metadata properties between data source and a SharePoint list

1. **Column Mapping** step will appear as shown below:

Apply External metadata to SharePoint library

Column mapping
Select column from SharePoint library to match with a column in external data source

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

	SharePoint Library Columns	Data Source Columns	Reference column
*			<input type="checkbox"/>

Back Next Finish Cancel

- External Data Connector can automatically map columns for you if needed. Select **Map columns automatically as in source** to automate mapping. Column mapping will be done based on the column name.

Apply External metadata to SharePoint library

Column mapping
Select column from SharePoint library to match with a column in external data source

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

	SharePoint Library Columns	Data Source Columns	Reference column
✎	Name (File) ▼	Name (nvarchar) ▼	<input checked="" type="checkbox"/>
	yn (Boolean) ▼	yn (nvarchar) ▼	<input type="checkbox"/>
	single (Text) ▼	single (nvarchar) ▼	<input type="checkbox"/>
	multiple (Text) ▼	multiple (nvarchar) ▼	<input type="checkbox"/>
*	▼	▼	<input type="checkbox"/>

- Specify at-least one reference column, to fetch the corresponding document from SharePoint library. External Data Connector will read the reference column value, query them against the list and if the item exists in the list, the metadata of that document will be modified.

Create new columns

To specify the details of the columns to create during integration, perform the steps given below.

1. The **Create new columns** window will appear as shown below.

The screenshot shows a dialog box titled "Apply External metadata to SharePoint library" with a close button (X) in the top right corner. The main heading is "Create new columns (Optional)" with a green checkmark icon. Below the heading is the instruction: "Specify column details if you want to map the the data source columns with new columns in SharePoint library".

Under "Create columns:", there is a checked checkbox labeled "Map columns automatically as in source". Below this is the instruction: "Specify the new column details to create in the SharePoint library. The data source field contains the columns which are not mapped in the previous step."

	SharePoint Library Columns	Field Type	Data Source Columns
▶	multiple	Single line of text	multiple (nvarchar)
	datetime	Date and Time	datetime (datetime)
*			

At the bottom of the dialog box are four buttons: "Back", "Next", "Finish", and "Cancel".

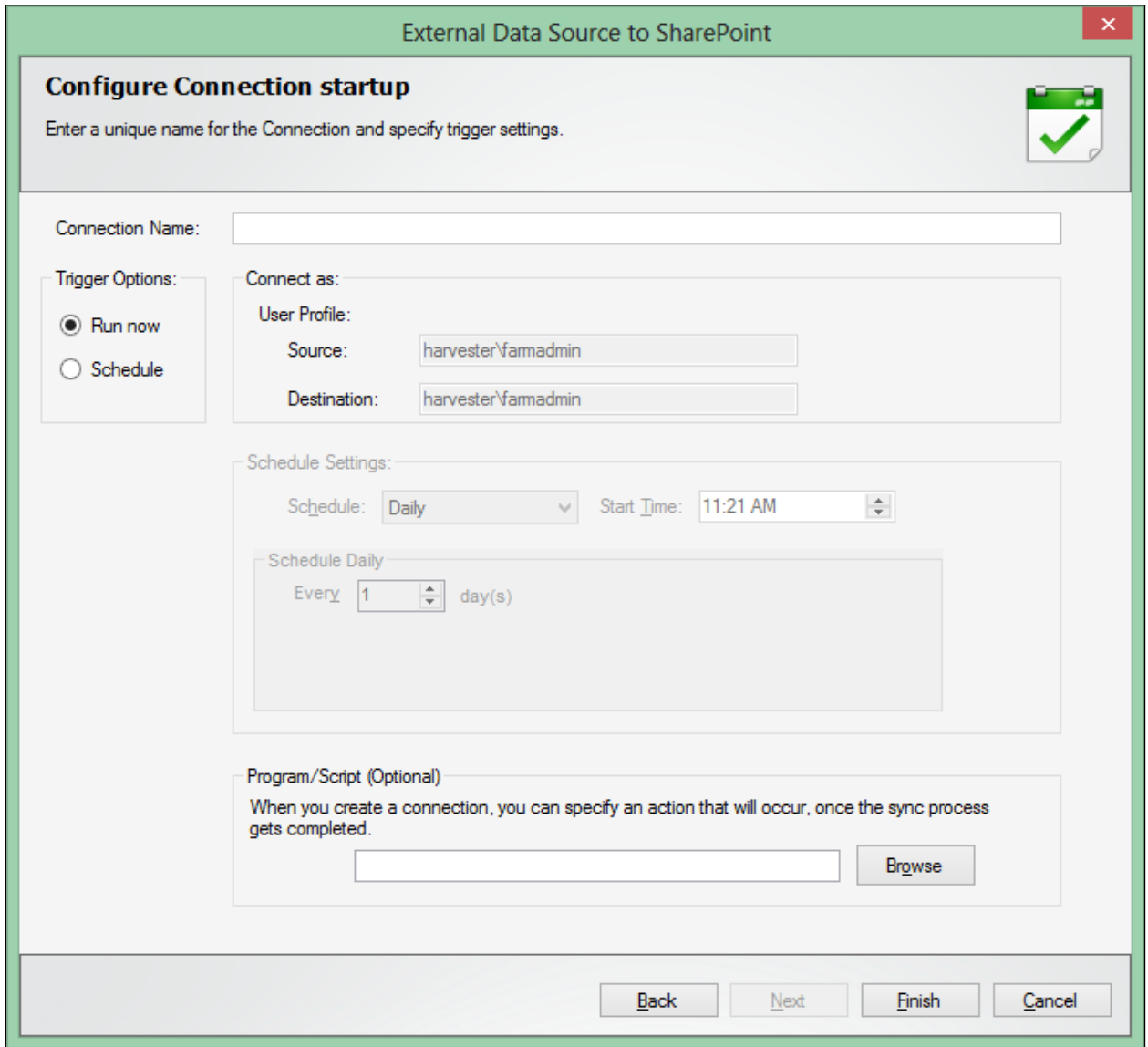
2. Specify the column details like column name and column type to create columns in SharePoint library.
3. Data source field in this step will display the columns which are not mapped in the previous step.

Note: Columns of type single/multiple line of text, Number, Date and time and Yes/No can be created.

Configure Connection Startup

To specify the connection name and trigger settings for the External Data Connector connection, perform the steps given below

1. **Configure Connection startup** step will appear as shown below:



The screenshot shows a dialog box titled "External Data Source to SharePoint" with a close button (X) in the top right corner. The main heading is "Configure Connection startup" with a sub-instruction: "Enter a unique name for the Connection and specify trigger settings." There is a green checkmark icon in the top right of the main area. Below this, there are several sections:

- Connection Name:** A text input field.
- Trigger Options:** Two radio buttons: "Run now" (selected) and "Schedule".
- Connect as:** A section with "User Profile:" and two text input fields: "Source:" (containing "harvester\famadmin") and "Destination:" (containing "harvester\famadmin").
- Schedule Settings:** A section with "Schedule:" (a dropdown menu set to "Daily") and "Start Time:" (a time picker set to "11:21 AM"). Below this is a "Schedule Daily" section with "Every" (a spinner set to "1") and "day(s)".
- Program/Script (Optional):** A section with a text input field and a "Browse" button. The text below reads: "When you create a connection, you can specify an action that will occur, once the sync process gets completed."

At the bottom of the dialog box, there are four buttons: "Back", "Next", "Finish", and "Cancel".

2. Enter a unique connection name in **Connection Name** textbox.
3. Select a Connection Option from one of the following options given below:
 - Run now - to run the connection immediately after clicking Finish button
 - Schedule - To create a Windows scheduled task. External Data Connector will create a schedule connection in the Windows Scheduled Tasks with the given settings.

4. The Connection settings for a **Schedule** connection will appear as shown below:

External Data Source to SharePoint

Configure Connection startup

Enter a unique name for the Connection and specify trigger settings.

Connection Name:

Trigger Options:

Run now

Schedule

Connect as:

User Profile:

Source:

Destination:

Schedule Settings:

Schedule: Start Time:

Schedule Daily

Every day(s)

Program/Script (Optional)

When you create a connection, you can specify an action that will occur, once the sync process gets completed.

5. You can also specify location to an executable or a script to execute once the sync gets completed, if needed.

Program/Script (Optional)

When you create a connection, you can specify an action that will occur, once the sync process gets completed.

Edit Connection

Edit connection is similar to creating a connection, except that a few settings cannot be altered as stated below.

1. The External Data Connector Connection Wizard appears as shown below:

External Data Source to SharePoint

Select the external data source
Specify the data source details which contains the details to create list items

Data source: Microsoft SQL Server (SQL Client) ▼

Server name:

Log on to the server

Use Windows Authentication

Use Server Authentication

User Name: ▼ ...

Password:

Connect to a database

Select or enter a database name: ▼

Back Next Finish Cancel

2. Specify [External Data source](#) details.
3. Specify the URL of the SharePoint site and authentication details in [Destination SharePoint location](#).
4. In [Data Source summary](#) you can edit the query statement to read data from Data Source.
5. [File Contents](#) will display the content to be imported if the selected data source is a XLSX, CSV or a HTML file.
6. Specify [Column Mapping](#) conditions.
7. In [Configure Connection startup](#) edit mode, the connection name cannot be altered.
8. Click **Finish** button to save the connection settings, or click **Back** button to go to the previous step.

Message Folders to SharePoint

[Create a Connection](#)

[Edit a Connection](#)

Create a Connection

Step 1 : [Exchange and Directory Server Details](#)

Step 2 : [Recipient Mailboxes](#)

Step 3 : [Folder Search](#)

Step 4 : [Item Attributes](#)

Step 5 : [Item Search](#)

Step 6 : [Mail Item Search](#)

Step 7 : [Destination SharePoint Location](#)

Step 8: [List Details](#)

Step 9: [Multi List Mapping](#)

Step 10: [Column Mapping](#)

Step 11: [Configure Connection Startup](#)

Exchange and Directory Server details

In this window, you can specify details like Exchange server name, version and credentials to access the Exchange server.

1. Exchange server details step will appear as shown below:

The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button (X) in the top right corner. The main title is "Exchange / Office 365 credentials" and the subtitle is "Specify Exchange server and directory server details like server name, version and credentials to fetch user and mailbox details". There is a mail icon with an upward arrow in the top right corner.

Exchange server type: Exchange On-Premises Exchange Online

Version: Exchange 2010

Exchange Server Name: rd70

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

Domain Controller Name: rd60

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

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

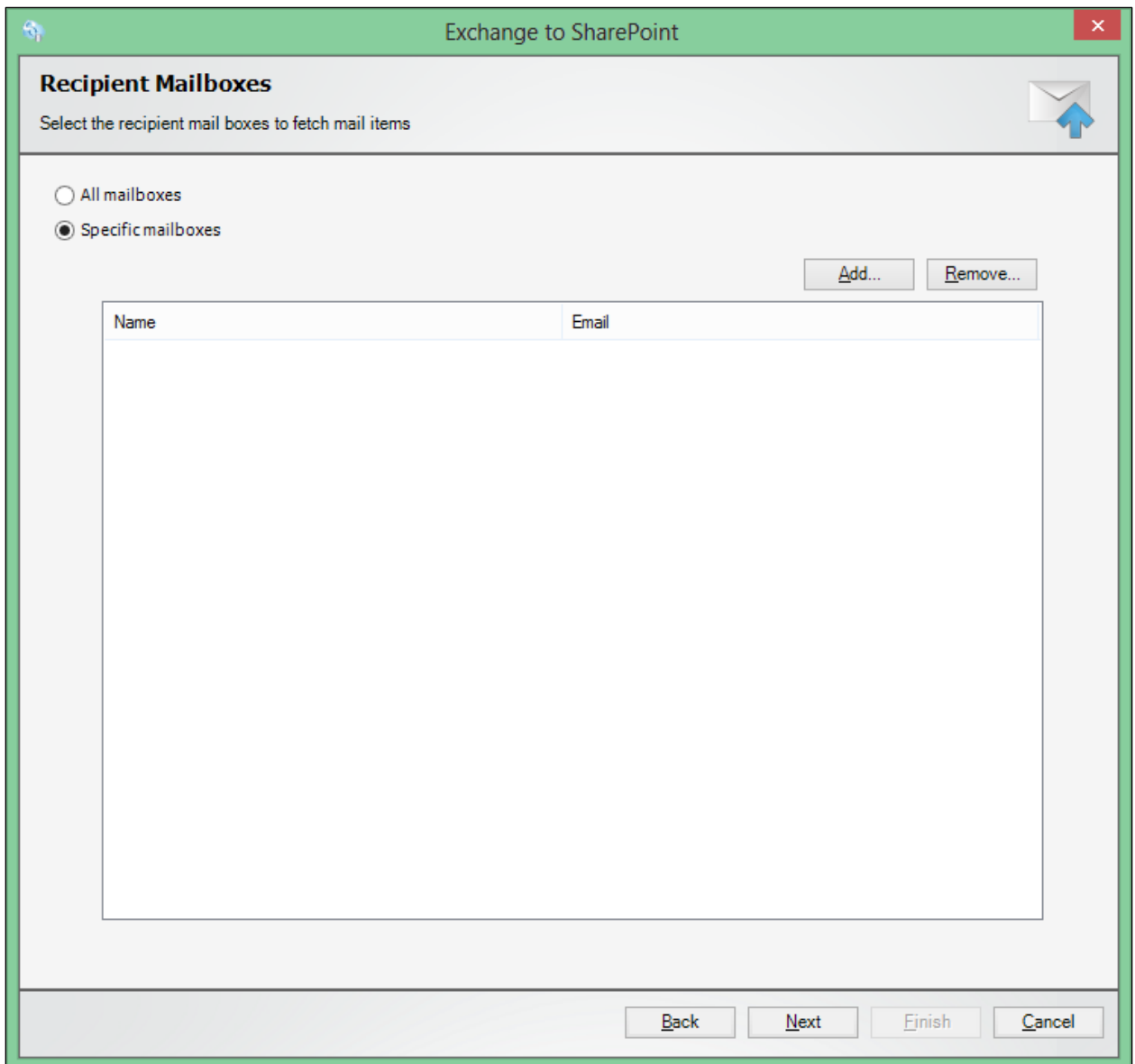
2. The user account specified, should have impersonation rights to impersonate mailboxes and to access its mail items. For more details on configuring impersonation for a specified user, read [Configuring impersonation rights](#) to a mailbox user

3. Specify the directory server details like server name and credentials, to fetch the mailboxes corresponding to the specified exchange server.

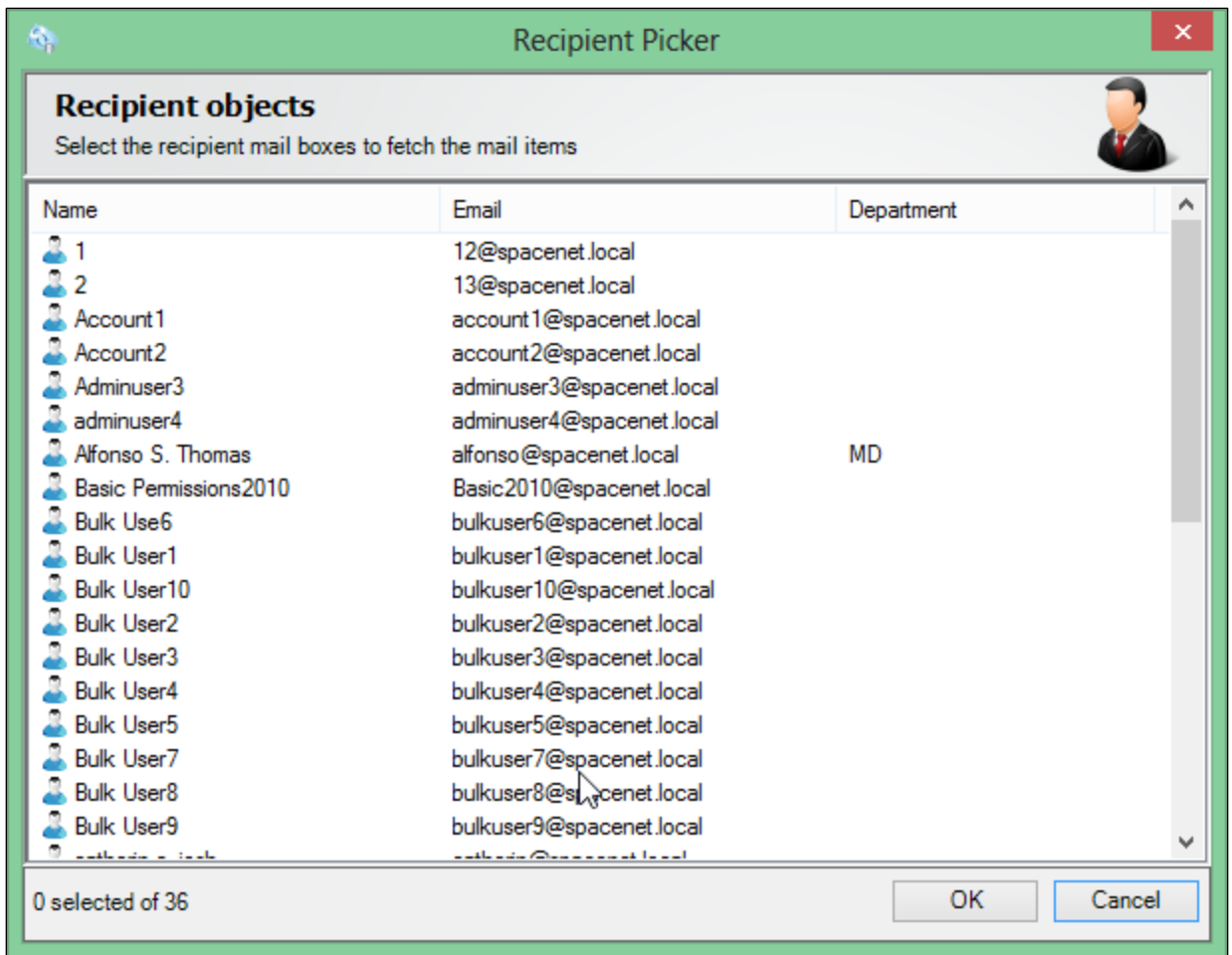
Recipient Mailboxes

From this window, you can select multiple mailboxes to fetch mail items.

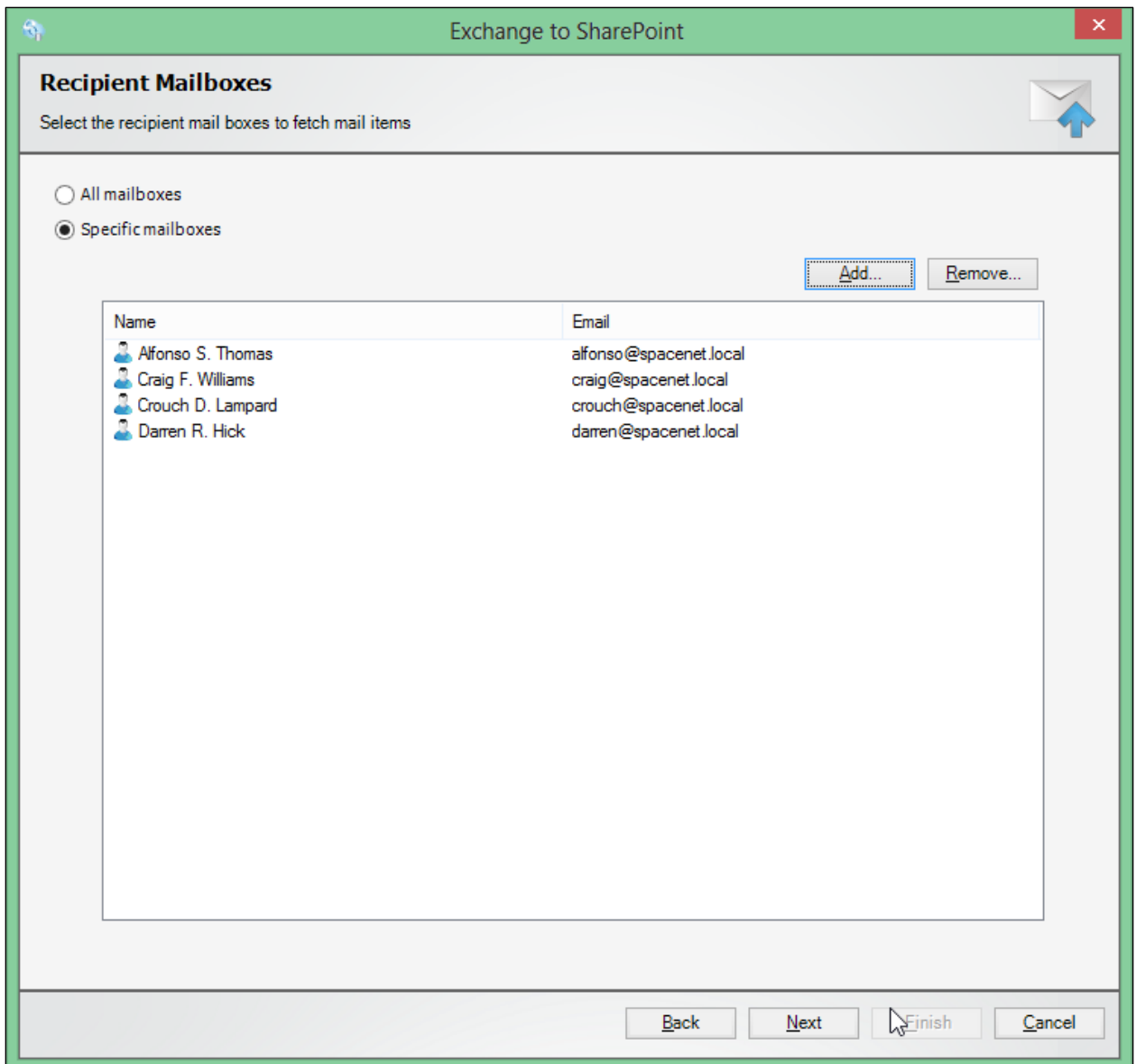
1. **Recipient mailboxes** step will appear as shown below:



2. On clicking **Add** button, a window will appear which contains all the mailboxes in the specified directory server like shown below.



3. From this window, you can select multiple mailboxes to fetch mail items.

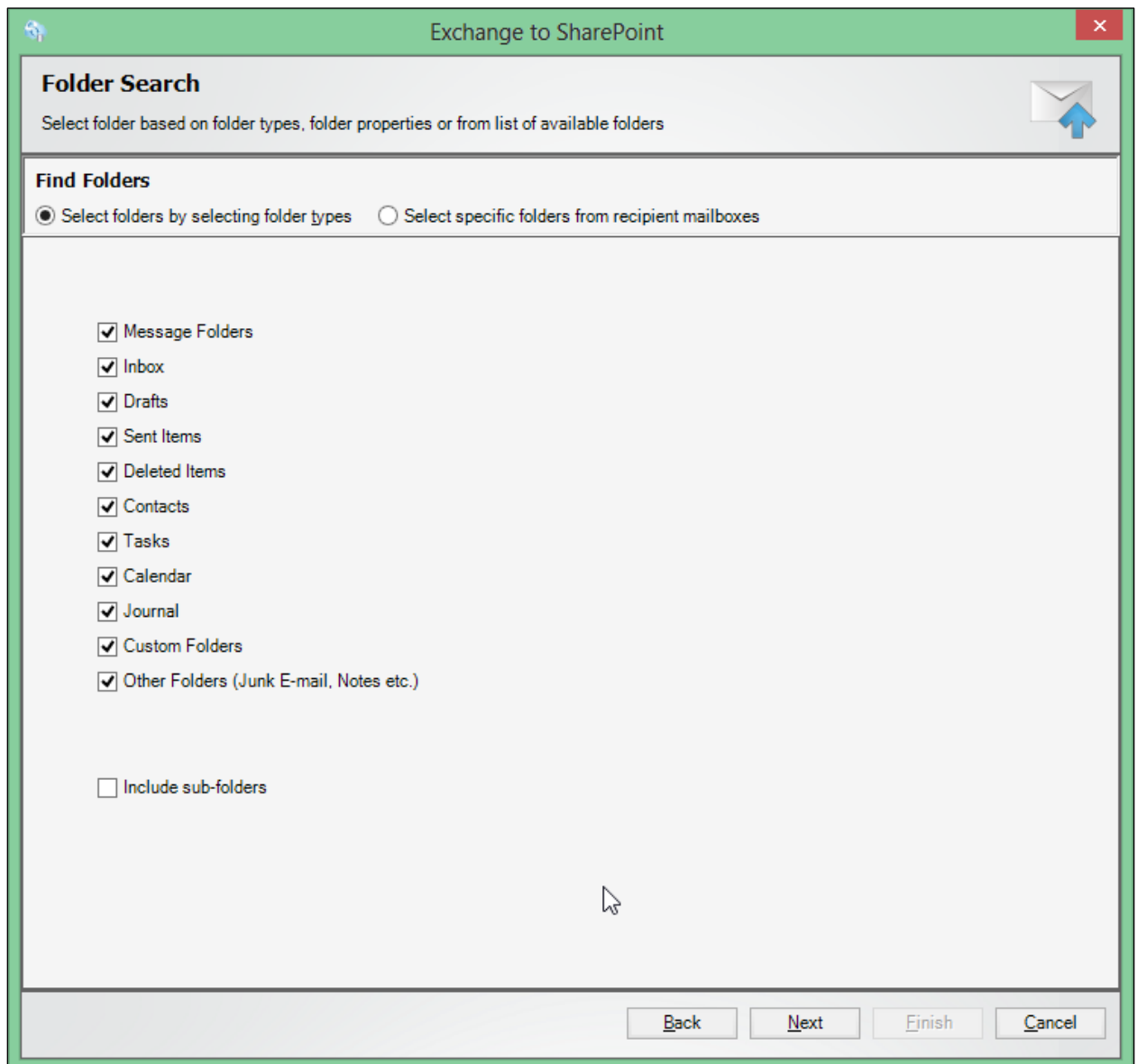


4. On selecting **All Mailboxes** option you can fetch mail items from all the mailboxes.

Folder Search

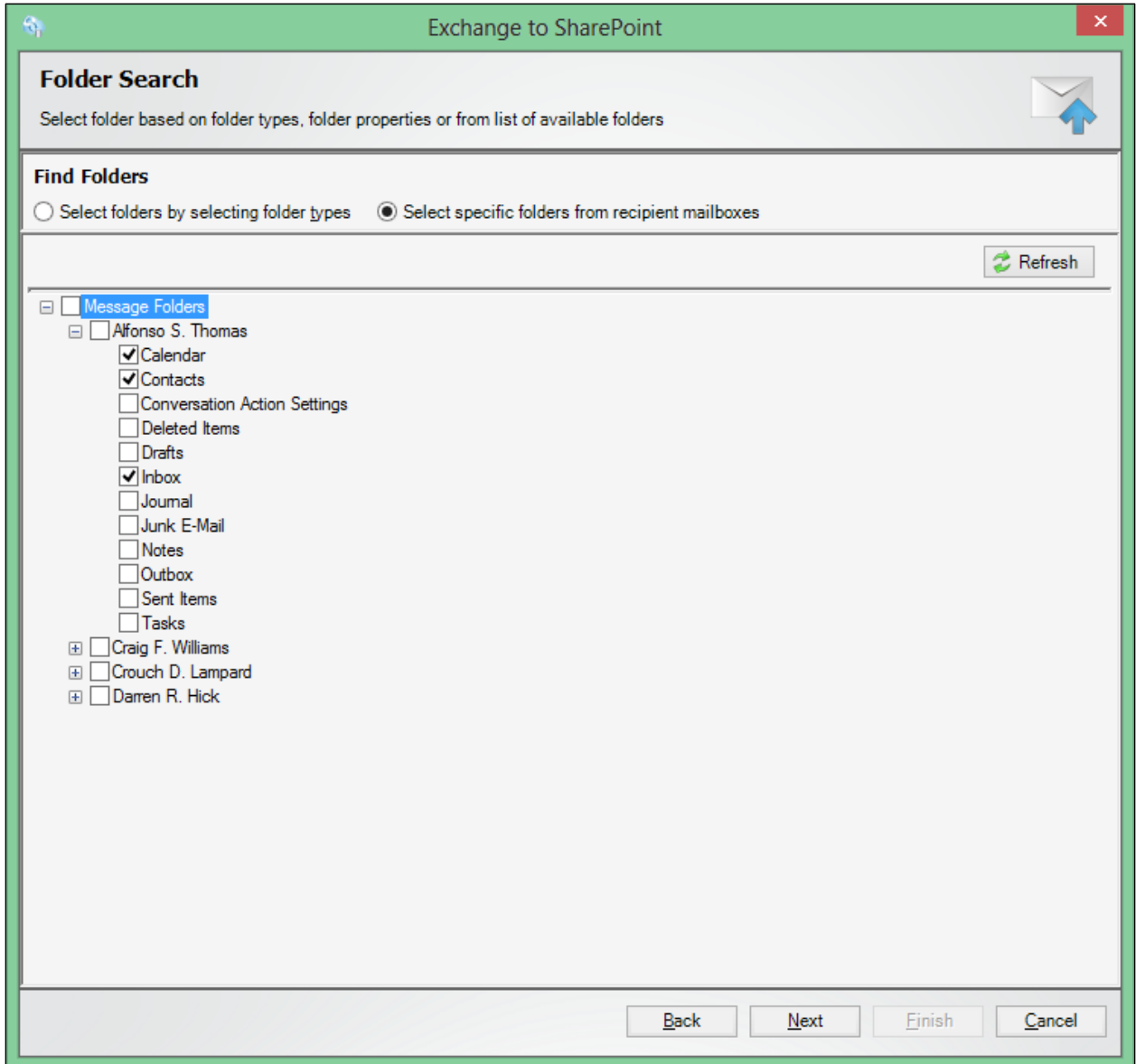
From this window, you can refine folder results by folder types, filter conditions or by selecting from the list of available folders.

1. **Folder Search** step will appear as shown below:



2. The default option to filter folders is based on its folder types. You can select the types of folders to filter from the entire folder collection available in the server

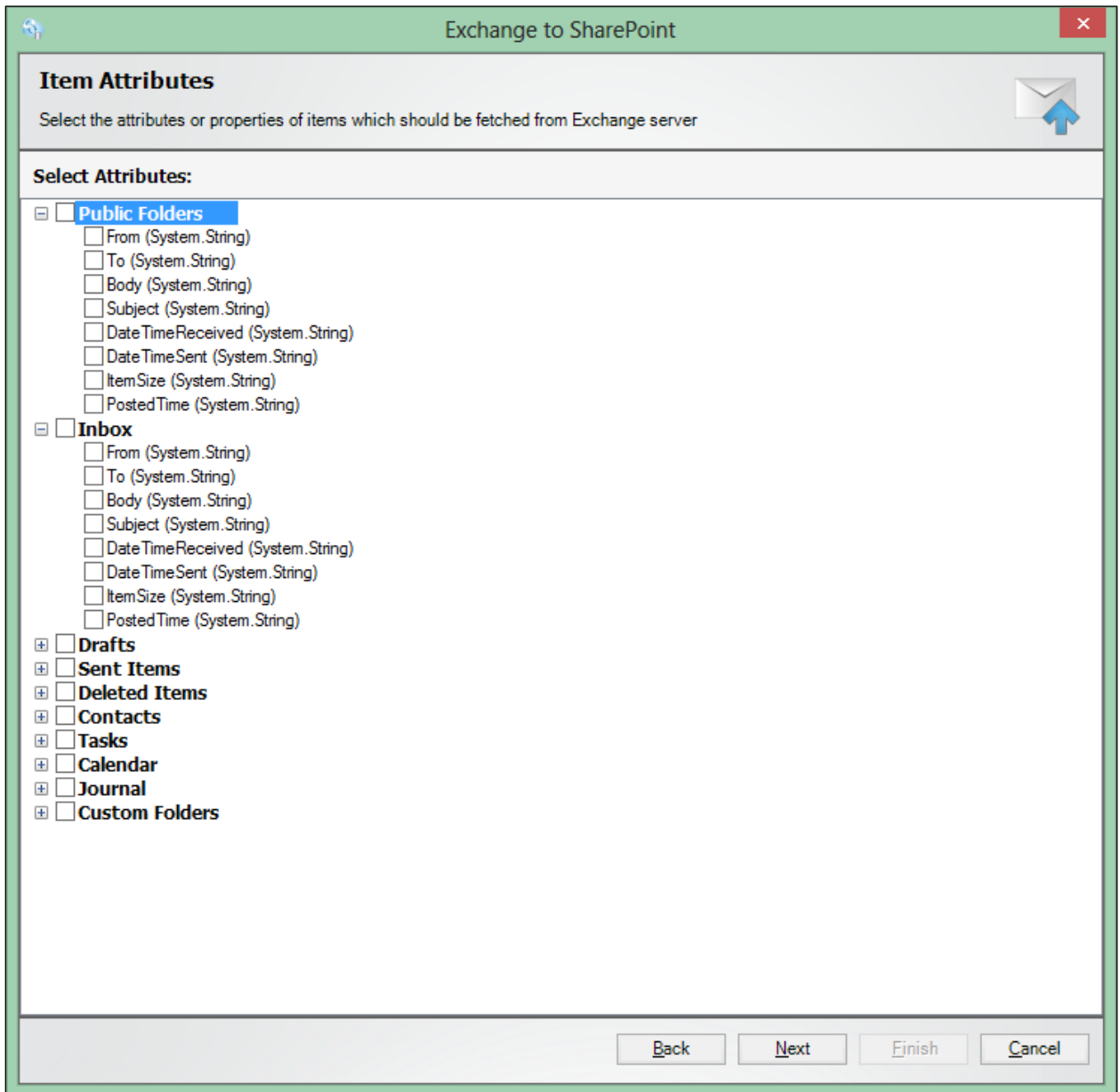
3. You can also select folders from the list of available folders to fetch mail items.



Item Attributes

From this window, the user can select item attributes for all the folder types.

1. **Item Attributes** window will appear as shown below:



2. From this window, the user can select the item attributes to fetch from the Exchange server.
3. Only the selected attributes, will be allowed for mapping in Column Mapping step. If none of the columns are selected, the column mapping will be based on the destination list.

Item Search

Using this window, you can refine the item results by specifying item search conditions and also you can save the specified search conditions as a template.

1. **Item Search** step will appear as shown below:

Exchange to SharePoint

Item Search (Optional)
Specify optional criteria to search mail items. You may load a criteria from a saved search query or specify a new criteria

Find Items **New Search Query** **Saved Search Queries**

Date Range

Field	Condition	Value	Exclude	

Subject / Body

Field	Condition	Value	Exclude	

From / To / Cc

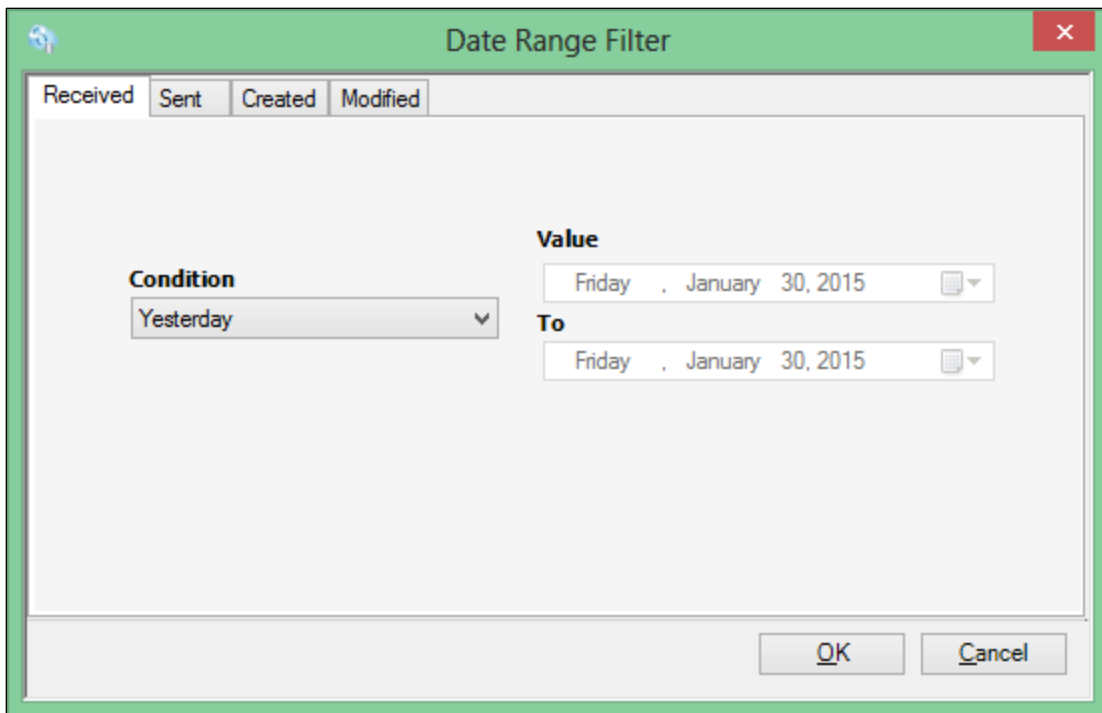
Field	Condition	Value	Exclude	

Headers

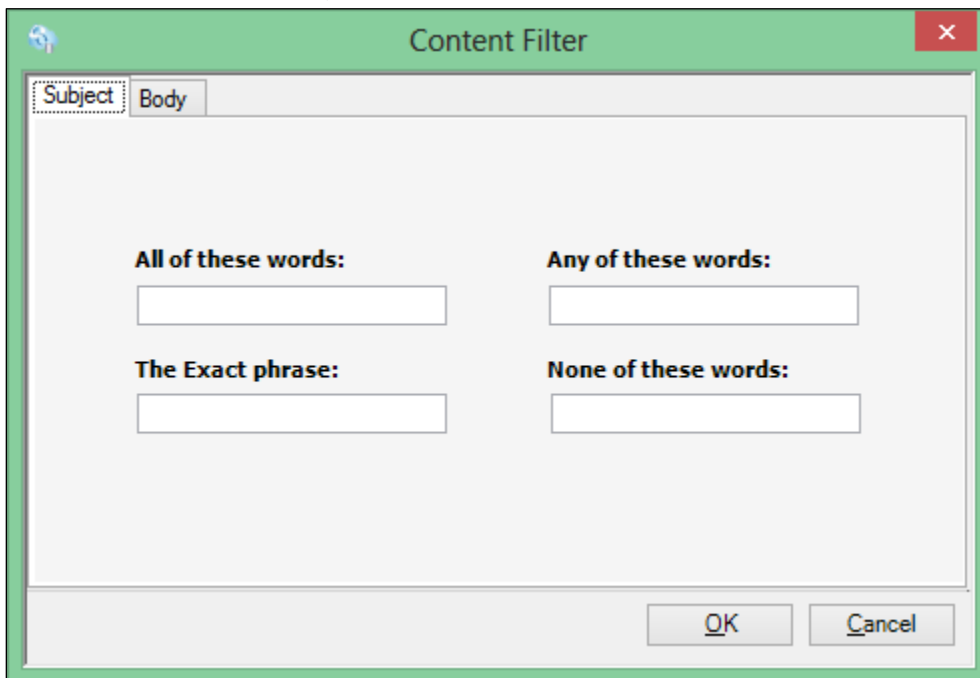
Field	Condition	Value	Exclude	

Bring the items when:
 All of the above conditions are satisfied Any one of the above conditions is satisfied

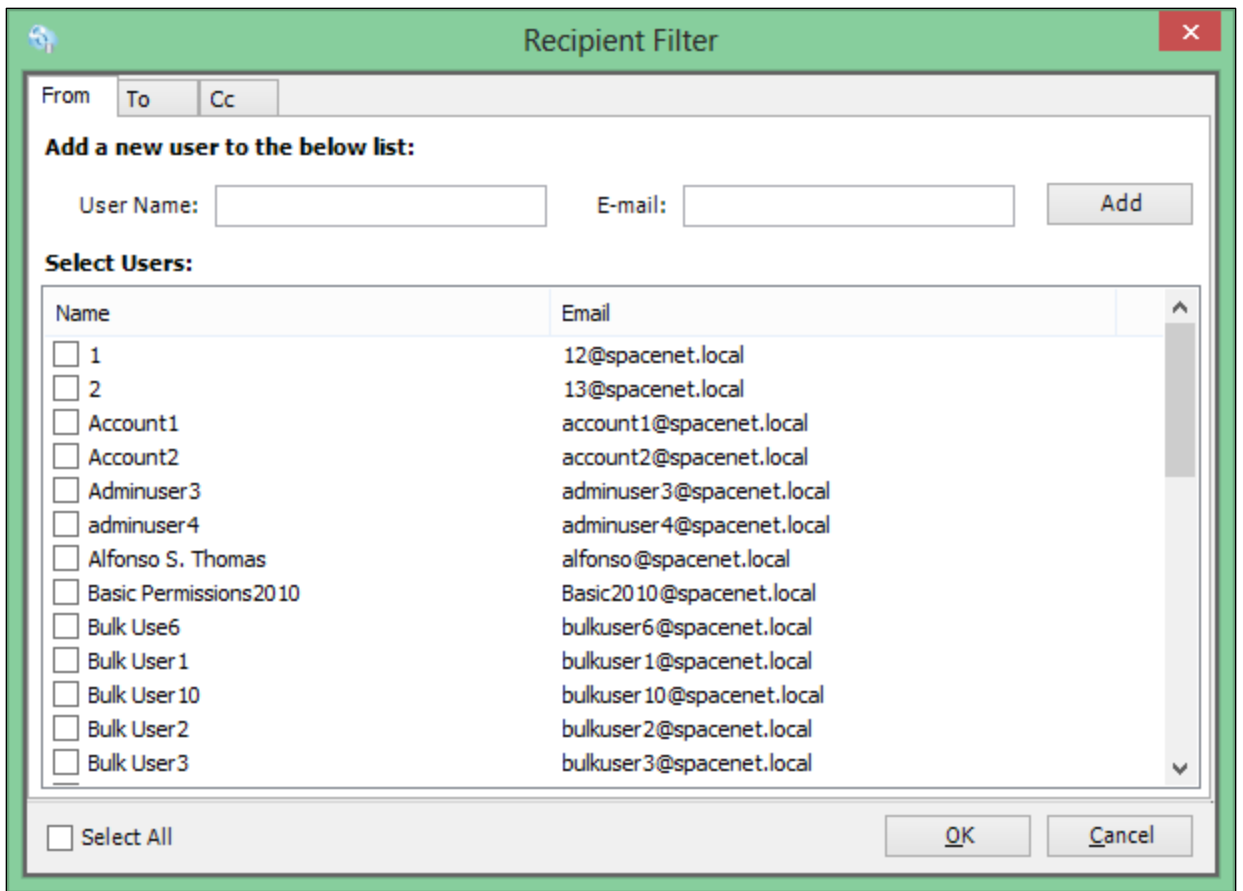
2. Items can be filtered based on its properties. To filter items based on its Received, Sent, Created or Modified time, you can use the **Date Range** button.



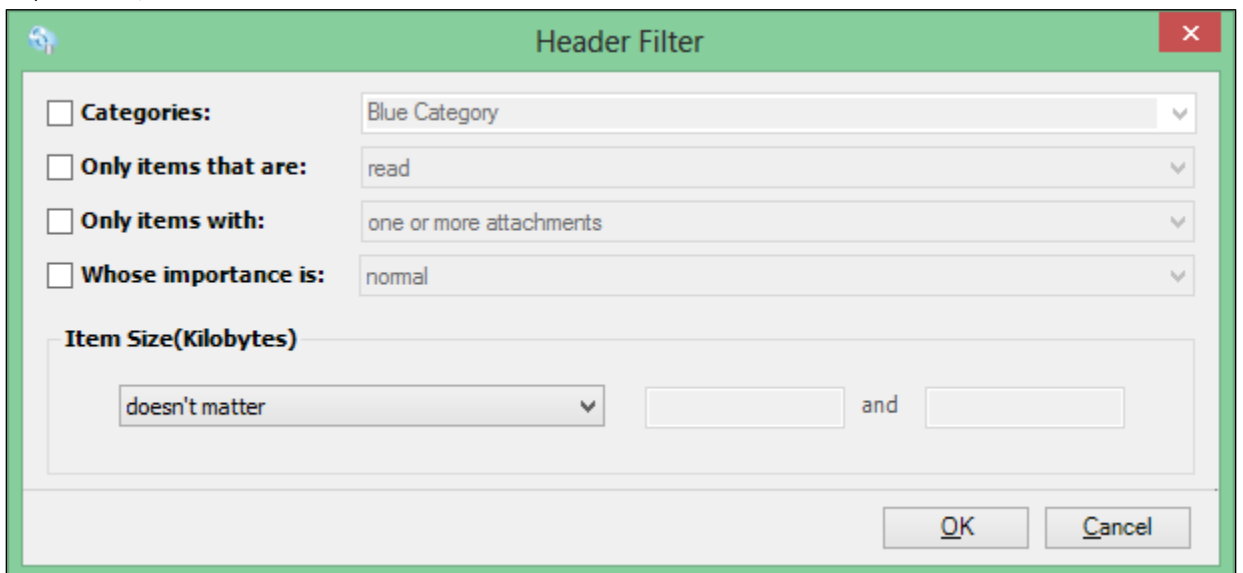
3. To filter items based on Subject or Body, click on the respective button and specify keywords to search for in the text fields provided to filter mail items.



4. To filter items based on the recipients, click on the respective button and select the users to filter mail items corresponding to the selected users.



5. You can also specify search conditions for other properties like categories, read/unread, importance, size and attachments.

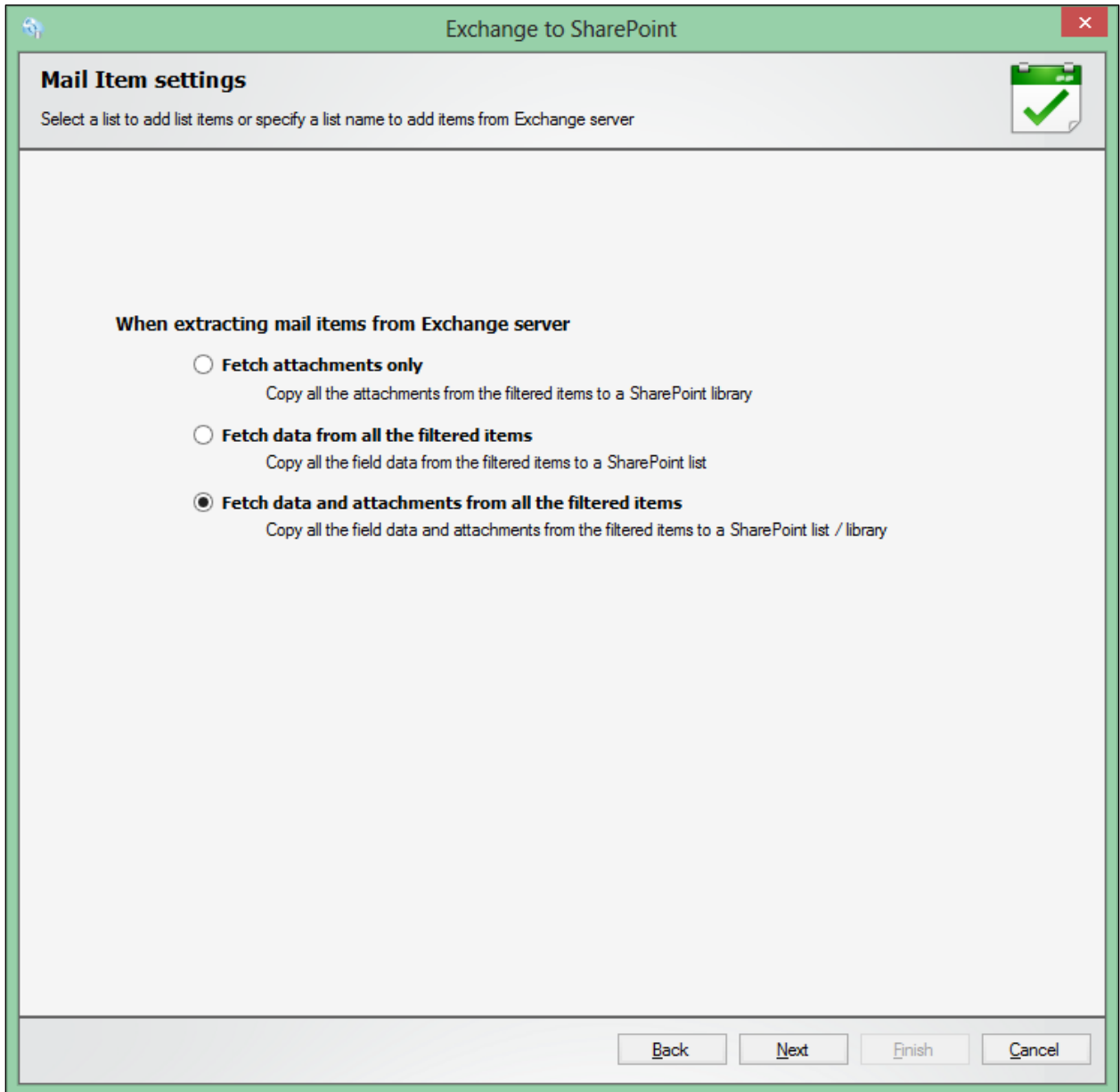


6. If you want to save the search conditions as a search query, you can select the **New Search Query** option and specify a name for the search query by clicking the **Save this Search Query** button. You can also load item search conditions from **Saved Search Queries**.

Mail Item Settings

Using this window, you can specify additional options to bring in mail items from Exchange to SharePoint list.

1. Mail Item Settings step will appear as shown below:



The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Mail Item settings" with a green checkmark icon. Below the heading is the instruction: "Select a list to add list items or specify a list name to add items from Exchange server".

The main content area is titled "When extracting mail items from Exchange server" and contains three radio button options:

- Fetch attachments only**
Copy all the attachments from the filtered items to a SharePoint library
- Fetch data from all the filtered items**
Copy all the field data from the filtered items to a SharePoint list
- Fetch data and attachments from all the filtered items**
Copy all the field data and attachments from the filtered items to a SharePoint list / library

At the bottom of the dialog box, there are four buttons: "Back", "Next", "Finish", and "Cancel".

2. The additional options available in mail item settings are:

- **Fetch Attachments Only** - Allows you to bring all the attachments from the filtered items to a SharePoint library.
- **Fetch data from all the filtered items** - Allows you to bring all the mail item properties to a SharePoint list without attachments.
- **Fetch data and attachments from the filtered items** - Allows you to bring both properties and attachments from all the filtered items to a SharePoint list / library.

Destination SharePoint Location

To specify a SharePoint URL of a site, in which you wish to integrate data from an external data source, perform the steps given below:

1. The Destination SharePoint location step appears as shown below:

The screenshot shows a window titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Select destination SharePoint location" with a sub-instruction: "Specify the URL of a SharePoint site to create list items from Exchange server".

The "URL:" field contains the text "http://vm-sp2013-2".

The "SharePoint user credential" section includes:

- "Authentication type:" dropdown menu set to "Windows Authentication".
- "Use the following credential to connect to SharePoint:" section with a "User Name:" dropdown menu containing "harvester\vmadmin" and a list of suggestions: "(johndoe@contoso.com, contoso\johndoe, johndoe)".
- "Password:" field with masked characters "*****".

The "List Mapping" section has two radio button options:

- Copy the selected folders / folder types to a single SharePoint list
- Copy each folder / folder type to different SharePoint lists

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

2. Specify a valid SharePoint URL in the URL textbox. External Data Connector will load all the lists from the specified SharePoint site, if the site URL and authentication is valid.
3. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below:

- a. Specify the Authentication Type
 - Windows Authentication
 - Forms Authentication
 - Office 365 Cloud based identity
 - Federated Authentication
- b. Specify the user credentials

Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: \,UserName@DomainName, UserName and its corresponding password. External Data Connector will initiate Windows authentication or Forms authentication depending on configuration in the destination SharePoint site. Click Next button to proceed.

External Data Connector will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet / Credential Manager for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created.

Click ... button to create new user profile.

Select Federated Identity in Authentication Type combo to connect to a SharePoint site (SharePoint On-premise or SharePoint Online) using federated identity configured using ADFS. Also, select this option to connect to Office 365 SharePoint Online configured using federated identity provider.

To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.onmicrosoft.com).

Exchange to SharePoint

Select destination SharePoint location

Specify the URL of a SharePoint site to create list items from Exchange server

URL:

SharePoint user credential

Authentication type:

Use the following credential to connect to SharePoint:

User Name:

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

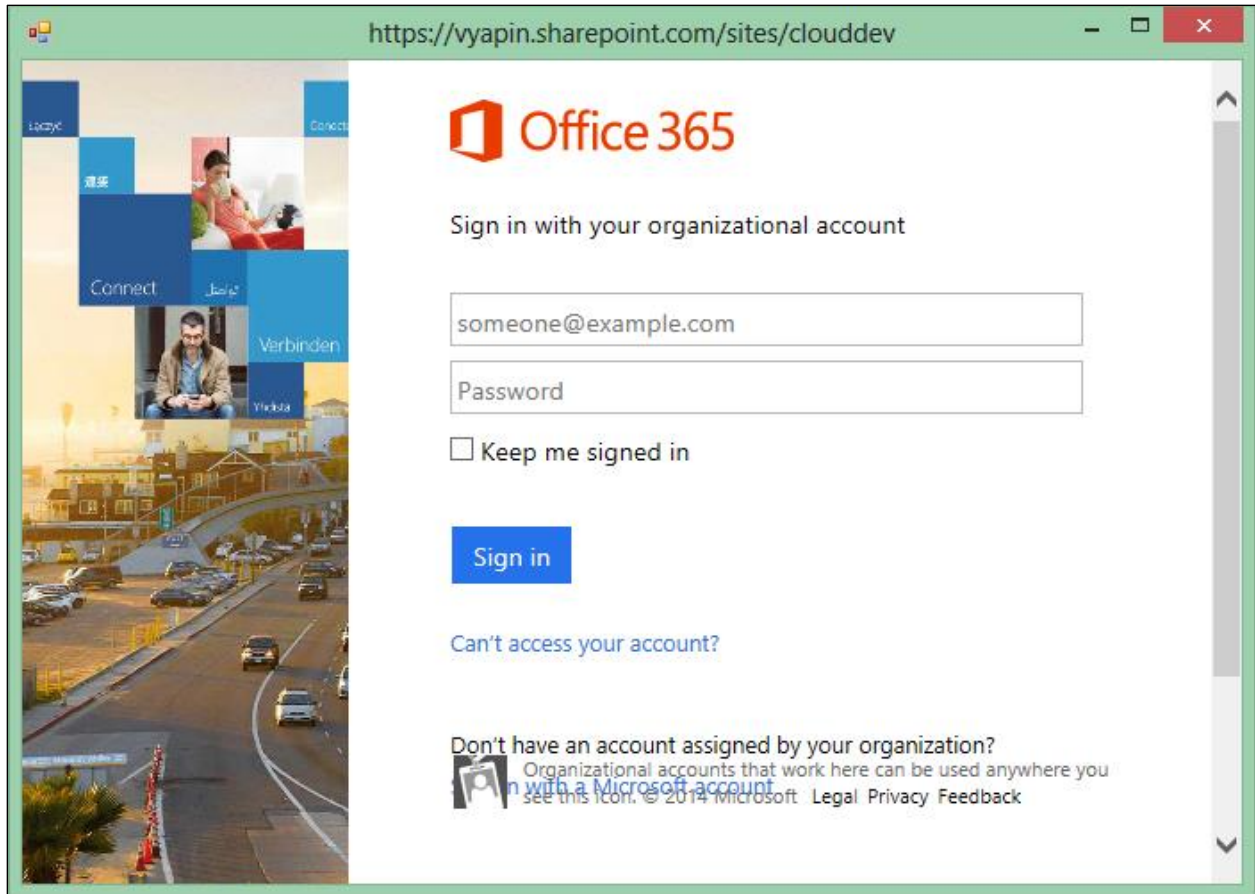
Password:

List Mapping

Copy the selected folders / folder types to a single SharePoint list

Copy each folder / folder type to different SharePoint lists

Upon clicking Next button to proceed, you will be prompted for credential (username and password) as shown below:

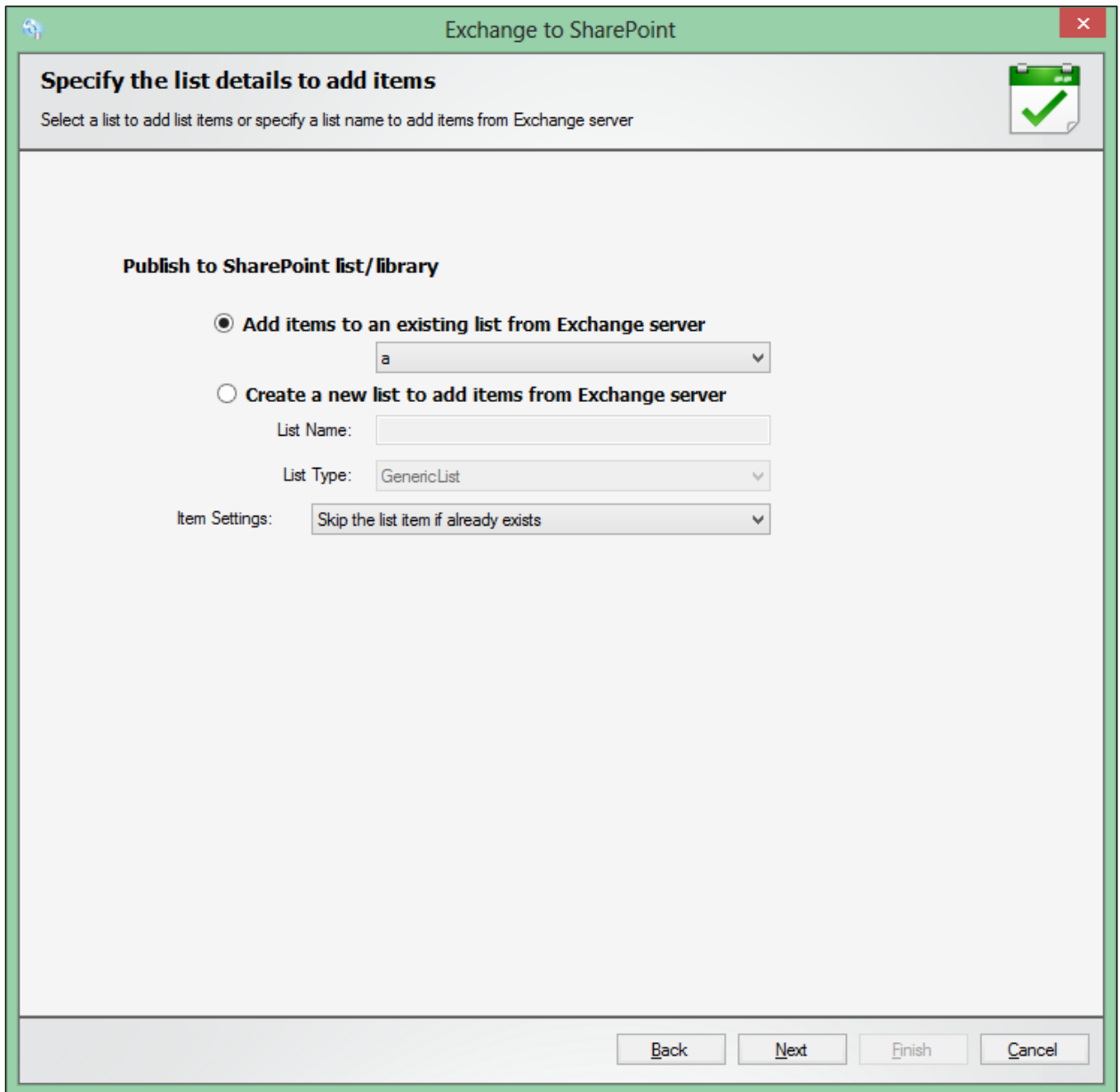


Provide ID and Password in the respective textboxes and click Sign in button to proceed.

List Details

To specify the list to add list items from data source perform the steps given below:

1. The List details step appears as shown below:



The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Specify the list details to add items" and the instruction below it is "Select a list to add list items or specify a list name to add items from Exchange server". A green checkmark icon is in the top right of the main area. The section is titled "Publish to SharePoint list/library". There are two radio button options: "Add items to an existing list from Exchange server" (which is selected) and "Create a new list to add items from Exchange server". Under the selected option, there is a dropdown menu showing "a". Under the unselected option, there are three fields: "List Name:" (empty text box), "List Type:" (dropdown menu showing "GenericList"), and "Item Settings:" (dropdown menu showing "Skip the list item if already exists"). At the bottom of the dialog, there are four buttons: "Back", "Next", "Finish", and "Cancel".

2. Specify the list in which the items has to be added and also specify the action which has to be performed, if the list item already exists in the list.

Publish to SharePoint list/library

Add items to an existing list from Exchange server

a

Create a new list to add items from Exchange server

List Name:

List Type:

Item Settings:

3. You can select between an existing list or create a new list to add the filtered items.

Multi List Mapping

External Data Connector also allows you to map each of the selected folder to a different SharePoint list / library.

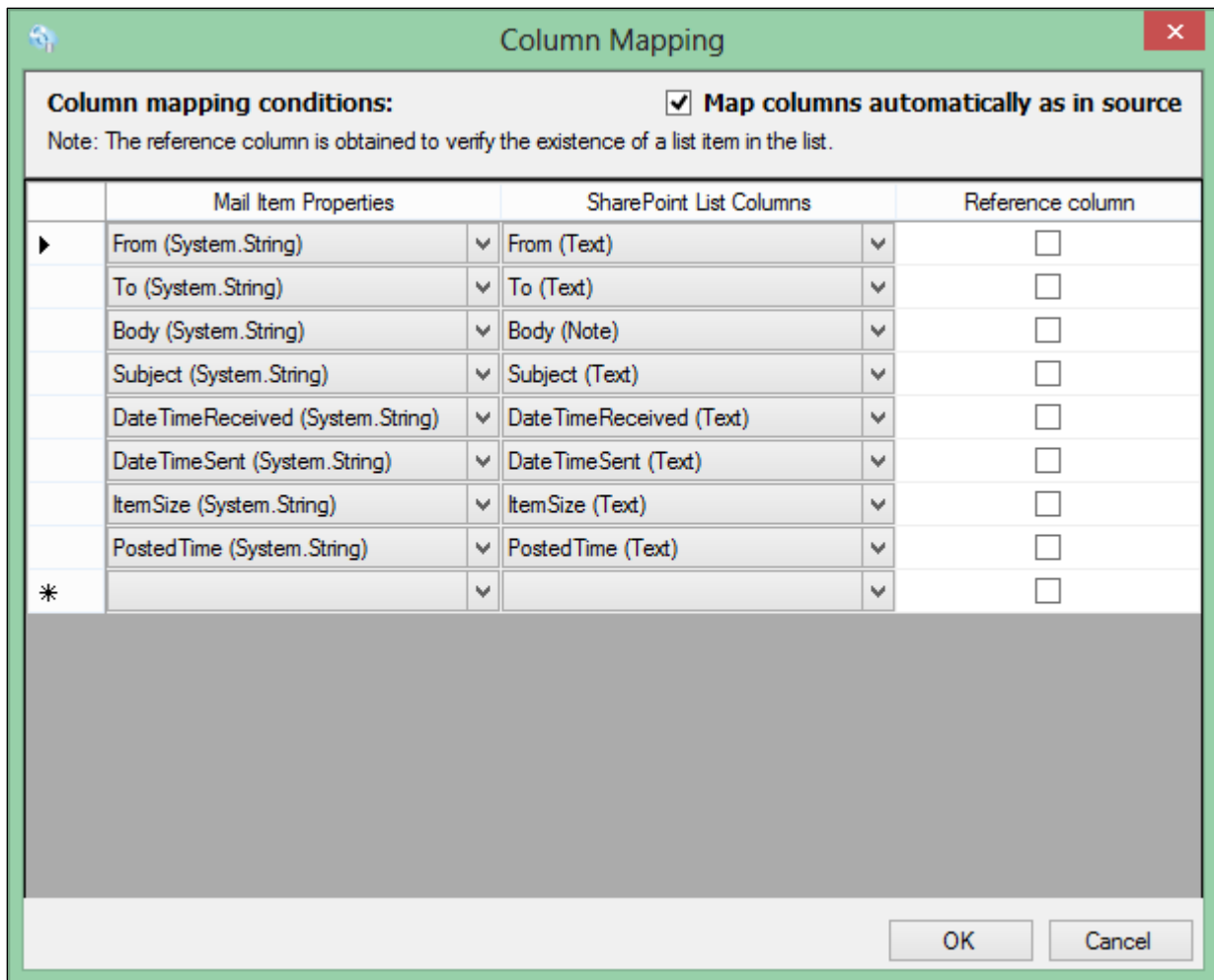
1. Multiple list mapping step will appear as shown below:

The screenshot shows a window titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Specify the list details to add items" with a green checkmark icon. Below the heading is the instruction "Select lists to add list items from the filtered folders in Exchange server".

There are two dropdown menus: "Folder / Folder types" with the value "12" and "SharePoint list / library" with the value "a". A "Map" button is located to the right of the second dropdown. Below these is an "Item Settings" section with a dropdown menu set to "Skip the list item if already exists".

The main area of the window is a table with three columns: "Exchange Folder", "SharePoint List", and "Reference Column". The table body is currently empty. At the bottom right of the table area is a "Remove" button. At the very bottom of the window are four buttons: "Back", "Next", "Finish", and "Cancel".

2. Select a folder and a SharePoint list which you want to map from its respective fields. On clicking on Map button you will be allowed to map columns for the selected folder and list like shown below,

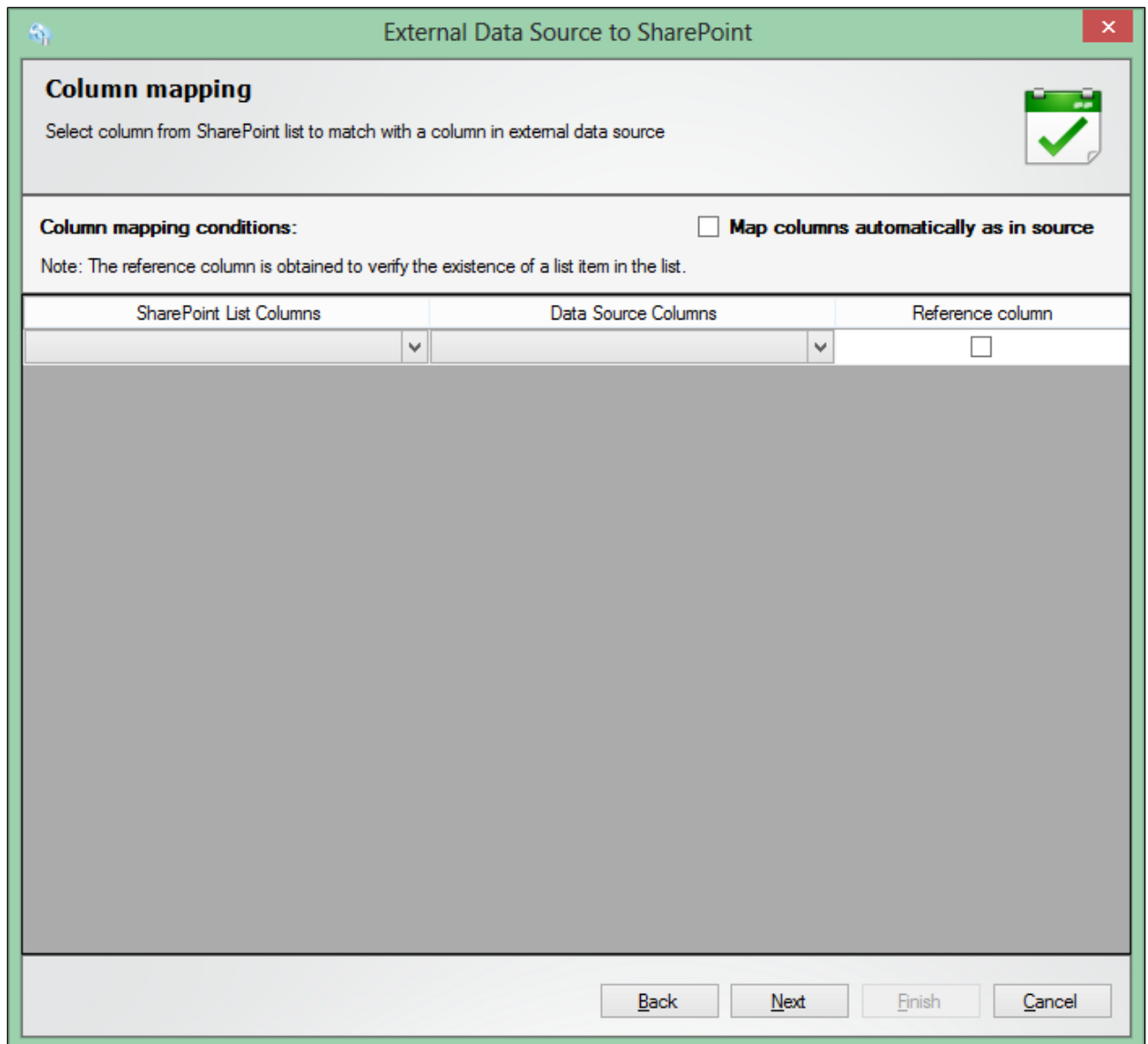


3. After mapping all the selected folders with columns, select the desired option in Item Settings to skip, update, overwrite or add as new item, if the item already exists in the SharePoint list. Click Next to proceed the operation.

Column Mapping

External Data Connector allows you to map metadata properties between data source and a SharePoint list

1. **Column Mapping** step will appear as shown below:



The screenshot shows a dialog box titled "External Data Source to SharePoint" with a close button (X) in the top right corner. The main heading is "Column mapping" with a green checkmark icon. Below the heading is the instruction: "Select column from SharePoint list to match with a column in external data source".

Under "Column mapping conditions:", there is a checkbox labeled "Map columns automatically as in source". A note below reads: "Note: The reference column is obtained to verify the existence of a list item in the list."

The dialog features three columns for selection:

SharePoint List Columns	Data Source Columns	Reference column
▼	▼	<input type="checkbox"/>

The main area of the dialog is a large grey rectangle, likely representing a list of columns that is currently empty or obscured. At the bottom, there are four buttons: "Back", "Next", "Finish", and "Cancel".

2. External Data Connector can automatically map columns for you if needed. Select **Map columns automatically** as in source to automate mapping. Column mapping will be done based on the column name.

External Data Source to SharePoint

Column mapping
Select column from SharePoint list to match with a column in external data source

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

SharePoint List Columns	Data Source Columns	Reference column
First Name (Text) ▼	First Name (System.String) ▼	<input checked="" type="checkbox"/>
Last Name (Text) ▼	Last Name (System.String) ▼	<input type="checkbox"/>
Company (Text) ▼	Company (System.String) ▼	<input type="checkbox"/>
Phone (Text) ▼	Phone (System.String) ▼	<input type="checkbox"/>
Email (Text) ▼	Email (System.String) ▼	<input type="checkbox"/>
▼	▼	<input type="checkbox"/>

- If the selected list to add items is a new list, new columns will be created in the list if auto-mapping option is selected. You can also select the type of column to be created in the list.

External Data Source to SharePoint

Column mapping
Select column from SharePoint list to match with a column in external data source

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

SharePoint List Columns	Field Type	Data Source Columns	Reference column
First Name	Single line of text	First Name (System.String)	<input checked="" type="checkbox"/>
Last Name	Single line of text	Last Name (System.String)	<input type="checkbox"/>
Company	Single line of text	Company (System.String)	<input type="checkbox"/>
Phone	Single line of text	Phone (System.String)	<input type="checkbox"/>
Email	Single line of text	Email (System.String)	<input type="checkbox"/>
Country	Single line of text	Country (System.String)	<input type="checkbox"/>
			<input type="checkbox"/>

- Specify at-least one reference column, to avoid adding duplicate items in the list. External Data Connector will read the reference column value, query them against the list and if the item exists in the list, action specified in the list item settings will be performed (Skip, Update, Overwrite or Add).

Note: If 'Create a new list' option is selected for integration, columns of type single/multiple line of text, Number, Date and time and Yes/No can be created.

Configure Connection Startup

To specify the connection name and trigger settings for the External Data Connector connection, perform the steps given below

1. **Configure Connection startup** step will appear as shown below:

The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button (X) in the top right corner. The main heading is "Configure Connection startup" and the instruction is "Enter a unique name for the Connection and specify trigger settings." There is a help icon (envelope with arrow) in the top right.

The form contains the following fields and options:

- Connection Name:** A text box containing "taskName".
- Description:** A text box containing "this is an interactive task".
- Trigger Options:** A group box containing two radio buttons: "Run now" (selected) and "Schedule".
- Connect as:** A group box containing:
 - User Profile:** A text box containing "voyager\adminuser1".
 - Destination:** A text box containing "voyager\famadmin_sp13-1".
- Schedule Settings:** A group box containing:
 - Schedule:** A dropdown menu set to "Daily".
 - Start Time:** A time picker set to "03:07 PM".
 - Schedule Daily:** A sub-group box containing "Every" followed by a spinner box set to "1" and the text "day(s)".

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

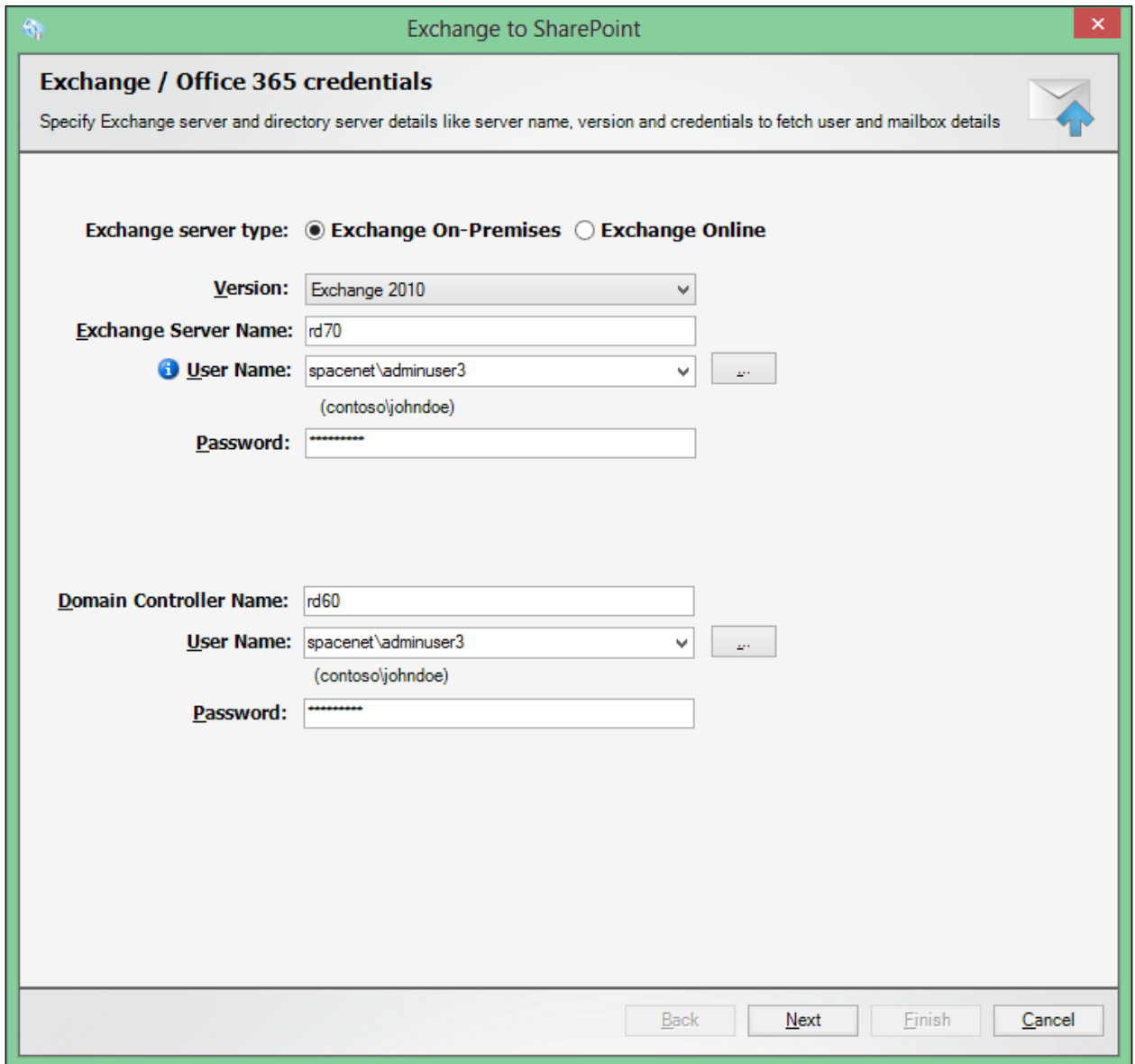
2. Enter a unique connection name in **Connection Name** textbox.

3. Select a Trigger Option from one of the following options given below:
Run now - to run the connection immediately after clicking Finish button
Schedule - To create a Windows scheduled task. External Data Connector will create a schedule connection in the Windows Scheduled Tasks with the given settings.

Edit a connection

Edit Connection is similar to creating a connection, except that a few settings cannot be altered as stated below.

1. The External Data Connector Connection Wizard appears as shown below:



The screenshot shows the 'Exchange to SharePoint' wizard window. The title bar reads 'Exchange to SharePoint'. The main window title is 'Exchange / Office 365 credentials'. Below the title, it says 'Specify Exchange server and directory server details like server name, version and credentials to fetch user and mailbox details'. There is a close button (X) in the top right corner and a mail icon with an arrow pointing up.

Exchange server type: Exchange On-Premises Exchange Online

Version: Exchange 2010

Exchange Server Name: rd70

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

Domain Controller Name: rd60

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

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

2. Specify Exchange and Directory [server details](#)
3. Select the [Recipient mailboxes](#) to fetch its mail items.

4. Specify [Folder Search](#) and [Item Search](#) conditions to refine folder and item results.
5. Specify [Mail Item Settings](#) to bring the data and attachments from Exchange server.
6. In [Destination SharePoint location](#) specify the URL of the site and other necessary details.
7. Specify list and column mapping details based on the option selected in **Destination SharePoint Location**.
8. In [Configure Connection startup](#) edit mode, the connection name cannot be altered.
9. Click **Finish** button to save the connection settings, or click **Back** button to go to the previous step.

Public Folders to SharePoint

[Create a Connection](#)

[Edit a Connection](#)

Create a Connection

Step 1 : [Exchange and Directory Server Details](#)

Step 2 : [Folder Search](#)

Step 3 : [Item Attributes](#)

Step 4 : [Item Search](#)

Step 5 : [Mail Item Settings](#)

Step 6 : [Destination SharePoint Location](#)

Step 7 : [List Details](#)

Step 8 : [Multi List Mapping](#)

Step 9 : [Column Mapping](#)

Step 10 : [Configure Connection Startup](#)

Exchange server details

In this window, you can specify details like Exchange server name, version and credentials to access the Exchange server.

1. **Exchange server details** step will appear as shown below:

The screenshot shows a window titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Exchange / Office 365 credentials" and the subtitle is "Specify Exchange server and directory server details like server name, version and credentials to fetch user and mailbox details". There is an envelope icon with an upward arrow in the top right corner.

Exchange server type: Exchange On-Premises Exchange Online

Version: Exchange 2010

Exchange Server Name: rd70

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

Domain Controller Name: rd60

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

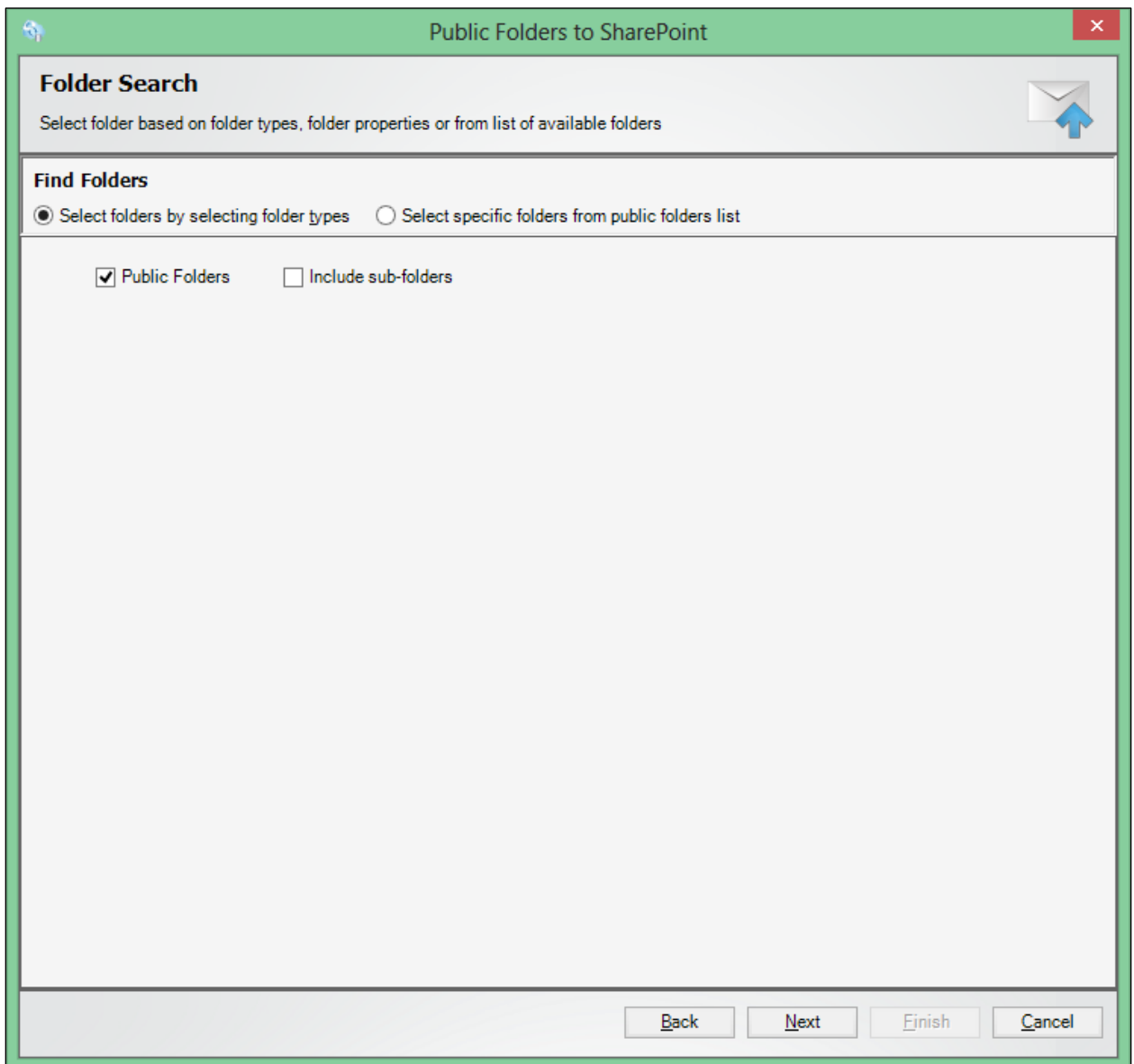
At the bottom, there are four buttons: Back, Next, Finish, and Cancel.

2. The user account specified, should have impersonation rights to impersonate mailboxes and to access its mail items. For more details on configuring impersonation for a specified user, read [Configuring impersonation rights](#) to a mailbox user
3. Specify the directory server details like server name and credentials, to fetch the mailboxes corresponding to the specified exchange server.

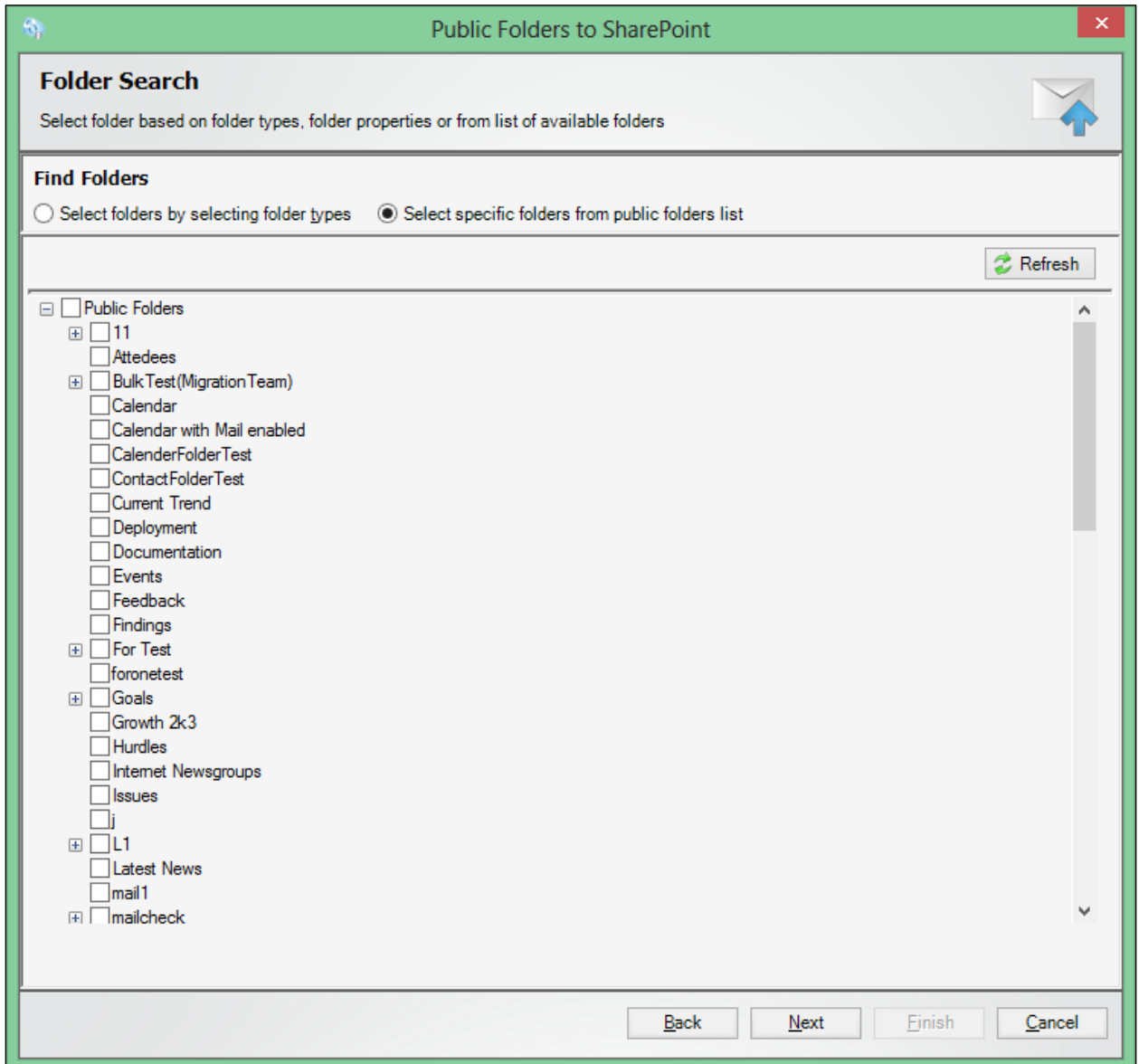
Folder Search

From this window, you can refine folder results by folder types, filter conditions or by selecting from the list of available folders.

1. **Folder Search** step will appear as shown below:



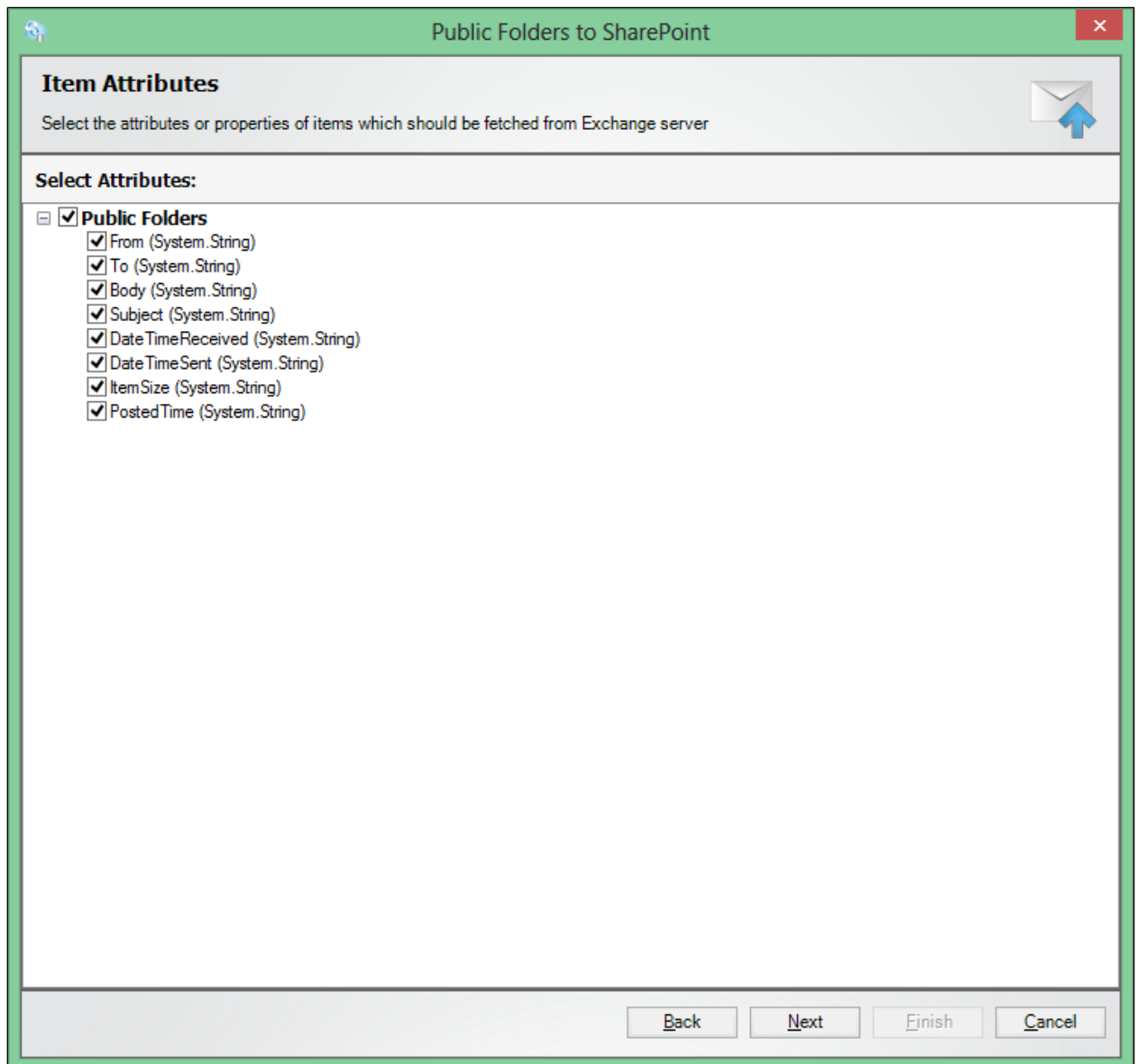
2. The default option to filter folders is based on its folder types. You can select the types of folders to filter from the entire folder collection available in the server
3. You can also select folders from the list of available folders to fetch mail items.



Item Attributes

From this window, the user can select item attributes for all the folder types.

1. **Item Attributes** window will appear as shown below:



2. From this window, the user can select the item attributes to fetch from the Exchange server.
3. Only the selected attributes, will be allowed for mapping in Column Mapping step. If none of the columns are selected, the column mapping will be based on the destination list.

Item Search

Using this window, you can refine the item results by specifying item search conditions and also you can save the specified search conditions as a template.

1. **Item Search** step will appear as shown below:

Exchange to SharePoint

Item Search (Optional)
Specify optional criteria to search mail items. You may load a criteria from a saved search query or specify a new criteria

Find Items **New Search Query** **Saved Search Queries** [Dropdown] [Manage]

Date Range

Field	Condition	Value	Exclude	

Subject / Body

Field	Condition	Value	Exclude	

From / To / Cc

Field	Condition	Value	Exclude	

Headers

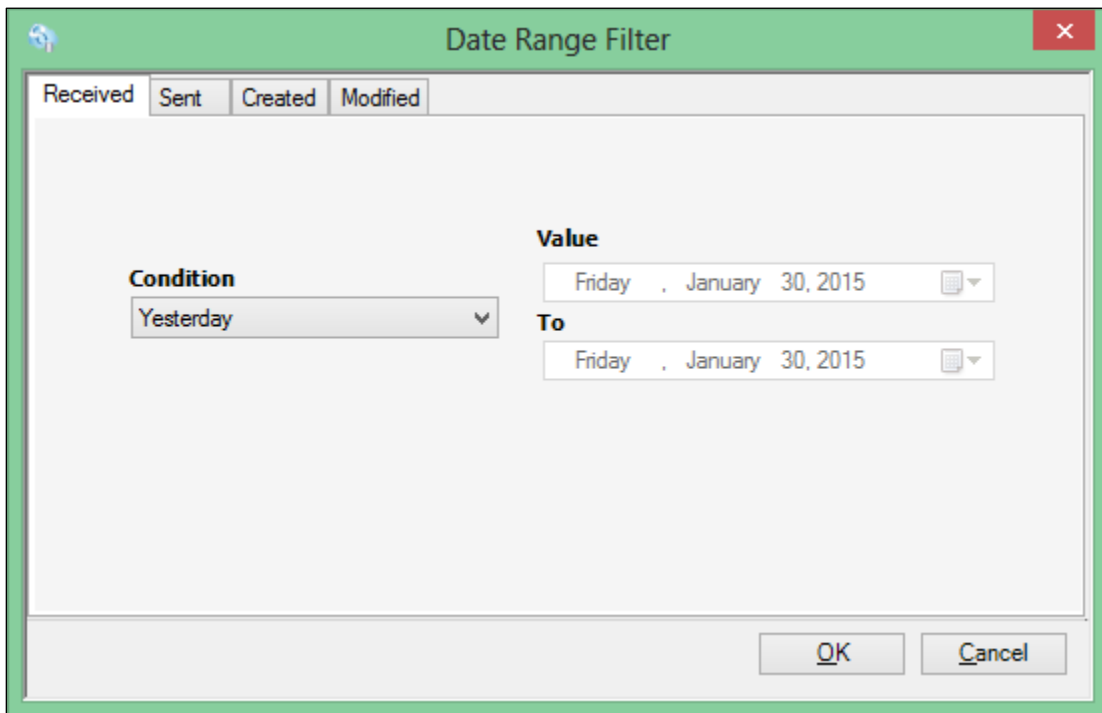
Field	Condition	Value	Exclude	

Bring the items when:

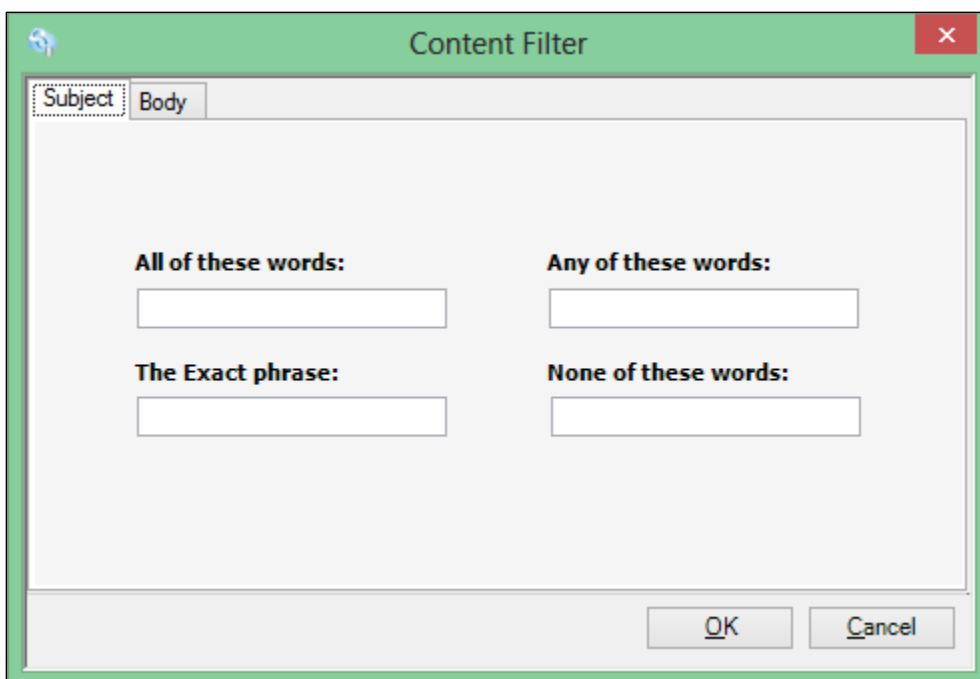
All of the above conditions are satisfied Any one of the above conditions is satisfied

[Save this Search Query] [Back] [Next] [Finish] [Cancel]

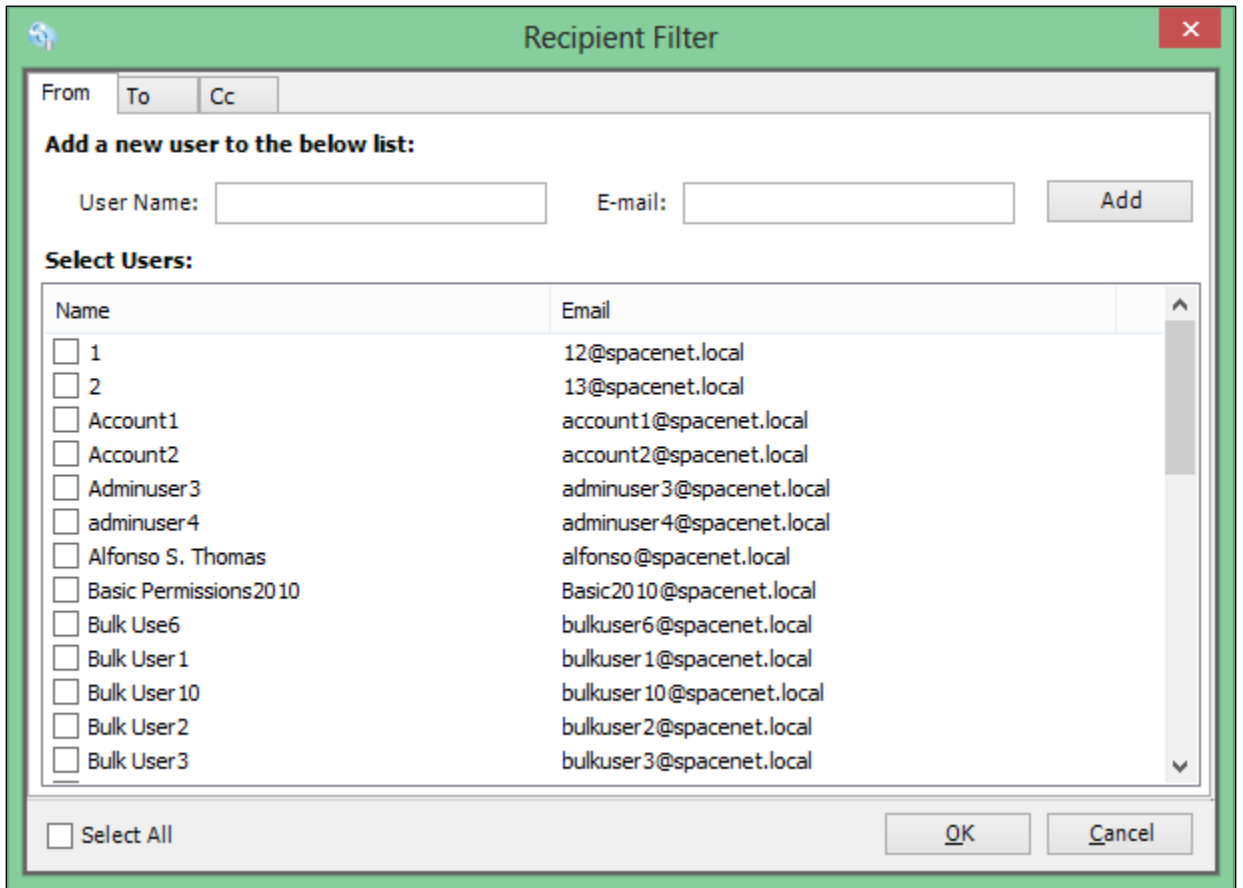
- Items can be filtered based on its properties. To filter items based on its Received, Sent, Created or Modified time, you can use the **Date Range** button.



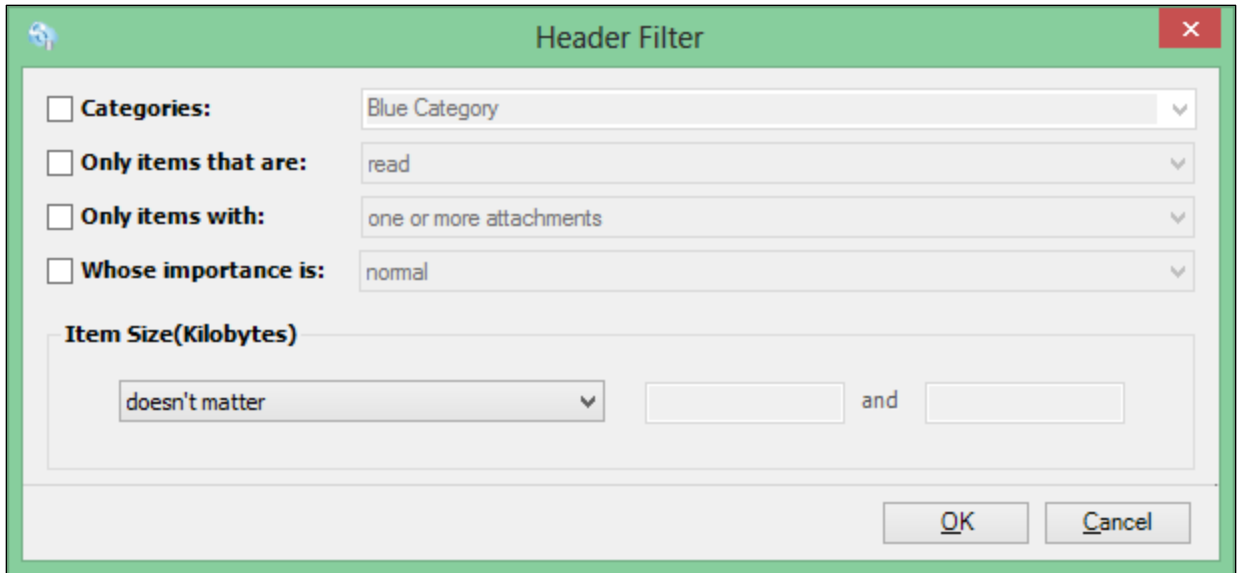
- To filter items based on Subject or Body, click on the respective button and specify keywords to search for in the text fields provided to filter mail items.



- To filter items based on the recipients, click on the respective button and select the users to filter mail items corresponding to the selected users.



- You can also specify search conditions for other properties like categories, read/unread, importance, size and attachments.

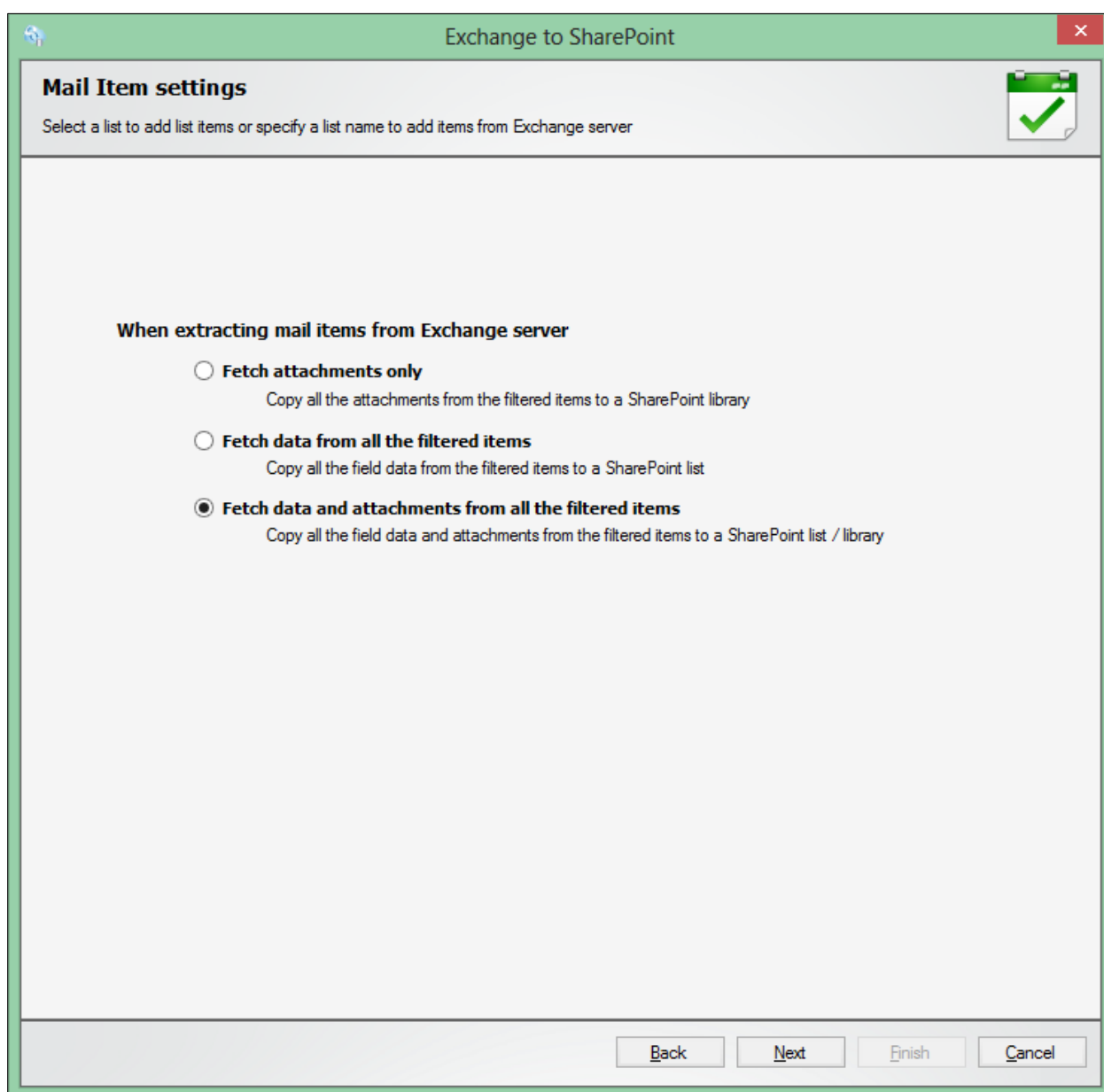


6. If you want to save the search conditions as a search query, you can select the **New Search Query** option and specify a name for the search query by clicking the **Save this Search Query** button. You can also load item search conditions from **Saved Search Queries**.

Mail Item Settings

Using this window, you can specify additional options to bring in mail items from Exchange to SharePoint list.

1. **Mail Item Settings** step will appear as shown below:



The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button (X) in the top right corner. The main heading is "Mail Item settings" with a green checkmark icon in the top right. Below the heading is the instruction: "Select a list to add list items or specify a list name to add items from Exchange server".

The main content area is titled "When extracting mail items from Exchange server" and contains three radio button options:

- Fetch attachments only**
Copy all the attachments from the filtered items to a SharePoint library
- Fetch data from all the filtered items**
Copy all the field data from the filtered items to a SharePoint list
- Fetch data and attachments from all the filtered items**
Copy all the field data and attachments from the filtered items to a SharePoint list / library

At the bottom of the dialog box, there are four buttons: "Back", "Next", "Finish", and "Cancel".

2. The additional options available in mail item settings are,

Fetch Attachments Only - Allows you to bring all the attachments from the filtered items to a SharePoint library.

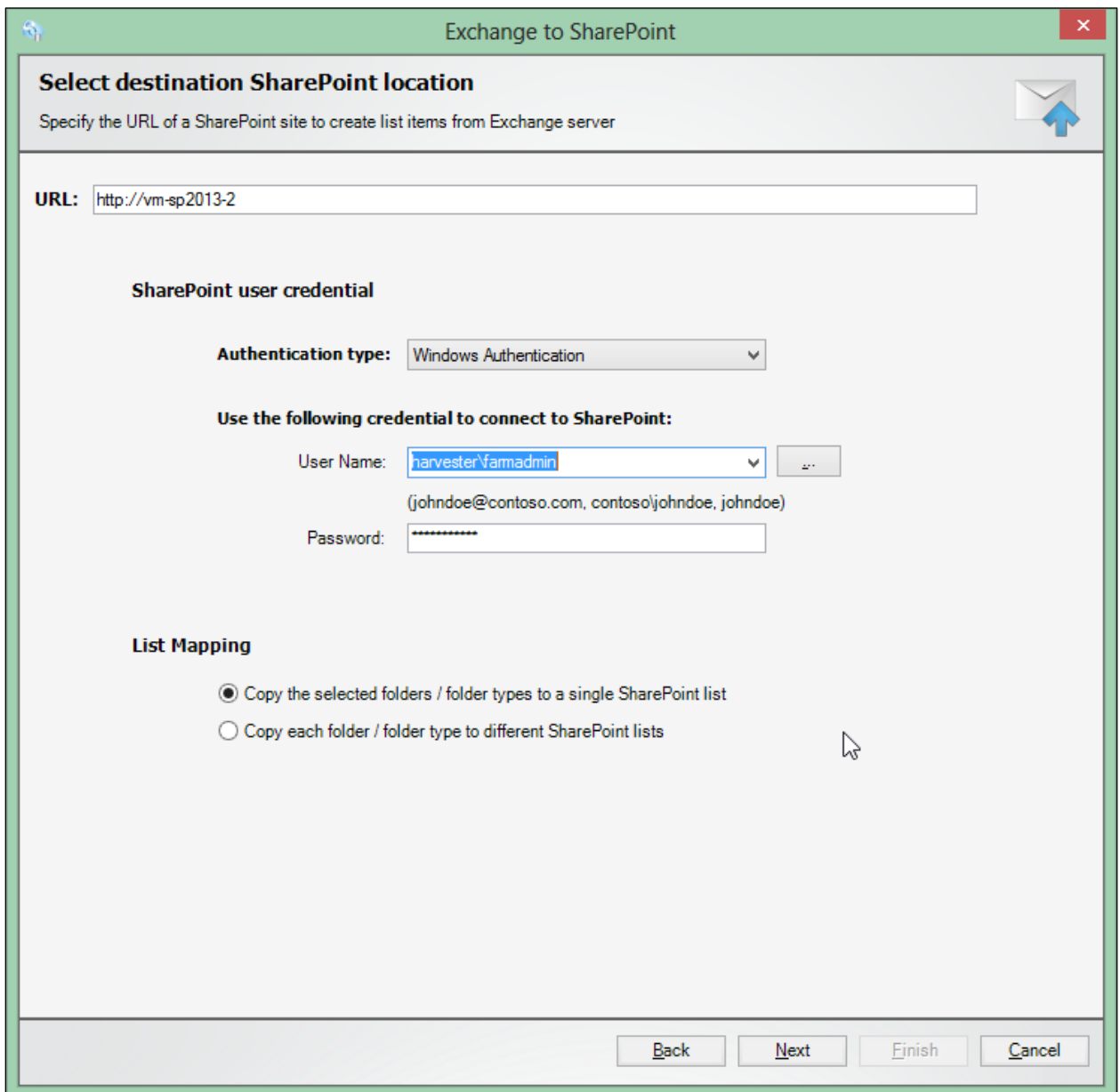
Fetch data from all the filtered items - Allows you to bring all the mail item properties to a SharePoint list without attachments.

Fetch data and attachments from the filtered items - Allows you to bring both properties and attachments from all the filtered items to a SharePoint list / library.

Destination SharePoint Location

To specify a SharePoint URL of a site, in which you wish to integrate data from an external data source, perform the steps given below:

1. The **Destination SharePoint location** step appears as shown below:



The screenshot shows a window titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Select destination SharePoint location" with a sub-instruction: "Specify the URL of a SharePoint site to create list items from Exchange server".

The "URL:" field contains the text "http://vm-sp2013-2".

The "SharePoint user credential" section includes:

- "Authentication type:" dropdown menu set to "Windows Authentication".
- "Use the following credential to connect to SharePoint:" section with:
 - "User Name:" dropdown menu set to "harvester\farmadmin" and a browse button.
 - Example text: "(johndoe@contoso.com, contoso\johndoe, johndoe)".
 - "Password:" field with masked characters "*****".

The "List Mapping" section has two radio button options:

- Copy the selected folders / folder types to a single SharePoint list
- Copy each folder / folder type to different SharePoint lists

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

2. Specify a valid SharePoint URL in the URL textbox. External Data Connector will load all the lists from the specified SharePoint site, if the site URL and authentication is valid.
3. Specify the Authentication type and user credentials to connect to the SharePoint URL using the options given below:
 - a. Specify the Authentication Type
 - Windows Authentication
 - Forms Authentication
 - Office 365 Cloud based identity
 - Federated Authentication
 - b. Specify the user credentials

Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: \,UserName@DomainName, UserName and its corresponding password. External Data Connector will initiate Windows authentication or Forms authentication depending on configuration in the destination SharePoint site. Click Next button to proceed.

External Data Connector will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords applet / Credential Manager for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created.

Click ... button to create new user profile. Click here to view the details about Profile Manager dialog.

Select Federated Identity in Authentication Type combo to connect to a SharePoint site (SharePoint On-premise or SharePoint Online) using federated identity configured using ADFS. Also, select this option to connect to Office 365 SharePoint Online configured using federated identity provider.

To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option for both Cloud Identity (Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.onmicrosoft.com).

Exchange to SharePoint

Select destination SharePoint location

Specify the URL of a SharePoint site to create list items from Exchange server

URL:

SharePoint user credential

Authentication type:

Use the following credential to connect to SharePoint:

User Name:

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

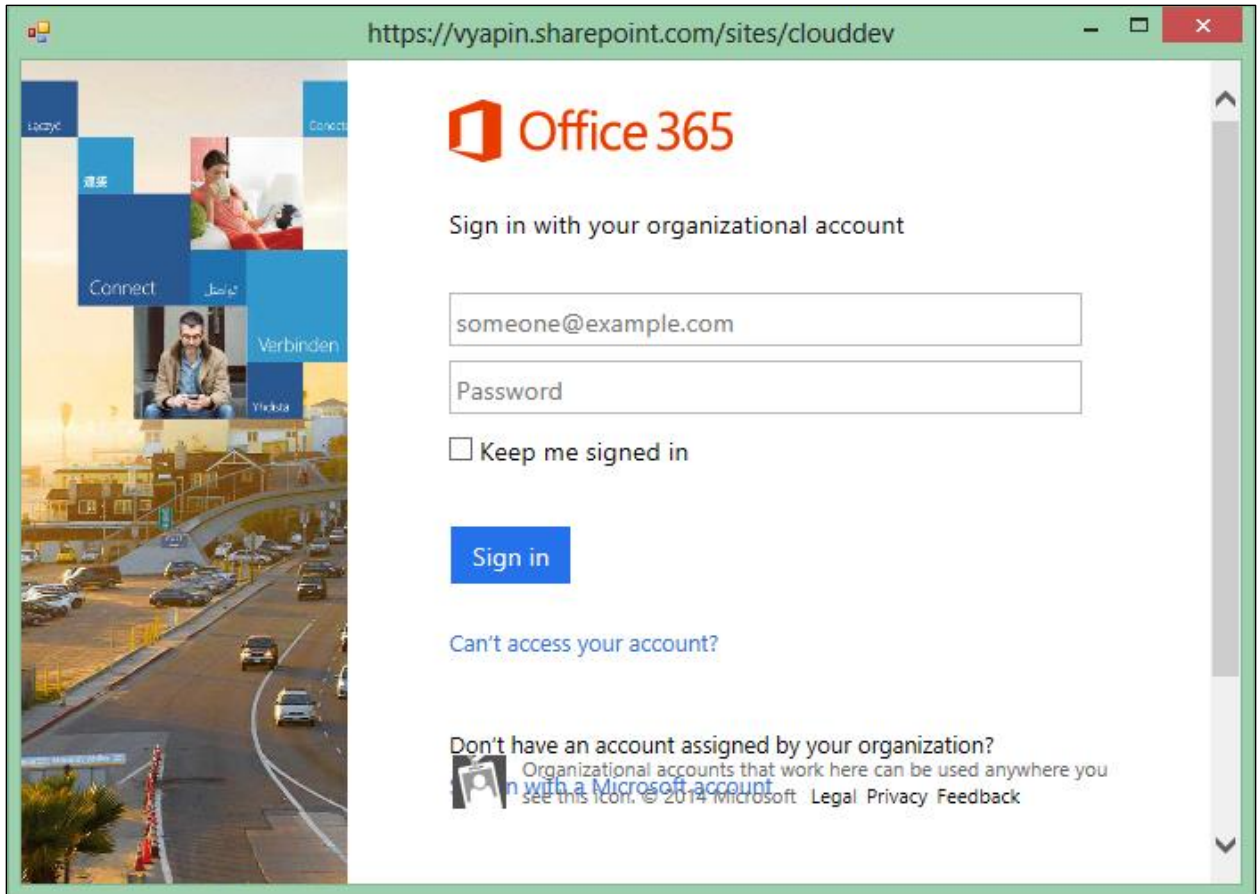
Password:

List Mapping

Copy the selected folders / folder types to a single SharePoint list

Copy each folder / folder type to different SharePoint lists

Upon clicking Next button to proceed, you will be prompted for credential (username and password) as shown below:

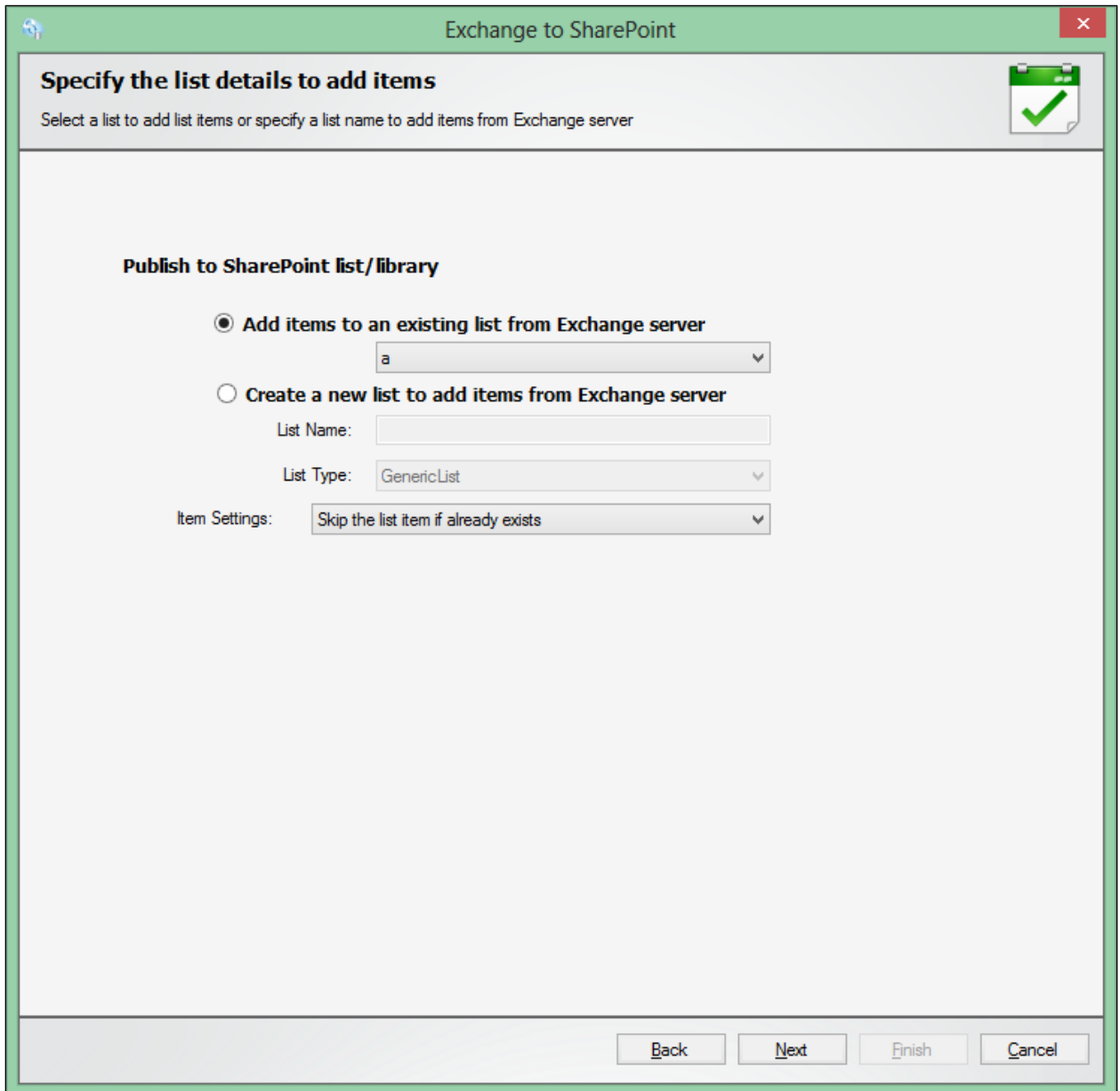


Provide ID and Password in the respective textboxes and click Sign in button to proceed.

List Details

To specify the list to add list items from data source perform the steps given below:

1. The **List details** step appears as shown below:



The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button (X) in the top right corner. The main heading is "Specify the list details to add items" and the instruction below it is "Select a list to add list items or specify a list name to add items from Exchange server". There is a green checkmark icon in the top right corner of the dialog area.

Publish to SharePoint list/library

- Add items to an existing list from Exchange server**
a
- Create a new list to add items from Exchange server**
List Name:
List Type: GenericList
Item Settings: Skip the list item if already exists

At the bottom of the dialog, there are four buttons: **Back**, **Next**, **Finish**, and **Cancel**.

2. Specify the list in which the items has to be added and also specify the action which has to be performed, if the list item already exists in the list.

Publish to SharePoint list/library

Add items to an existing list from Exchange server

a

Create a new list to add items from Exchange server

List Name:

List Type:

Item Settings:

3. You can select between an existing list or create a new list to add the filtered items.

Multi List Mapping

External Data Connector also allows you to map each of the selected folder to a different SharePoint list / library.

1. **Multiple list mapping** step will appear as shown below:

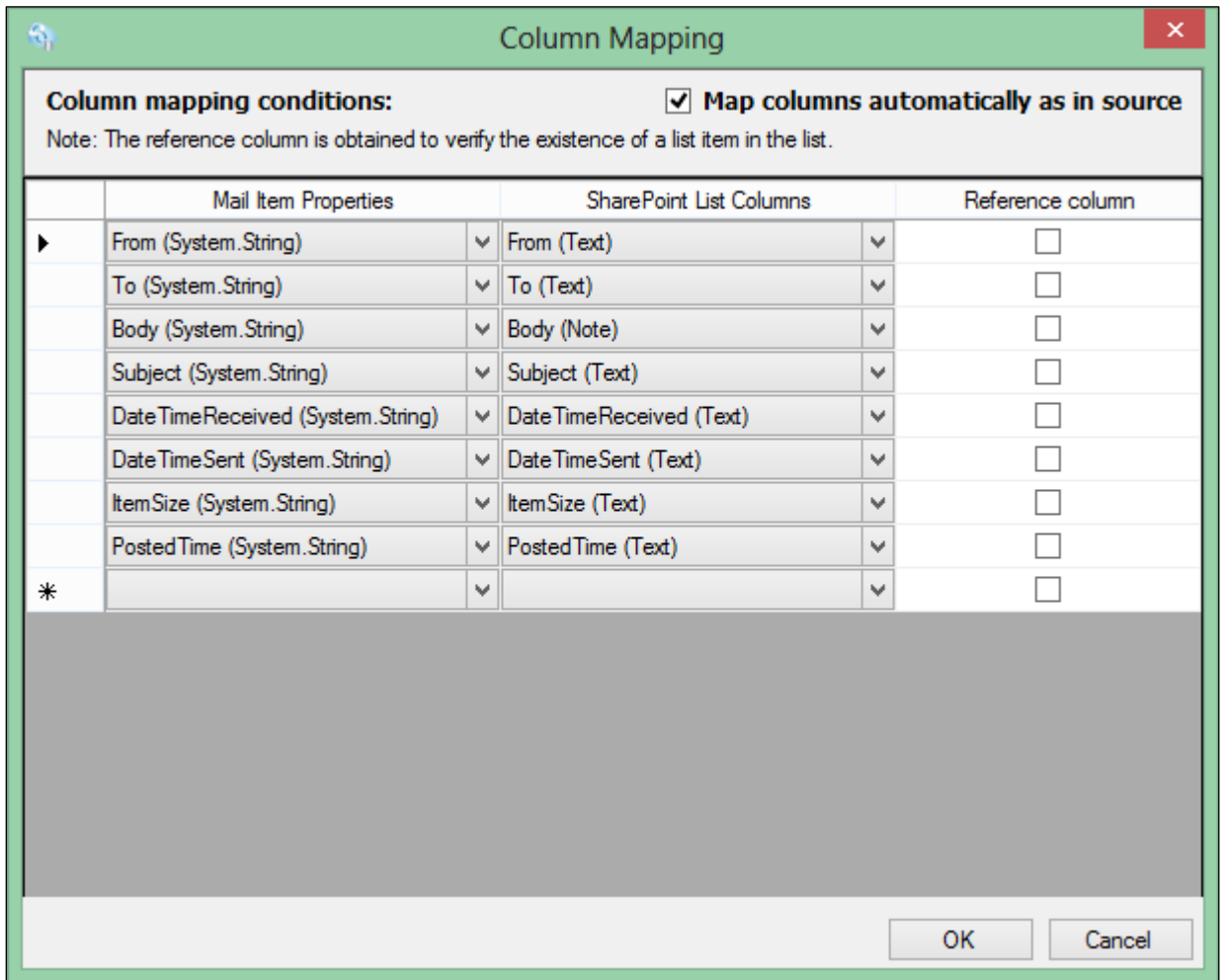
The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Specify the list details to add items" and a sub-heading reads "Select lists to add list items from the filtered folders in Exchange server".

There are two dropdown menus: "Folder / Folder types" with the value "12" and "SharePoint list / library" with the value "a". A "Map" button is located to the right of the second dropdown. Below these is an "Item Settings" dropdown menu with the value "Skip the list item if already exists".

A large table area is present, with a header row containing three columns: "Exchange Folder", "SharePoint List", and "Reference Column". The table body is currently empty.

At the bottom right of the table area is a "Remove" button. At the very bottom of the dialog are four buttons: "Back", "Next", "Finish", and "Cancel".

2. Select a folder and a SharePoint list which you want to map from its respective fields. On clicking on Map button you will be allowed to map columns for the selected folder and list like shown below.

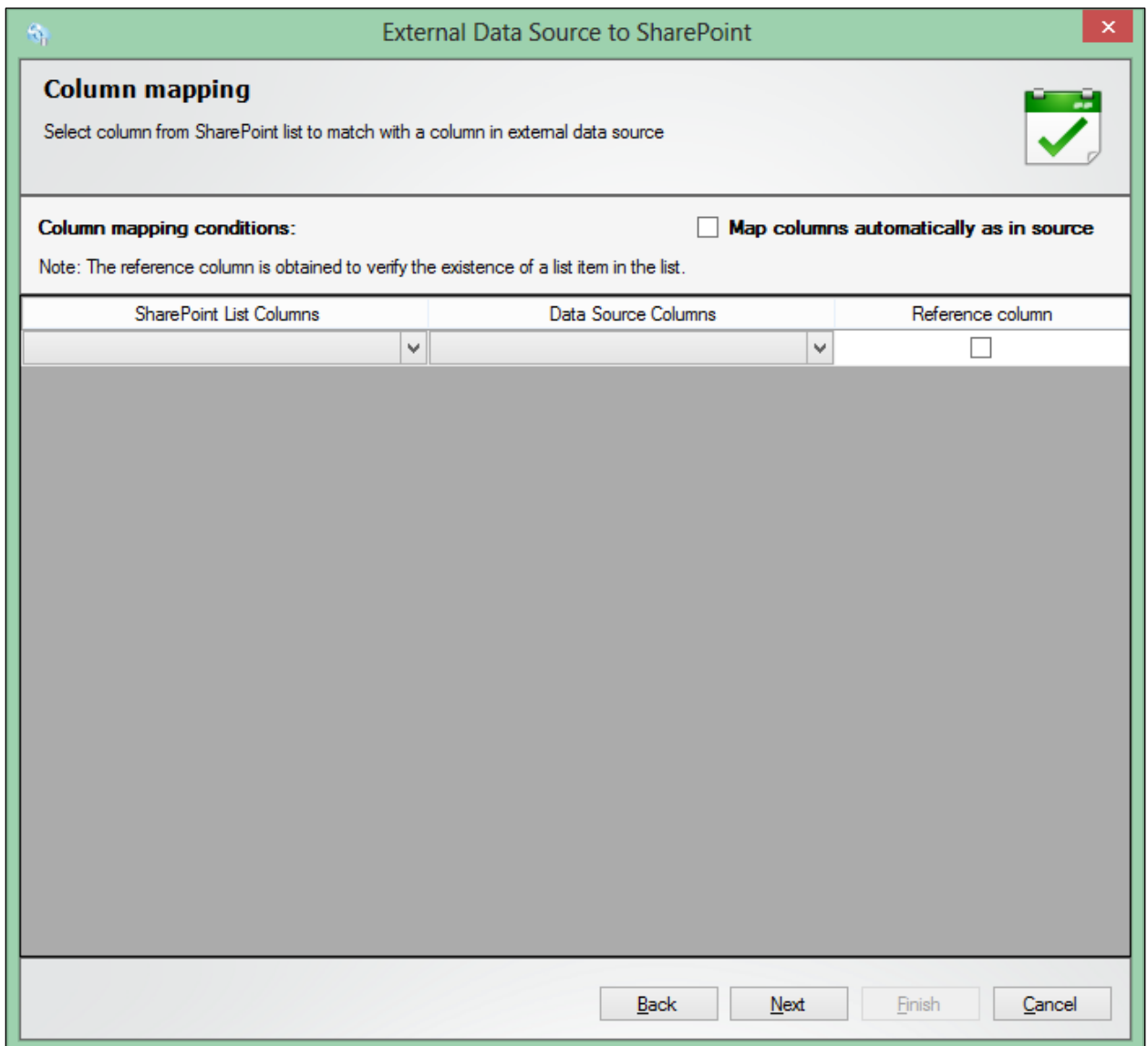


3. After mapping all the selected folders with columns, select the desired option in Item Settings to skip, update, overwrite or add as new item, if the item already exists in the SharePoint list. Click Next to proceed the operation.

Column Mapping

External Data Connector allows you to map metadata properties between data source and a SharePoint list

1. **Column Mapping** step will appear as shown below:



The screenshot shows a dialog box titled "External Data Source to SharePoint" with a close button (X) in the top right corner. The main heading is "Column mapping" with a green checkmark icon. Below the heading is the instruction: "Select column from SharePoint list to match with a column in external data source".

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

SharePoint List Columns	Data Source Columns	Reference column
		<input type="checkbox"/>

At the bottom of the dialog box are four buttons: "Back", "Next", "Finish", and "Cancel".

2. External Data Connector can automatically map columns for you if needed. Select Map columns automatically as in source to automate mapping. Column mapping will be done based on the column name.

External Data Source to SharePoint

Column mapping
Select column from SharePoint list to match with a column in external data source

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

SharePoint List Columns	Data Source Columns	Reference column
First Name (Text) ▼	First Name (System.String) ▼	<input checked="" type="checkbox"/>
Last Name (Text) ▼	Last Name (System.String) ▼	<input type="checkbox"/>
Company (Text) ▼	Company (System.String) ▼	<input type="checkbox"/>
Phone (Text) ▼	Phone (System.String) ▼	<input type="checkbox"/>
Email (Text) ▼	Email (System.String) ▼	<input type="checkbox"/>
▼	▼	<input type="checkbox"/>

Back Next Finish Cancel

3. If the selected list to add items is a new list, new columns will be created in the list if auto-mapping option is selected. You can also select the type of column to be created in the list.

External Data Source to SharePoint

Column mapping
Select column from SharePoint list to match with a column in external data source

Column mapping conditions: **Map columns automatically as in source**

Note: The reference column is obtained to verify the existence of a list item in the list.

SharePoint List Columns	Field Type	Data Source Columns	Reference column
First Name	Single line of text	First Name (System.String)	<input checked="" type="checkbox"/>
Last Name	Single line of text	Last Name (System.String)	<input type="checkbox"/>
Company	Single line of text	Company (System.String)	<input type="checkbox"/>
Phone	Single line of text	Phone (System.String)	<input type="checkbox"/>
Email	Single line of text	Email (System.String)	<input type="checkbox"/>
Country	Single line of text	Country (System.String)	<input type="checkbox"/>
			<input type="checkbox"/>

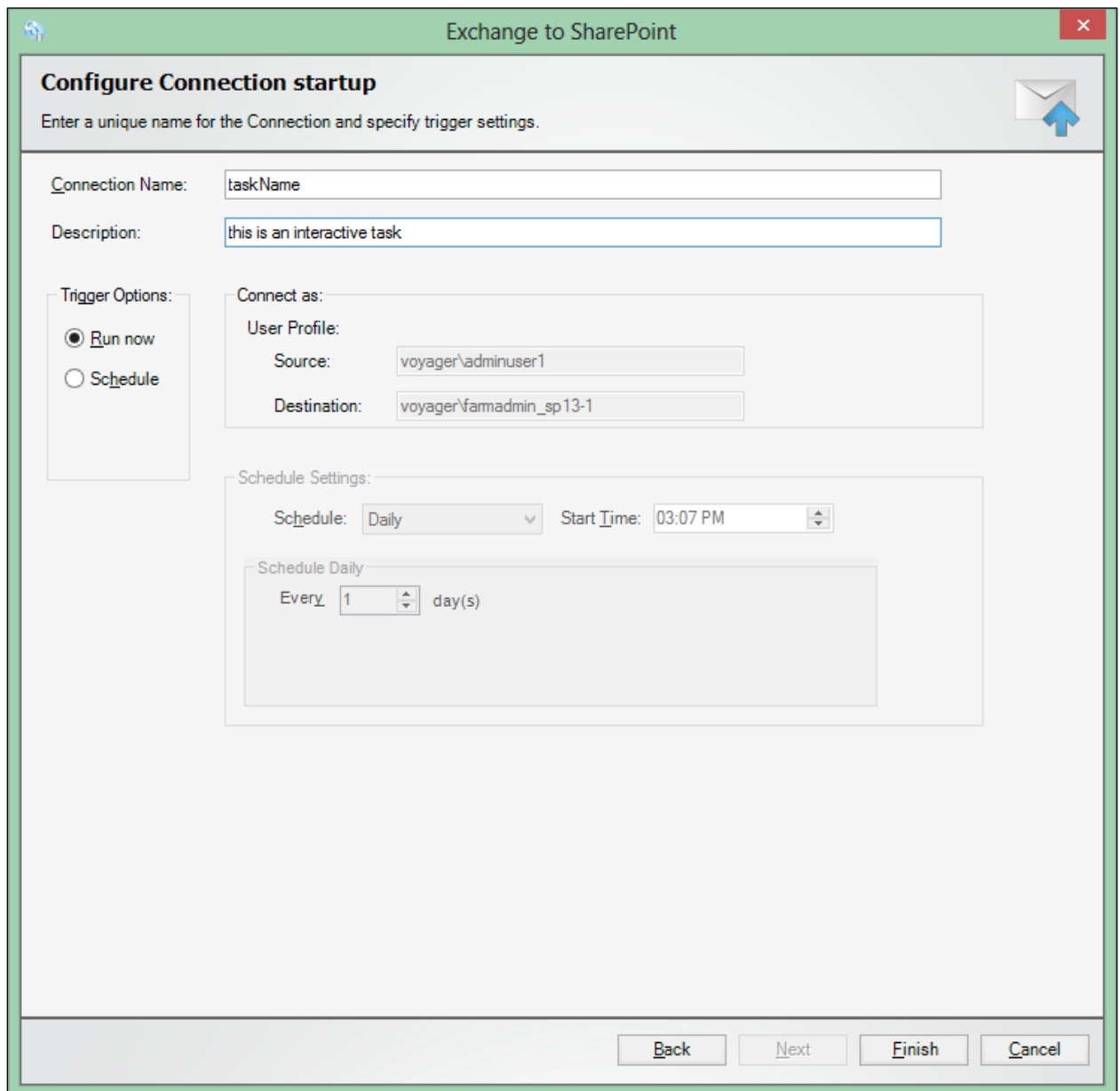
Back Next Finish Cancel

- Specify at-least one reference column, to avoid adding duplicate items in the list. External Data Connector will read the reference column value, query them against the list and if the item exists in the list, action specified in the list item settings will be performed (Skip, Update, Overwrite or Add).
- Note:** If 'Create a new list' option is selected for integration, columns of type single/multiple line of text, Number, Date and time and Yes/No can be created.

Configure Connection Startup

To specify the connection name and trigger settings for the External Data Connector connection, perform the steps given below

1. **Configure Connection startup** step will appear as shown below:



The screenshot shows a dialog box titled "Exchange to SharePoint" with a close button (X) in the top right corner. The main heading is "Configure Connection startup" and the instruction below it says "Enter a unique name for the Connection and specify trigger settings." There is a help icon (envelope with arrow) in the top right.

The form contains the following fields and options:

- Connection Name:** A text box containing "taskName".
- Description:** A text box containing "this is an interactive task".
- Trigger Options:** A group box containing two radio buttons: "Run now" (selected) and "Schedule".
- Connect as:** A group box containing:
 - User Profile:** A text box containing "voyager\adminuser1".
 - Destination:** A text box containing "voyager\famadmin_sp13-1".
- Schedule Settings:** A group box containing:
 - Schedule:** A dropdown menu set to "Daily".
 - Start Time:** A time picker set to "03:07 PM".
 - Schedule Daily:** A sub-group box containing "Every" followed by a spinner box set to "1" and the text "day(s)".

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

2. Enter a unique connection name in Connection Name textbox.

3. Select a Trigger Option from one of the following options given below:

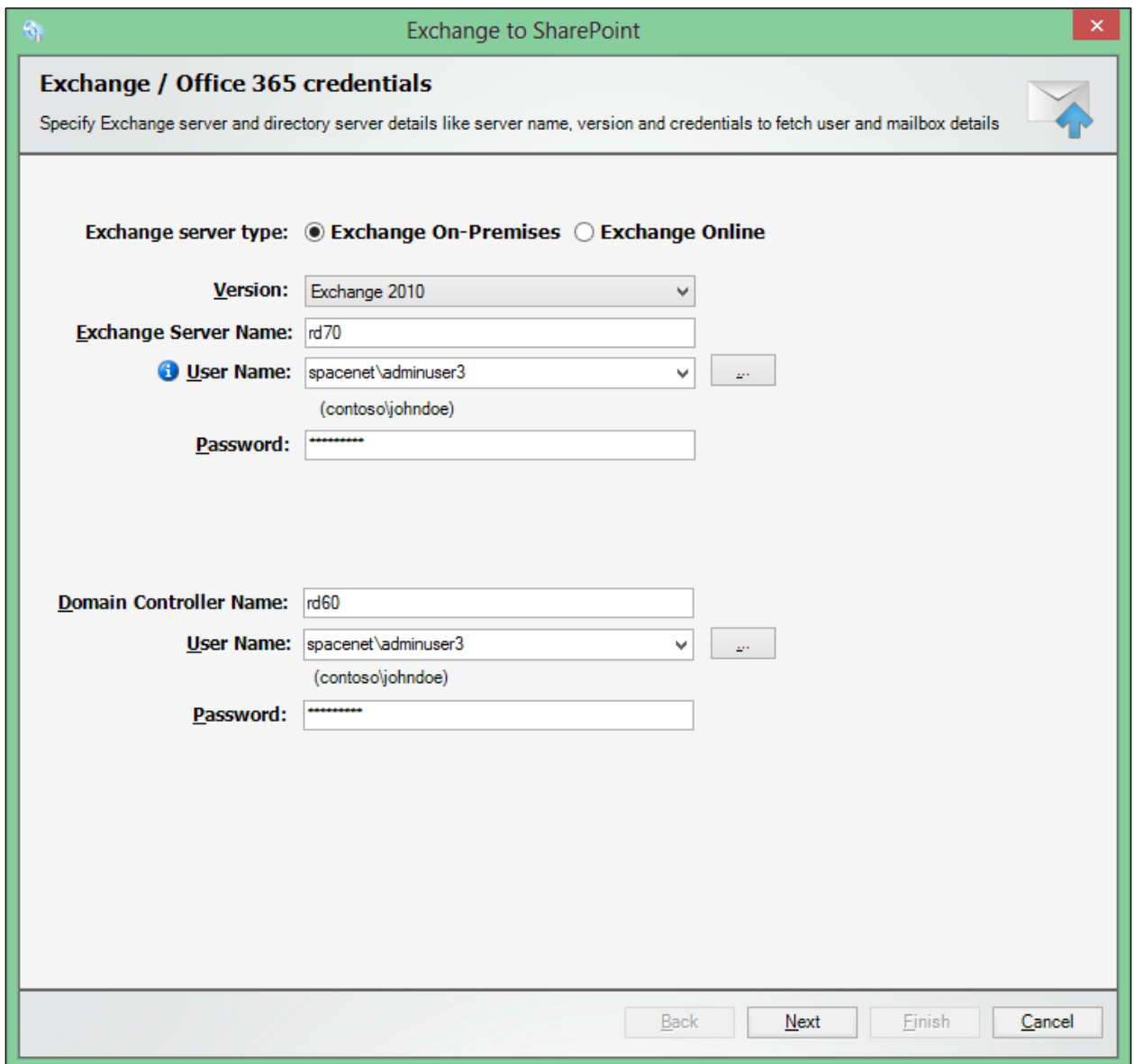
Run now - to run the connection immediately after clicking Finish button

Schedule - To create a Windows scheduled task. External Data Connector will create a schedule connection in the Windows Scheduled Tasks with the given settings.

Edit a connection

Edit Connection is similar to creating a connection, except that a few settings cannot be altered as stated below.

1. The External Data Connector Connection Wizard appears as shown below:



The screenshot shows a window titled "Exchange to SharePoint" with a close button in the top right corner. The main heading is "Exchange / Office 365 credentials" and the subtitle is "Specify Exchange server and directory server details like server name, version and credentials to fetch user and mailbox details". There is a blue envelope icon with an upward arrow in the top right corner of the main area.

Exchange server type: Exchange On-Premises Exchange Online

Version: Exchange 2010

Exchange Server Name: rd70

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

Domain Controller Name: rd60

User Name: spacenet\adminuser3 (contoso\johndoe)

Password: *****

At the bottom of the window, there are four buttons: Back, Next, Finish, and Cancel.

2. Specify Exchange and Directory [server details](#).

3. Specify [Folder Search](#) and [Item Search](#) conditions to refine folder and item results.
4. Specify [Mail Item Settings](#) to bring the data and attachments from Exchange server.
5. In [Destination SharePoint location](#) specify the URL of the site and other necessary details.
6. Specify list and column mapping details based on the option selected in **Destination SharePoint Location**.
7. In [Configure Connection startup](#) edit mode, the connection name cannot be altered.
8. Click **Finish** button to save the connection settings, or click **Back** button to go to the previous step.

Configuring impersonation rights

To assign Impersonation rights for a user, walk through the respective Exchange Server sections.

For Exchange Online

Please refer the following article:

<https://msdn.microsoft.com/en-us/library/office/dn722376%28v=exchg.150%29.aspx>

For Exchange 2013

Prerequisites:

Administrative credential for the server running Exchange 2013 to assign role for a user in EAC.

Using EAC:

- Create a mailbox enabled account, say ARKES Service Account in Exchange Server organization.
- Launch the Exchange Admin Center (EAC) and browse to Permissions -> Admin roles. Click the “+” sign to add a new role.

To access the EAC by going to <http://serverFQDN/ecp/default.aspx> page

The screenshot shows the Exchange Admin Center (EAC) interface. The browser address bar displays <https://mpr-svr-02/ecp/default.aspx>. The page title is "Exchange admin center". The left navigation pane shows "permissions" selected. The main content area is titled "admin roles" and lists various roles. The "Compliance Management" role is selected, and its details are shown on the right. The details include a description: "This role group will allow a specified user, responsible for compliance, to properly configure and manage compliance settings within Exchange in accordance with their policy." The "Assigned roles" section lists: Data Loss Prevention, Information Rights Management, Retention Management, View-Only Audit Logs, View-Only Configuration, and View-Only Recipients. The "Members" section is empty. The "Write scope" is set to "Default". At the bottom, it indicates "1 selected of 12 total".

- Create a role with the following specifications.

Name: User Impersonate.

Description: User role with impersonation rights for EDC.

Write Scope: Default.

Roles: Add the Role name "ApplicationImpersonation".

Members: Add the User "EDC Service Account".

Role Group - Internet Explorer, optimized for Bing and MSN

new role group Help

User Impersonate

Description:
Allows this user to impersonate other user mailboxes.

Write scope:
 Default
 Organizational unit: _____

Roles:
 + -

NAME
ApplicationImpersonation

Members:
 + -

NAME	DISPLAY NAME
service Account	service Account

save cancel

- o Save the changes and wait for few minutes for the settings to replicate.

For Exchange 2010

Prerequisites:

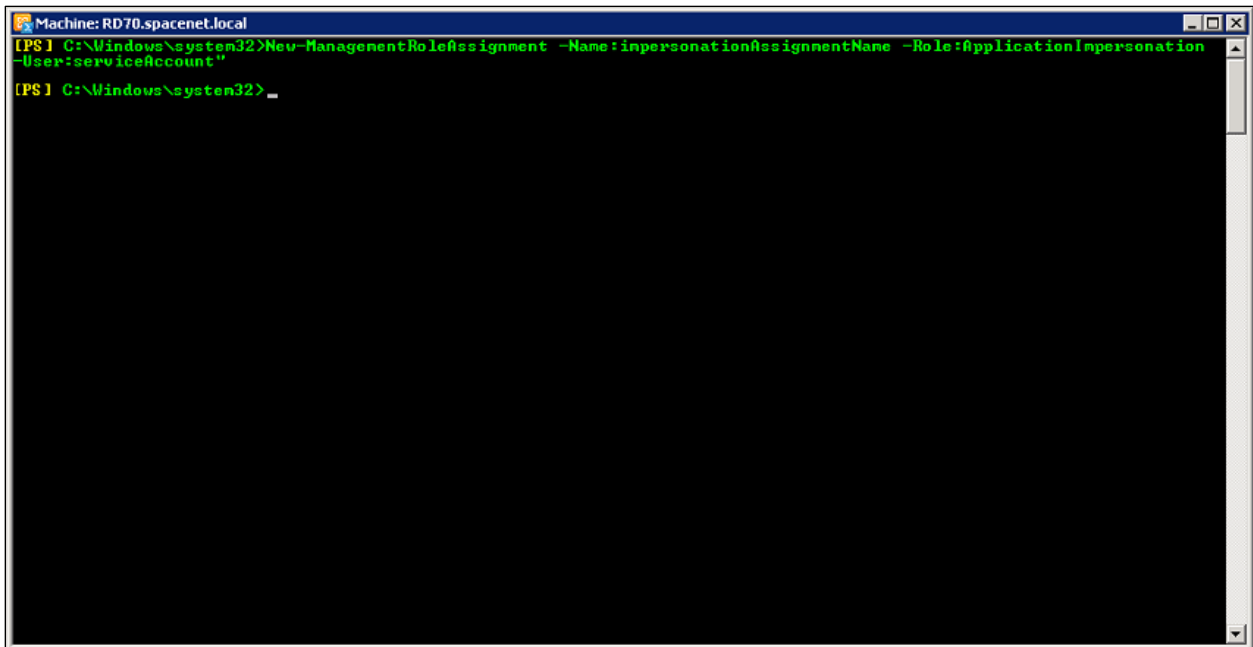
- I. Administrative credentials for the server running Exchange 2010 that has Client Access server role installed.
- II. Domain Administrator credentials, or a credential with permission to create and assign roles and scopes.
- III. Remote PowerShell installed on the computer from which you will run the command.

Using Management Shell:

Create a mailbox enabled ARKES Account, say ARKES Service Account in Exchange Server organization.

Open the Exchange Management Shell.

Run **New-ManagementRoleAssignment -Name:impersonationAssignmentName -Role:ApplicationImpersonation -User:ARKES Service Account** command.



```
Machine: RD70.spacenet.local
PS C:\Windows\system32>New-ManagementRoleAssignment -Name:impersonationAssignmentName -Role:ApplicationImpersonation -User:serviceAccount
PS C:\Windows\system32> _
```

Using PowerShell:

Open PowerShell and run the following cmdlets in the specified order:

"Add-PSSnapin Microsoft.Exchange.Management.PowerShell.E2010"

Run **New-ManagementRoleAssignment -Name:impersonationAssignmentName -Role:ApplicationImpersonation -User:ARKES Service Account** command.


```
Select Windows PowerShell
PS C:\Users\adminuser4> add-psnapin Microsoft.Exchange.Management.PowerShell.E2010
PS C:\Users\adminuser4> New-ManagementRoleAssignment -Name:impersonationAssignmentName -Role:ApplicationImpersonation
User:serviceAccount"
PS C:\Users\adminuser4>_
```

For Exchange 2007

Prerequisites:

- I. Administrative credentials for the server running Exchange 2007 that has Client Access server role installed.
- II. Domain Administrator credentials, or a credential with permission to create and assign roles and scopes.

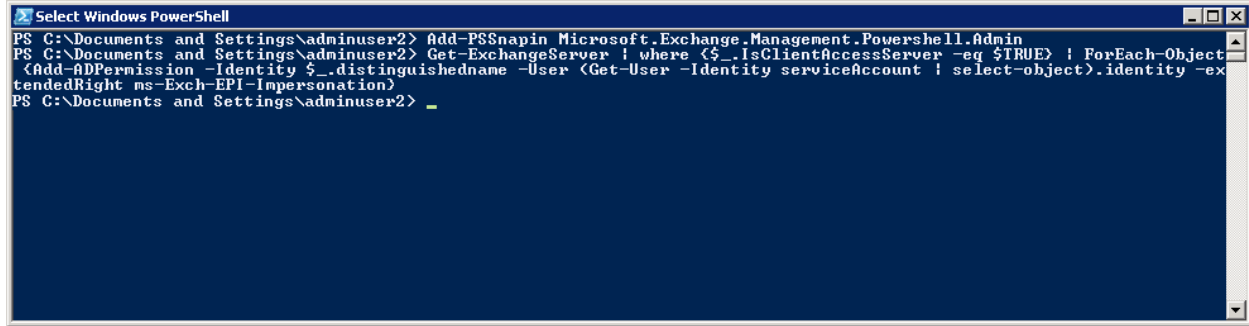
Using Management Shell:

- o Create a mailbox enabled ARKES Account, say ARKES Service Account in Exchange Server organization.
- o Open the Exchange Management Shell.
Run `Get-ExchangeServer | where {$_.IsClientAccessServer -eq $TRUE} | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity ARKES Service Account | select-object).identity -extendedRight ms-Exch-EPI-Impersonation}` command.

```
Machine: RD77 | Scope: spacenet.local
[PS] C:\Documents and Settings\adminuser2>Get-ExchangeServer | where {$_.IsClientAccessServer -eq $TRUE} | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity serviceAccount | select-object).identity -extendedRight ms-Exch-EPI-Impersonation}
[PS] C:\Documents and Settings\adminuser2>_
```

Using PowerShell:

- Open PowerShell and run the following cmdlets in the specified order:
"Add-PSSnapin Microsoft.Exchange.Management.PowerShell.E2010"
Run `Get-ExchangeServer | where {$_.IsClientAccessServer -eq $TRUE} | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity ARKES Service Account | select-object).identity -extendedRight ms-Exch-EPI-Impersonation}` command.



```
Select Windows PowerShell
PS C:\Documents and Settings\adminuser2> Add-PSSnapin Microsoft.Exchange.Management.PowerShell.Admin
PS C:\Documents and Settings\adminuser2> Get-ExchangeServer | where {$_.IsClientAccessServer -eq $TRUE} | ForEach-Object
{Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity serviceAccount | select-object).identity -ex
tendedRight ms-Exch-EPI-Impersonation}
PS C:\Documents and Settings\adminuser2> _
```

References

[Frequently Asked Questions](#)

[Error Messages and Resolution](#)

[Troubleshooting](#)

[How to uninstall External Data Connector?](#)

Frequently Asked Questions

For frequently asked questions about the product, please refer to the [Frequently Asked Questions](#) section in the website.

Error Messages and Resolution Tips

You may notice one or more of the error messages given below when using External Data Connector to connect to SharePoint and perform an integration connection. 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 of online help document 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.
The remote server returned an error: (401) Unauthorized.	Make sure the username and password is valid to connect the SharePoint site.
Login failed. The login is from an untrusted domain and cannot be used with Windows authentication.	Make sure the domains of the current user and the data source are trusted to access with windows authentication.
The remote name could not be resolved	Ensure that the entered Site URL is valid.
Select at-least one table to continue this operation	Ensure that you select at-least one table in the query builder, to generate the SELECT statement.
Left and Right table names cannot be same, select unique tables	In query builder, to perform JOIN operation, the selected left and right table should not be same. Select unique tables to perform JOIN operation.
Select columns of same datatype to join	The selected columns for JOIN operation must be of same data type to proceed the JOIN operation.
Select at-least one reference column	The reference column is used to avoid adding duplicate items in SharePoint list. So, it is mandatory to select at-least one column while mapping columns.
String was not recognized as a valid Date Time	Ensure that the mapped column in the data source contains a valid data time value.
User/Group [group_name] is not found	Check whether the reported group exists in the destination site collection. If it is a user name,

	ensure that the given user name exists in the corresponding SharePoint site or Active Directory domain.
--	---

Troubleshooting

If and when a problem arises, please forward the following files to support@vyapin.com to provide you with the solution.

1. Error log file - e.g., \ExternalDataConnector1x\ErrorLog\ExternalDataConnectorErrorLog.txt
2. For issues while running a connection, the Error Log file will be generated in a date and time-stamp folder within the connection folder name under 'TaskHistory' for scheduled connection and 'RunnowTasks' for interactive connection folders.
 - **Error Log for Scheduled Connection:** Error Log for Scheduled Connection: <Application Data Folder>\ExternalDataConnector1x\TaskHistory\runnowtest\20140526024832\ErrorLog\ExternalDataConnectorErrorLog.txt
 - **Error Log for Interactive Connection:** <Application Data Folder>\ExternalDataConnector1x\RunnowTasks\runnowtest\TaskHistory\20140526024750\ErrorLog\ExternalDataConnectorErrorLog.txt
3. The <Application Data Folder> is the common location where External Data Connector connection and their history will be stored in the computer running External Data Connector application. The <Application Data Folder> can be found from Help -> About screen. The default path of <Application Data Folder> is as follows:
 - Windows XP, Windows 2003 - C:\Documents and Settings\All Users\Documents
 - Windows 8.1, Windows 8, Windows 7, Windows 2012, Windows 2008, Windows Vista - C:\Users\Public\Documents

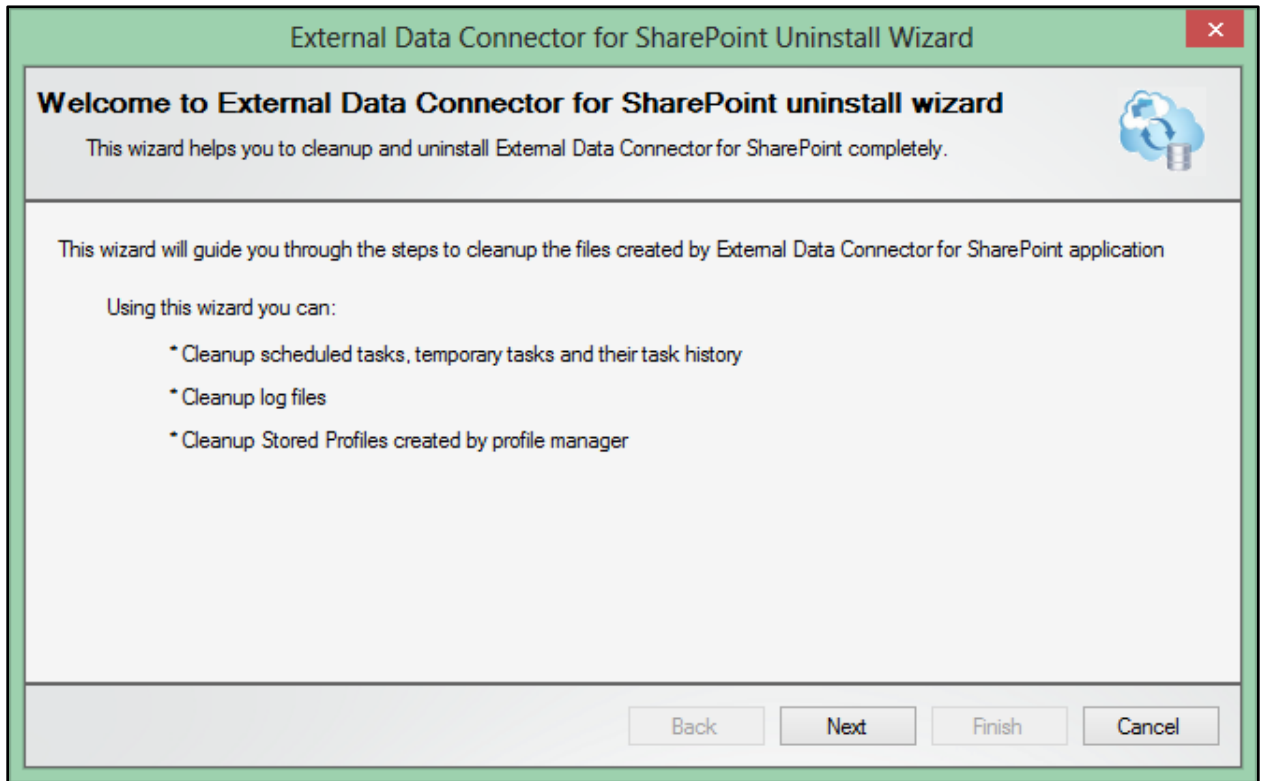
How to uninstall External Data Connector?

When you create integration connections in External Data Connector, the application creates Windows Scheduled Connections (to run the integration connections at the specified time interval) and Stored User Profiles in the computer where External Data Connector is installed. Integration connection results for every connection run instance is also maintained in the computer as application files.

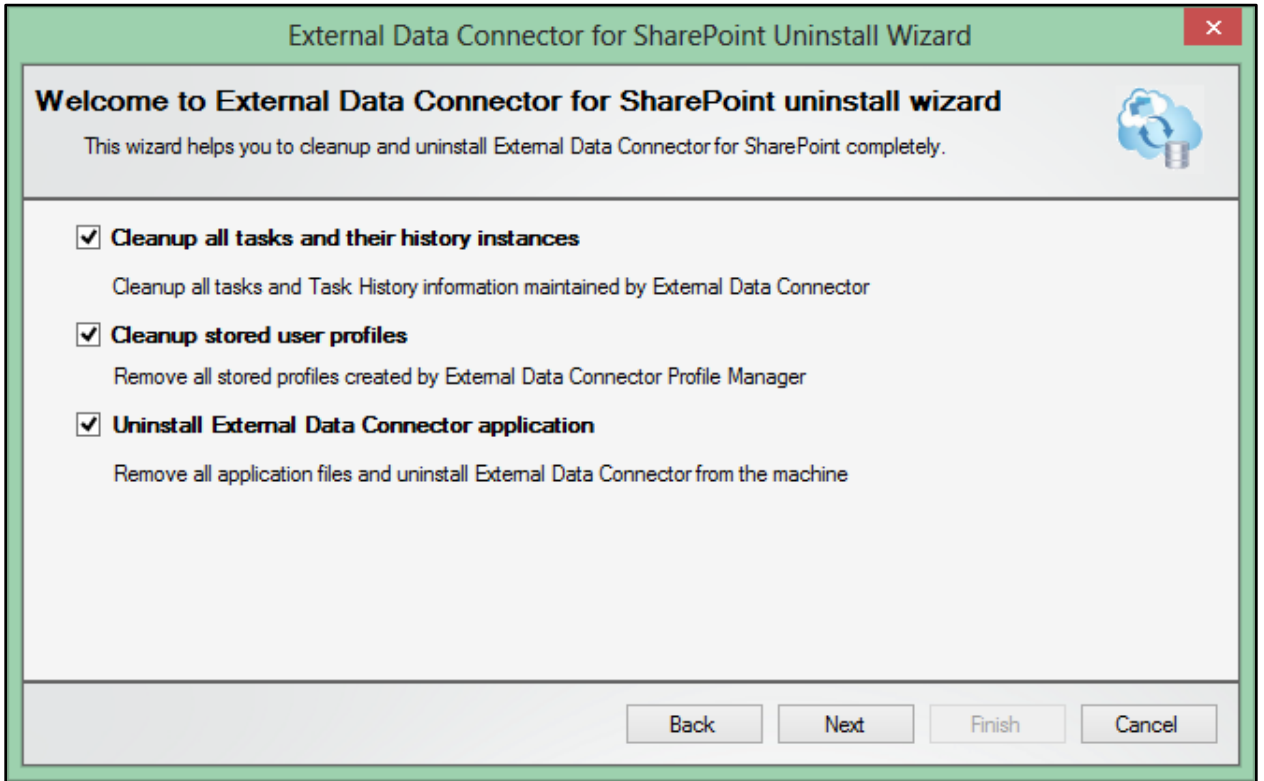
When you uninstall External Data Connector through **Control Panel - Add / Remove Programs** applet, Windows Installer program will remove only the application files from your machine. But, the application related files created by External Data Connector remain in the computer. In order to remove External Data Connector 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 / profiles that are created by External Data Connector for SharePoint application selectively and uninstall External Data Connector completely from the machine.

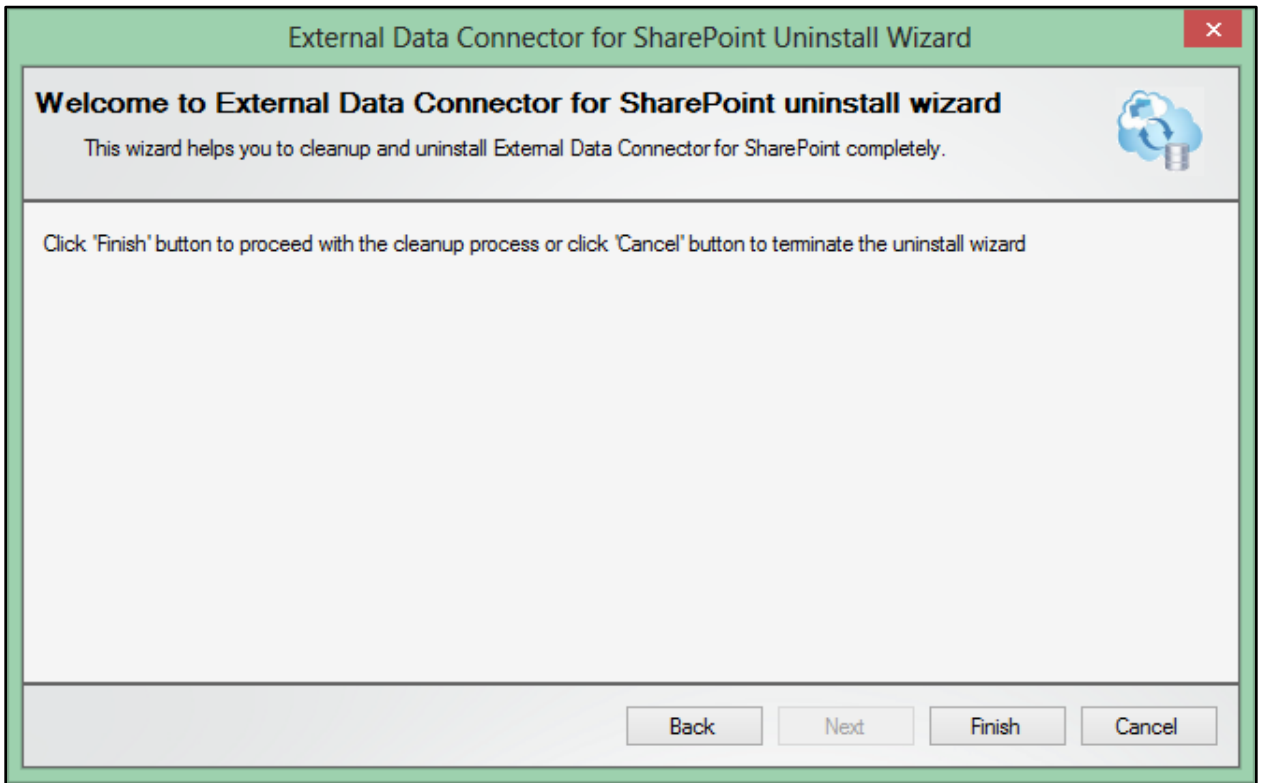
1. Launch the uninstall wizard by clicking **Start -> Programs -> External Data Connector for SharePoint -> External Data Connector Uninstall Wizard**. External Data Connector uninstall wizard will be shown as below:



2. Select required cleanup options as shown below:



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 External Data Connector application from the machine, if you have selected the cleanup option **Uninstall External Data Connector application** in the wizard.

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