

Document Import Kit for SharePoint 2010

Document migration tool for Microsoft SharePoint

Product Overview



Document Import Kit for SharePoint 2010 (DocKIT) is a powerful application for migrating documents, data and their associated metadata properties from network file shares, file servers and local hard drives to SharePoint 2010 and SharePoint 2007. DocKIT supports Microsoft SharePoint Server 2010 / Microsoft SharePoint Foundation 2010 and Microsoft Office SharePoint Server 2007 (MOSS 2007) / Microsoft Windows SharePoint Services v3.0 (WSS 3.0) environments.

Benefits

DocKIT software has been specifically designed to comprehensively address content migration needs of companies from file shares to Microsoft SharePoint. DocKIT provides granular level control over the contents migrated to the SharePoint repository.

- ✓ Simple solution which does not require end-user training to import documents and its associated metadata properties to SharePoint.
- ✓ Consolidate documents and data from different file servers and network shares locations into many SharePoint list types across several Sites - Document libraries, Picture libraries, Tasks, Calendar, Contacts, Survey, Discussion Boards, Announcements, Links, Issue Tracking and Custom Lists.
- ✓ Auto-generate folder structures, file list and mine out metadata from files in various file share locations that are to be migrated to SharePoint using the built-in Metadata Extractor tool.
- ✓ Hassle-free software installation using a simple wizard.
- ✓ Migrate contents to multiple SharePoint servers in your network from a single desktop or client.
- ✓ Easily retain source content metadata when migrating them to SharePoint:
 - Retain document summary properties of source documents namely - Title, Subject, Author, Category, Keywords and Comments and MS-Office custom

The DocKIT application proved extremely useful for importing large numbers of files and folders quickly and easily into SharePoint. Previously, we were having to import files individually, but through using DocKIT we were able to deal with huge directories in a fraction of the time that it would have taken. An excellent tool, really glad we found it.

- Guildford Borough Council, UK

"I found DocKIT product through SharePoint.com and found it extremely useful. We used DocKIT to import hundreds of documents into SPS. Users were in desperate need for them but refused to take the time to upload them. DocKIT saved us the upload time, and more importantly, made the information available in a timely fashion."

- iFormation Group, USA

- properties in SharePoint.
 - Retain the original Created Date, Last Modified Date, Created By and Modified By fields in the equivalent system fields in SharePoint for each folder / document migrated to SharePoint.
 - Maintain document versions as in source.
 - Associate metadata stored in a CSV / Excel / TXT file with the respective documents in SharePoint lists / libraries.
 - Rename source folder & file names and make them SharePoint-friendly names based on file naming rules.
- ✓ Invoke migration task using a command-line or Windows Task Scheduler interface in any external application or batch file.

Key Features

Import documents and metadata properties to SharePoint libraries

Import folders and files along with metadata (stored in external metadata file and file properties) from file shares to SharePoint libraries using DockKIT's Explorer interface or a batch descriptor file.

DockKIT allows you to associate metadata of documents stored in an external file, thereby eliminating the burden of manually entering values to the documents while checking in. This feature is extremely useful if you have the document properties (metadata) stored in a database or spreadsheet or any other third-party application.

DockKIT associates file system properties ('Summary' properties) - Title, Subject, Author, Category, Keywords, and Comments and applies it to the respective documents in SharePoint. DockKIT imports file properties such as Manager, Company, Date Last Printed, Date Last Saved, Revision Number, Version, Word Count etc. and all other custom file properties in the case of MS-Office documents. DockKIT retains the original Created Date, Last Modified Date, Created By (Author) and Modified By (Editor) and assigns them to the respective system / built-in columns in SharePoint library. These features are extremely useful if you want to store the original document property values in the respective SharePoint columns.

Assign metadata to documents in SharePoint Libraries using a metadata file

Update document metadata properties to documents already residing in SharePoint libraries using the field values specified in the metadata file. This feature is extremely useful to update document metadata alone without affecting the file contents.

System Requirements for DockKIT for SharePoint 2010 application

- ✓ Windows 7 / Vista / XP (or) Windows Server 2008 / 2003 (32 or 64 bit) with the latest service packs.
- ✓ Microsoft Office 2010 /2007 Suite or Microsoft Office 2007 Compatibility Pack or higher (required when importing Office 2007 format based file properties)

System Requirements for DockKIT Web Services

Windows Server 2008 R2 front-end web server(s) or application server(s) running Microsoft SharePoint Server 2010 / Microsoft SharePoint Foundation 2010

(or)

Windows Server 2008 / 2003 front-end web server(s) or application server(s) running Microsoft Office SharePoint Server 2007 / Windows SharePoint Services v3.0.

Import data or metadata properties to SharePoint lists

Import, Update (Edit) and Delete list items in a SharePoint List based on the line entries in the batch descriptor file. Manage list items residing in multiple SharePoint lists using a single batch file.

DockKIT allows you to import metadata and its associated file attachments to SharePoint lists such as Tasks, Calendar, Contacts, Survey, Discussion Boards, Announcements, Links, Issue Tracking and Custom Lists. DockKIT can also update metadata properties (column values) for existing SharePoint list items or delete the items, including file attachments in the SharePoint list.

DockKIT retains the original Created Date, Last Modified Date, Created By and Modified By fields to the equivalent system fields in SharePoint for each list item available in the source location. You can also update SharePoint's built-in fields, namely - Content Approval Status & related Comments, Content Type, Created Date, Modified Date, Created By and Modified By fields for each folder and list item in a SharePoint list.

Manage metadata in SharePoint lists

Update or Clean-up (Delete) SharePoint list items using DockKIT's Explorer interface using the quick metadata management tool.

Migrate many document metadata properties

DockKIT imports folders and documents to SharePoint libraries with the following metadata properties that typically define the source content:

- ✓ Custom metadata properties defined in the external metadata file (CSV / TXT / XLS)
- ✓ Summary file system properties - Title, Subject, Author, Category, Keywords and Comments
- ✓ File properties such as Manager, Company, Date Last Printed, Date Last Saved, Revision Number, Version, Word Count etc. in the case of MS-Office documents
- ✓ Original Created Date & Last Modified Date of source documents
- ✓ Author (Created By) and Editor (Modified By) of source documents

Feature List

- ✓ **Import multiple versions** - DockKIT imports multiple document versions available in the source folder or multiple list item versions defined in the batch file in the user-defined order. DockKIT provides granular control in versioning the documents or list items during migration thereby avoiding data duplication.

- ✓ **Rename folder or documents on-the-fly** - Rename folder / documents residing in multiple file locations during migration to collate them as multiple document versions in the SharePoint library or to convert them to SharePoint-friendly names.
- ✓ **Metadata Extractor** - Generate metadata for a list of files / documents residing in file shares or local drives. Mine out metadata from file summary properties and custom properties for various file formats. You can extract document properties associated with Microsoft Office and PDF and file properties from various file types such as JPEG, PNG, GIF, BMP, TIFF, HTML, TXT, MSG etc. This feature will be useful to auto-generate folder structures, file list and mine out metadata in various file share locations that are to be migrated to SharePoint.
- ✓ **Map document properties to SharePoint columns** - Map folder & file metadata properties to SharePoint built-in or custom columns using the Column Mapping Template.
- ✓ **Dynamic column values** - Use built-in functions to construct metadata values from the source metadata properties residing in file summary properties or external metadata file properties and assign them to SharePoint library / list columns of your choice.
- ✓ **Define import conditions** - Filter documents based on certain metadata properties prior to import. You can also import data or metadata to a SharePoint library / list based on user-defined criteria.
- ✓ **Import to multiple destinations** - DockIT enables simultaneous import of documents or metadata into multiple SharePoint libraries / lists in a SharePoint Site.
- ✓ **Import Task Manager** - DockIT creates import tasks and maintains task history in a task oriented interface. Create a scheduled task or store the task settings and manually run the task on-demand. Keep track of all import tasks performed using DockIT. Task Manager internally uses the familiar Windows Task Scheduler to run import tasks at different time intervals - daily, monthly, weekly etc.
- ✓ **Pre-migration Validation** - Validate task settings when importing documents and metadata properties to SharePoint libraries / lists by

performing a dry test run to minimize errors during a live import.

- ✓ **Activity Status Reports** - View detailed activity log reports classified as completed successfully, errors, warnings and items ignored after the migration task is fully complete.
- ✓ **Re-import documents** - Re-import folders and documents that failed during content migration in the first attempt by the simple click of a button.
- ✓ **Automate Tasks** - Run import tasks from the command line (DOS prompt) or automate to run in a scheduled manner using the Windows Task Scheduler interface. Automatically move the source folders & files to a new target location once they are imported to SharePoint.

Installation Instructions

The application installation packages (.msi) must be installed depending on your import requirements (refer table below). The simple setup wizard will guide you through the installation process.

Setup file	Description
DocKIT for SharePoint 2010 application	
DocKIT.msi	Install DocKIT application in the SharePoint Server or any client computer running Windows 7 / Vista / XP.
DocKIT Web Services component **	
DocKITWebServices_2010.msi	SharePoint 2010 servers (SharePoint Server 2010 / SharePoint Foundation 2010 running on Windows Server 2008 R2.
DocKITWebServices_2007_x86.msi	SharePoint 2007 servers (MOSS 2007 / WSS 3.0) running on 32-bit platform of

	Windows Server 2003 (or) Windows Server 2008.
DocKITWebServices_2007_x64.msi	SharePoint 2007 servers (MOSS 2007 / WSS 3.0) running on 64-bit platform of Windows Server 2003 (or) Windows Server 2008.
<p>** DocKIT Web Services component must be installed in each front-end web server or application server if you intend to work with the following fields or data types in SharePoint: Created Date, Last Modified Date, Created By, Modified By, Approval Status, Target Audiences, Document Sets, Managed Metadata and, Business Connectivity Services (BCS) / Business Data Catalog.</p>	



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