

# SmartVault Bulk File Upload Tool

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The SmartVault Bulk File Upload Tool gives you a way to upload whole folder structures to SmartVault in bulk. You can simply select the folders you want to upload and go – you don't have to worry about the upload stopping due to any errors or a lost network connection. Using this tool, you can:

- Upload hundreds of megabytes or gigabytes of data to SmartVault, even while your users continue to work.
- Not worry about losing your network connection. If your network connection is lost, this tool will keep retrying until your network connection comes back up.
- Identify any files with invalid characters (e.g., '%' or '+') to fix them before the upload, or have SmartVault auto-name these folders or files for you.

## Installation

To install the Bulk File Upload Tool, you must be a local administrator on your PC. Download and install the SmartVault Bulk File Upload Tool from the SmartVault web site. This tool will periodically check for updates and automatically update itself.

The program will run automatically after installing. You can also run the Bulk File Upload Tool at any time from the Windows Start button under All Programs > SmartVault > SV Power Tools.

**If you are running in a hosted environment, check with your hosting company for details on how to install and run this tool, which may be different from that described above.**

## Setup

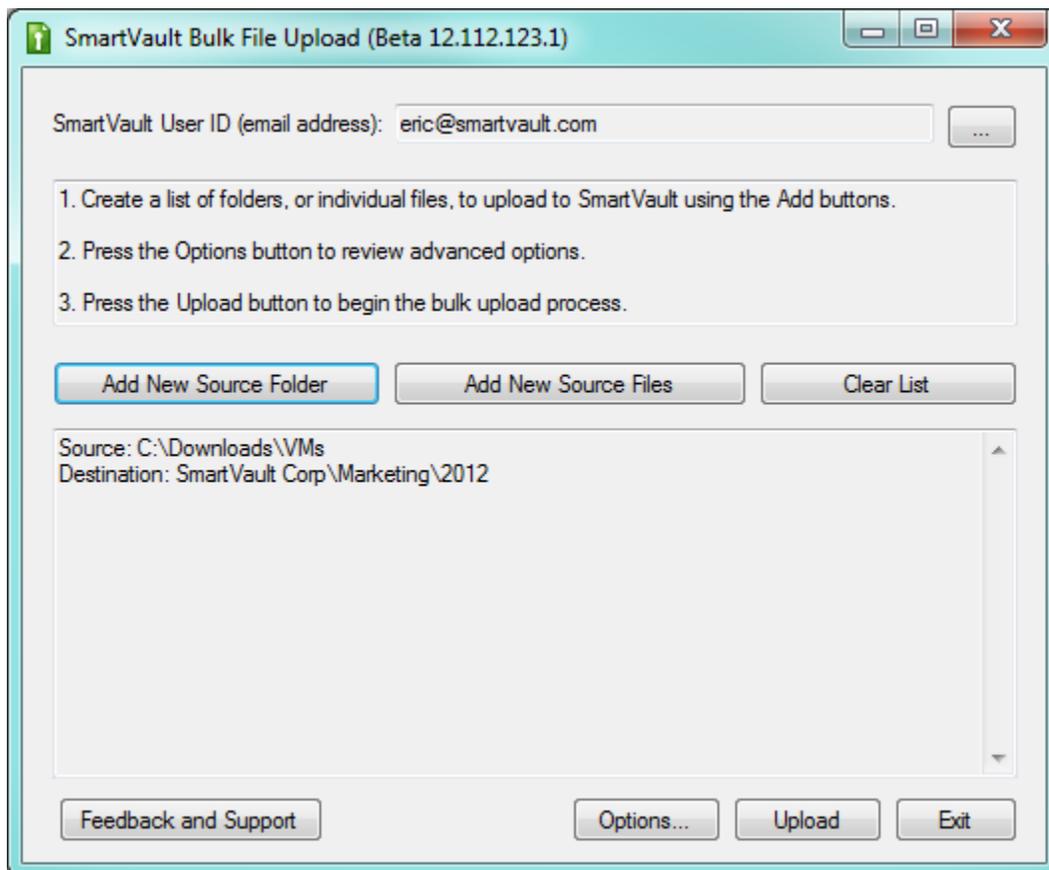
The first time you run the tool, you will be asked to enter your SmartVault user ID. Next, you will see a screen similar to the one below. To configure the Bulk File Upload Tool to run with your SmartVault User ID, you must get a secure PIN code from the SmartVault portal and enter it into the User ID Setup screen.

1. Click the Get Pin button which will open a new browser window to <https://my.smartvault.com> where you will need to sign into SmartVault web portal.
2. Click the Allow button and copy the Use PIN from the web page.
3. Return to the SmartVault User ID Setup dialog and enter the PIN and click OK.



## Using the Bulk File Upload Tool

When you run Bulk File Upload Tool, you will get a screen similar to the one below. From this screen, you can select folders and/or individual files from your local file system, pick a location in SmartVault, and begin uploading the files.



Follow the steps outlined in the instruction panel of the tool to select folders and file and begin uploading to SmartVault. For each folder, or group of files you select using the Add buttons shown above, you can select a destination vault or folder in SmartVault.

When you click Upload, the tool will first check your source files to see if there are any files or folders with names that use characters (such as '%' and '+') that are allowed by Windows and Mac operating systems, but not by SmartVault. This will also estimate how long it will take to upload your files.

After the Upload process completes, a status message will display the results of the upload, including upload speed (e.g., "MB per minute") and a message with any errors that were encountered during the upload process.

To get started using the Bulk File Upload Tool, we recommend the following:

1. Familiarize yourself with the Options section discussed below.
2. If you are performing a one-time bulk upload of all of your company's data to SmartVault, read the section below titled **Migrating All Your Company's Files**.
3. Create a test vault or folder and experiment with uploading folders and files to SmartVault.
4. After the above, you should be ready to go!

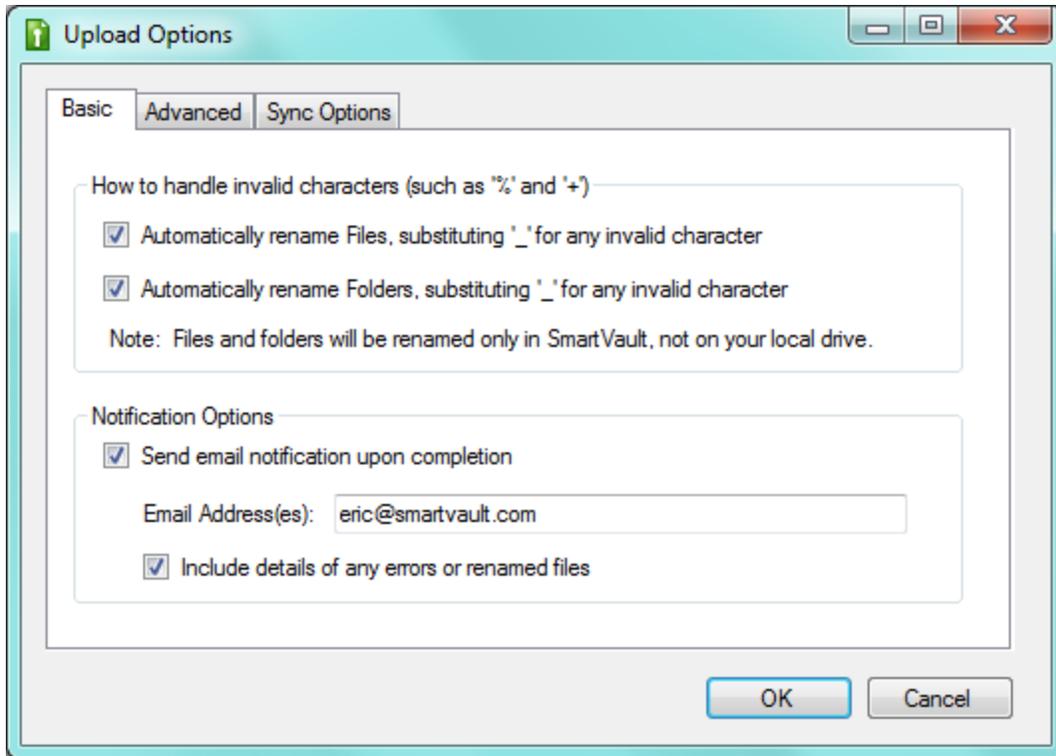
## Options

Configuration options are available from the "Options..." button on the main screen of the Bulk File Upload tool. Changes you make to these Options will be saved and restored the next time you run the Bulk File Upload Tool (unless you quit the tool by clicking on the "X" icon in the upper-right-hand corner of the main window).

### Basic Options

The default basic options are shown below. These include options for configuring...

- How the tool should handle file and folder names with invalid characters.
- Notification options (if you have Microsoft Outlook installed)



### How to handle invalid characters

There are two characters that are allowed to be used in folder and files names by the Windows and Mac operating systems, but not allowed by SmartVault (such as '+' and '%'). You can use these three options to configure how the tool should deal with folder and files that contain these invalid characters.

You can use these configuration options to automatically rename files and folders with these invalid characters in SmartVault. If you do, the folders or files with these invalid characters will be renamed upon being uploaded to SmartVault, using a '\_' (underscore) character in the place of the invalid character. The source file will not be renamed on your local computer; the renaming will occur only in SmartVault.

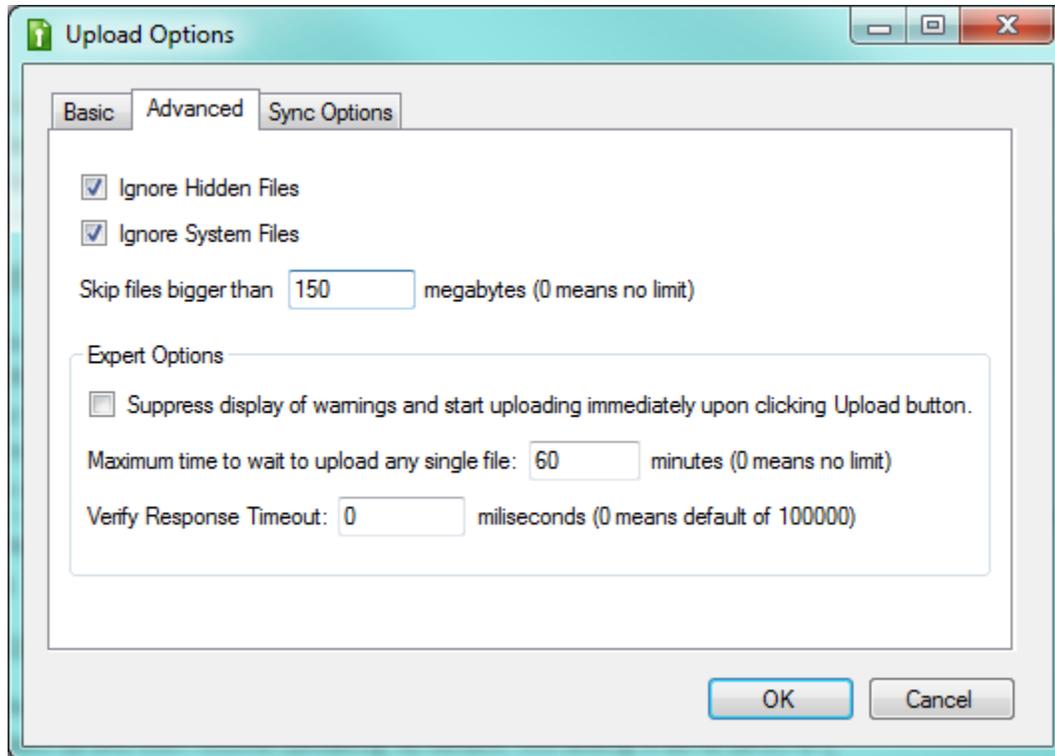
### Notification Options

You may specify one or more email addresses that will receive a notification when the upload completes. To specify multiple email addresses, separate each one by a ',' or ';' character. This notification email will give you a summary of files uploaded. You can also opt to include a detailed list of errors and any files that were automatically renamed due to having invalid characters. You should be careful when including this detail, especially if the email may be sent "in the clear" over the Internet, in case there may be any confidential information included in directory names and/or file names.

Email notifications require that you have Microsoft Outlook installed and properly configured on the machine running the Bulk File Upload Tool.

## Advanced Options

Advanced options are all disabled by default. You will rarely need to use these options; however, they are available for advanced users who want or need more control over the upload process.



### Ignore Hidden / System Files

By default, the Bulk Upload Tool will upload any hidden or system files; however, you can ignore (not upload) hidden and/or system files with these settings on the Advanced tab.

### Skip Big Files

Very large files that take longer than 10 minutes cannot be uploaded using this upload tool. For a fast Internet connection, this could be approximately 150MB. You should use the SmartVault Inbox Tool to upload these files. Once you know the maximum file size that can be uploaded using this tool, you can use this setting to tell the upload tool to ignore files bigger than the specified size.

### Suppress display of warnings and start uploading immediately upon clicking Upload button

By default, when you click Upload, the tool will analyze your local files for invalid path names and then ask you to confirm that you want to begin the upload. If you have a huge number of files to upload, it may take a while for this analysis to complete and for the confirmation dialog to appear. If you know you want to perform the upload and don't want to wait for the confirmation dialog, select this option. There will still be an analysis phase, but the upload process will start automatically when the analysis

phase has been completed, so you can leave your computer instead of waiting around for the confirmation dialog.

### Maximum time to wait to upload any single file

If you lose your network connection while files are being uploaded, the tool will wait until the network connection comes back up and then resume uploading. By default, this setting is set to zero (“0”), meaning that the maximum wait time is “infinite” – the tool will simply wait until the network connection comes back up. This setting allows you to specify that the tool should abort if the network connection is lost and does not come back up for the specified “max wait time”.

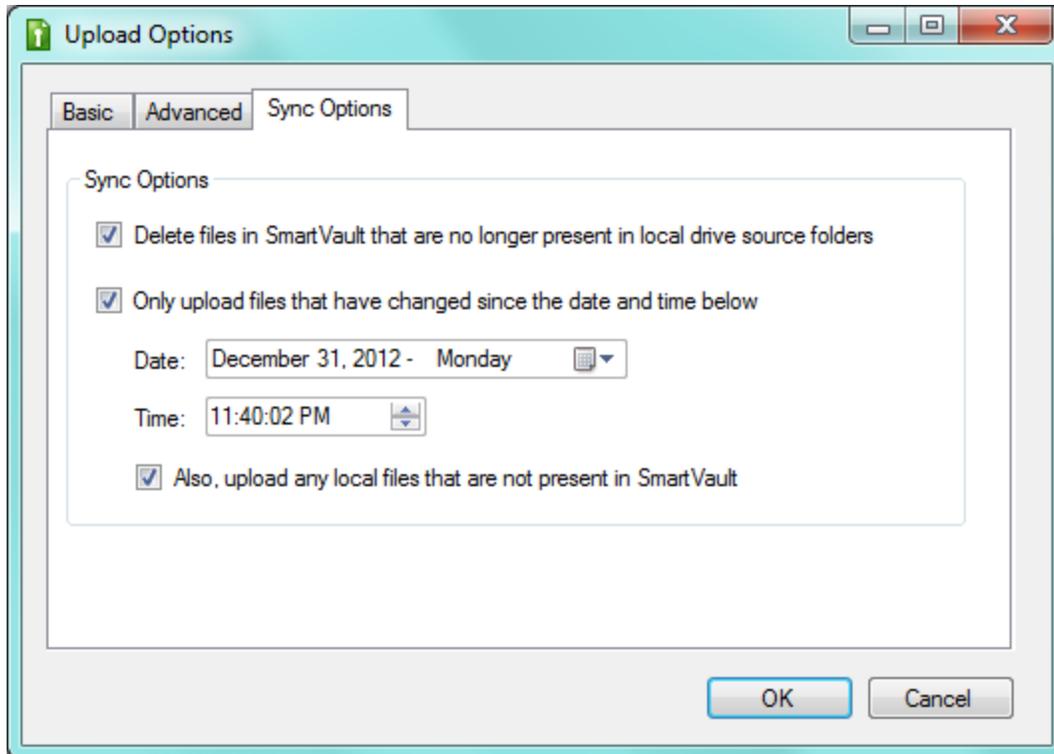
### Verify Response Timeout

This setting should be set to 0, so SmartVault can use the best default timeout option when uploading files. If you have trouble uploading files, SmartVault support personnel might suggest alternate settings.

### **Sync Options**

The Sync Options are available to save you time if you have to break your upload into jobs that need to run at different times, or if files have been changed on your local computer and you only want to upload the changes to SmartVault. Sync Options are all disabled by default. These options are primarily used when you are doing a one-time bulk upload of all of your company’s data to SmartVault. For more details on best practices for importing all your files to SmartVault, read the section below titled **Migrating All Your Company’s Files**.

Note: This tool will not actually detect which files have been changed. It will, however, give you important options to speed up the upload process, especially if you are migrating large amounts of data (e.g., hundreds of GB) to SmartVault using the best practices recommended in the **Migrating All Your Company’s Files** section, below.



### Delete files in SmartVault that are no longer present in the local drive source folders

If you select folders to upload to SmartVault, and there are folders or files in the SmartVault destination that are not (or no longer) present on your local file system, these folders/files will be deleted in SmartVault. [Remember: you can always restore deleted files in SmartVault using the Recycle Bin task in the SmartVault portal.]

### Only upload files that have changed since the date and time below

The Bulk File Upload Tool will not actually inspect files to see if they are different from a file already in SmartVault, but you can configure the tool to only upload files that have been modified on your local computer since a specific date and time.

If you select this option, you can also select the final option to check SmartVault for any files that may exist in the source folder that have not been modified since the specified date/time, but don't exist in SmartVault. It takes a little extra time to check SmartVault for these files, so it will slow the upload process down a little, but if you think files in SmartVault may have been deleted, you can use this option to make sure all the files on your local PC are uploaded to SmartVault.

## **Migrating all of your company's files to SmartVault**

If you have tens, hundreds, or thousands of GB to upload to SmartVault, we recommend you read this section which describes best practices for migrating all your company data to SmartVault.

The Problem: A typical internet connection may let you upload from 500MB to 1GB per hour<sup>1</sup>. If you have 10GB to upload, this could take 10-20 hours; 100GB would take days, and 500GB or more would take weeks. In addition, while files are being uploaded, you may have users continuing to work in your current folders. So after the upload has completed, what you uploaded may no longer be current.

The Solution: Don't try and migrate all your data at once. Use the Bulk File Upload tool to make a first pass at uploading all your data; it will skip any files that are currently in use. After this first pass, which may take days, you can use the Sync Options of the Bulk File Upload tool to only upload files that have changed since the first pass. After the second pass, SmartVault should be totally in-sync with your local file system, and your users can stop using your local file system and switch over to using SmartVault.

SmartVault Direct Disk Upload Service: If you have over 100GB, or have a slow network connection, you can send a disk drive directly to SmartVault for us to upload via a high-speed connection in our data center. SmartVault charges \$1 per GB with a \$500 minimum for this service. For more information, email SmartVault support at [support@smartvault.com](mailto:support@smartvault.com).

The recommended general framework to migrate all your files to SmartVault can be found on the next page; however, every business is different. For assistance with migrating large folder structures containing over 50-100GB of data or more, please contact SmartVault Customer Care for an assessment of the best migration strategy to meet your needs.

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<sup>1</sup> Because there is overhead associated with creating each folder and each file, uploading lots of small files will take longer than uploading a small number of large files of the same cumulative size.

## Best Practice for Migrating All Your Files to SmartVault

The recommended process to migrate all your data to SmartVault is described below. To get help from the SmartVault Customer Care group, go to [www.smartvault.com/support/contact-support](http://www.smartvault.com/support/contact-support).

1. **Test Connection Speed:** Create a test vault or folder to upload 25-100MB of data to test your connection speed. The upload tool will display and remember your data upload speed (in MB/minute) and use it to estimate total upload time for upload jobs.
2. **Validation:** Pick the folders/files you want to upload to SmartVault and press Validate. This will identify folders and files with invalid characters (e.g., '%' and '+') and also to get an estimate of the total time it will take to upload your files. [If this is an impractical amount of time for you to dedicate a machine to upload your files, contact SmartVault about our Direct Disk Upload Service, which would replace steps 5 and 6, below.]
3. **Correct:** If any files or folders containing invalid characters were found, you may want to manually rename them. If not, you can use the Options settings in the Bulk File Upload Tool to automatically rename these by default when you upload files.
4. **Prepare SmartVault:** Create one or more vaults or folders in SmartVault in which to upload your local files. This should be separate from wherever you are currently working in SmartVault, because you should not be working in the destination directory(ies) until you have totally finished the migration process. For tips on how to create your folder structure in SmartVault, see [www.smartvault.com/support](http://www.smartvault.com/support), or send an email to [support@smartvault.com](mailto:support@smartvault.com) for help.
5. **Prepare Local PC:** Select a PC that can be left uninterrupted for the duration of the upload. While files are being uploaded, users can continue to work with your local file system; however, you will need to run the Bulk File Import Tool again to sync up any changes (step #7, below).
6. **Start Upload:** Select the local folder and/or individual files you want to upload to SmartVault and press the Upload button to begin the upload. Record the date and time that you started the upload, which will be needed in step #7. Let the upload process run to completion.
7. **Sync to Changes During Upload:** During the previous step, if any files may have changed on your local file system you will need to sync those changes to SmartVault. Run the upload process again, just like you did in Step 6; however, this time select all the Sync Options by pressing the "Options..." button before you upload. Enter the date and time recorded as your start time in Step 6 in the Sync options section of the Advanced Options form.

Note: During Step 7, you should make sure that users are not using your local file system; else, you will need to re-run Step 7 to make sure SmartVault files are in sync with your local files.

8. **Move files in SmartVault to permanent locations:** Use the SmartVault Portal to move folders to their permanent location, if required. You can also use the mapped drive to move folders.<sup>2</sup>
9. **Start Using SmartVault!** All your files should now be in SmartVault, and you can "turn off" your old file system and have your users begin using SmartVault.

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<sup>2</sup> Use the mapped drive to *move* large folders, but not to *copy* large folders. You should copy large folders from the SmartVault Portal. If you copy using the mapped drive, it's slow: Windows will try to copy the files one by one.