Dockit Migrator v14x

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1. Dockit Introduction

Dockit Migrator

1.1 How to install Dockit Server Agent?

Dockit Server Agent must be installed on a Windows Server running Microsoft SharePoint (2016 / 2013 / 2010 / 2007).

- For SharePoint 2007 servers

  Use *DockitServerAgent_2007_x86.msi* in order to install in 32-bit Windows Server 2003 (or) Windows Server 2008

  Use *DockitServerAgent_2007_x64.msi* in order to install in 64-bit Windows Server 2003 (or) Windows Server 2008

- For SharePoint servers2010

  Use *DockitServerAgent_2010.msi* in order to install in 64-bit Windows Server 2008 / Windows Server 2008 R2

- For SharePoint servers 2016 / 2013

  Use *DockitServerAgent_2013&2016.msi* in order to install in 64-bit Windows Server 2012 R2 / Windows Server 2012

If necessary, reset IIS, by using IISRESET /noforce for the changes to take place in SharePoint server.

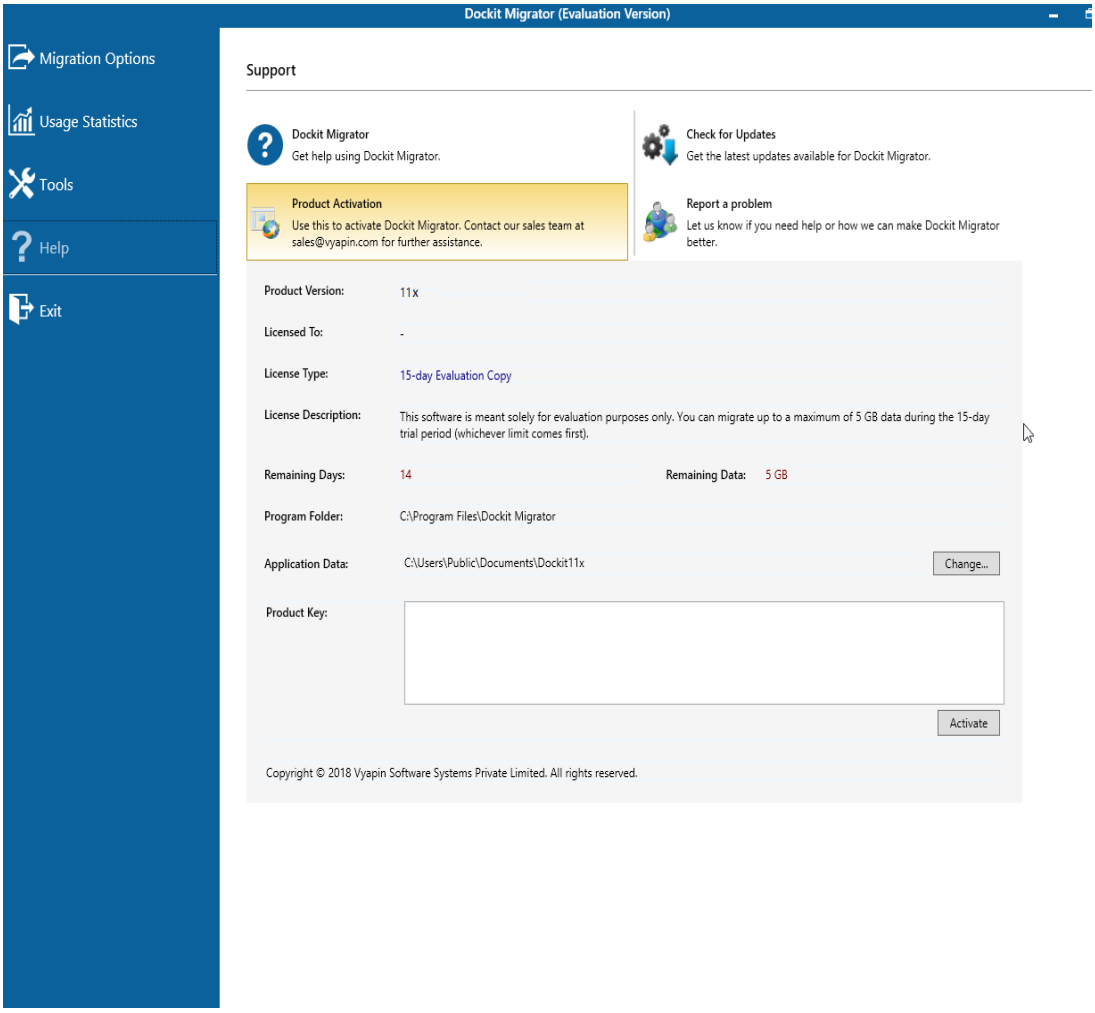
You can check the existenceof Dockit Server Agent component in target SharePoint server using Server Agent Test Tool tool available under 'Tools' menu of Dockit Migrator main screen.

1.2 Change Application Data folder location

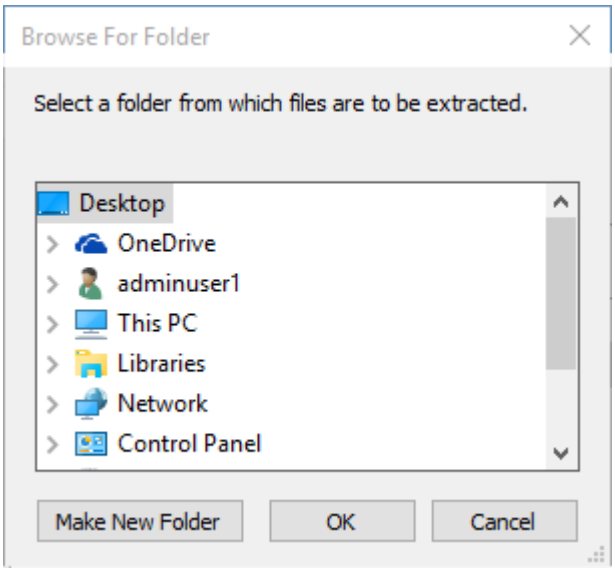
Dockit enables you to change **Application Data** folder location, where Dockit's import tasks and related settings, file renaming rules, activity logs and error logs are stored, at any time after installing Dockit software. To change the Application Data folder location, perform the following steps given below:

1 Select **Product Activation** option from **Help** menu
.

2 The **Product Activation** page appears as shown below:
.

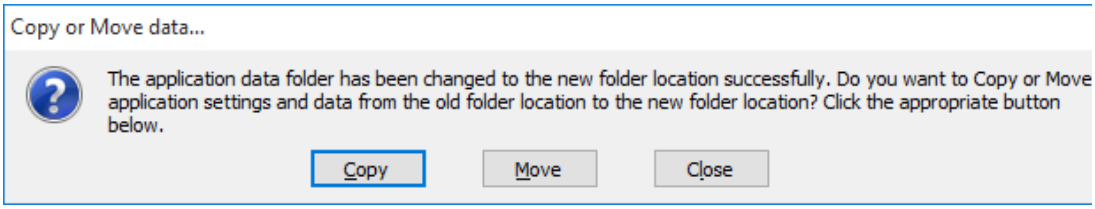


3. Click **Change** button to change **Application Data** folder location of Dockit application. The Browse For Folder location dialog will appear as shown below:



4. Select a desired folder location and Click OK. The folder location can be local drives or mapped network drives.

5. Dockit provides an option to copy or move the existing Dockit application settings (Dockit migration task settings, task histories, file renaming rules, activity logs, error logs etc.) to the new location once you change the Application Data Folder. Once you specify the new Application Data folder location, Dockit will prompt you to copy or move existing Dockit application settings to the new location as shown below:



6. Click the desired action (Copy / Move / Close) to proceed. Dockit will use the new Application Data folder location henceforth.

1.3 How to uninstall Dockit?

When you create SharePoint import tasks in Dockit, the application creates Windows Scheduled Tasks (to run the import tasks at the specified time interval) and Stored User Profiles in the computer where Dockit is installed. Import task results for every task run instance is also maintained in the computer as application files.

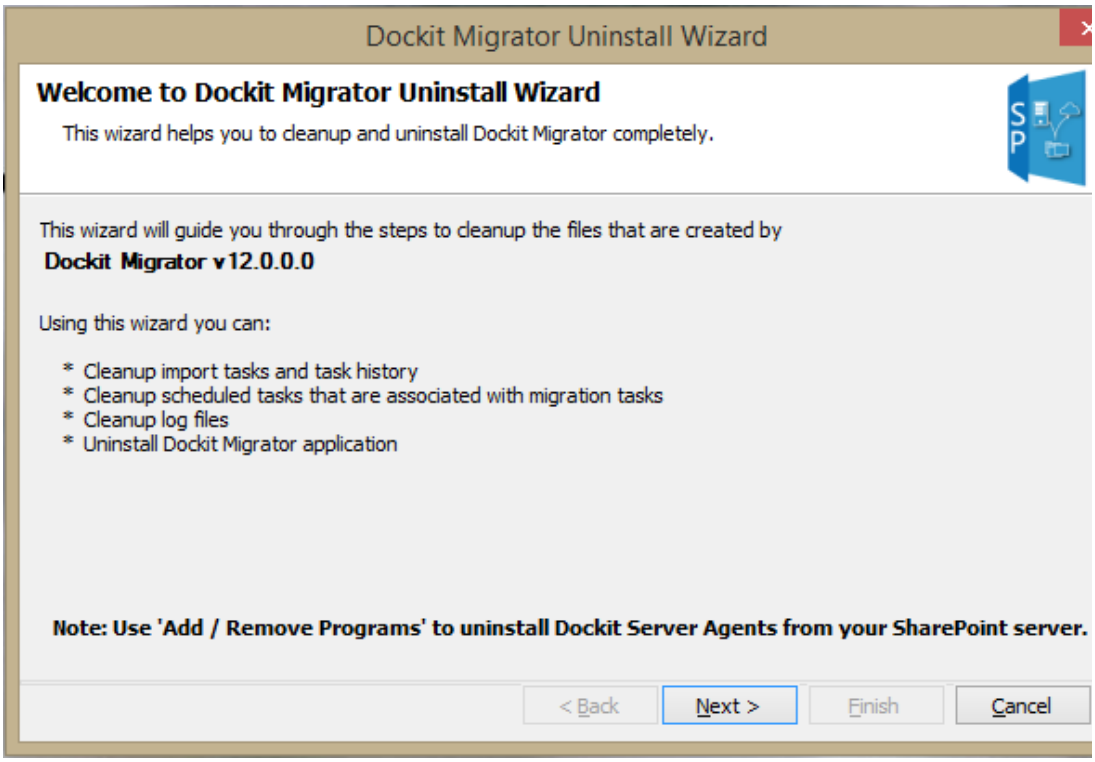
When you uninstall Dockit through Control Panel - Add / Remove Programs applet, Windows Installer program will remove only the application files from your machine. But, the application related files created by Dockit remain in the computer. In order to remove Dockit worker files completely, the uninstall 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 Dockit Migrator application selectively and uninstall Dockit completely from the machine.

Note: You need to uninstall Dockit Server Agent you need to uninstall Dockit Server Agent component separately from your SharePoint Server 2016 / 2013 / 2010 / 2007 using Control Panel.

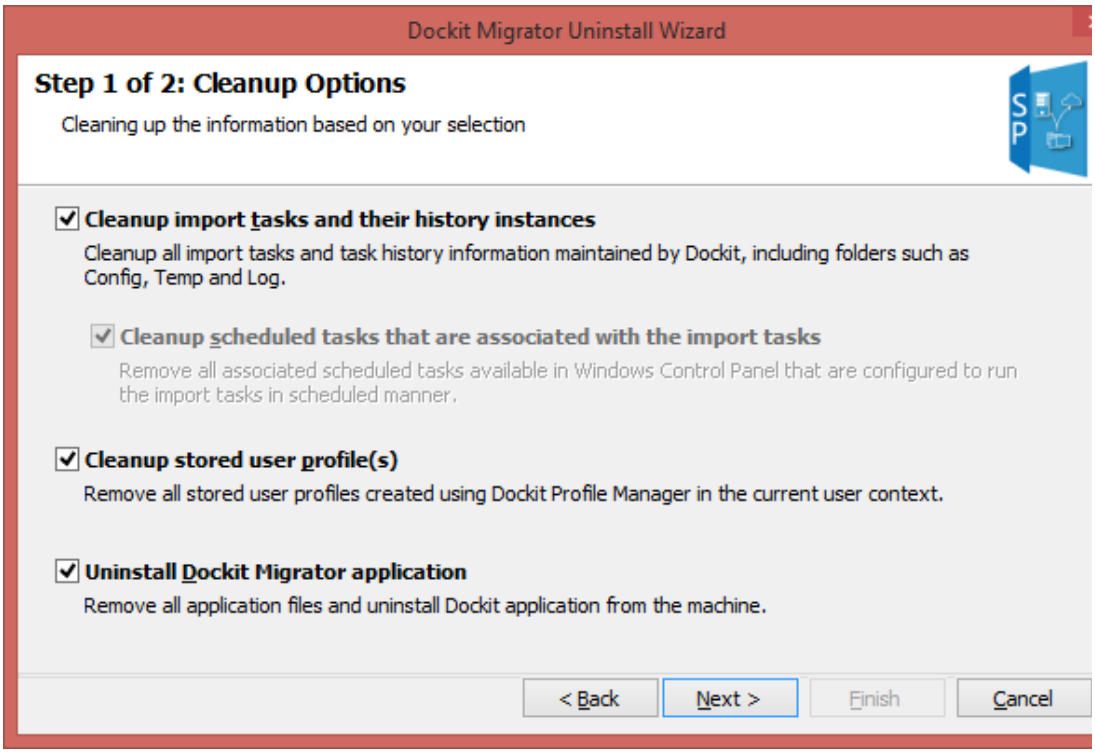
1. Launch the uninstall wizard by clicking Start -> Programs -> Dockit Migrator -> Dockit Uninstall Wizard.

2. The **Dockit Uninstall Wizard** dialog will be shown as below:



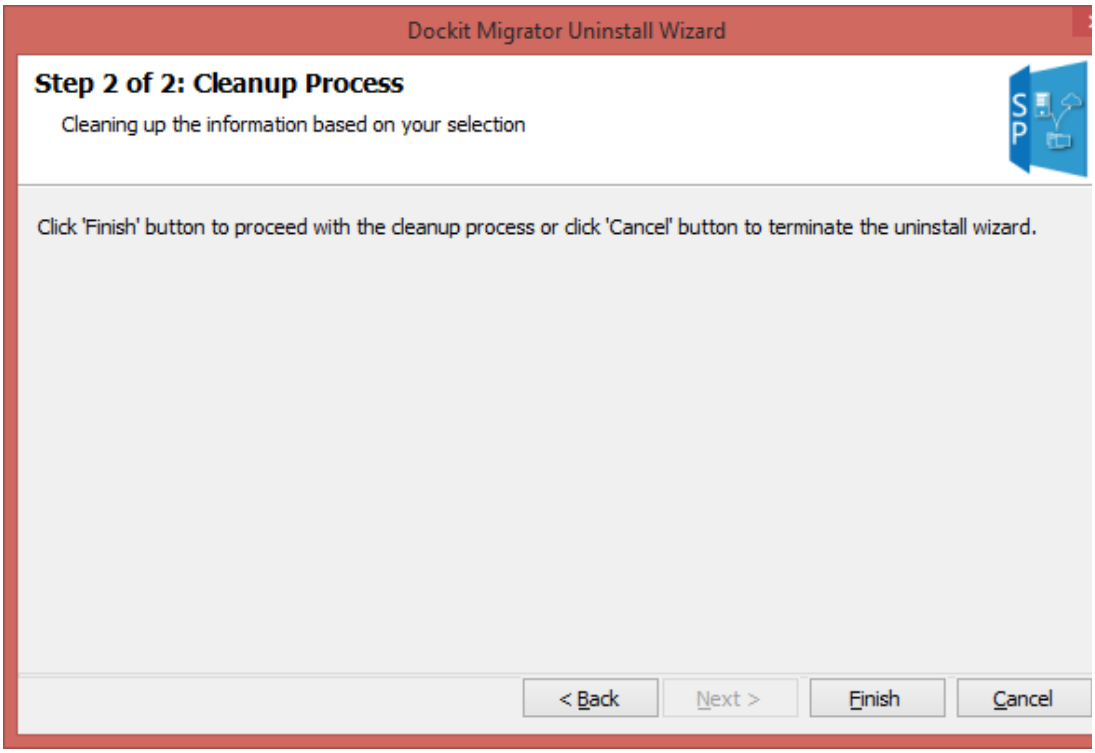
Click **Next** to proceed.

Select required cleanup options as shown below:



2. Click **Next** to proceed.

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

1.4 How to register the software?

You can purchase Dockit Migrator through our website https://www.vyapin.com/ . Please contact our Sales department at sales@vyapin.com for sales and price related queries.

How to register the software?

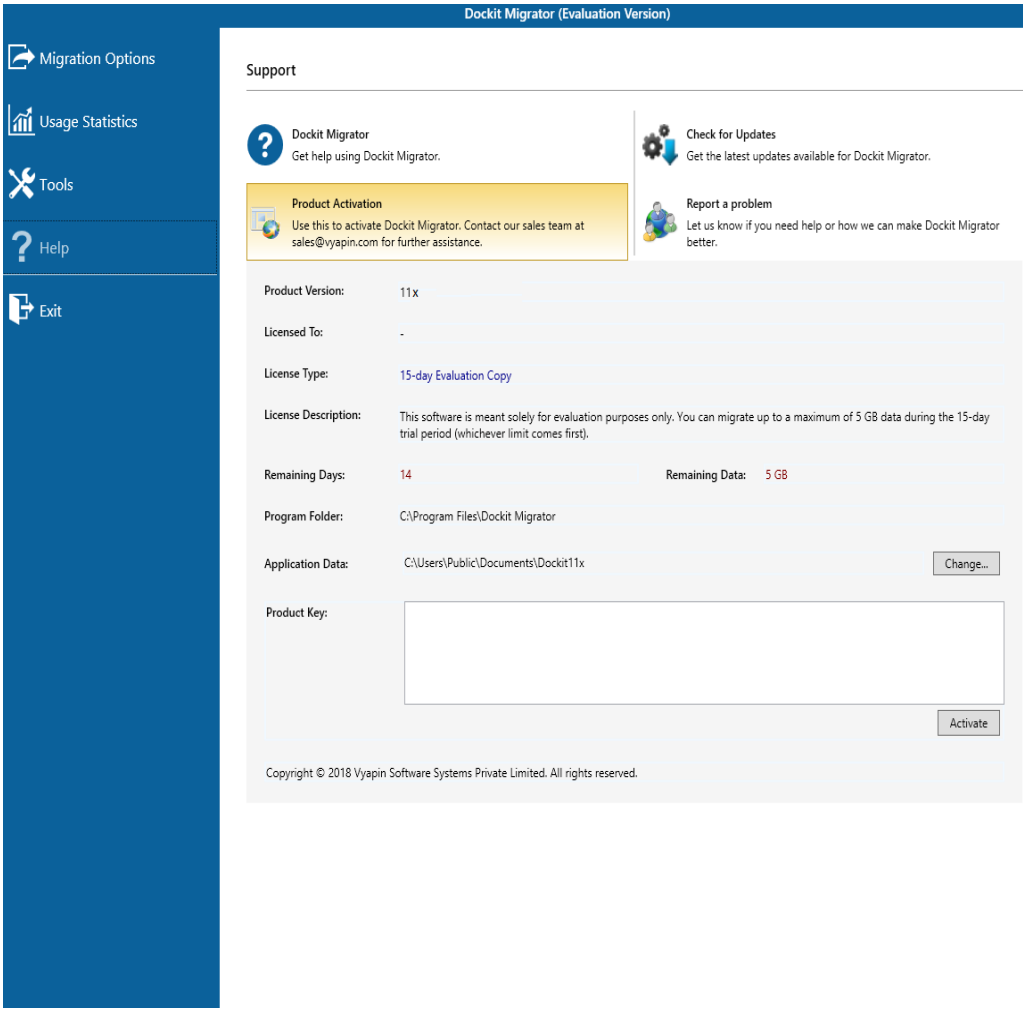
Once you purchase the software online or through any one of our resellers, you will receive a purchase notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to register the software.

Request License Key

In case you do not receive an e-mail from our sales team after you purchase the software, please contact our sales department at sales@vyapin.com with the sales order number. You can also request the license by the filling up the form shown below. Please allow 12 hours from the time of purchase for our sales department to process your orders.

1. Select **Product Activation** from **Help** menu

2. The **Product Activation** page appears as shown below:



3. Once you paste the license key, click **Activate** button to apply the new license key.

1.5 Technical support

Please send all Technical Support questions to support@vyapin.com.

Please send us the following additional information if you are reporting a problem:

1. Version of Dockit Migrator that you are evaluating or you have registered with us. (Version information could be found in the "About Dockit" dialog in "Help" tab.
2. Additional services or resource consuming processes/applications (like anti-virus) running in the background on Dockit Migrator installed computer, as well as the destination Microsoft SharePoint Servers.
3. Hardware configuration of the computer where Dockit is installed.

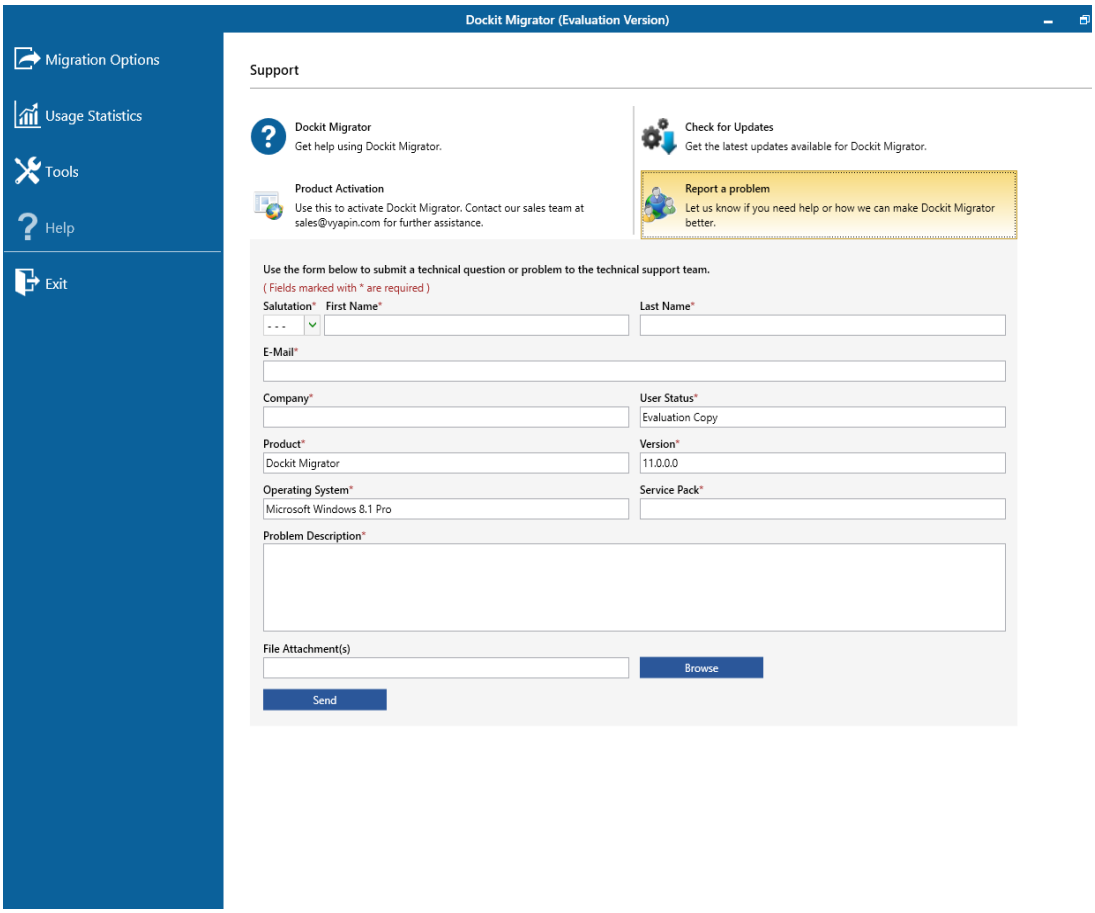
4. "DockitErrorLog.txt" available in the common application data path of Dockit Migrator (e.g., *<Application Data Folder>*\Dockit12x\Log\DockitErrorLog.txt).
5. Dockit error logs and activity log files (ActivityLog.txt, ActivityErrors.txt, MetadataErrors.txt and DockitErrorLog.txt) stored in the application data path. For example: *<Application Data Folder>*\Dockit12x\TaskHistory*<taskname>**<timestamp>*.

Note:
<Application Data Folder> is the location where Dockit Migrator tasks and task history is stored in the computer running Dockit application. The *<Application Data Folder>* can be found from **Help -> Product Activation** screen. The default path of *<Application Data Folder>* is as follows:

- Windows 10 / Windows 8 / Windows 7, Windows Server 2012 R2 / Windows Server 2012 / Windows Server 2008 R2 / Windows Server 2008 - C:\Users\Public\Documents

Select **Report a problem** option from **Help** menu as shown below.

1.



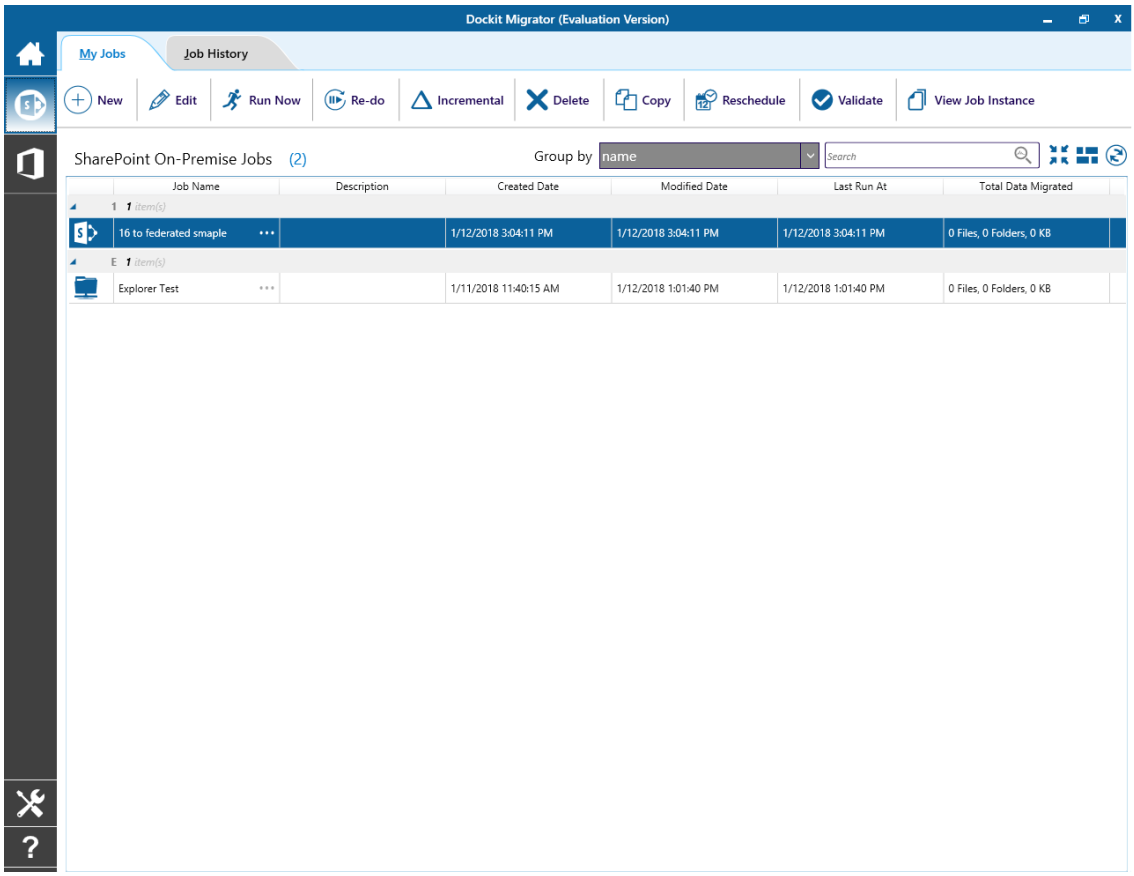
2. Dockit Task Manager

- Task Manager
- Create a new task

- Edit an existing task
- Run a task
- Re-do Task
- Incremental Task
- Delete an existing task
- Copy task
- Reschedule a task
- Validate task
- Manage categories
- Cleanup history
- View job instance
- Task History

2.1 Task Manager

Dockit creates import tasks for import process setup to migrate documents and metadata from file system to SharePoint. Dockit Task Manager in the main application window will help you manage Dockit import tasks and their corresponding task history. Dockit Task Manager provides menu and tools to work with the tasks easily.



- Refers the task is in incremental mode.

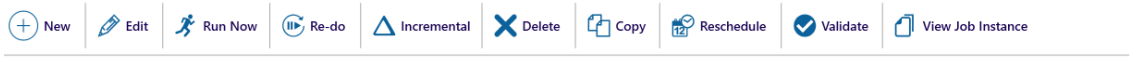
- Refers the task is scheduled in Windows Task Scheduler.

Dockit Task Manager contains a standard menu bar and toolbar along with two panes to manage Dockit export task effectively:

1. Task List pane
2. Task History pane

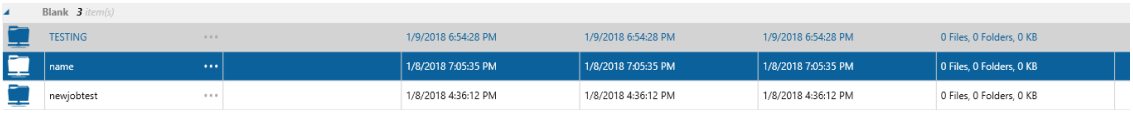
Standard menu bar and toolbar

Standard menu bar and toolbar contain all the commands (or actions) to work with a Dockit export task.

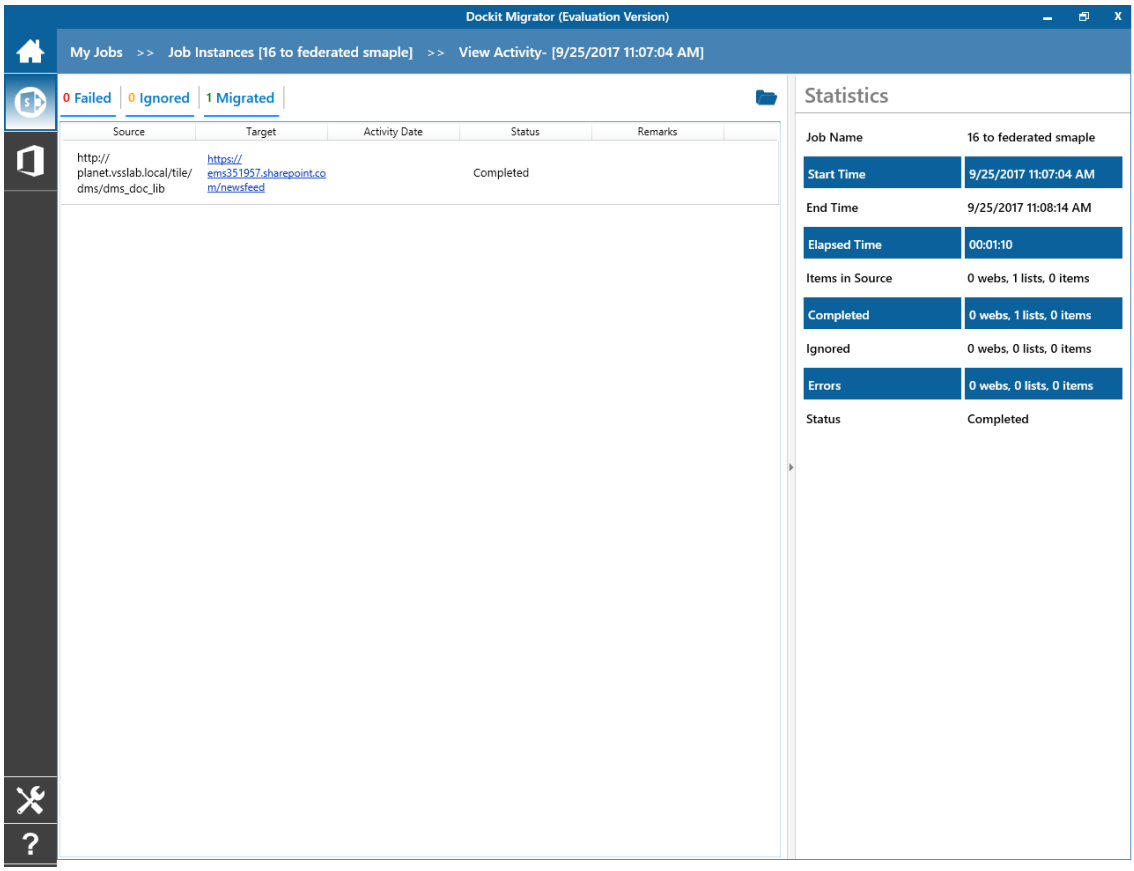


Task List:

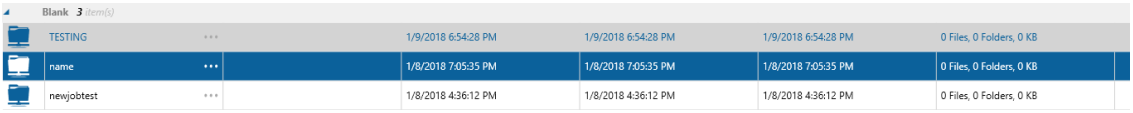
Task List pane contains all export tasks created by the user. Task related operations such as Edit Task, Copy Task, Delete Task and Run Now can be performed based on the selected task in the Task List pane. It provides information about task such as Description, Created Date, Modified Date, Total Items Processed, Total Data Transferred and Settings for each task. The information about category will be displayed on Show Categories. The default selection on category list is **All Tasks** which shows all the created tasks under corresponding category. The default category is **Blank**.



The Settings of the task has been displayed when click the settings image which is at the last column of each task.

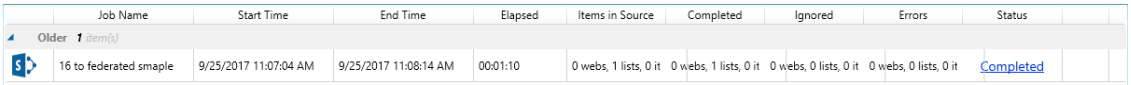


The **Show Categories** field helps you view only the tasks available in the selected category.



Task History:

Task History pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.

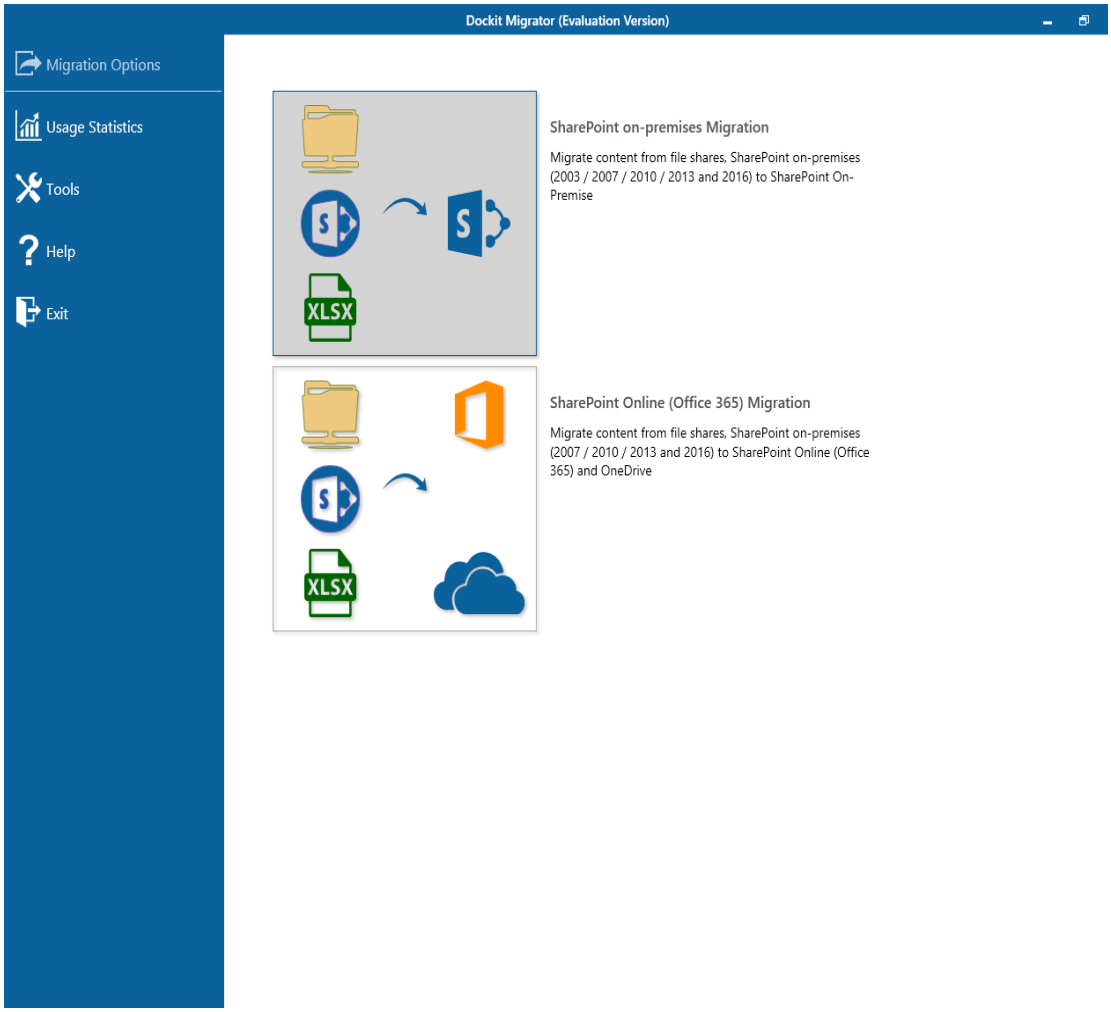


2.2 Create a task

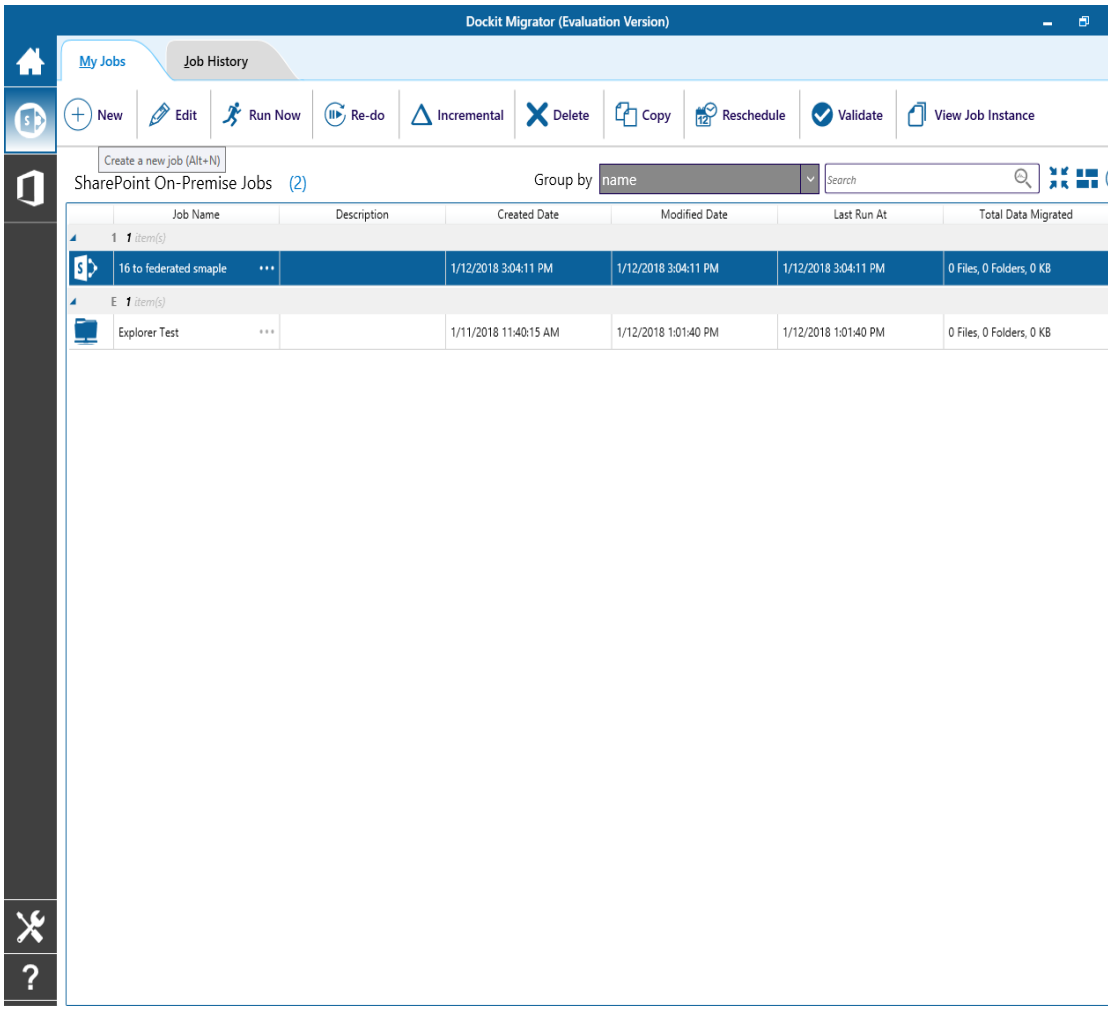
You can create a task to migrate data, documents and, their associated metadata properties from network file shares, file servers and local hard drives to SharePoint 2016 /

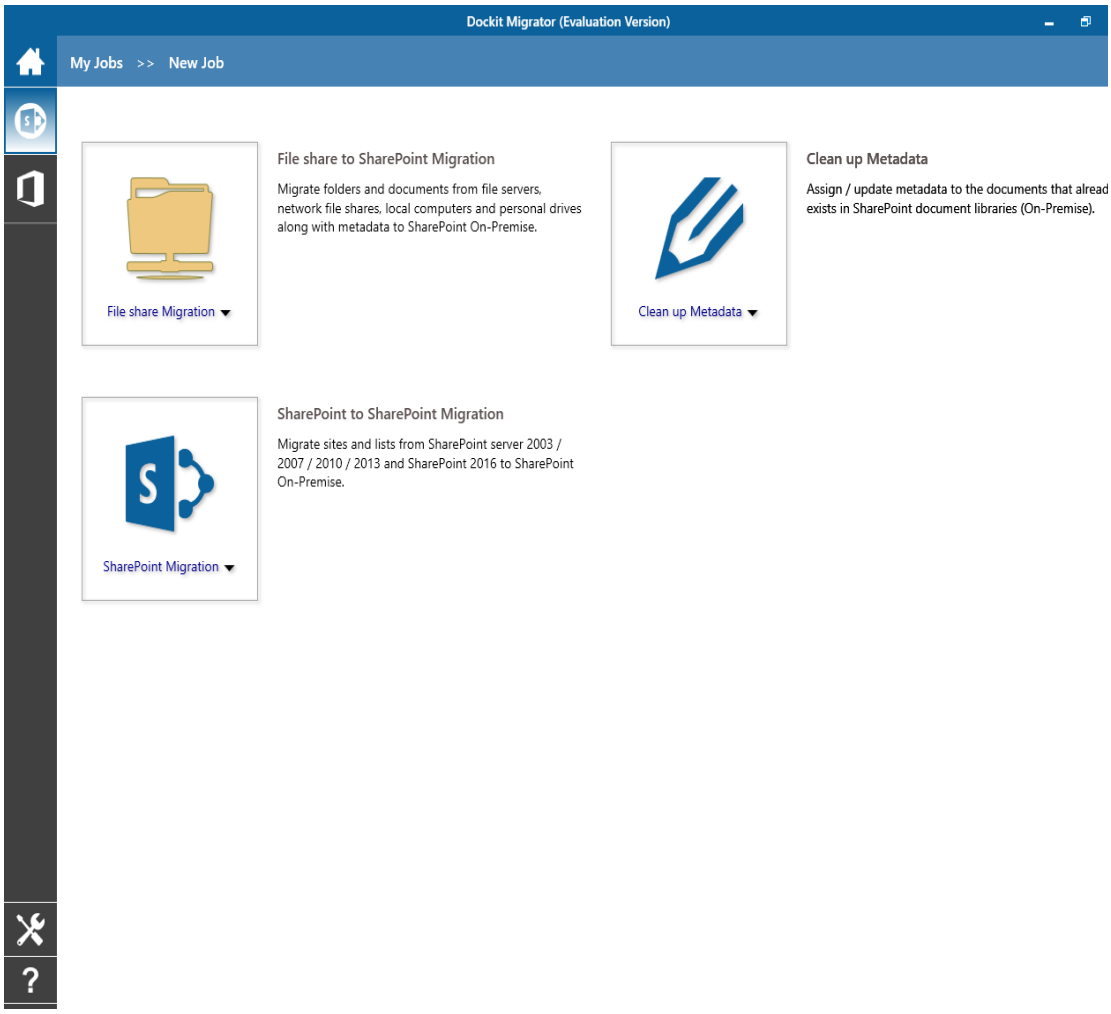
2013 / 2010 / 2007 and SharePoint Online in Office 365 . Dockit facilitates importing files and data into SharePoint libraries and lists using the following task options:

Click **SharePoint On-Premise Migration** from Migration Options menu of Dockit main screen.



Click **New** option and select a task type under the list of available task types (as shown below).


Dockit Migrator (Evaluation Version)
My Jobs
Job History
New
Edit
Run Now
Re-do
Incremental
Delete
Copy
Reschedule
Validate
View Job Instance
Create a new job (Alt+N)
SharePoint On-Premise Jobs (2)
Group by
name
Search
Job Name
Description
Created Date
Modified Date
Last Run At
Total Data Migrated
16 to federated smaple
1/12/2018 3:04:11 PM
1/12/2018 3:04:11 PM
1/12/2018 3:04:11 PM
0 Files, 0 Folders, 0 KB
Explorer Test
1/11/2018 11:40:15 AM
1/12/2018 1:01:40 PM
1/12/2018 1:01:40 PM
0 Files, 0 Folders, 0 KB



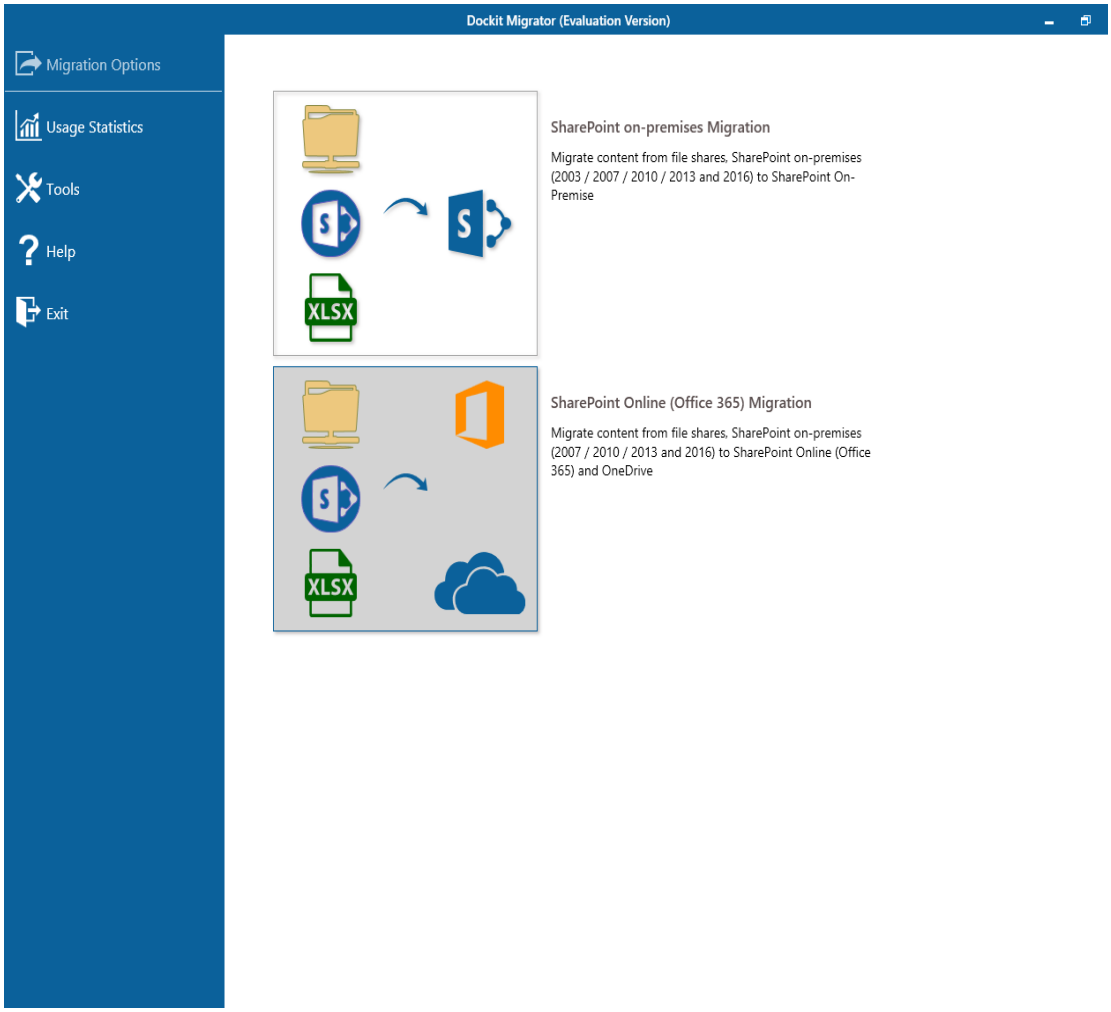
Click the links below for more information:

a. Create a task to File share To SharePoint Migration
b. Create a task to SharePoint To SharePoint Migration
c. Create a task to Clean Up Metadata

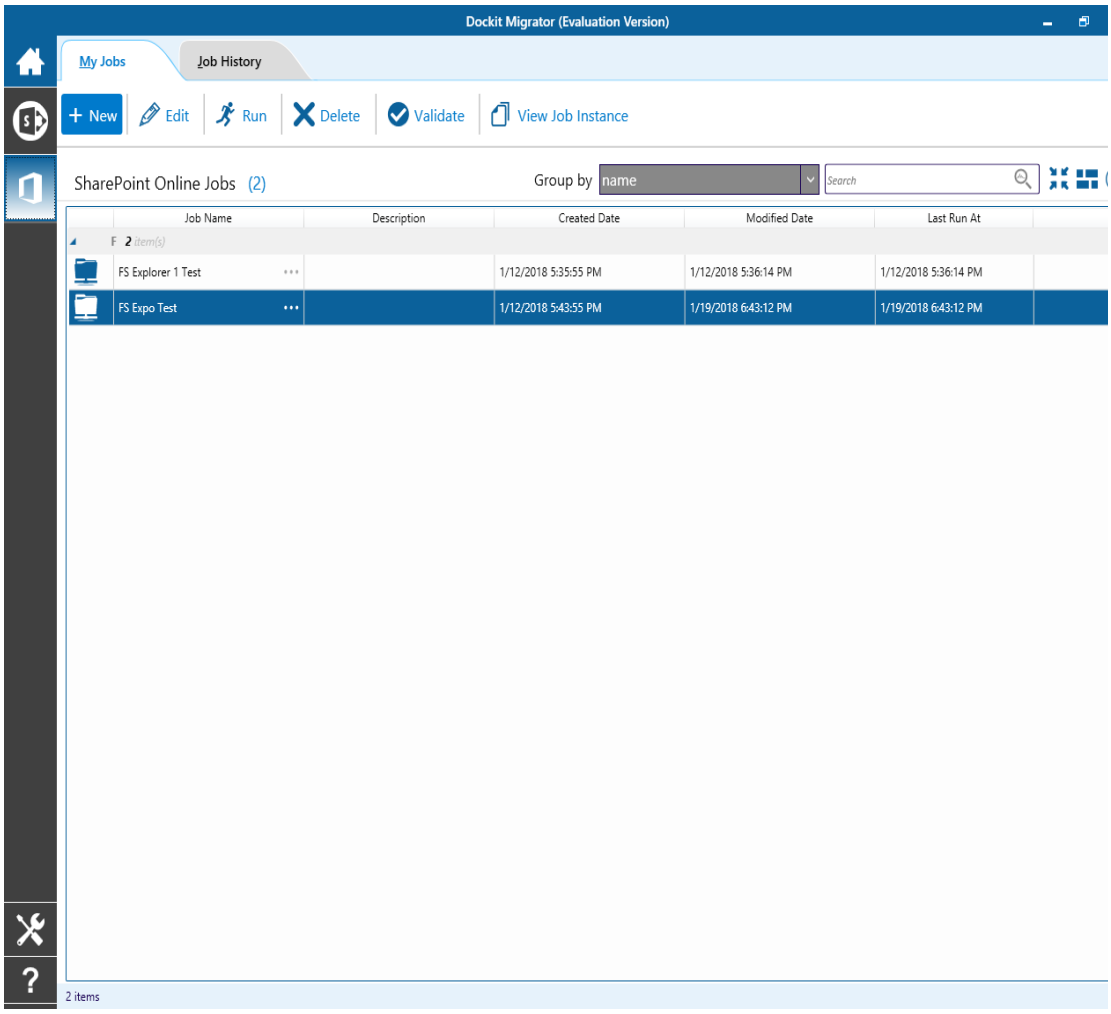
Create New Task on SharePoint Online (Office 365) Migration

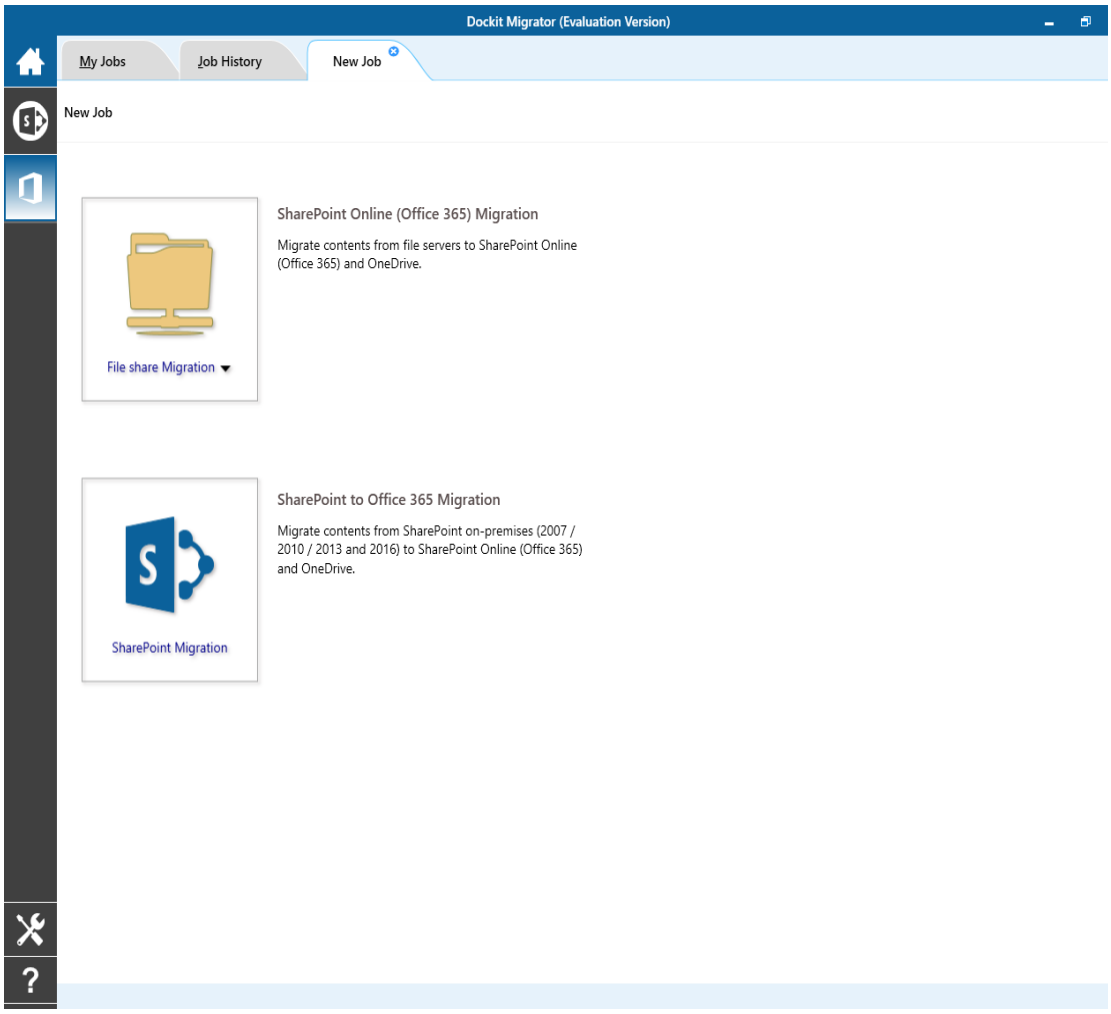
You can create a task to migrate data, documents and, their associated metadata properties from network file shares, file servers and local hard drives to SharePoint 2016 / 2013 / 2010 / 2007 and SharePoint Online in Office 365 . Dockit facilitates importing files and data into SharePoint libraries and lists using the following task options:

Click **SharePoint Online Migration** from Migration Options menu of Dockit main screen.



Click **New** option and select a task type under the list of available task types (as shown below).


Dockit Migrator (Evaluation Version)
My Jobs
Job History
New
Edit
Run
Delete
Validate
View Job Instance
SharePoint Online Jobs (2)
Group by
name
Search
Job Name
Description
Created Date
Modified Date
Last Run At
2 item(s)
FS Explorer 1 Test
1/12/2018 5:35:55 PM
1/12/2018 5:36:14 PM
1/12/2018 5:36:14 PM
FS Expo Test
1/12/2018 5:43:55 PM
1/19/2018 6:43:12 PM
1/19/2018 6:43:12 PM
2 items



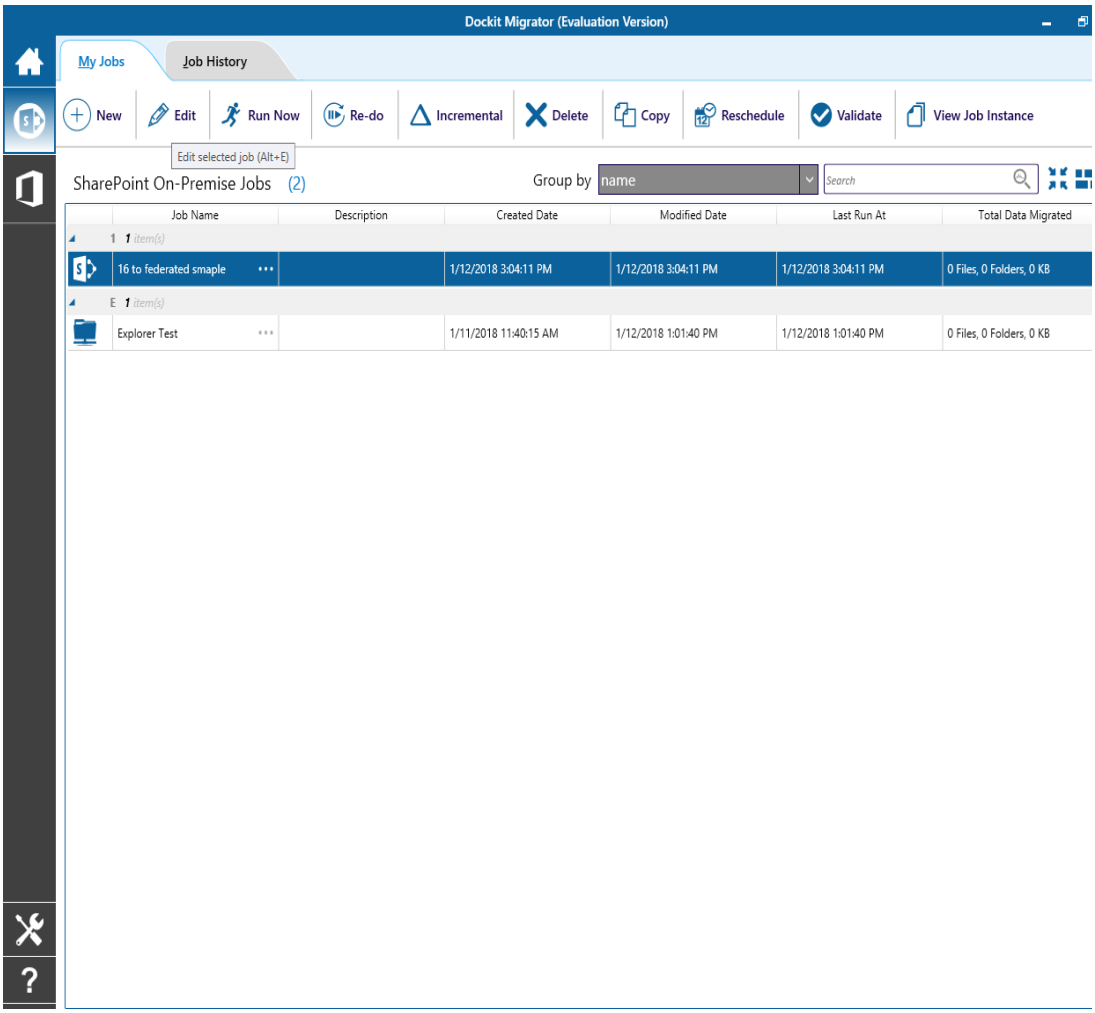
Click the links below for more information:

a. Create a task to SharePoint Online (Office 365) Migration
b. Create a task to SharePoint to Office 365 Migration

2.3 Edit an existing task

1. Select a desired task from the **Task List**.

2. Click **Edit Task** from Home menu of Dockit main screen.



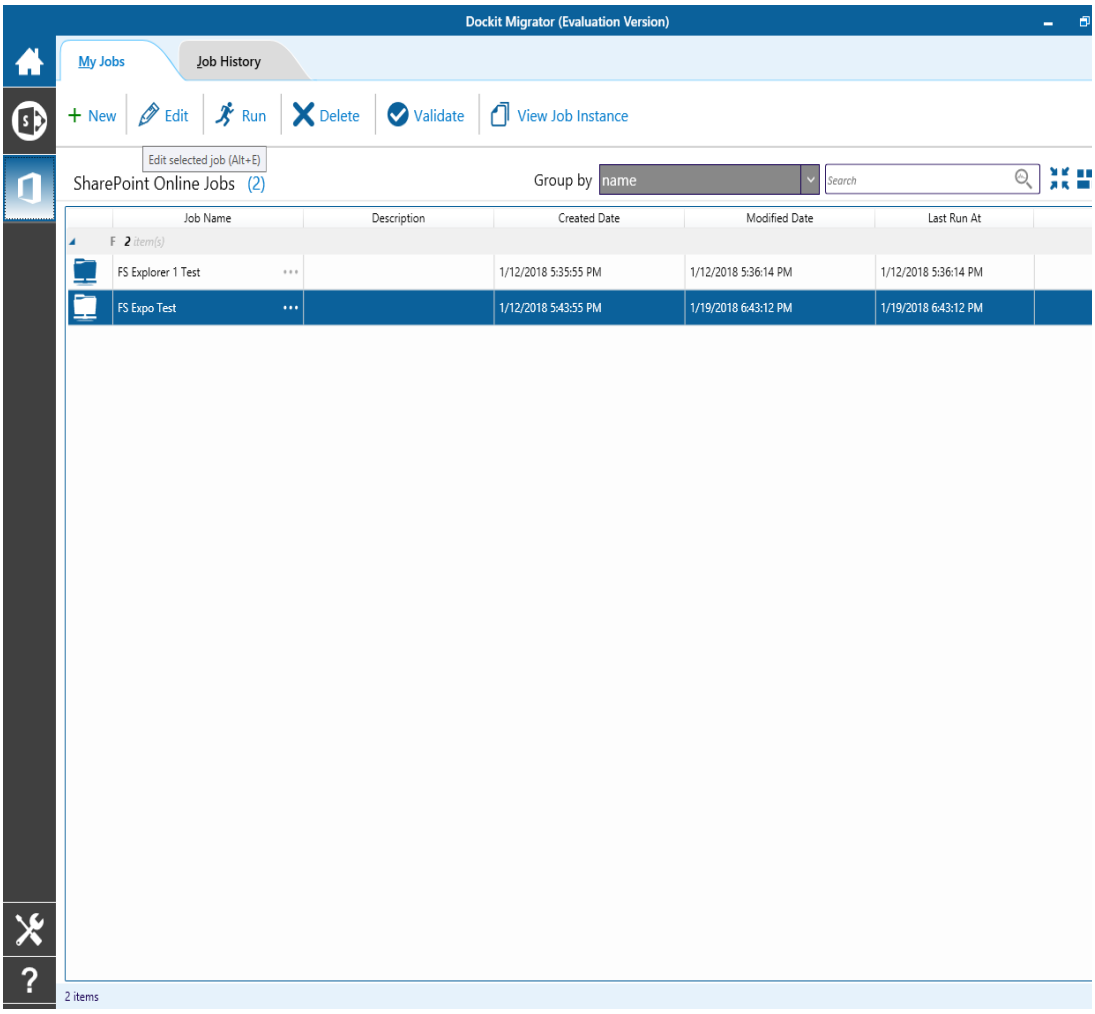
3. **Dockit Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

Edit Task SharePoint Online (Office 365) Migration

To edit SharePoint Online existing task:

1. Select a desired task from the **Task List**.

2. Click **Edit Task** from Home menu of Dockit main screen.

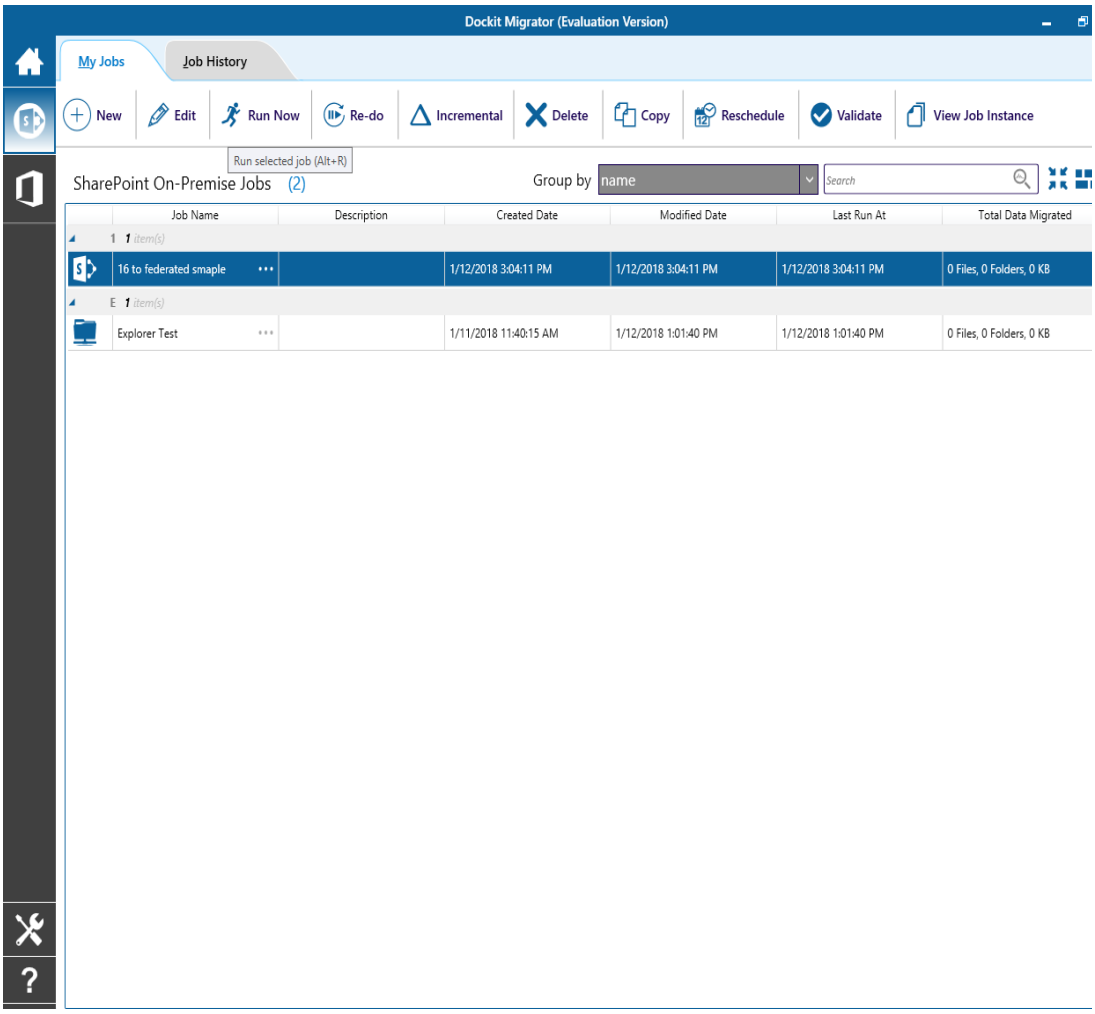


3. **Dockit Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

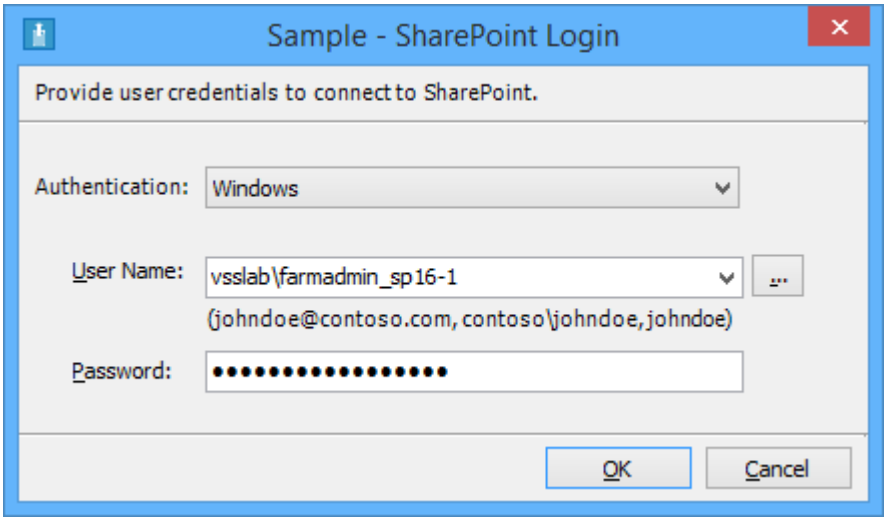
2.4 Run a task

Dockit 'Run Now' feature allows the user to instantiate a task any time after the task has been created. To run a Dockit import task:

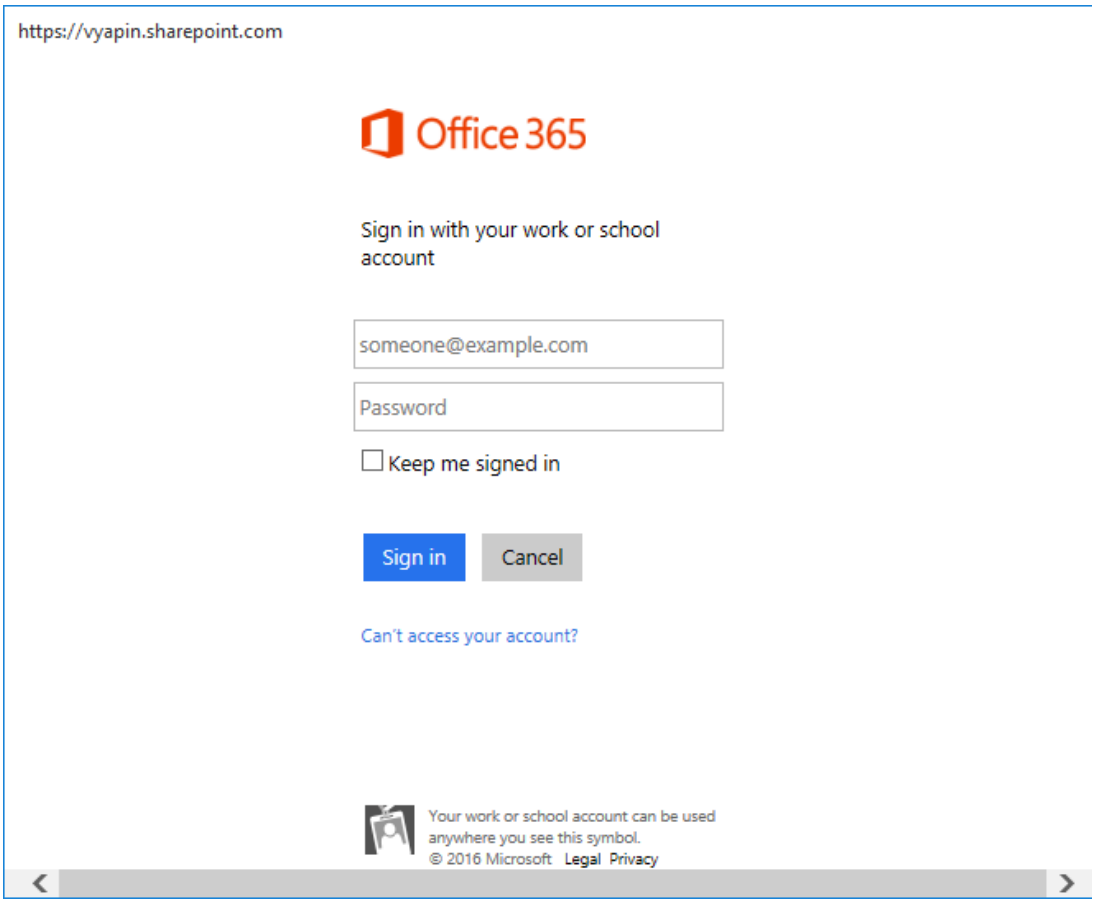
1. Select a task from **Task List** pane.
2. Click **Run Now** from Home menu of Dockit main screen.



3. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



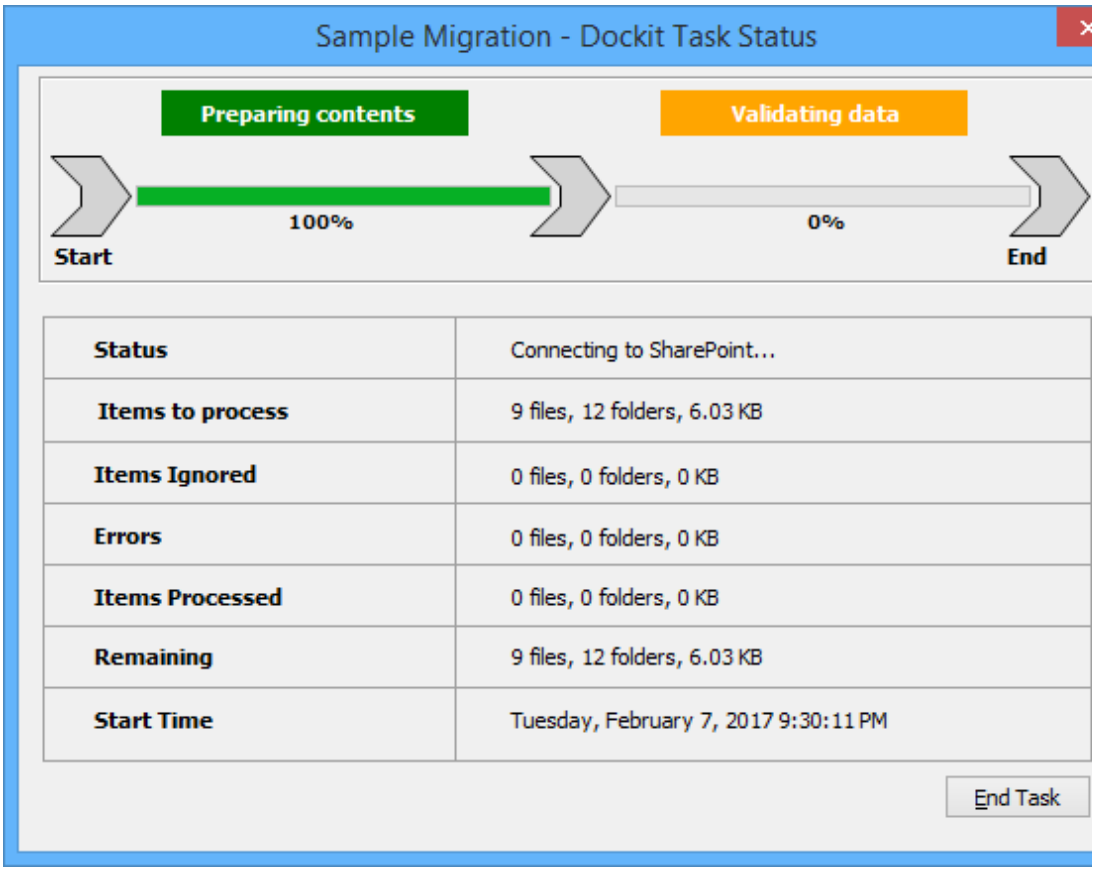
For **Federated authentication (Web Single Sign-on)** credential based import task. The **Web Login Dialog** to connect to SharePoint will appear as shown below:



The given credential will be used to connect to the SharePoint site.

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

.



Runtime statistics:

a. **Items to process -** Shows the total number of files / folders available in the source location along with total size.
b. **Items Ignored -** Shows the total number of files / folders ignored based on the task settings specified by the user. Migration task settings such as *Do not overwrite* and the files that do not meet the Export Condition will be taken into consideration here.
c. **Errors -** Shows the total number of errors that occurred when processing the files / folders.
d. **Items processed -** Shows the number of items (folders and files along with size) that are transferred or uploaded to SharePoint at any given time instance.
e. **Remaining -** Shows the total number of files / folders (including size) that are yet to be transferred or uploaded to SharePoint at any given time instance.
f. **Elapsed Time -** Shows the elapsed time from the instance the migration task started or commenced.

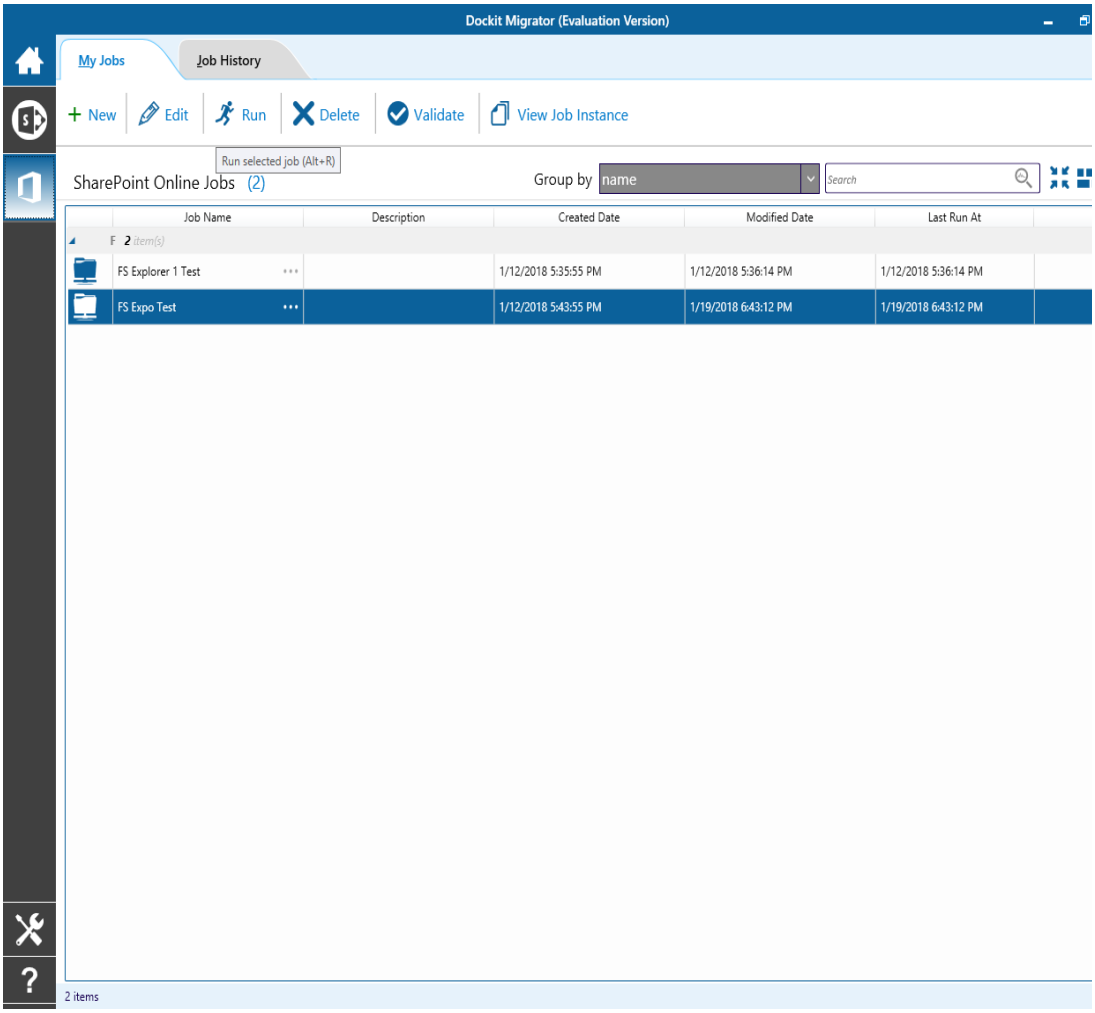
You can also use Dockit command line feature that allows you to instantiate a task from DOS command prompt anytime after an import task has been created using Dockit's task wizard. For more information Run a task from command line

5. Once the import task is complete, a new entry will be added in **Task History** section, where you can view the import activity performed when the task ran last.

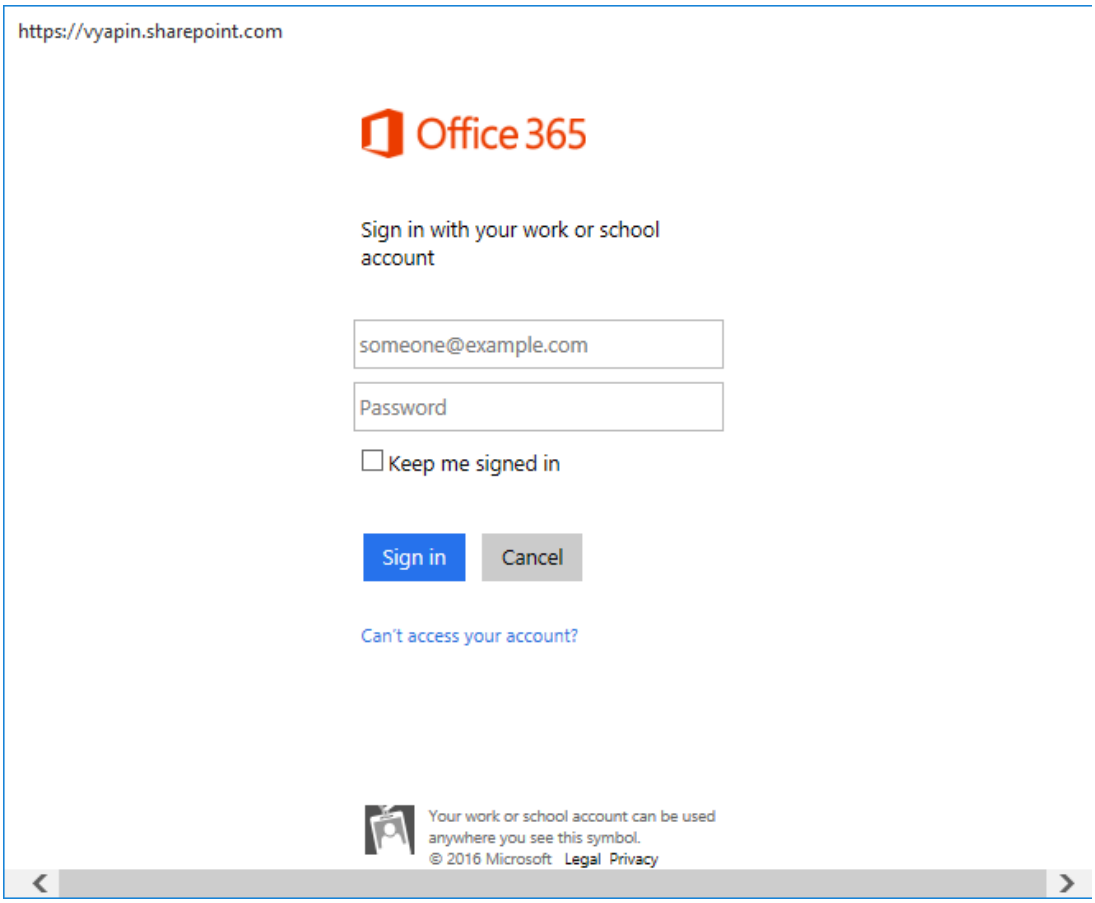
Run a task on SharePoint Online (Office 365) Migration

Dockit 'Run Now' feature allows the user to instantiate a task any time after the task has been created. To run a Dockit import task:

1 Select a task from **Task List** pane.
.
2 Click **Run Now** from Home menu of Dockit main screen.
.



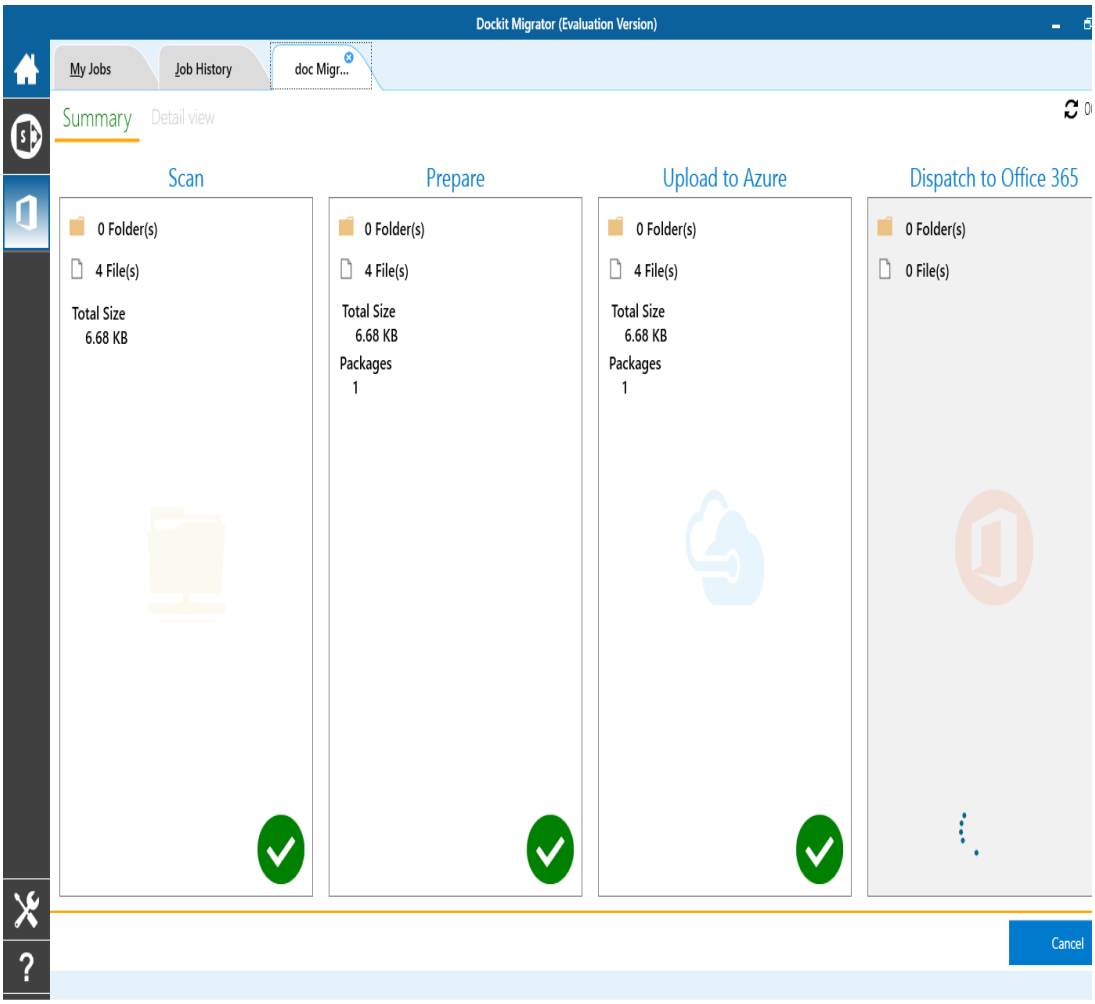
3 For **Federated authentication (Web Single Sign-on)** credential based import task.
. The **Web Login Dialog** to connect to SharePoint will appear as shown below:



The given credential will be used to connect to the SharePoint site.

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

.

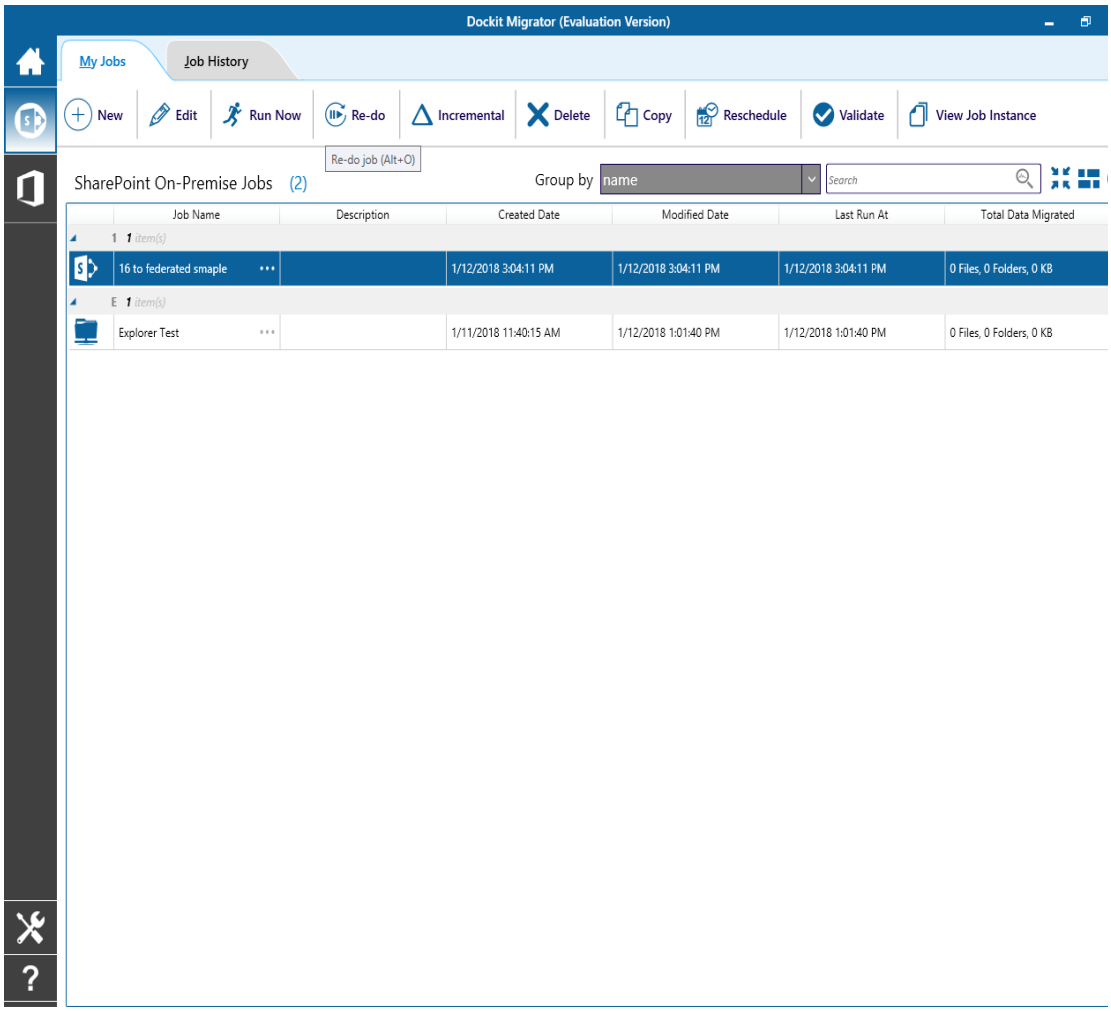


5 Once the migration job is complete, you can view the activity log for more information.
.

2.5 Re-do Task

The Re-do will help you re-process all the items that are added in the previous migration. Re-do is similar to a new task, except that you can re-migrate all the items that are added in the previous migration. If the item processed and migrated in the previous migration, the Re-do will delete the migrated item and migrate a fresh.

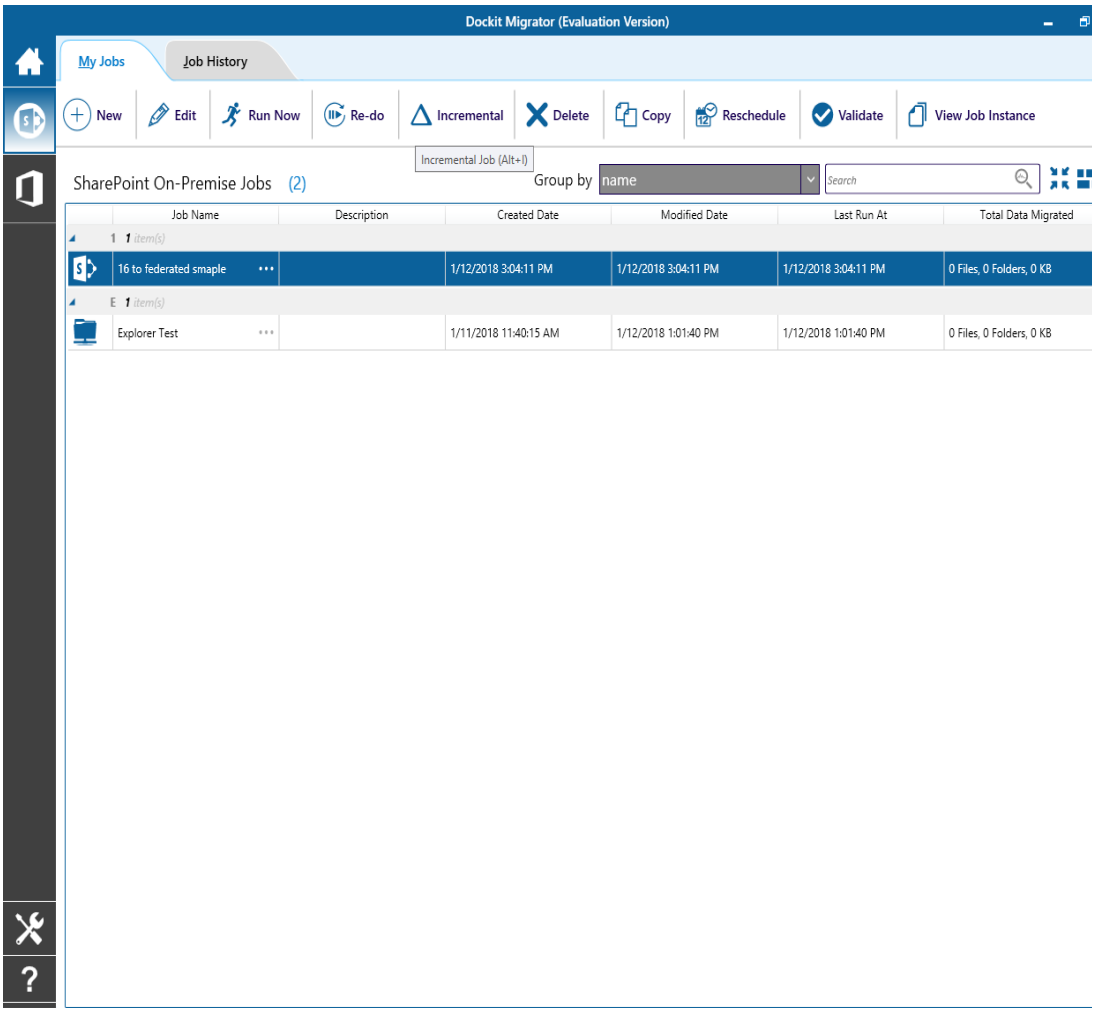
Click 'Re-do' button from **Home** menu of Dockit main screen.



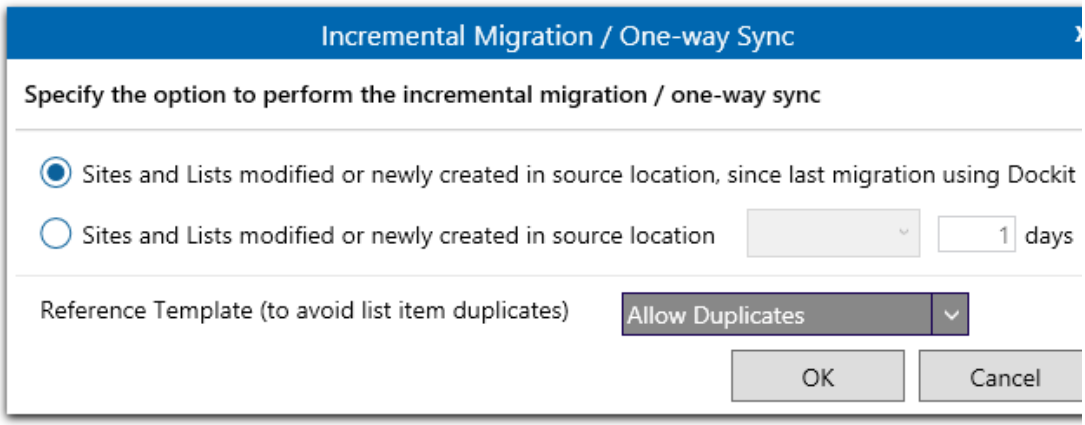
2.6 Incremental Task

The Incremental task will help you to migrate the incremental content.

1. Click 'Incremental Migration' button from **Home** menu of Dockit main screen.



2. 'Incremental Migration / One-way Sync' dialog will appear as shown below, you can select your desired option to perform incremental migration.



i) Documents Modified or newly created in source location, since last migration using Dockit

ii) Documents Modified or newly created in source location with specific time durations as follows:

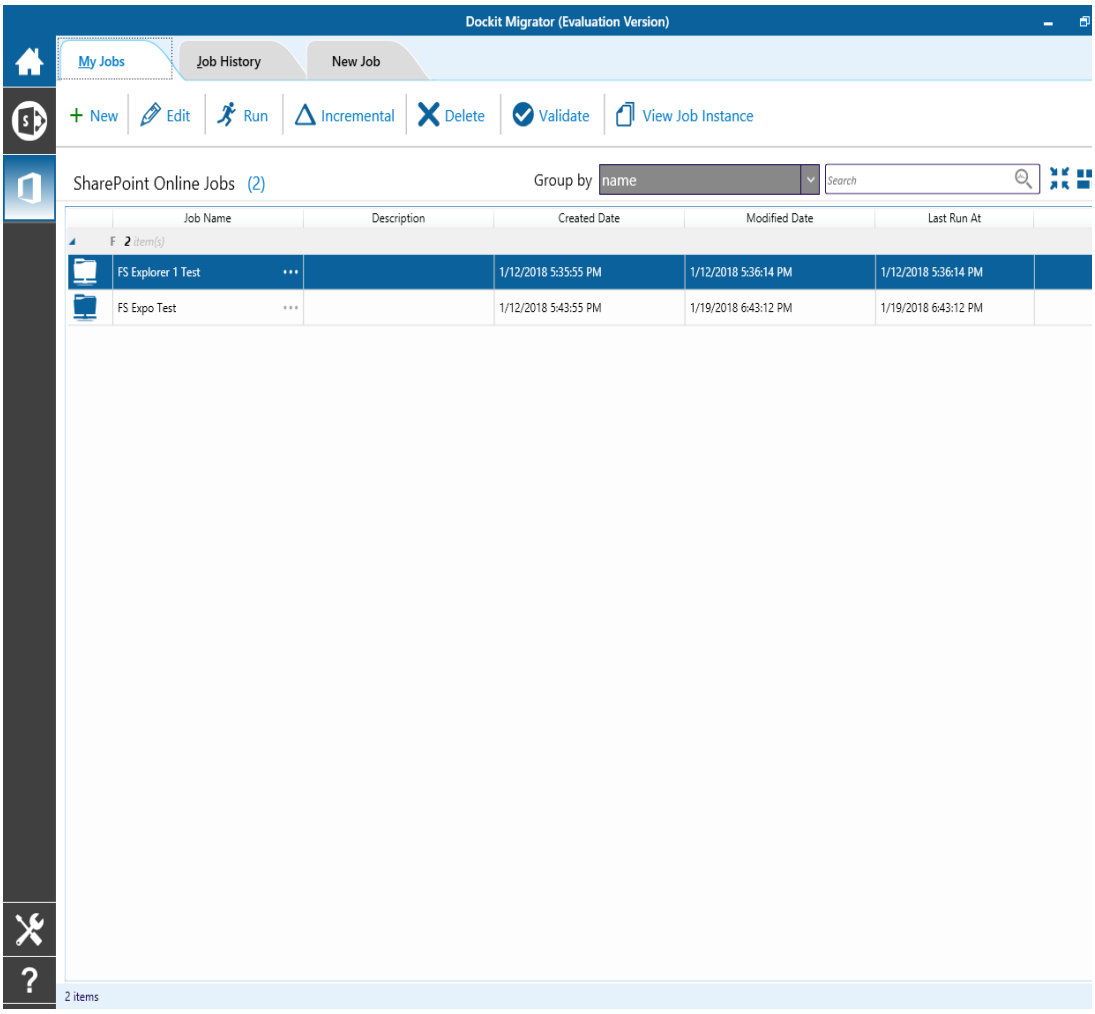
'This Week' 'Last 7 days' 'This Month' 'Last Week' 'Last 14 days' 'Last Month' 'Today' 'Yesterday' 'Last N Days'

3. Click OK will proceed.

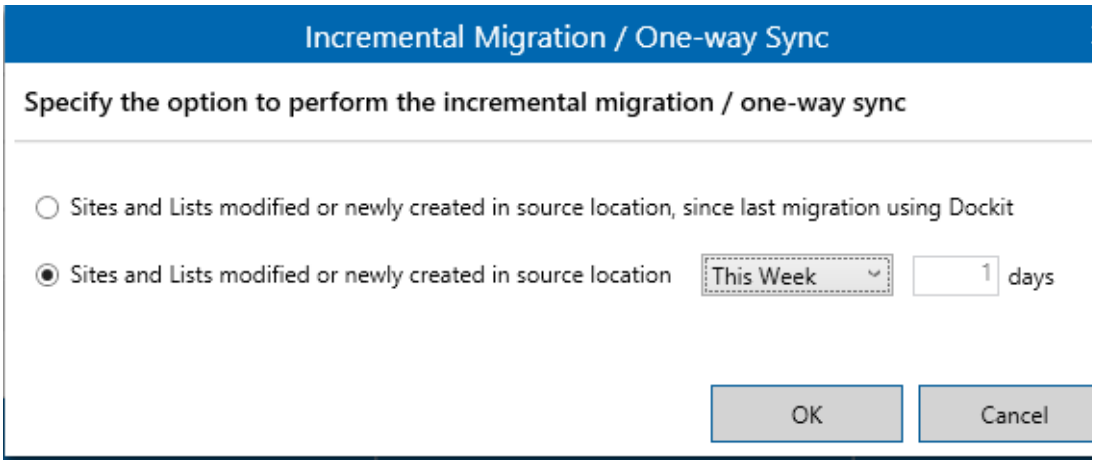
Incremental Migration (Online)

The Incremental task will help you to migrate the incremental content.

1. Click 'Incremental Migration' button from **Home** menu of Dockit main screen.



2. 'Incremental Migration / One-way Sync' dialog will appear as shown below, you can select your desired option to perform incremental migration.



i) Documents Modified or newly created in source location, since last migration using Dockit

ii) Documents Modified or newly created in source location with specific time durations as follows:

'This Week' 'Last 7 days' 'This Month' 'Last Week' 'Last 14 days' 'Last Month' 'Today' 'Yesterday' 'Last N Days'

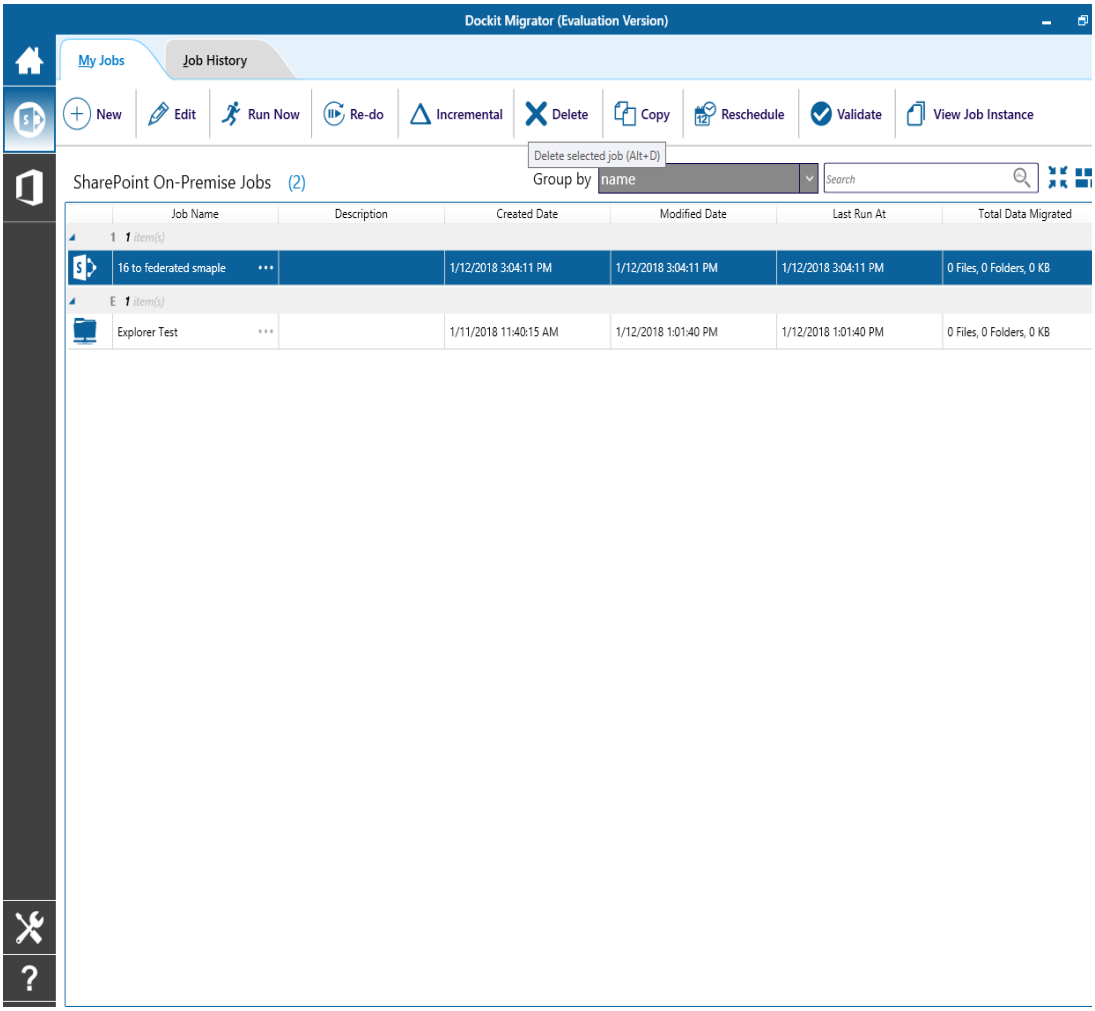
3. Click OK will proceed.

2.7 Delete an existing task

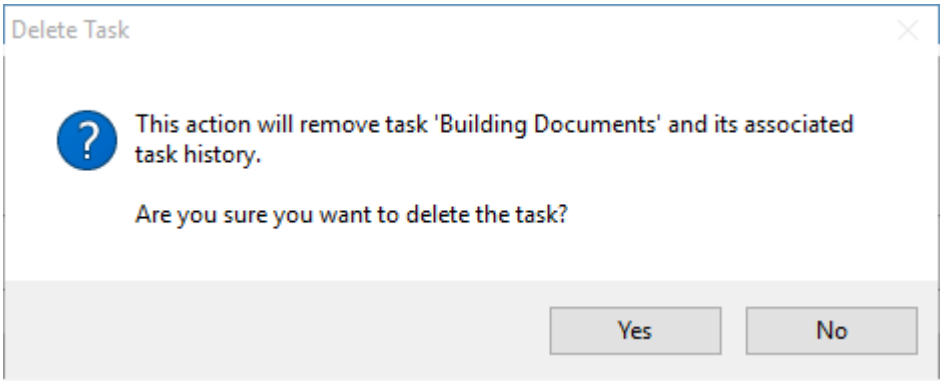
To delete a Dockit import task:

1. Select a desired task from **Task List**.

Click **Delete Task** from **Home** menu of Dockit main screen.

2. 

Click Yes in Delete Task message-box shown below:

3. 

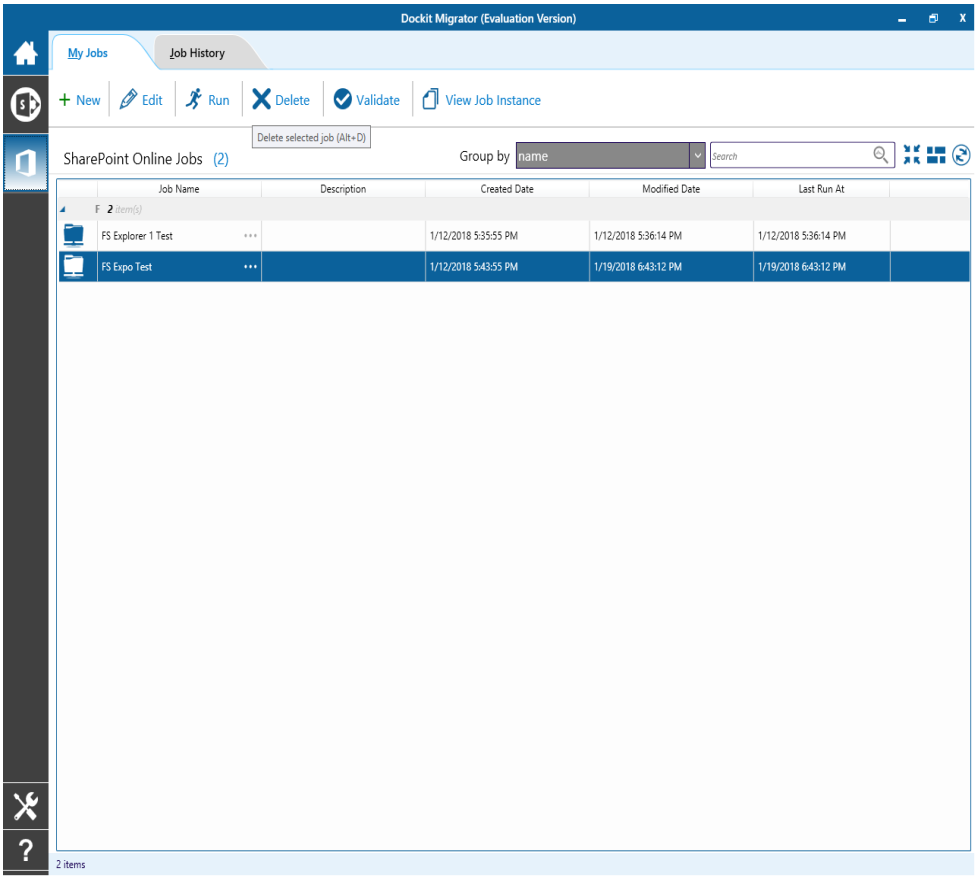
Note: Deleting a task will permanently delete the selected task and its task history items.

Delete an existing task on SharePoint Online (Office 365) Migration

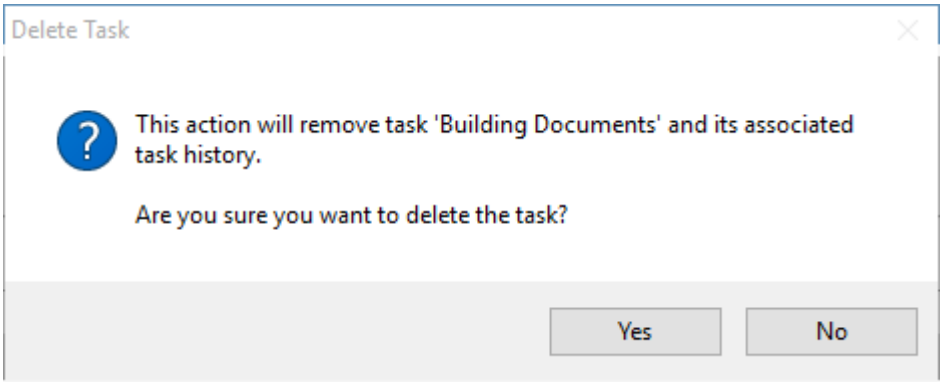
To delete a Dockit import task:

1. Select a desired task from **Task List**.

Click **Delete Task** from **Home** menu of Dockit main screen.



2. Click Yes in Delete Task message-box shown below:



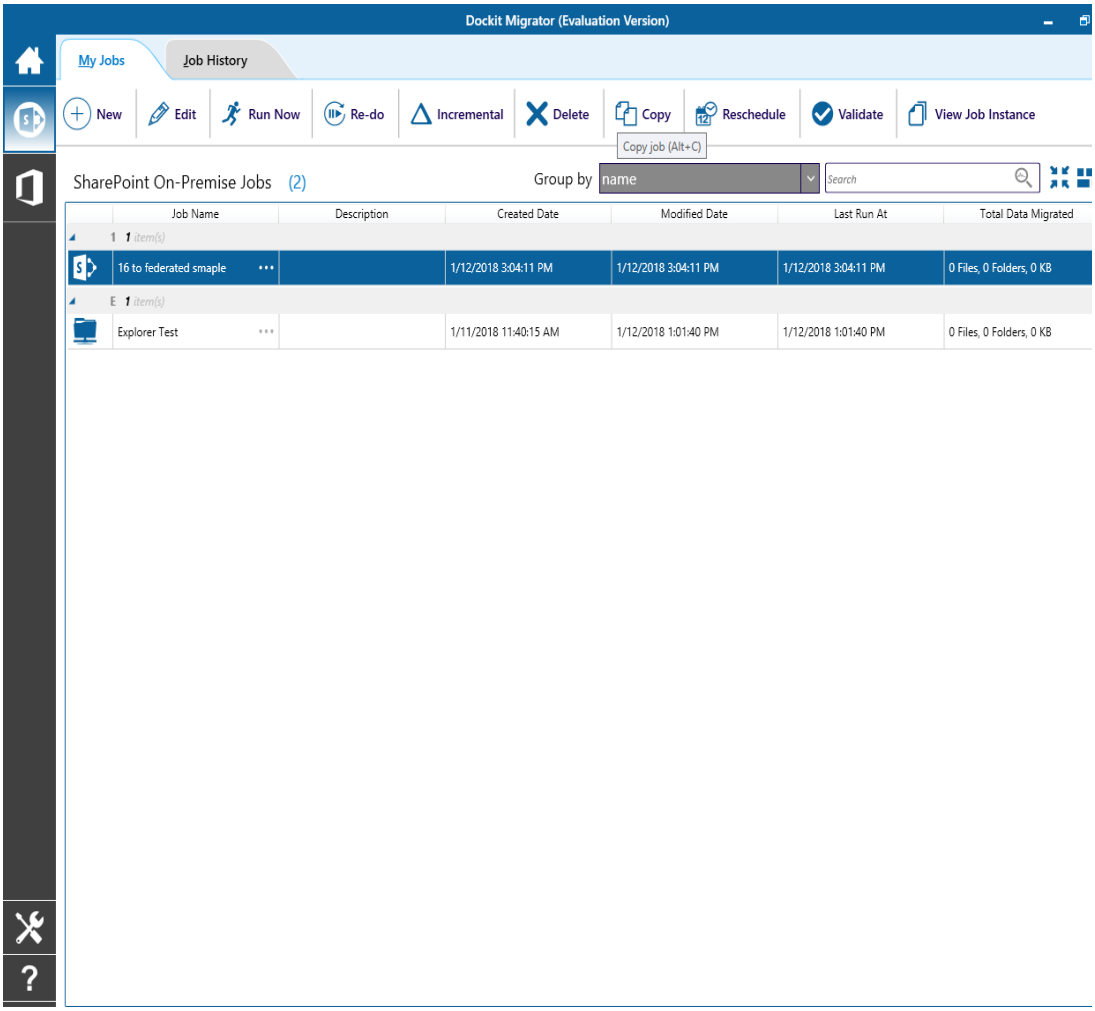
3. **Note:** Deleting a task will permanently delete the selected task and its task history items.

2.8 Copy task

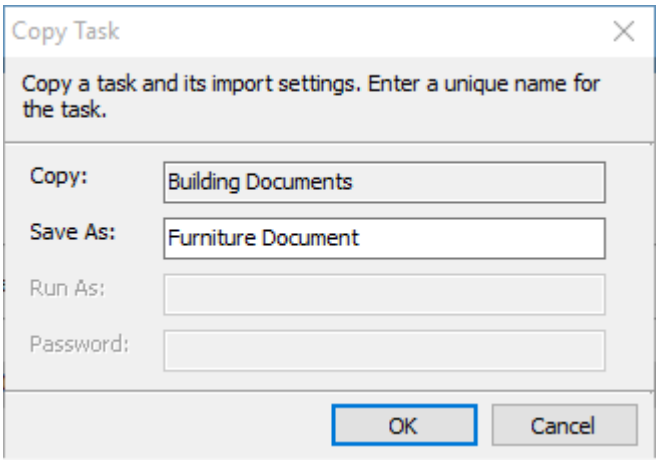
To copy or create a new task from an existing Dockit import task:

1. Select a desired task from the **Task List**.

   Click **Copy Task** from Home menu of Dockit main screen.



2. In **Copy Task** dialog, enter a new task name in **Save As** text-box, specify a **Run As** account and **Password** (if applicable) and Click **OK** to create a new task with the same import settings specified in the selected task.



2.9 Reschedule task

Use this tool to Reschedule Task in Windows Task Scheduler interface to automatically run the import tasks at scheduled intervals.

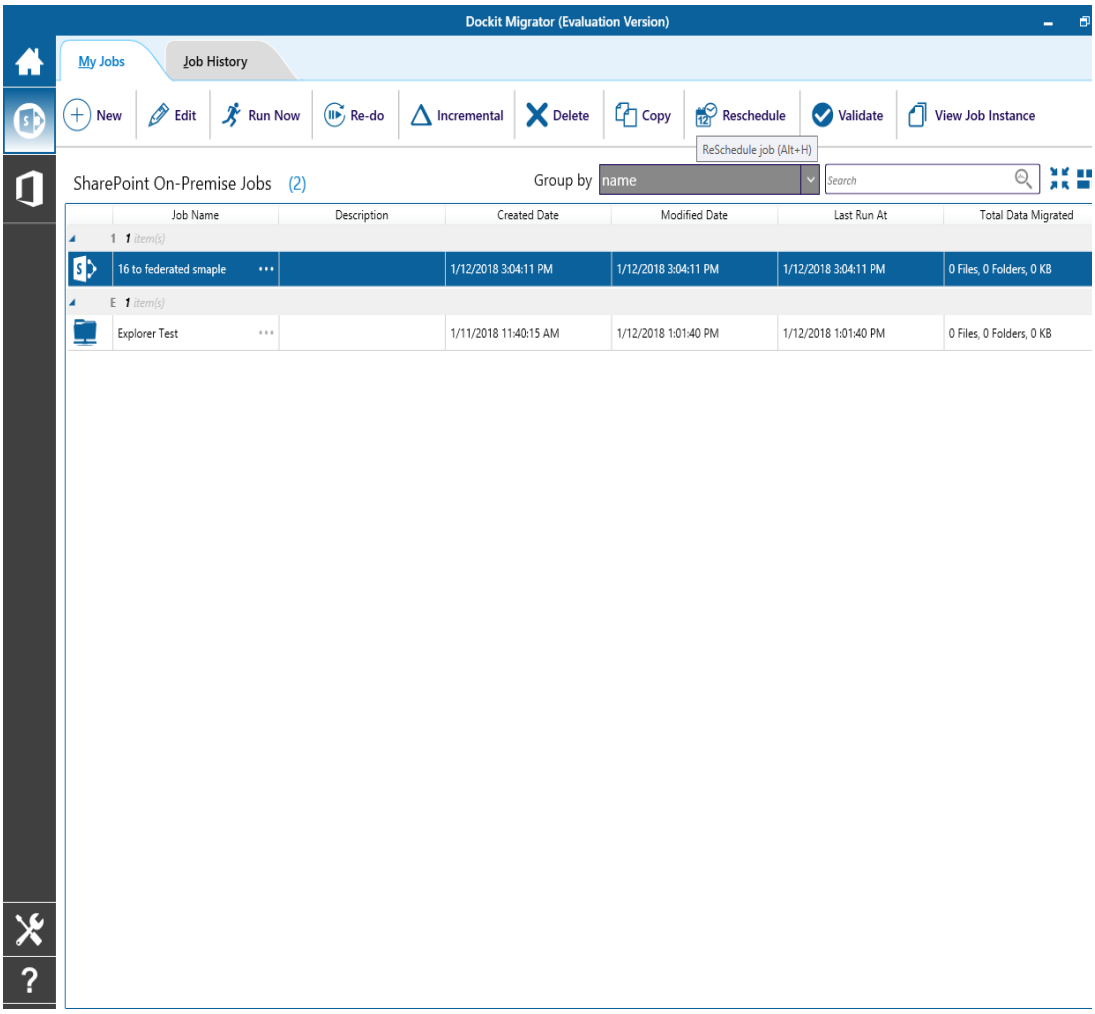
This tool helps you to re-create the Windows Schedule Task in the following two scenarios:

- To Reschedule that Task that was accidentally deleted and is required to be created again with the same schedule settings
- To Reschedule Task when the Dockit import tasks are migrated from an old computer to a new computer

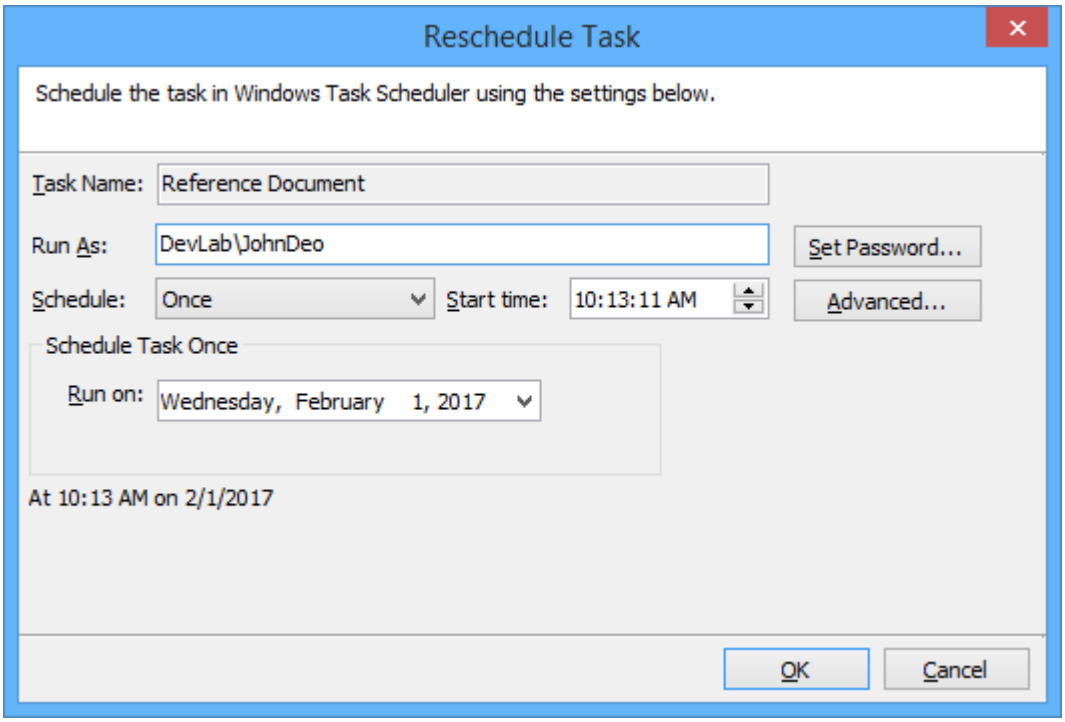
1. Select a task from the **Task List**

   If Dockit has enough information about the required Windows Schedule Task, the **Reschedule Task** option will be enabled.

2. Select **Reschedule Task** from **Home** menu of Dockit main screen



3. In **Create Windows Task** dialog, specify a **Run As** account and **Password** and Click **OK** to create a new schedule task with the same schedule settings that was previously saved by Dockit Import Task Wizard.



Schedule: To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.

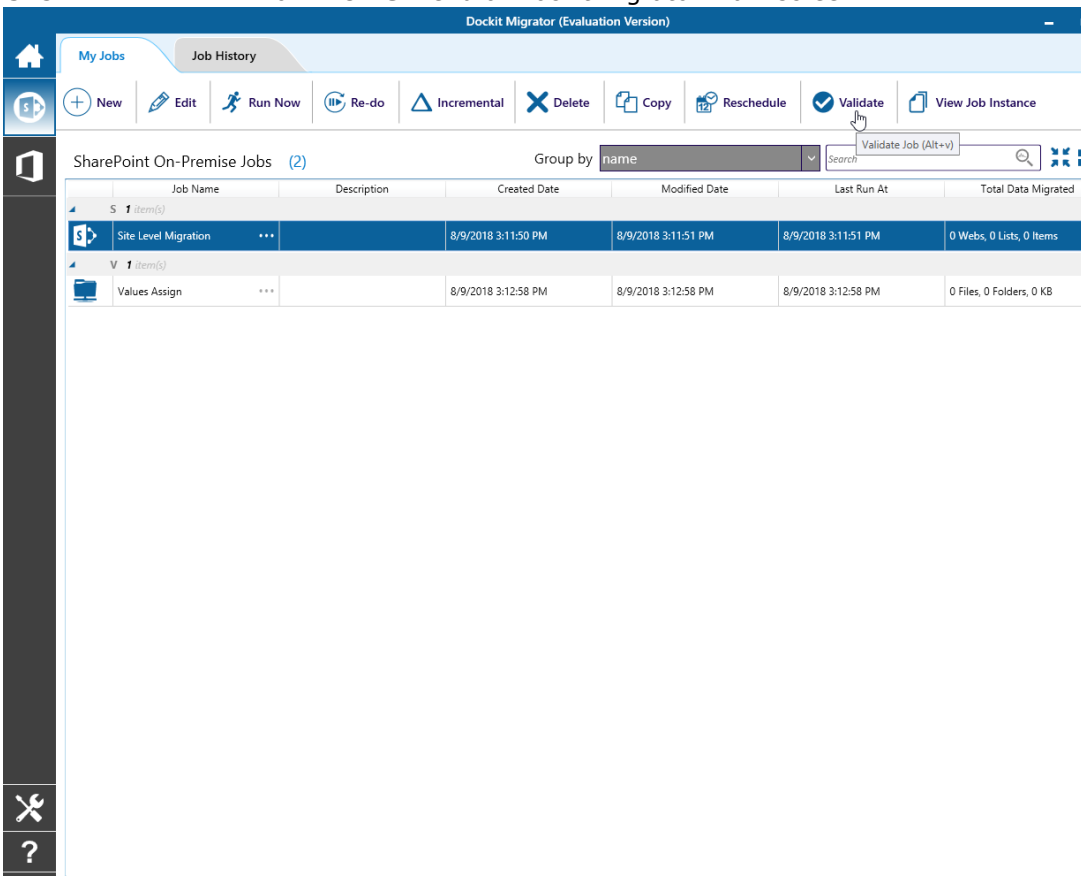
2.10 Validate Task

This tool will help you to identify the most common errors that are likely to occur and minimize such errors during a live migration.

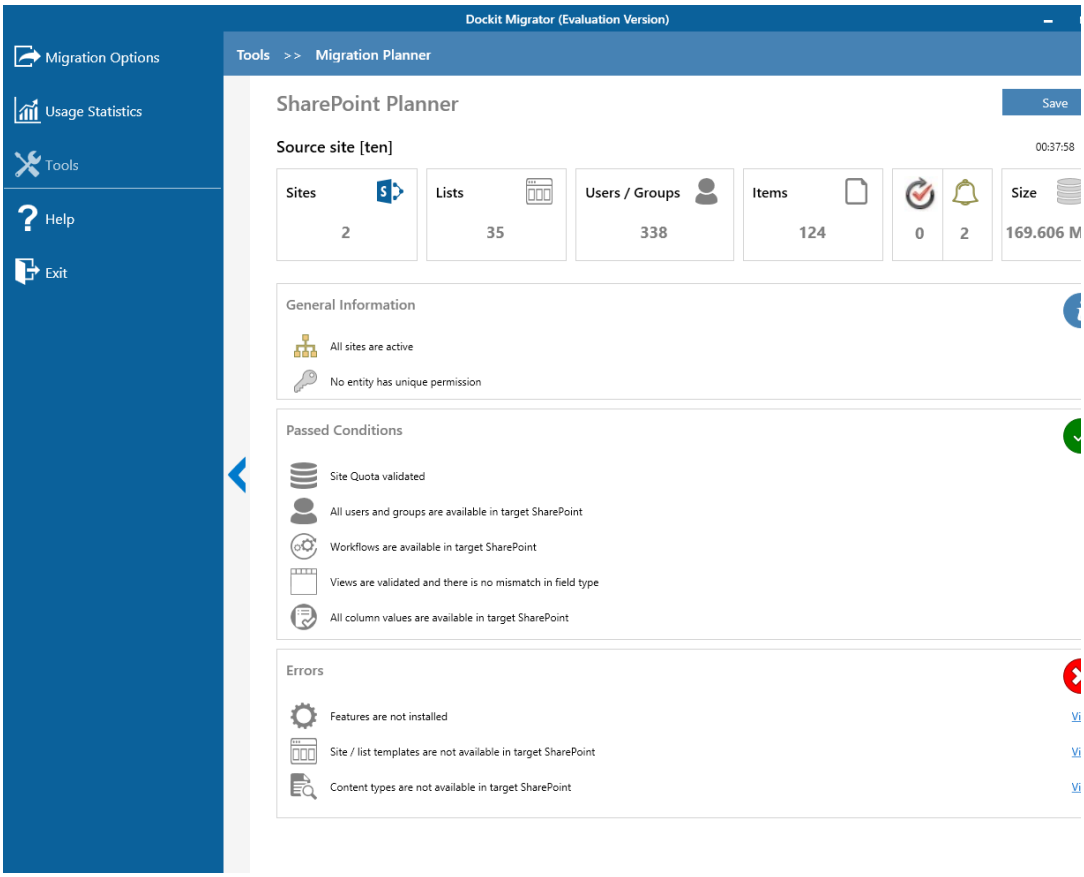
To Validate a Dockit Migrator task:

1 Select a desired task from **Task List**.
.

2. **Click** Validate from **Home** menu of Dockit Migrator main screen.



3. Validation Report shows the total number of site(s), list(s) and item(s) in **Scan** section and list of items going to validate and number of errors in **Validation Report** Section.



Features: Checks site / site collection features are available / installed in target SharePoint.

Site / list template(s): Checks site / list templates availability in target SharePoint.

Site Quota: Verifies site quota limit and shows the storage space required in target site (if site quota exceeds).

Users and groups: Checks availability of users and groups in target SharePoint and shows the unavailability of users and groups as error(s).

Site / list content types : Checks availability of site / list content types in target SharePoint

Site / list workflows: Checks availability of site / list workflows in target SharePoint

List view(s): Verifies list view schema in target SharePoint. Checks the mismatch field type in 'Group By' (list view).

4. **Columns:** Verifies schema for each column in target SharePoint. Verifies the source columns (Taxonamy, external data and reference list of lookup column) are available in target SharePoint.

5. Click **Cancel** button to close pre migration validation task.

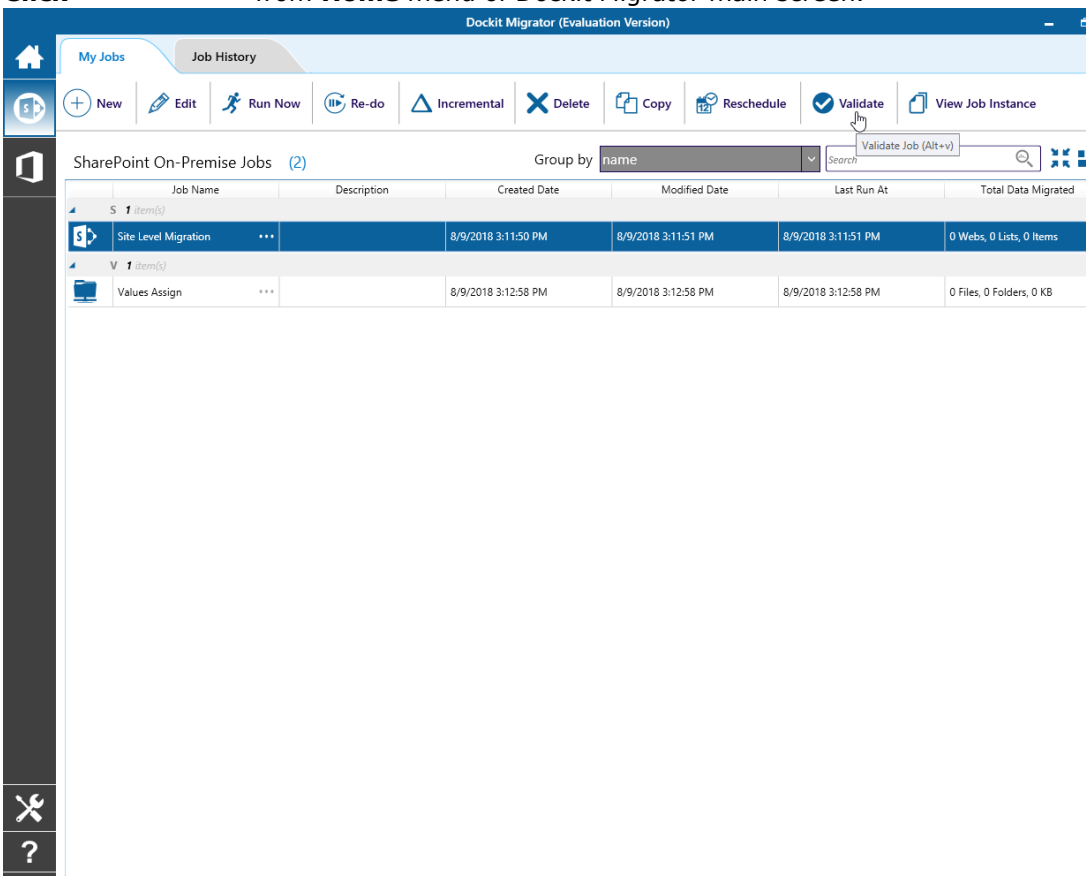
Validate Task for File Share Migration (SharePoint OnPremises and SharePoint Online)

This tool will help you to identify the most common errors that are likely to occur and minimize such errors during a live migration.

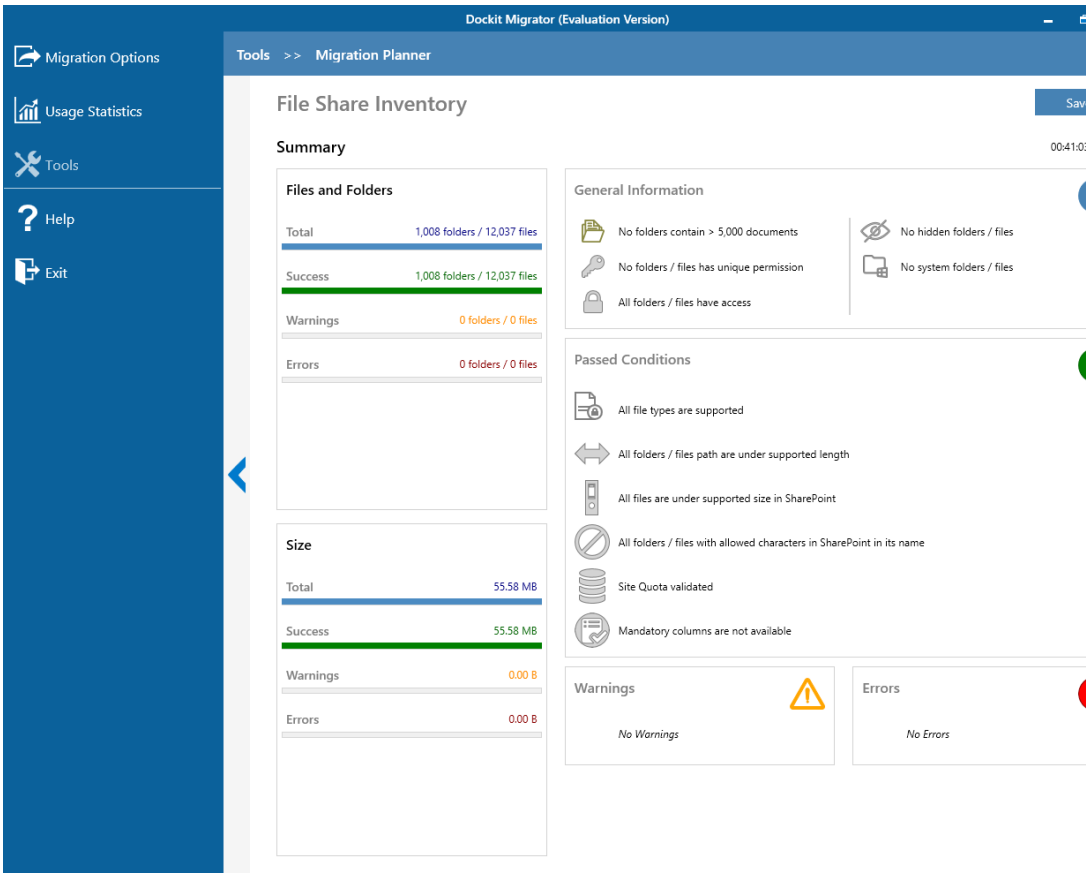
To Validate a Dockit Migrator task:

1. Select a desired task from **Task List**.

2. **Click** Validate from **Home** menu of Dockit Migrator main screen.



3. Validation Report shows the list of items going to validate and number of errors.



Checking Existence: Checks existence of source and target locations.

Site Quota: Verifies site quota limit and shows the storage space required in target site (if site quota exceeds).

Folder / file name: Checks folder / file name contains valid characters.

URL length: Checks folder / file URL length.

Column: Checks availability of columns in target SharePoint.

Metadata : Checks metadata value availability in target SharePoint (if applicable).

Mendatory Column: Checks the mendatory column values are valid.

Function: Verifies the functions (if any).

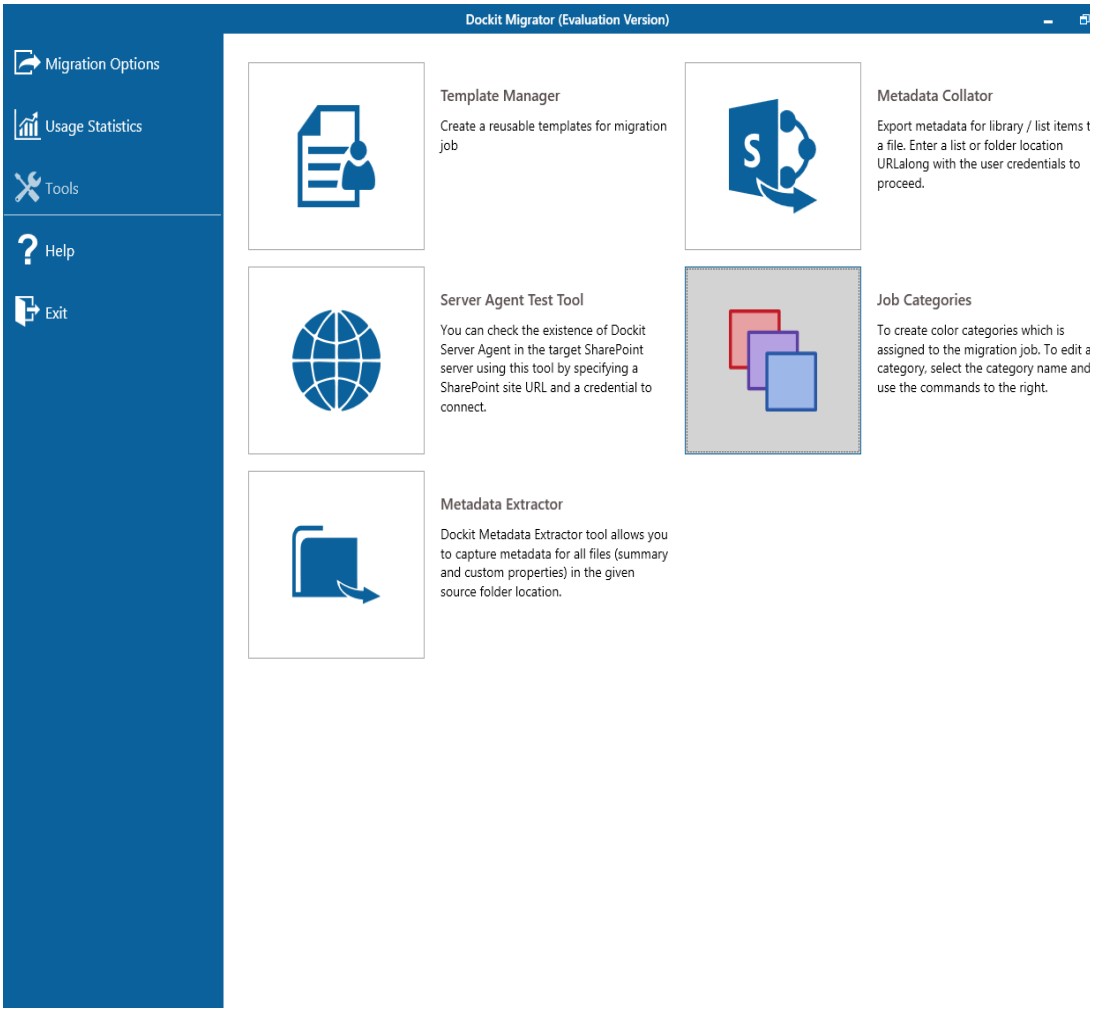
4. **Permission level:** Checks the existence of permission levels and users in target SharePoint.

5. Click **Cancel** button to cancel pre migration validation task.

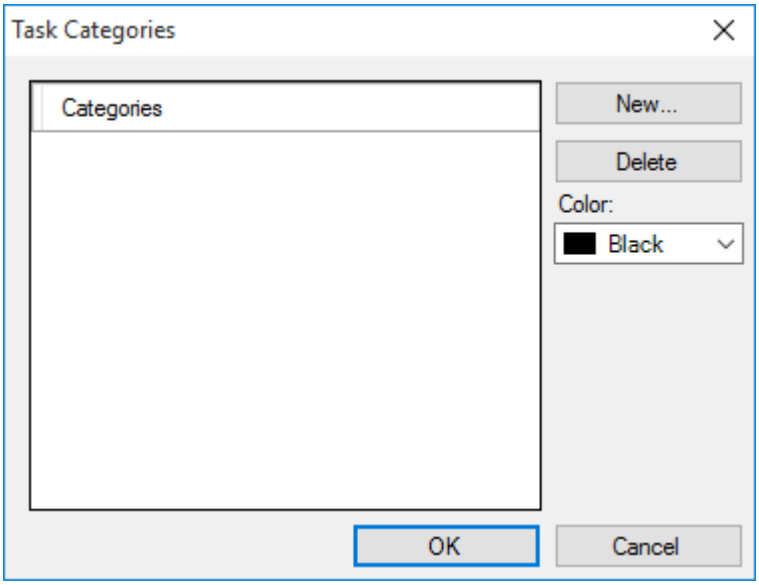
2.11 Manage categories

Use this tool to Add, Delete categories or change the Color of the categories. The Categories will help you group the related tasks and file them together.

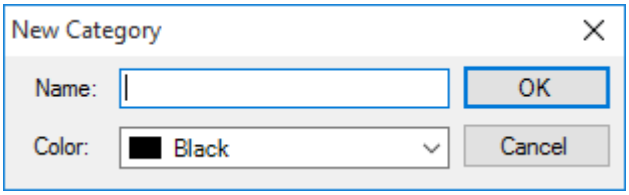
In order to edit Dockit categories, select Manage Categories from **Tools** menu of Dockit main screen.

1. 

The **Task Categories** dialog will be shown as below:

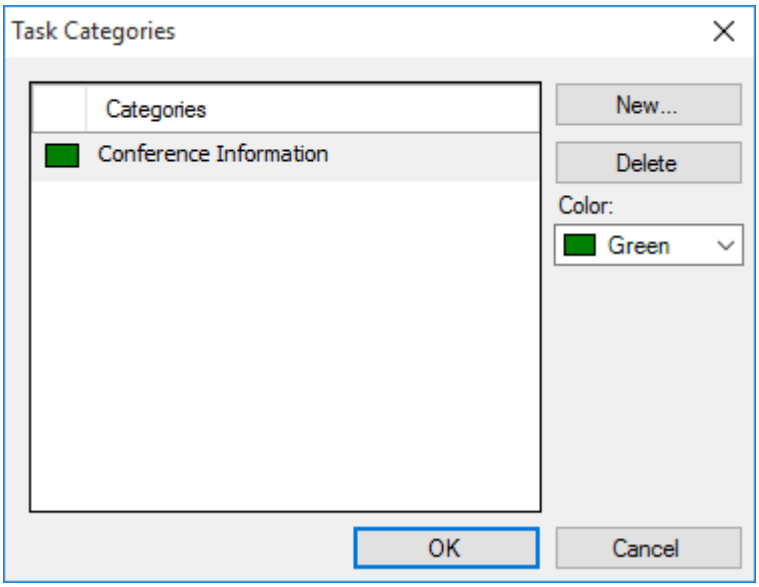
2. 

In order to add a category, click **New...** button and provide the information about category in the **New Category** dialog as shown below:



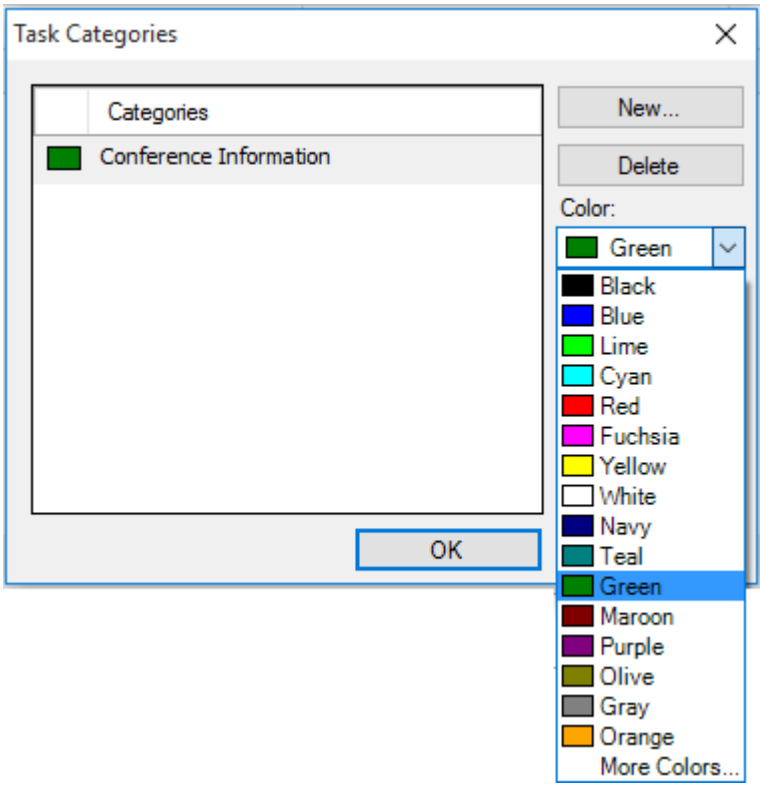
3. Click **OK**.

The newly added Category will be shown in the **Task Categories** as below:



4.

5. In order to change the color of the existing category, select the Category and Select the desired color in the Color Drop-Down List for the selected category as shown below:



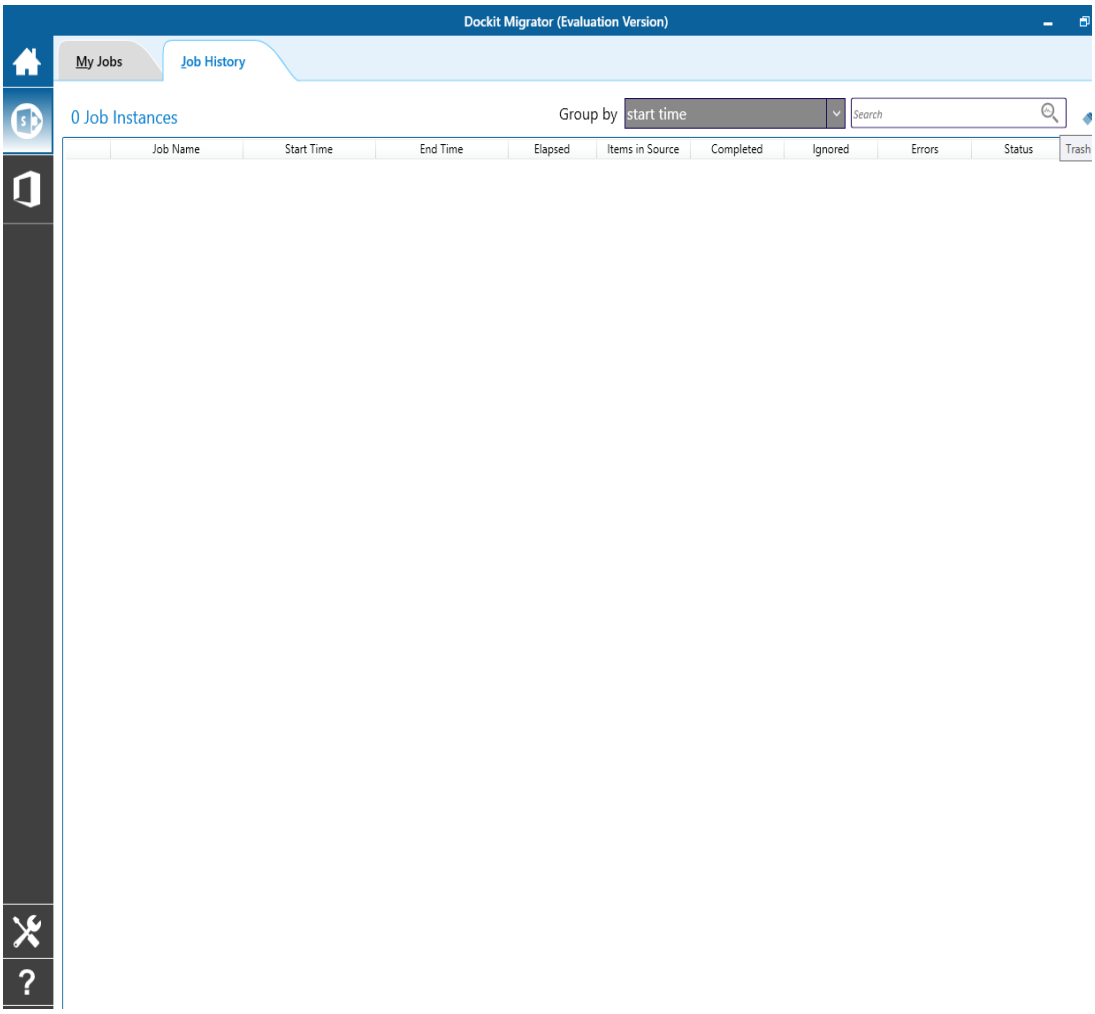
Click **OK** to enable the feature.

Henceforth, the categories in the Task Categories can be used to categorize the newly created tasks or to re-categorize old tasks.

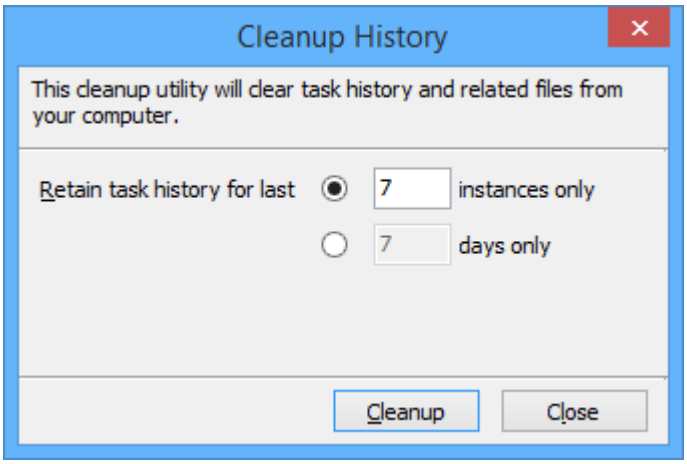
2.12 Cleanup history

Dockit maintains the task history of each task run in the application task history folder e.g., *<Application Data Folder>*\TaskHistory\<taskname>\<timestamp>. Over a period of time, the task history folder grows in size. We recommend cleaning up the task history periodically to control the disk space usage. To cleanup task history, perform the following steps given below:

1. Select **Trash (Alt + T)** from **Job History** tab of Dockit main screen.



The **Cleanup History** dialog appears as shown below:

2. 

a. Selecting **Retain task history for last <n> runs only** option will remove all history entries for each task that are older than <n> runs (task instances).

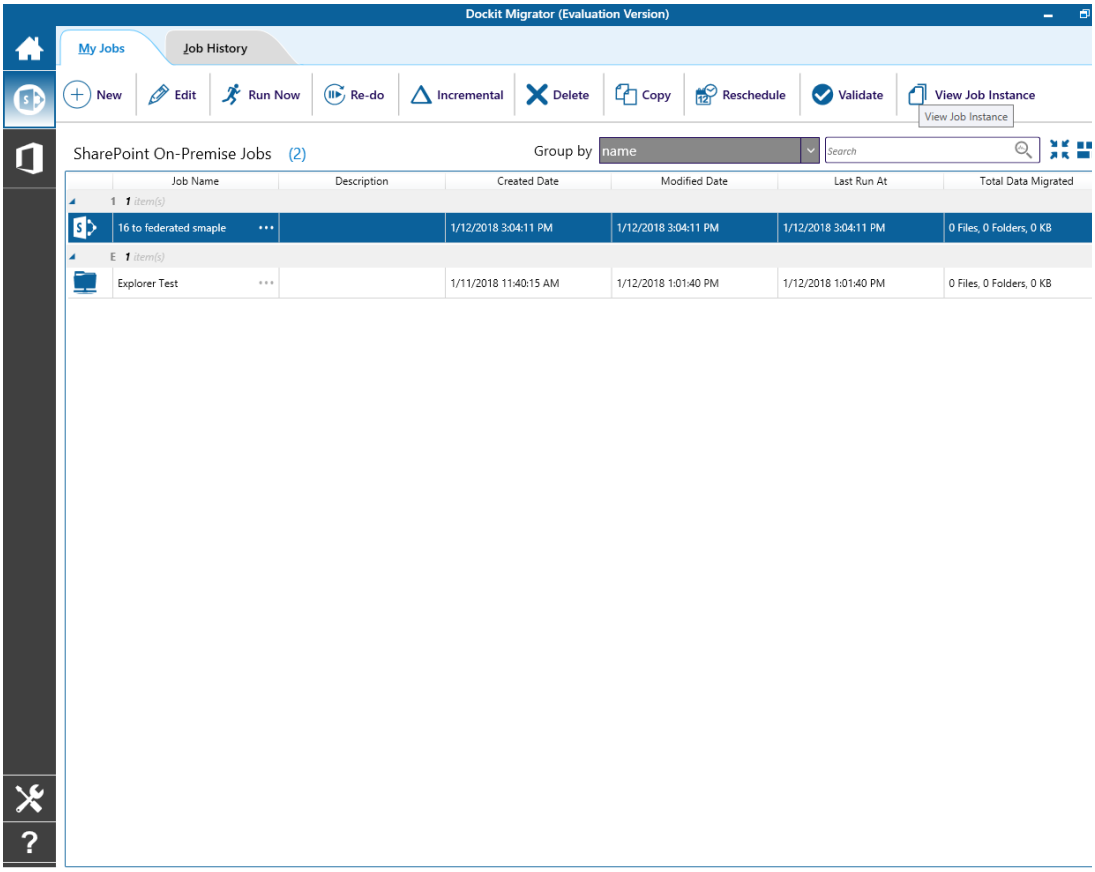
b. Selecting **Retain task history for last <n> days only** option will remove all history entries for each task that are older than <n> days.

2.13 View job instance

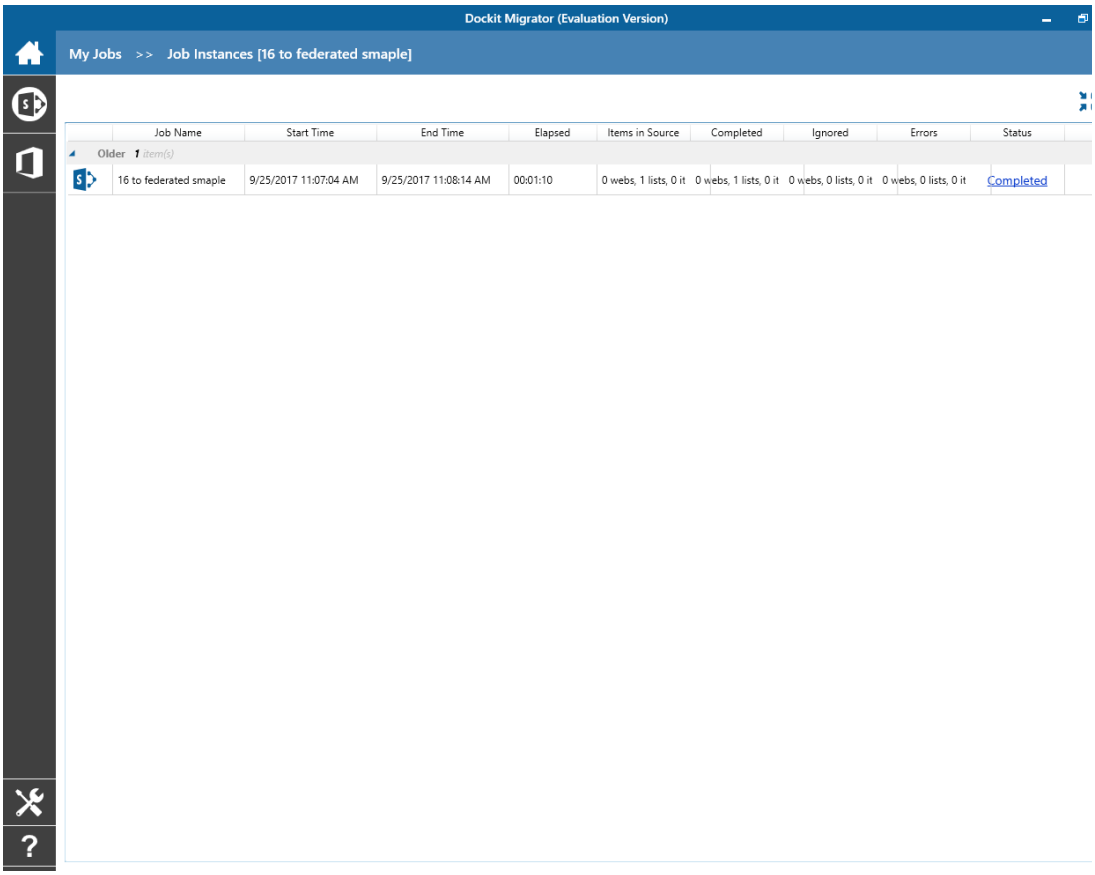
To view and manage task status of a selected task:

1. Select a task from the **Task List**

   Select **View Job Instance** of Dockit main screen.



1. The **Job Instance** page appears as shown below:



3. **Show status for <n> days:** Upon clicking **Go** button, displays task history entries of all tasks that were run within the specified number of days.

4. **Refresh:** Reloads the task history entries and updates the newly run tasks (if any).

5. **Open Log Folder:** Opens the folder that contains the activity log of the currently selected task history item.

6. **View activity log:** Displays activity log of the currently selected task history item.

7. **Remove:** Removes the currently selected task history entry and its associated log folders and files.

8. **Remove all:** Removes all task history entries and their associated log folders and files that are currently displayed.

9. Click **Close** button to close this window.

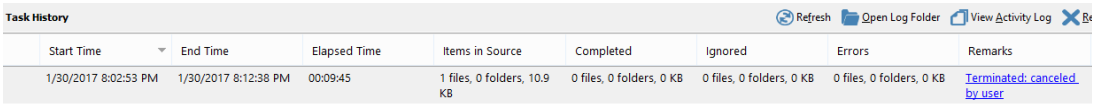
2.14 Task History

When an import task is run in Dockit, the task import information is maintained in the 'Task History' folder. The task history information can be seen at bottom of Dockit application's main window.

To view task history of a particular task:

1. Select a task from **Task List** pane.

   The history of task will be displayed at right-bottom of Dockit main window as shown below.



   Where
   Start Time -> Date and Time a task was initiated.
   End Time -> Date and Time a task completed its import process
   Elapsed Time -> Total time (hh:mm:ss) a task has taken to complete its import process.
   Remarks -> Brief remark about the status of import.

Possible Remarks	Description
Completed successfully	Import process was completed successfully without any errors
Incomplete: refer activity log	Import process encountered certain errors as described in the activity log
Incomplete: eval limit reached	Import process reached the maximum allowed number of files to import in evaluation / trial version. This message is applicable for evaluation / trial version only.
Terminated: canceled by user	Import process was canceled by the user.
Terminated abnormally	The import process was abnormally terminated / killed.
Failed: the following error occurred while creating activity log	The import process could not be initiated as there were issues in creating the activity log files and initiating the import process.

2. The following operations can be performed on Task history items:

   - View activity log
   - Manage task status
   - Retry

3. Dockit Tools

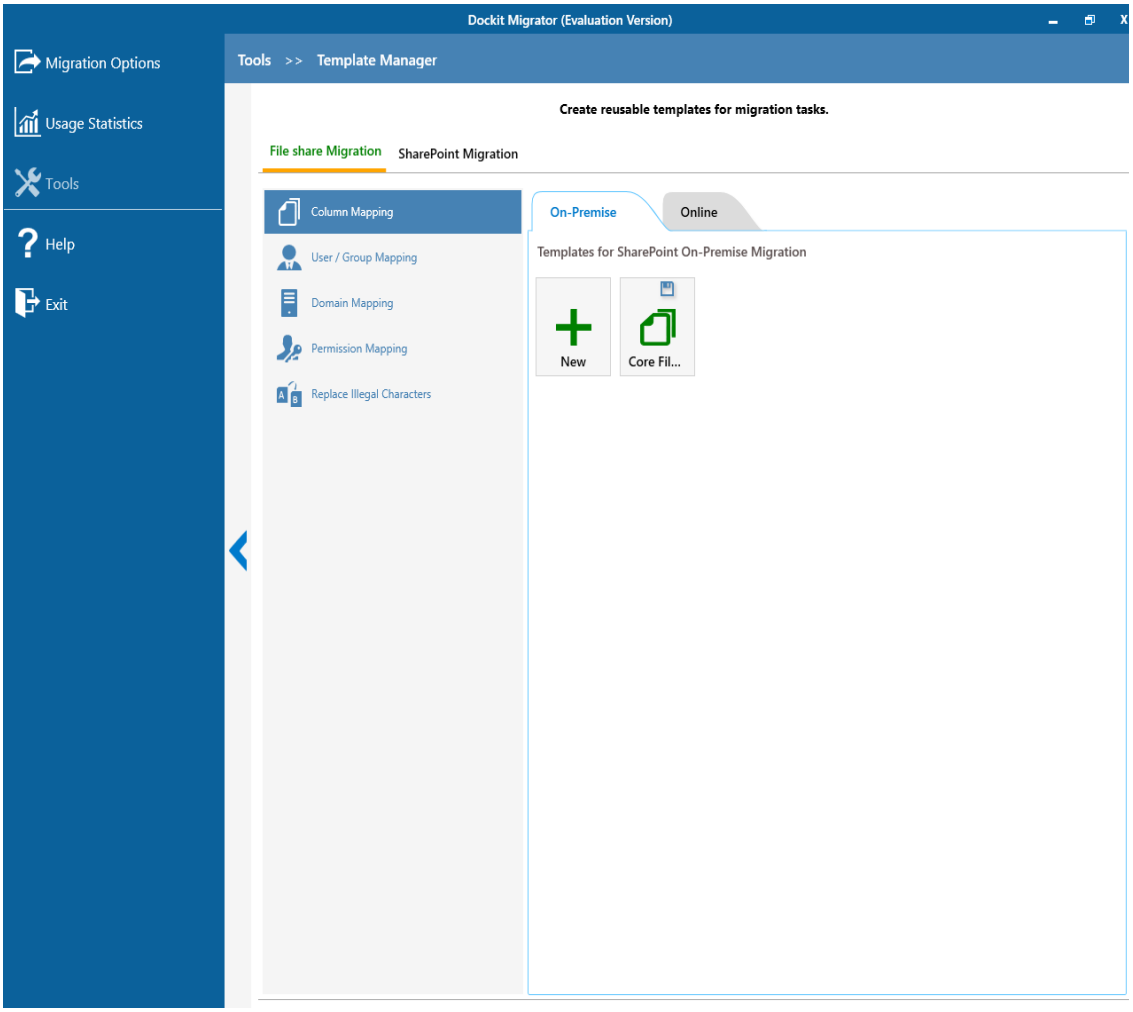
- Manage Templates
- Server Agent Test Tool
- Metadata Extractor
- Metadata Collator
- Migration Planner

3.1 Dockit Template Manager

Dockit uses various templates such as column mapping template, domain mapping template, user / group mapping template, permission mapping template, renaming rule, favorite columns and profile manager. These templates can be configured and save using Dockit Template Manager tool and can be reused in task settings. Dockit Template Manager tool available under **Templates** Menu in the Task Manager will help you manage various templates.

Select **File Share Migration** in **Manage Templates** from **Tools** menu of Dockit main screen.

Then **Template Manager** page will appear as shown below:



Click Copy to copy an existing template in a different name.

See the following sections for more information

Column Mapping

Domain Mapping

User / Group Mapping

Permission Mapping

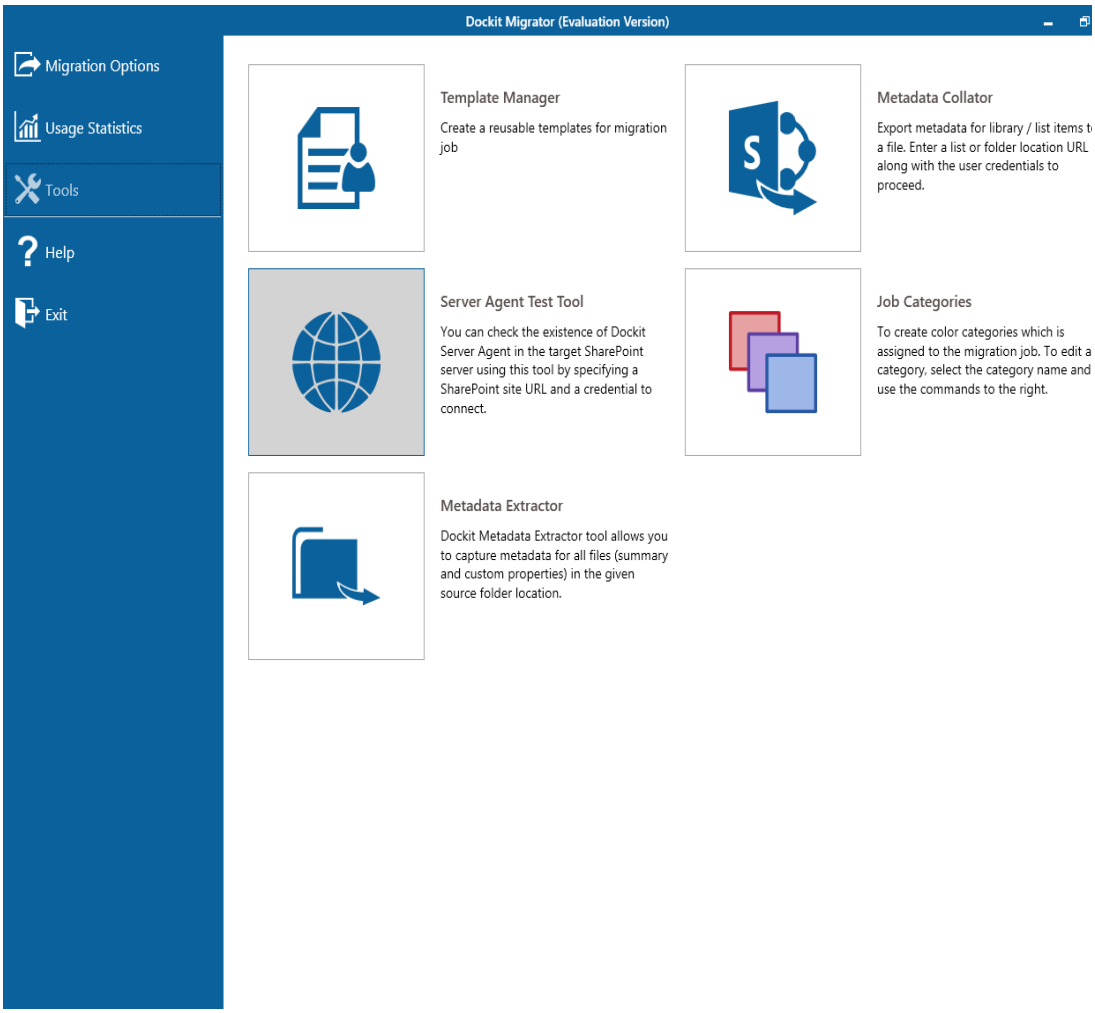
Replace Illegal Characters

3.2 Server Agent Test Tool

Dockit Server Agent is a server-side component of Dockit software. This Server Agent must be installed in the on-premise SharePoint servers (SharePoint 2016 / 2013 / 2010 / 2007) only.

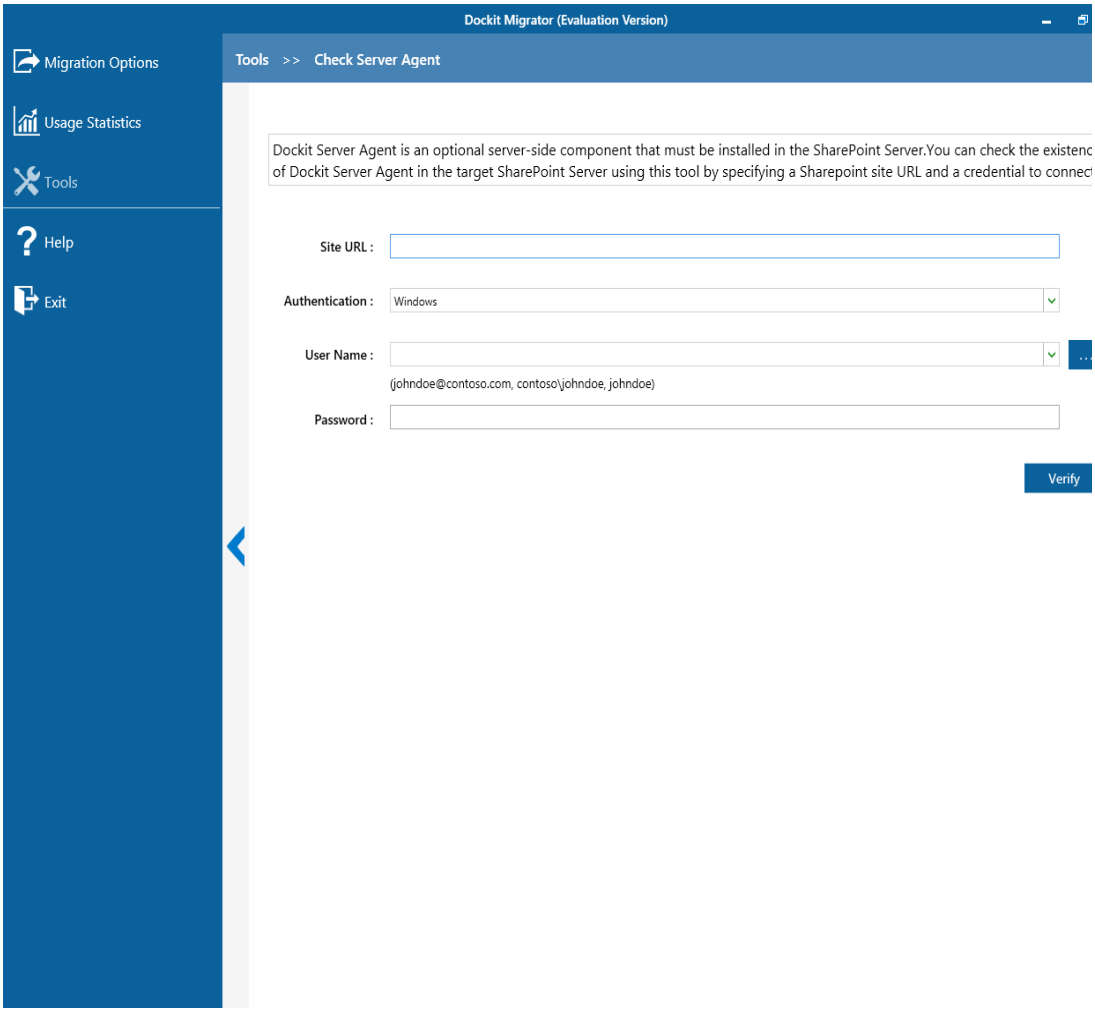
1 Select **Server Agent Test Tool** from **Tools** menu as shown below:

.



2 The **Check Server Agent** page appears as shown below:

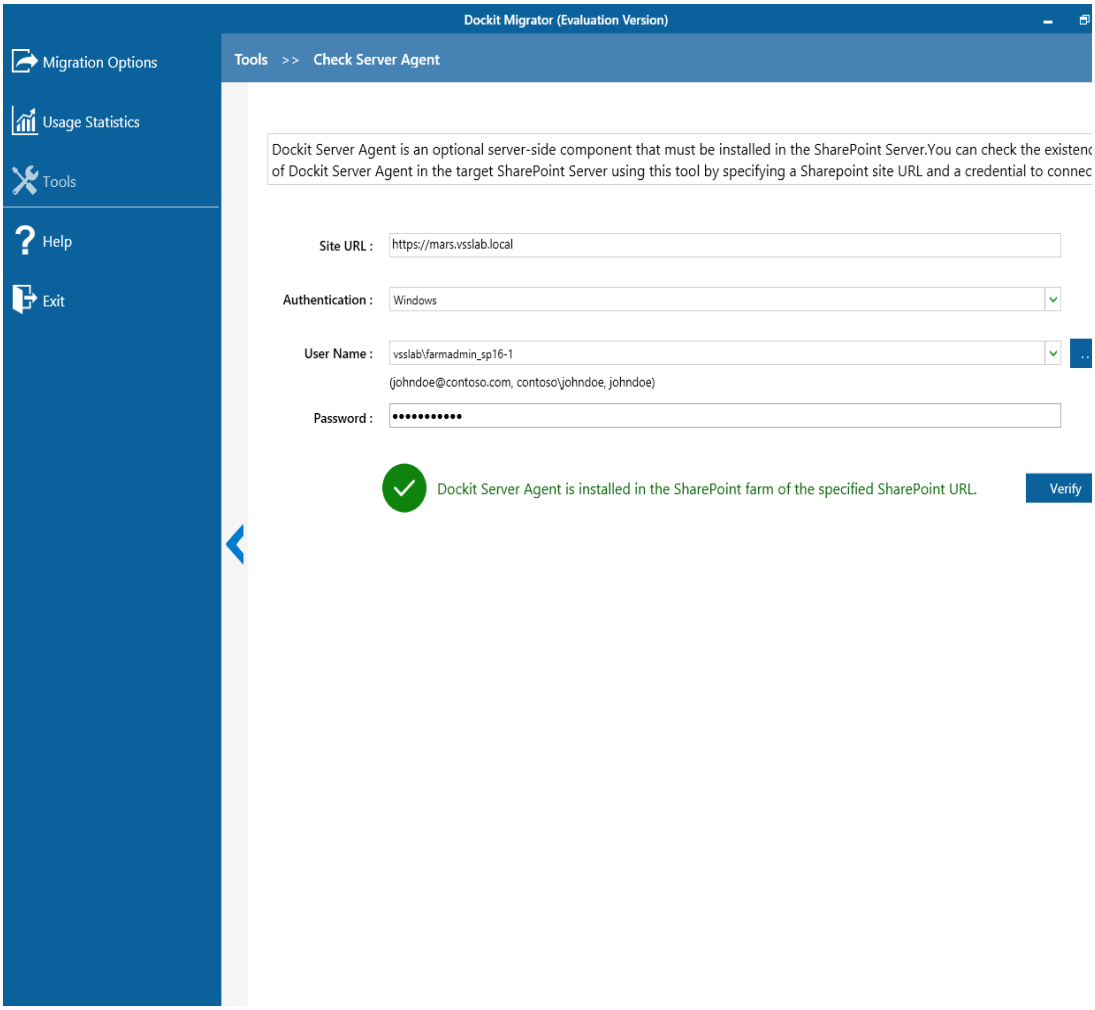
.



3. Specify a SharePoint URL in the URL textbox to verify **Dockit Server Agent** existence in the target SharePoint Server.

4. Connect to the SharePoint URL using the specified user credentials. Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>, UserName@DomainName, UserName** and its corresponding password . For example, johndoe@contoso.com, contoso\johndoe, johndoe.

5. Click **Verify** button to test the existence of **Dockit Server Agent** in the target SharePoint Server. When clicking this button, Dockit connects to the specified SharePoint server and checks the availability of **Dockit Server Agent** . Dockit will display the Server Agent status as shown below:

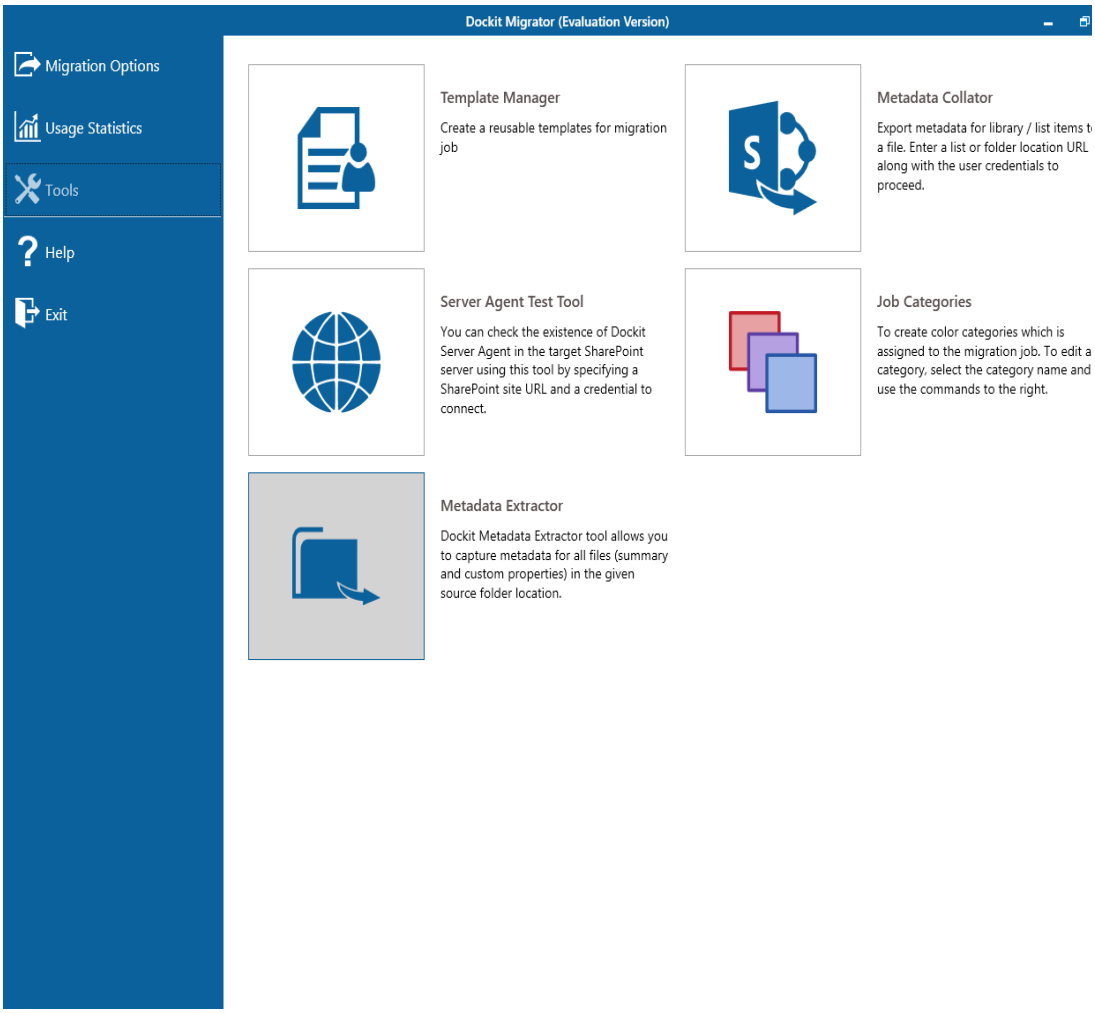


3.3 Metadata Extractor

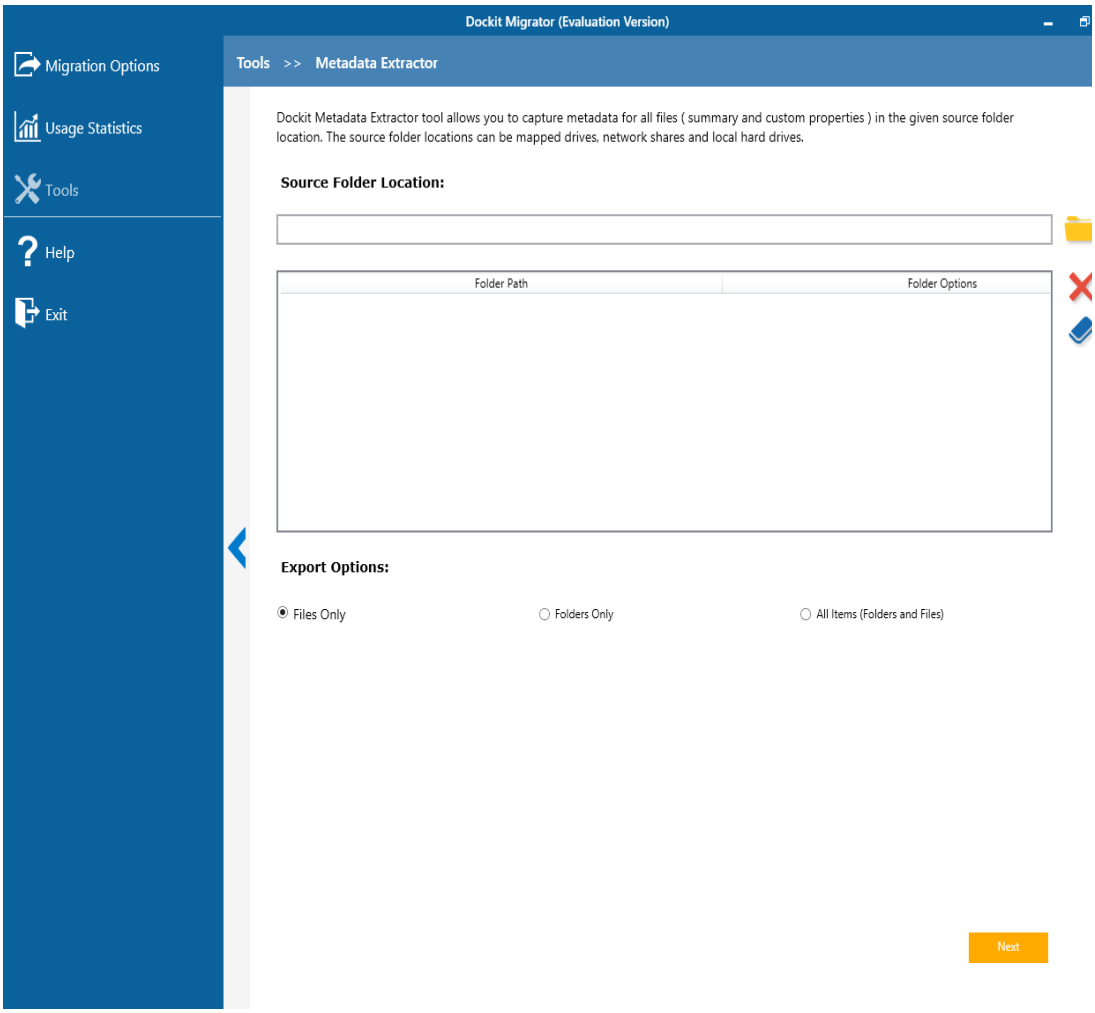
Dockit Metadata Extractor tool helps you generate an external metadata file with basic set of properties (Summary & Custom properties available in the file) in any of the Dockit supported file formats (say, CSV, TXT, Excel). Dockit Metadata Extractor tool extracts the metadata associated with the file and writes them in the metadata file along with the full path of the file.

Dockit Metadata Extractor allows you to extract file properties that are specific to the file extension. For example, Dockit provides almost 30+ properties for PDF file format alone. Dockit enumerates folders and sub-folders and generates metadata for all the files available underneath them.

1
. Select **Metadata Extractor** from **Tools** menu of Dockit main screen.

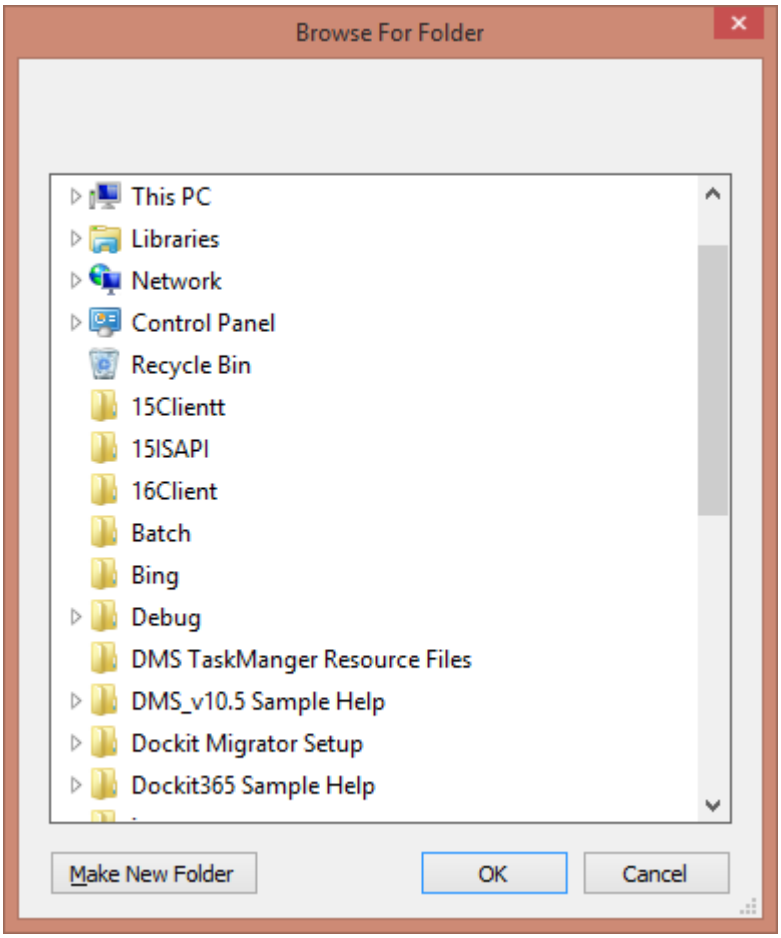


2. The **Metadata Extractor** page appears as shown below:



Specify a valid file system folder location in the **Source Folder Location** textbox. You can specify a Mapped Network location / Network Shares / local hard disk drive location in the textbox. Click **Browse** button to select the required folder using **Browse For Folder** dialog.

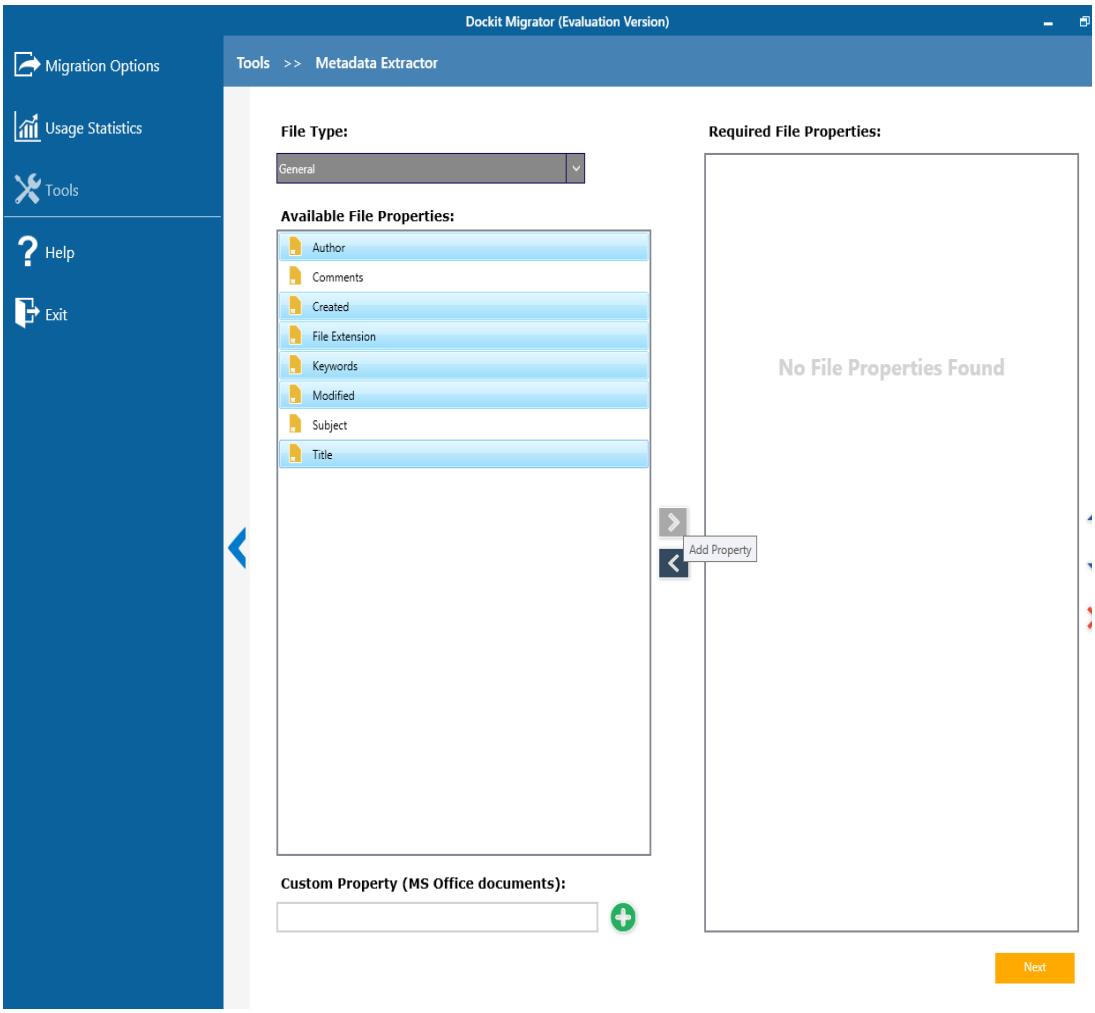
3. The **Browse For Folder** dialog will be shown as below:

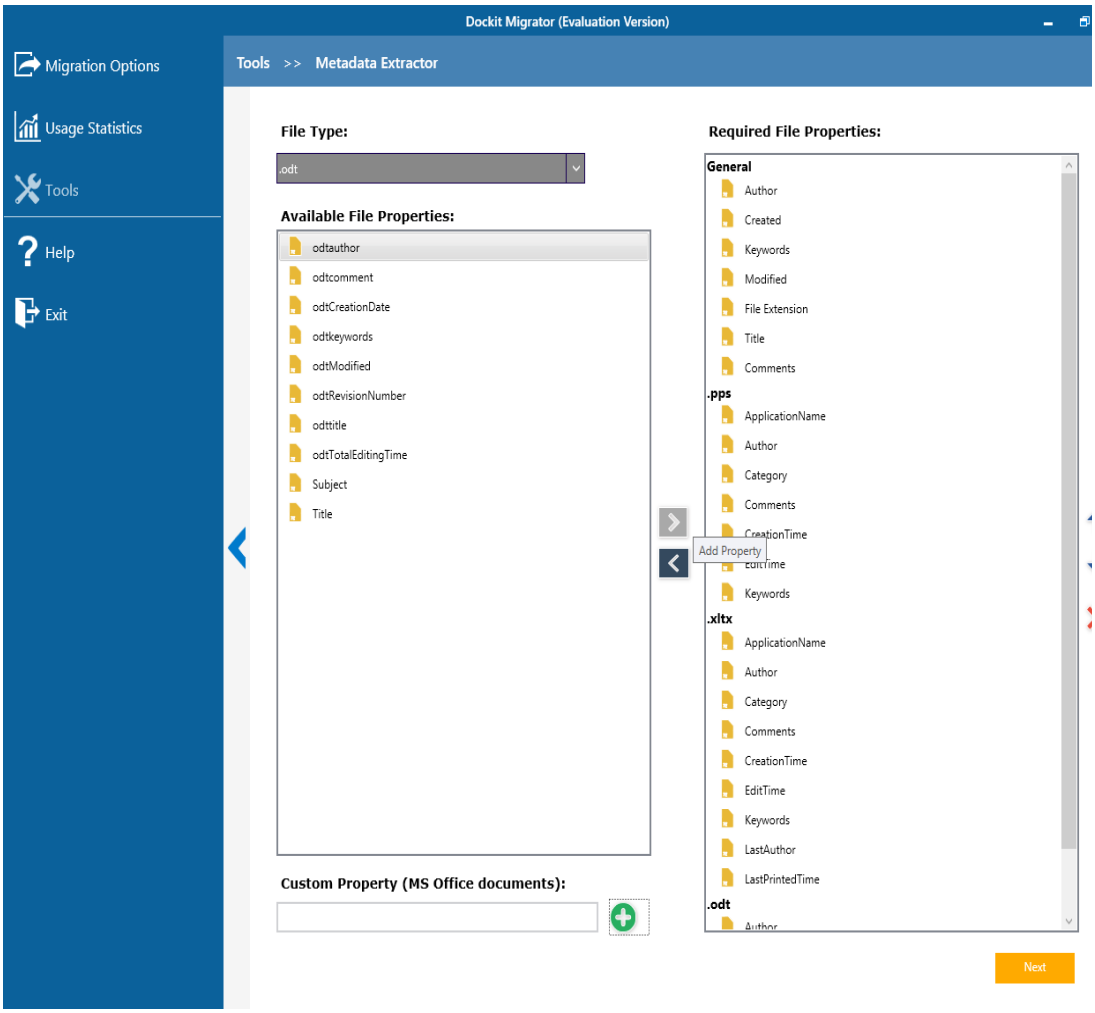


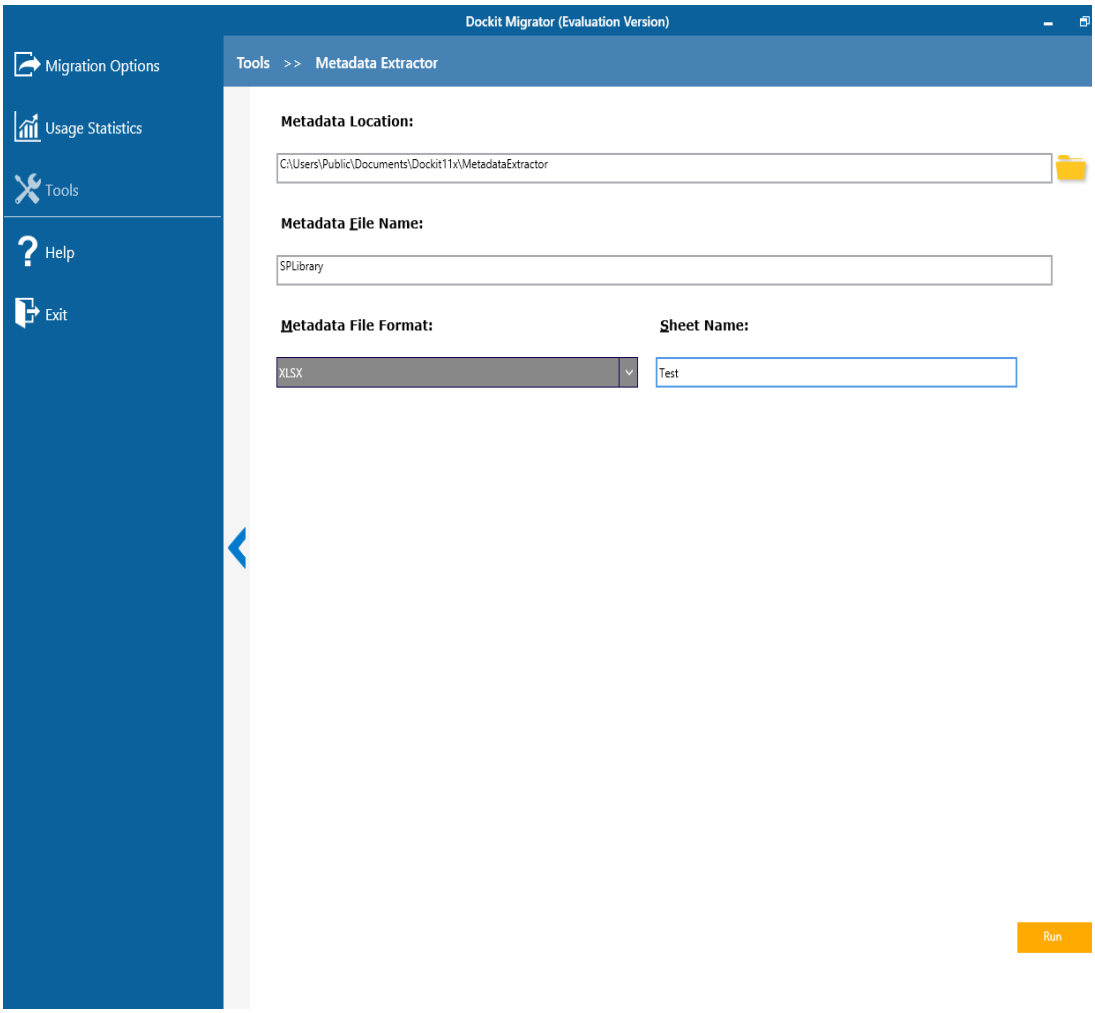
Upon selecting required source folder, click **OK** to add it for extraction.

4. Select the **Export Options** and click **Next** button to extract the file properties of the files.

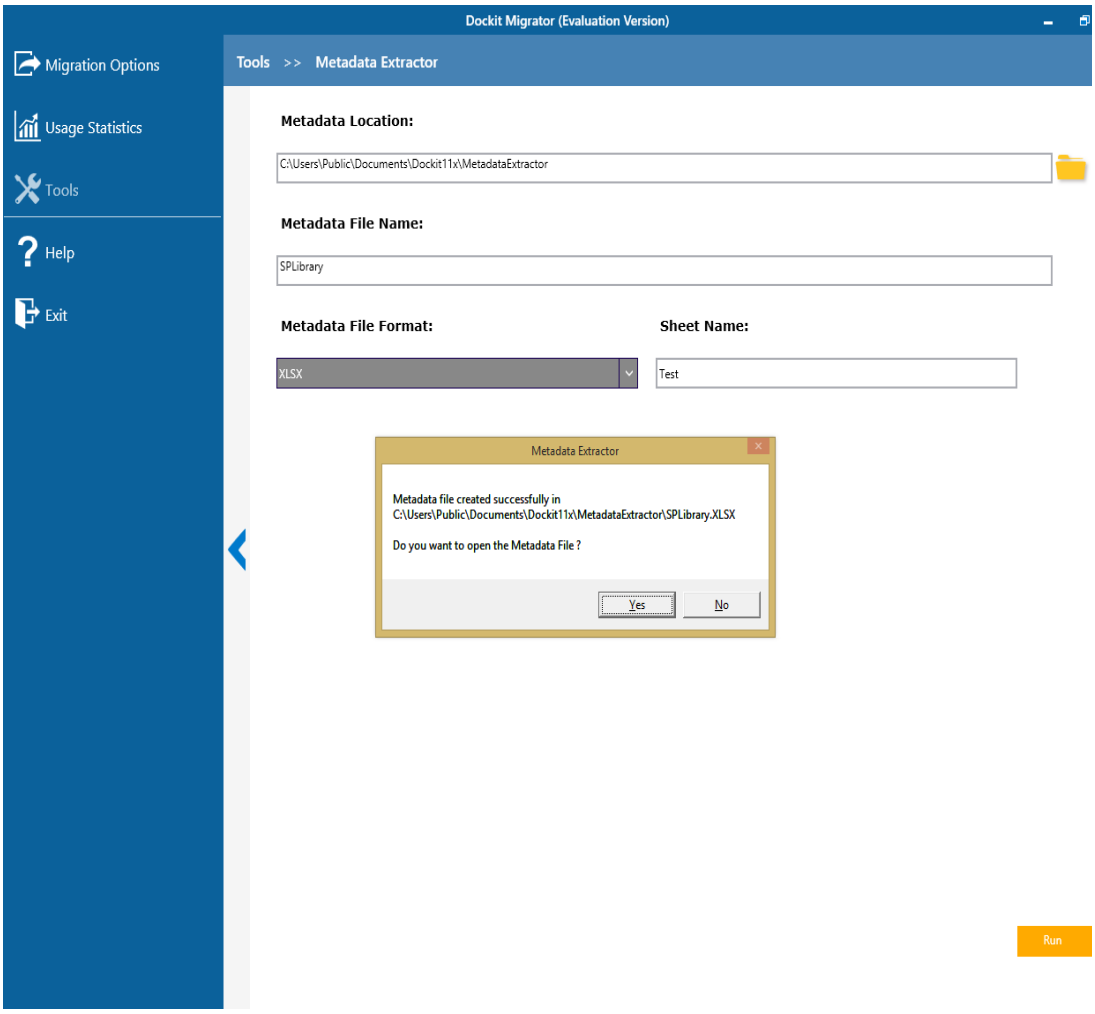
5. Select the **File Properties** to be extracted from the files as shown below:


Dockit Migrator (Evaluation Version)
Migration Options
Usage Statistics
Tools
Help
Exit
Tools >> Metadata Extractor
File Type:
General
Available File Properties:
Author
Comments
Created
File Extension
Keywords
Modified
Subject
Title
Add Property
Required File Properties:
No File Properties Found
Custom Property (MS Office documents):
Next


Dockit Migrator (Evaluation Version)
Migration Options
Usage Statistics
Tools
Help
Exit
Tools >> Metadata Extractor
File Type:
.odt
Available File Properties:
odtauthor
odtcomment
odtCreationDate
odtkeywords
odtModified
odtRevisionNumber
odttitle
odtTotalEditingTime
Subject
Title
Custom Property (MS Office documents):
Add Property
Required File Properties:
General
Author
Created
Keywords
Modified
File Extension
Title
Comments
.pps
ApplicationName
Author
Category
Comments
CreationTime
EditTime
Keywords
.xltx
ApplicationName
Author
Category
Comments
CreationTime
EditTime
Keywords
LastAuthor
LastPrintedTime
.odt
Next



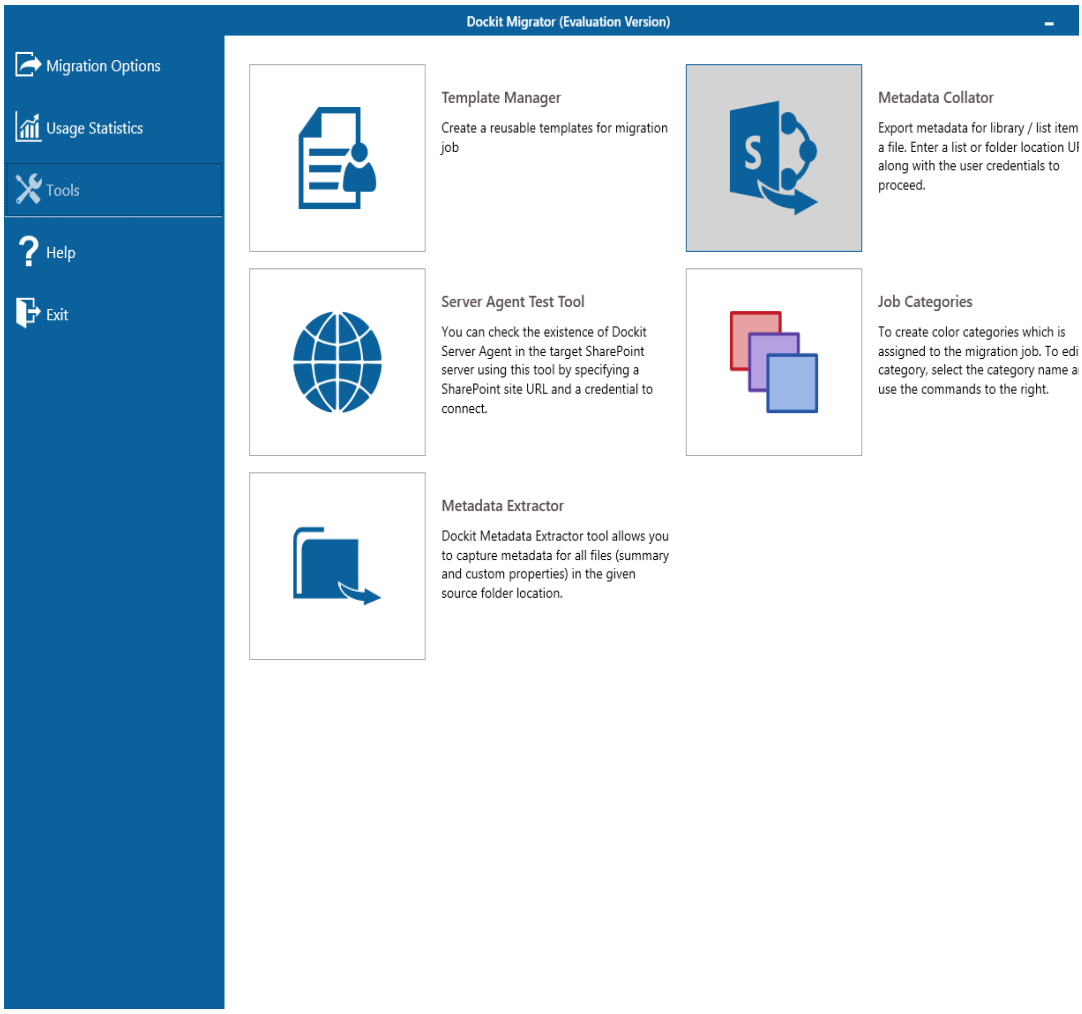
6. Click **Run** to commence extraction process. Once Metadata Extractor completes its job, it enables you to view the metadata file right away as below.



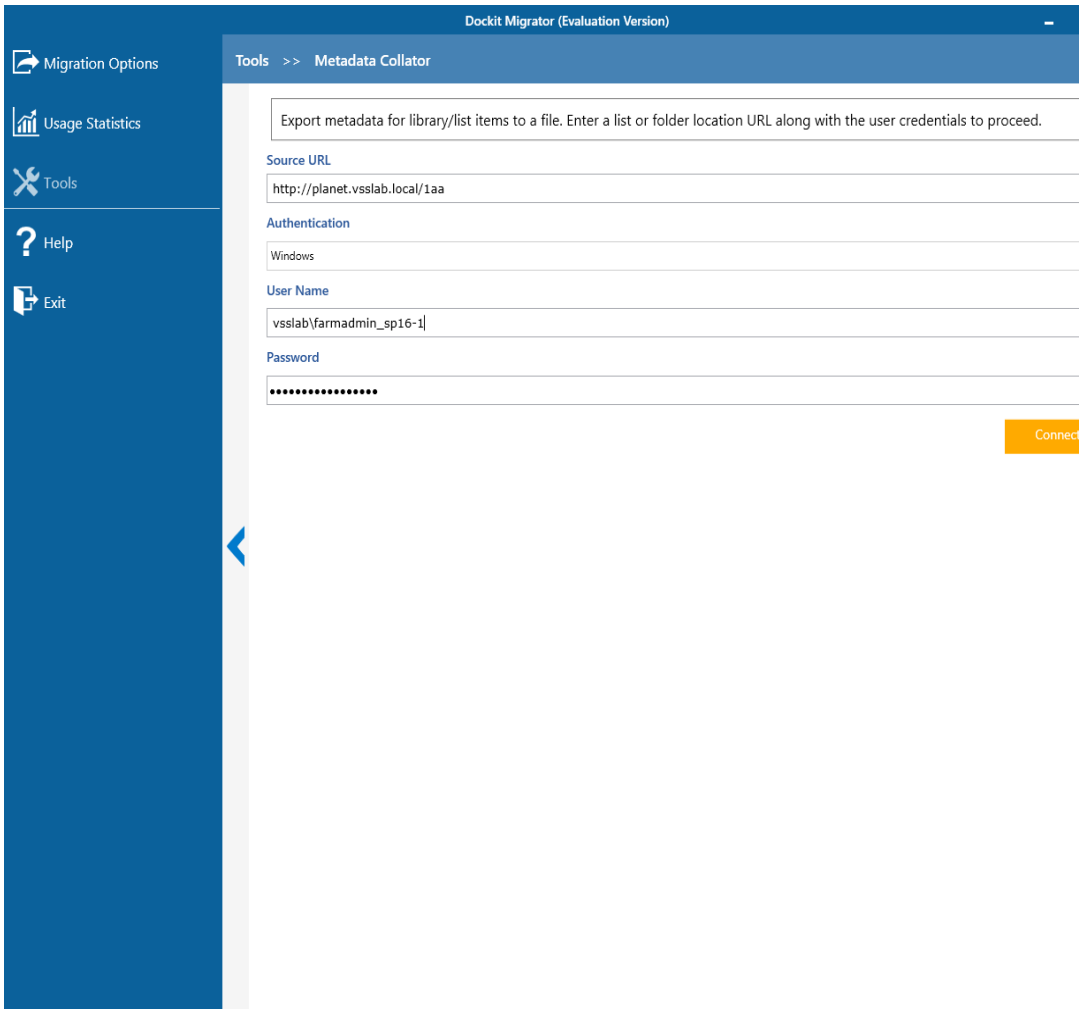
3.4 Metadata Collator

The Dockit Metadata Collator tool helps you generate the list items' URL for a given SharePoint List along with the associated metadata (SharePoint column values) and exports the metadata file to a CSV file format.

1. Select **Metadata Collator** from **Tools** menu of Dockit main screen.



2. The **Metadata Collator** page appears as shown below:



3. Specify a valid SharePoint List URL in the **URL** textbox. You can specify a SharePoint library / list / folder Location in the textbox (e.g., http://sharepoint.local/demo/lists/products). You can also specify a SharePoint online (Office 365) library / list / folder URL and click Connect. Upon clicking **Connect** button, you will be prompted for login credentials (username and password). Provide **User ID** and **Password** in the respective textboxes and click **Sign in** button to proceed.

4. Specify the user credentials to connect to the SharePoint URL using the options given below.

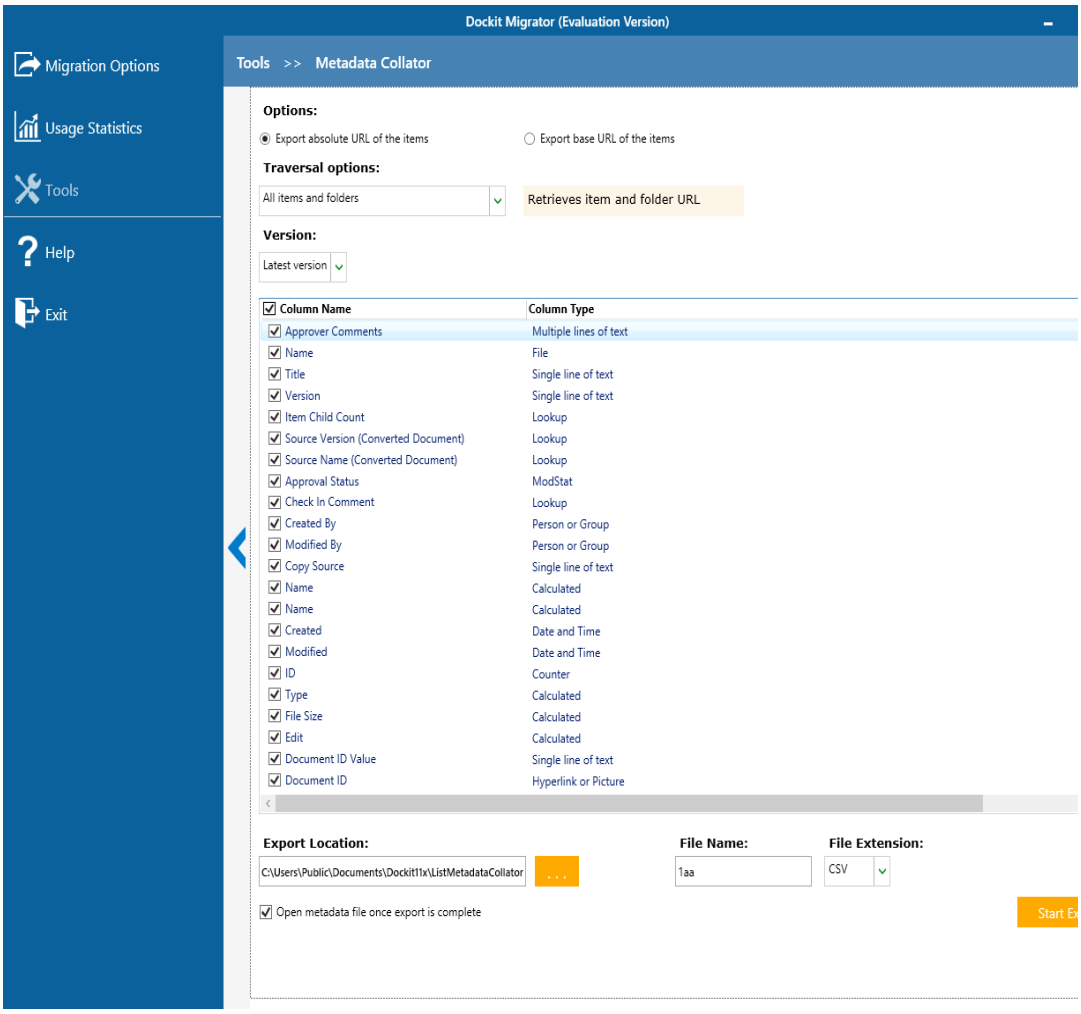
    a. **Use the following credential to connect to SharePoint -** Connect to SharePoint URL using the user context stored in the user profile (OR) enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>, UserName@DomainName , UserName** and its corresponding password. *Dockit* will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site. Click **Connect** button to proceed.

    b. **Use federated authentication (Web Single Sign-on) to connect to SharePoint -** 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).

5. Select desired columns from the available columns list. The column value will be exported along with the list item URL to the metadata file.



6. **Export Options:** Select any one of the following options to generate the URL for the list items:

   a. **Export absolute URL of the items -** Generate the absolute URL of the items with specified column value.

   b. **Export base URL of the items -** Generate URL of the items parent URL with specified column value.

7. **Traversal Options:** Select any one of the list traversal options as given below:

   a. **All items and folders** - Generate the URL list for all items and folders in the specified location.

   b. **All items only** - Generate the URL list for all items only, but not folders.

   c. **All folders only** - Generate the URL list for all folders, but not the items.

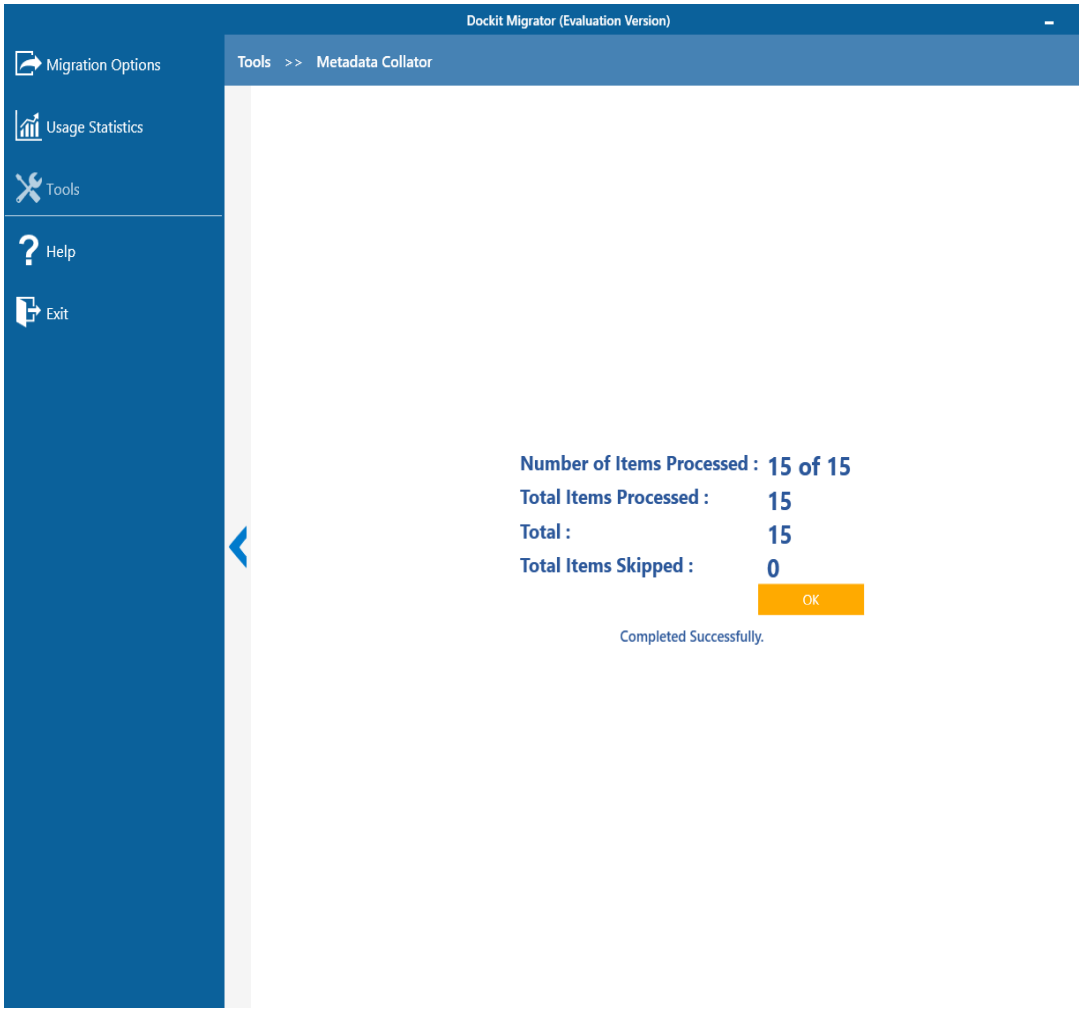
   d. **Items in current level** - Generate URL for all items and folders in the current / top level.

8. In **Export as:** option **,** specify valid export path in the textbox or click **(...)** button to specify the export file name.

9. Select option **'Open metadata file once export is complete'** to open the metadata file automatically after completing the export process.

10. Click **Start Export...** button to commence the export process.

11. After clicking **Start Export...** button, a page appears as shown below:



12. **Sample metadata entries generated using this tool:**

For Absolute URL with Title Column

"Destination Path", "Title",”ContentType","PolicyNumber"
" http://sharepoint.vyapin.demo/sites/migration/lists/countries/1_.000","United States of America ","Policy Info","123A"
" http://sharepoint.vyapin.demo/sites/migration/lists/countries/2_.000","Australia ","Policy Info","234B"

For Base URL with Title Column

"Destination Path", "Title","DocType","PolicyNumber"
" http://sharepoint.vyapin.demo/sites/migration/lists/countries","United States of America ","Word document","123A"

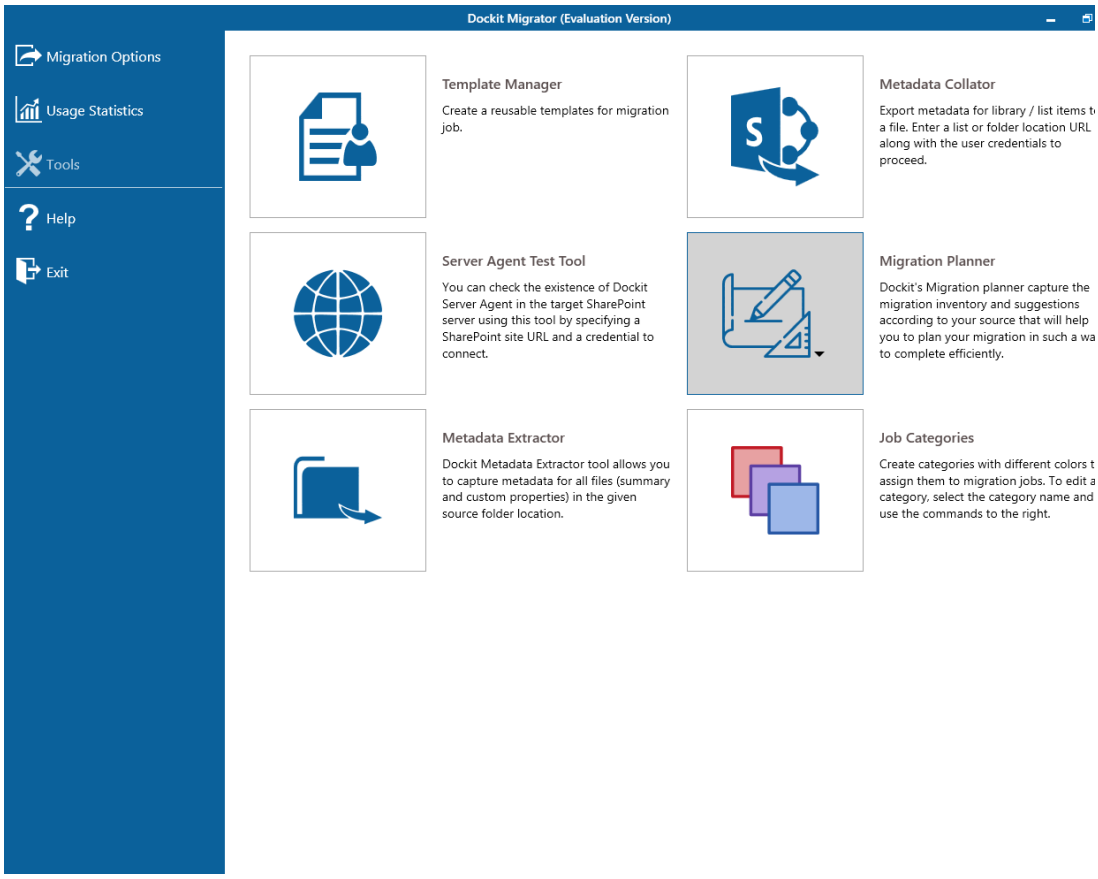
" http://sharepoint.vyapin.demo/sites/migration/lists/countries","Australia ","Excel Sheet","234B"

13. Click **Close** button to close the Metadata Collator page.

3.5 Migration Planner

1. Dockit's Migration planner captures the migration inventory and provides suggestions according to your source. This will help the user to plan the migration in such a way to complete without the most common errors.

   The **Migration Planner** page will appear as shown in the screen below:



2. **Types of Migration Planner:**

   There are two types in Migration Planner, as given below:

   - File share Migration Planner
   - SharePoint Migration Planner

4. Dockit Features

Task Manager

Change Application Data folder location

Task History

-->

- On Premise
- Online

4.1 On Premise

Task Manager

Change Application Data folder location

Task History

-->

- File Share Migration
- SharePoint Migration
- Clean Up Metadata

4.1.1 File Share to SharePoint Migration

Task Manager

Change Application Data folder location

Task History

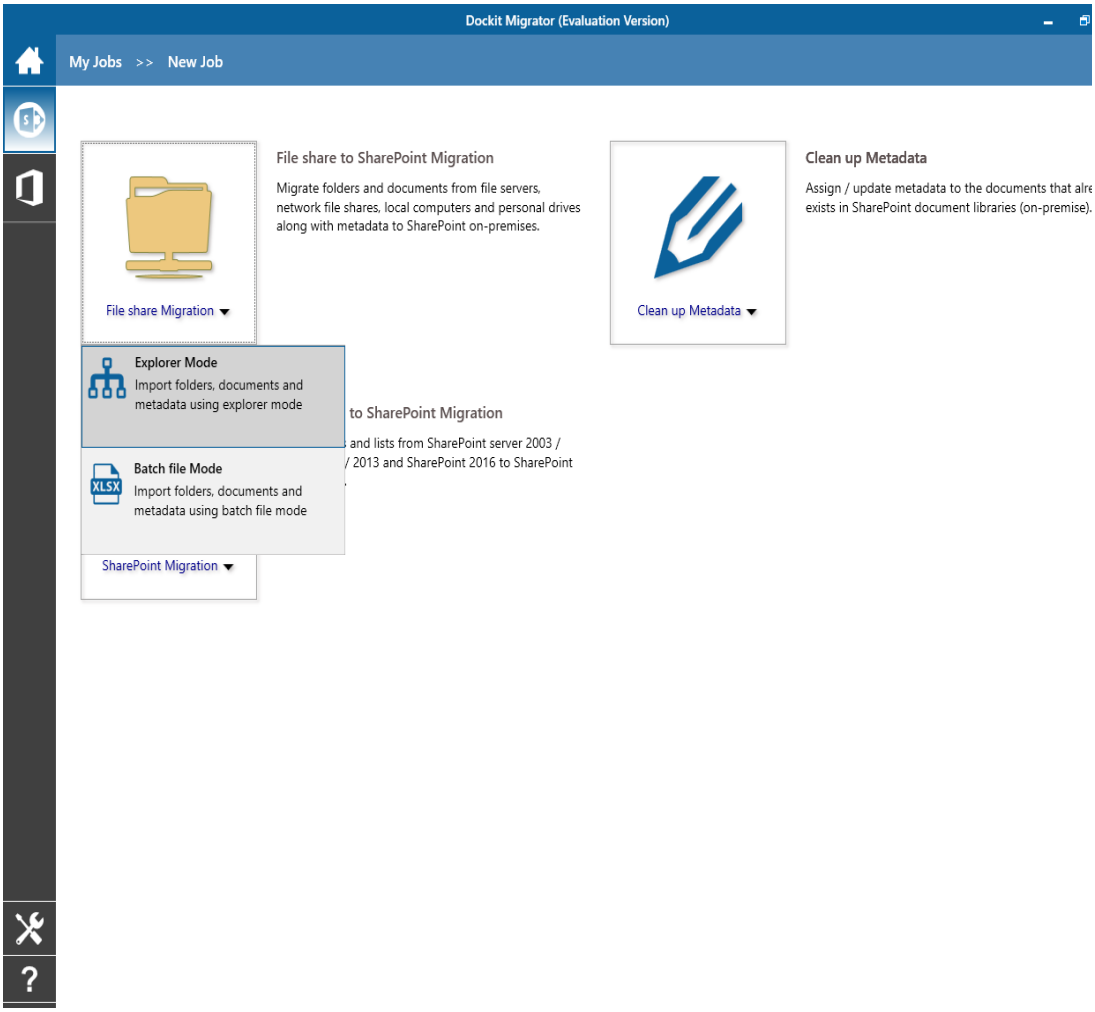
-->

- Explorer Mode
- Batch File Mode

4.1.1.1 Explorer Mode

To create a task to import folders and files along with metadata from File System to SharePoint Library:

1. Click **Explorer Mode** from **File share to SharePoint Migration** option in **New Job** page as shown below.



2. Specify SharePoint Destination Location (Credentials).

3. Select Items to Import (Select Files).

4. Specify Migration Settings.

5. Specify Task Settings.

6. Click **Finish** button to create a task, or click **Back** button to change any task settings.

4.1.1.1.1 Metadata file structure

The following section gives you the guidelines to create an external metadata file for **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** and **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** task type.

The first row of the metadata file is reserved for the headers and should contain the field names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint columns that are read-only will not be updated by Dockit.

The one of the fields (headers) in the metadata file should be named as '**Path**', as 'Path' is reserved header to lookup the path of the document whose metadata to be updated. The delimiter character used to separate the headers in the external metadata file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text). The comonly used separator is comma (,).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	**Equivalent Format String**
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

Be consistent with the drive letters and UNC path when adding folders and file into SharePoint library using Dockit user interface and the path field values in the metadata file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\MyDocs\File1.xlsx). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine_Name\Share_Name\Sample File1.xlsx).

You can also use wildcard notations in order to assign the same or different metadata for the folders, sub-folders & files. Please see the wildcard usage below:

Wildcard characters	**Example**	**Description**
.	D:\My Documents\folder1*.*	Assigns same metadata as the parent folder ‘folder1’ for all files and sub-folders.
*	D:\My Documents\folder2*	Assigns same metadata as the parent folder ‘folder2’ for all its sub-folders.
.*	D:\My Documents\folder3\.*	Assigns same metadata as the parent folder ‘folder3’ for all files in the parent folder and its sub-folders.

For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (“ ”) e.g., “John Doe”. When using accented characters

such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.

The following section describes the data types supported by SharePoint and an example of how to state the value in the metadata file for import.

SharePoint Data Type	**Remarks**	**Example**
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"

Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 7;Windows Vista;Windows 2003;Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"

People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	" http://sharepoint/Shared Documents/My Sample File.doc " "http://sharepoint/Pictures/chart.bmp"

Target Audiences (Multiple value) *(Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)*	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require *Dockit Server Agent* component to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010 and above).	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers
Publishing Schedule Start Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"

Publishing Image *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Pictures/chart.bmp" "Pictures/chart.bmp"
Publishing Hyperlink *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Documents/Sample File.doc" "/Documents/Sample File.doc" " NewsArticleImage.jpg"
Publishing HTML *(Applicable only for Collaboration Portal / Publishing Portal Site)*	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) *(Applicable only for SharePoint Enterprise Edition)*	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in *filter name: value* format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:*filter name* , **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit also automatically fills-up the column values associated with the BDC	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator" If the filter name contains colon (:) in its name, use the following syntax: "FILTER:Product:Product ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:1000AX"

	/ BCS column during import.	
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Alaska" "Alaska"
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States|

	Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	States|Alaska" "Washington;California;Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"

Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx " "http://sharepoint/Lists/Custom List/1_.000"

The following tables below describe the syntax to be used in the external metadata file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

Single Value	**Example**	**Final Result**
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. ** - The delimiter ';#' is a reserved character pattern in the Choice field column. The single value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#"	Windows Live;#Mail

Multi-Value	**Example**	**Final Result**
In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Windows Live Spaces; Mesh ;Windows Azure;Windows HPC

In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. * - *The delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail ;Windows Photo Gallery

Sample format of a CSV / TEXT metadata file:

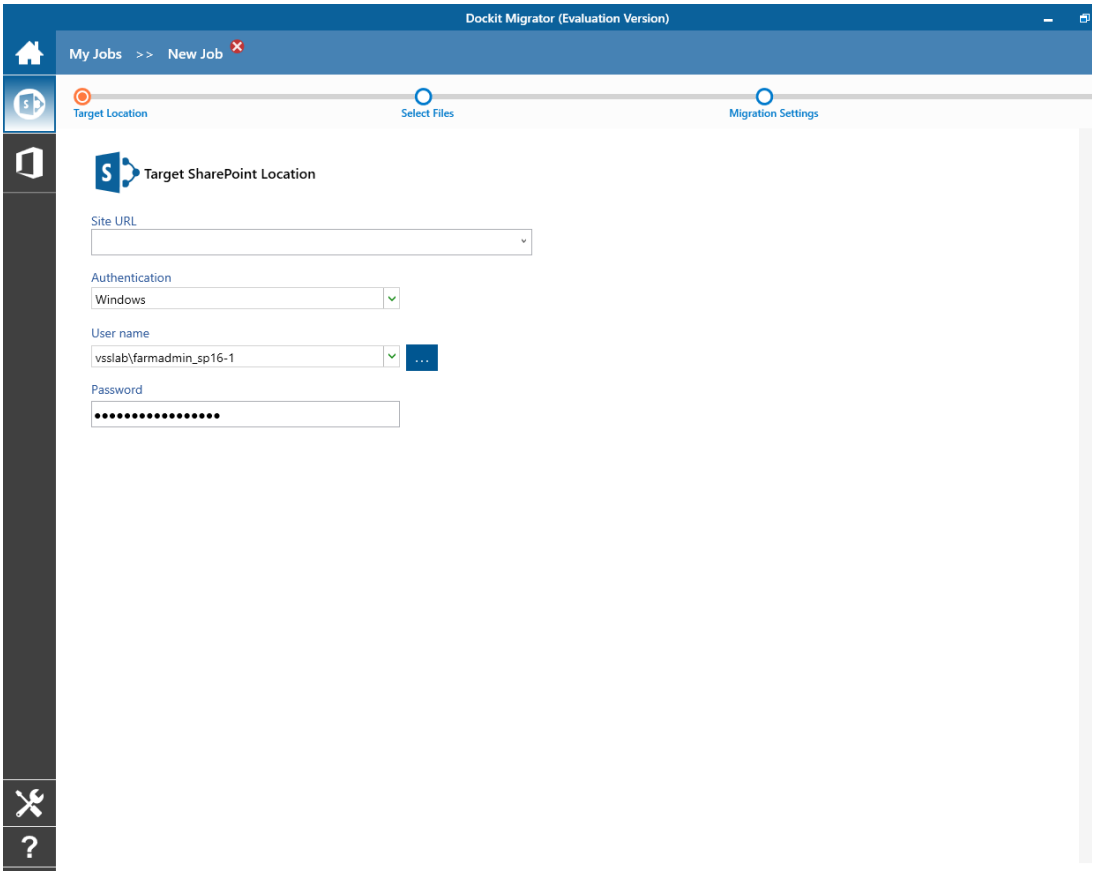
Note: Refer Point #2 for the separator to be used in the metadata file

"Path","Modified Date","Author Name","Designation","Department"
"C:\My Documents\Sample Brochure.doc","11/06/2006","John Doe","Director","Senior Management"
"C:\My Sales\Sample Sales Template.xlsx","11/24/2006","Jane Doe","VP Sales","Corporate Sales"
"C:\My Sales\Sample Product Demo.ppt","09/09/1999","David Blake","Sales Manager","Consumer Sales"

4.1.1.1.2 SharePoint destination location

To specify a SharePoint URL of a site / library / folder location into which you wish to upload folders and files from the file system, perform the steps given below:

1. The **Target SharePoint Credential** page will appear as shown below:



2. Specify a valid SharePoint URL in the **Site URL** textbox. You can specify a SharePoint site, library or folder location in the URL textbox. Dockit will load the tree view of the destination location from the level specified in this textbox.

3. Specify the *Authentication* mechanism and credentials to connect to SharePoint using one of the options described below:

a) To connect to SharePoint site configured with Windows or Forms based authentication, you can select one of the below options as applicable and click **Next** to proceed.

Windows or Forms - *Dockit* will initiate Windows or Forms authentication using the user account information stored in the user profile or the one entered in the textbox.

b) To connect to SharePoint Online site configured with your Microsoft Live ID, you can select below option and click **Next** to proceed.

Office 365 Cloud Identity - Connects to a SharePoint Online site in Office 365 using the given cloud identity i.e., Office 365 Online User Credential e.g., johndoe@vyapin.onmicrosoft.com.

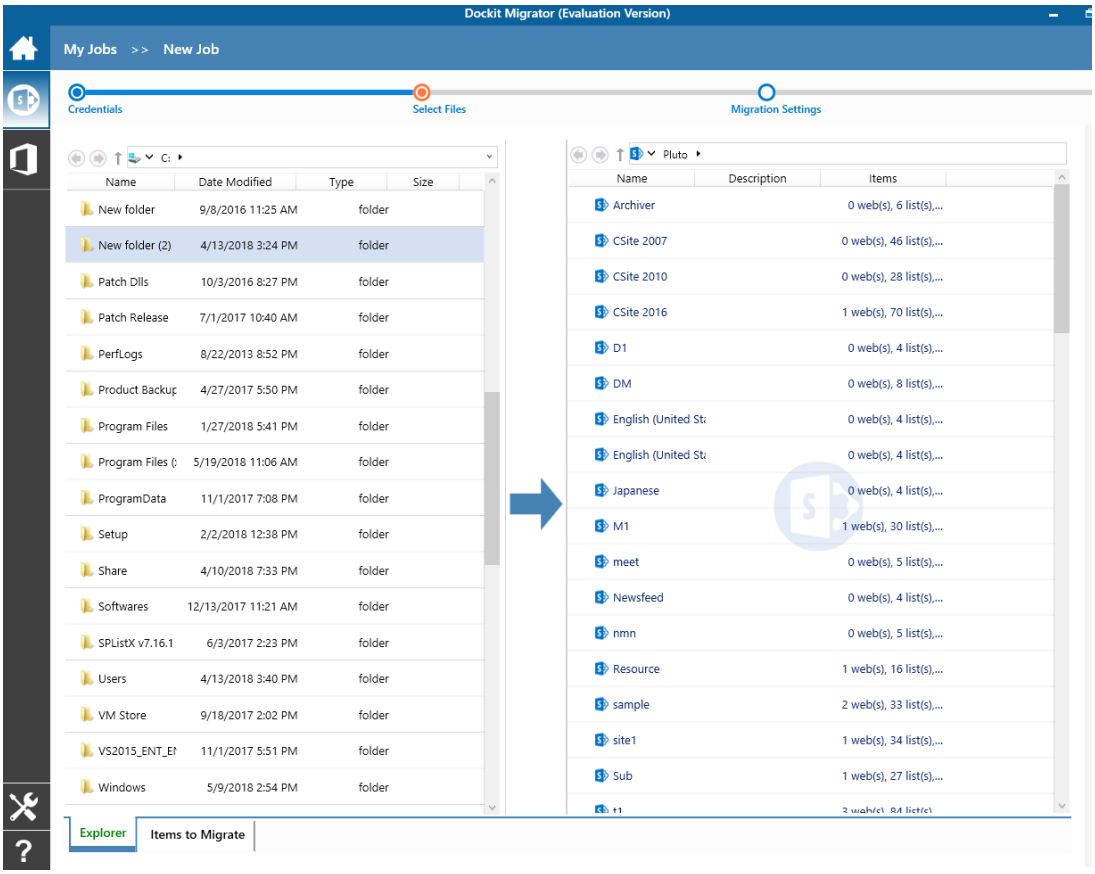
c) To connect to Office 365's SharePoint Online site that authenticates users using a trusted identity provider, you can select the Federated Identity option and proceed with the login process as shown below:

Federated Identity - Connects to a SharePoint site (On-premise or SharePoint Online) using the federated identity account configured using ADFS. Select this option to connect to Office 365 SharePoint Online sites that are configured using federated identity provider.

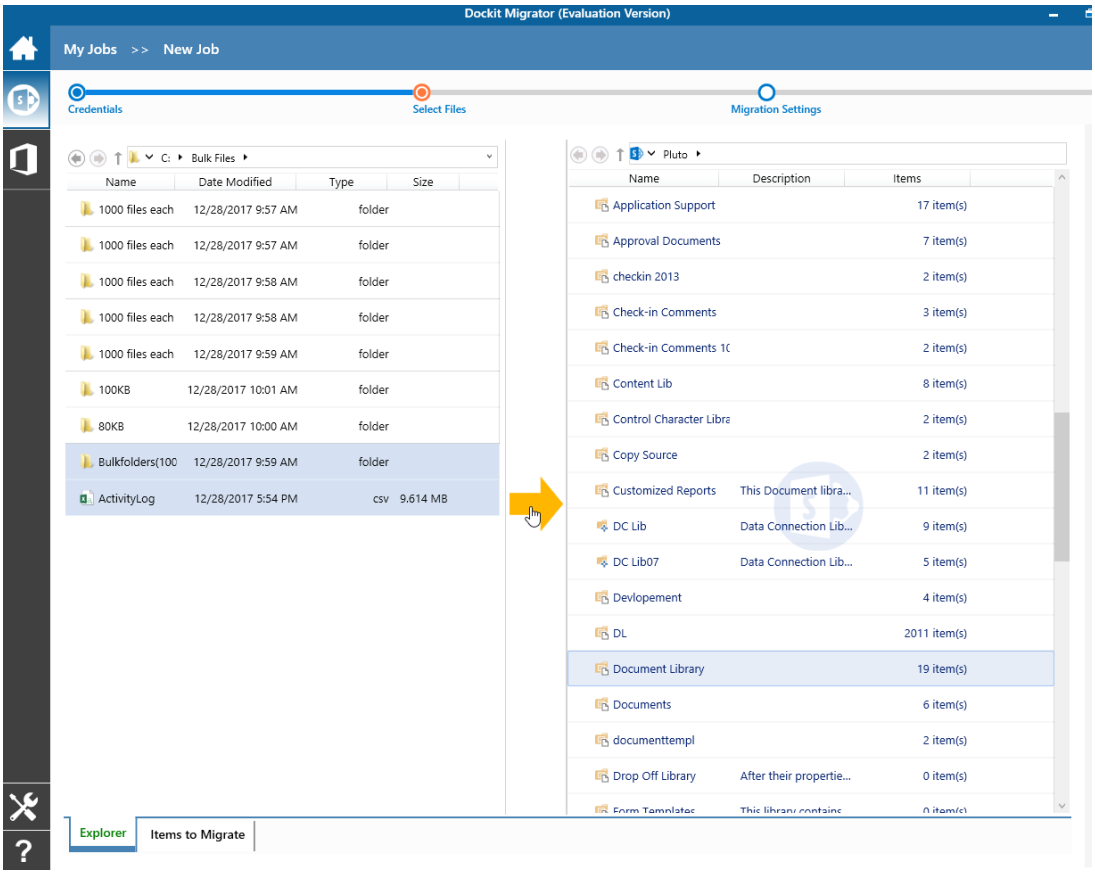
4.1.1.1.3 Items to import

To add folders and files to import to the destination location in SharePoint:

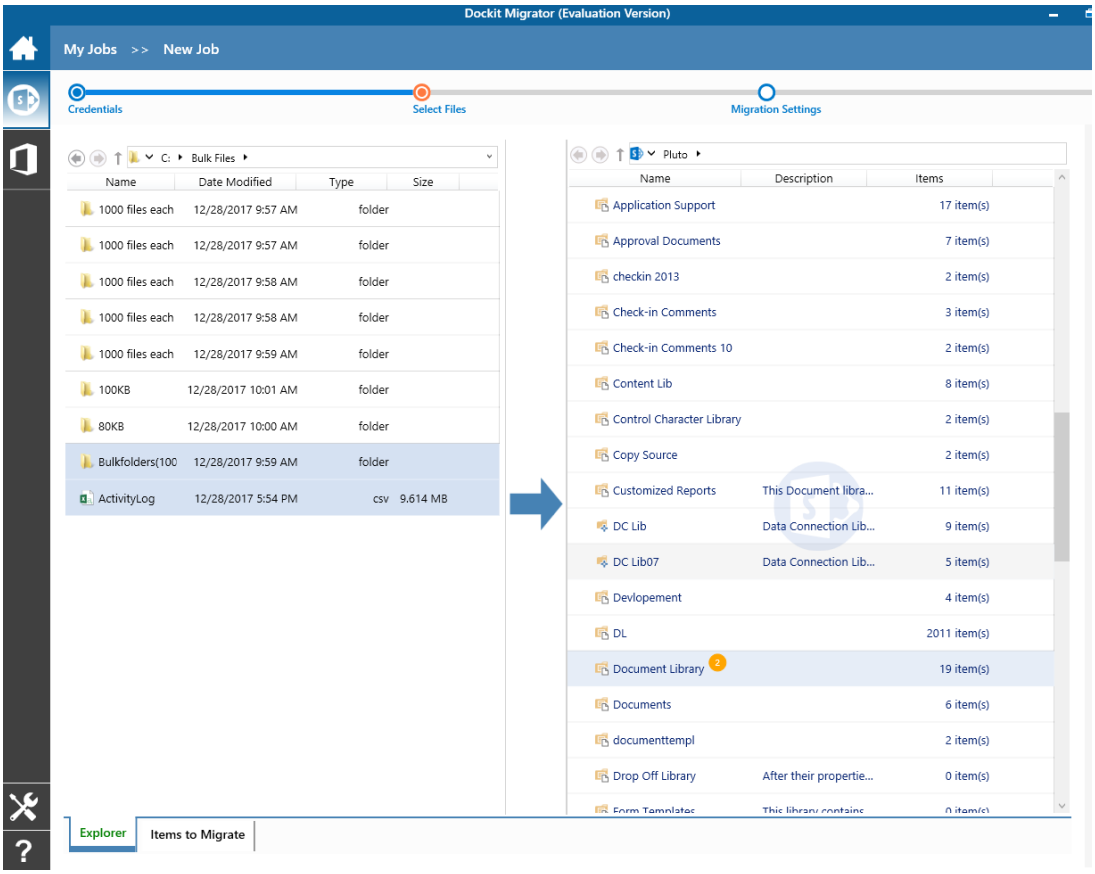
1. The **Select Files** page appears as shown below:



2. **Select Files** page contains two list-views. One is source list-view and the other one is target list-view. The ribbon's are available for both source and target on the top of their respective list-view's.



3. Browse the source folders and files of your local machine and network shares and select the required folders and files from list view (left pane). Select a destination location from target list-view (right pane) and click **'->'** button to import selected items.



4 The selected folders and files added for import will be displayed in the **Items to Migrate** tab. Dockit processes the top-level folders and files added for import in the order in which it appears in the **Items to Migrate** tab. The import process order can be changed by the **navigation** buttons available in the right side of the grid.

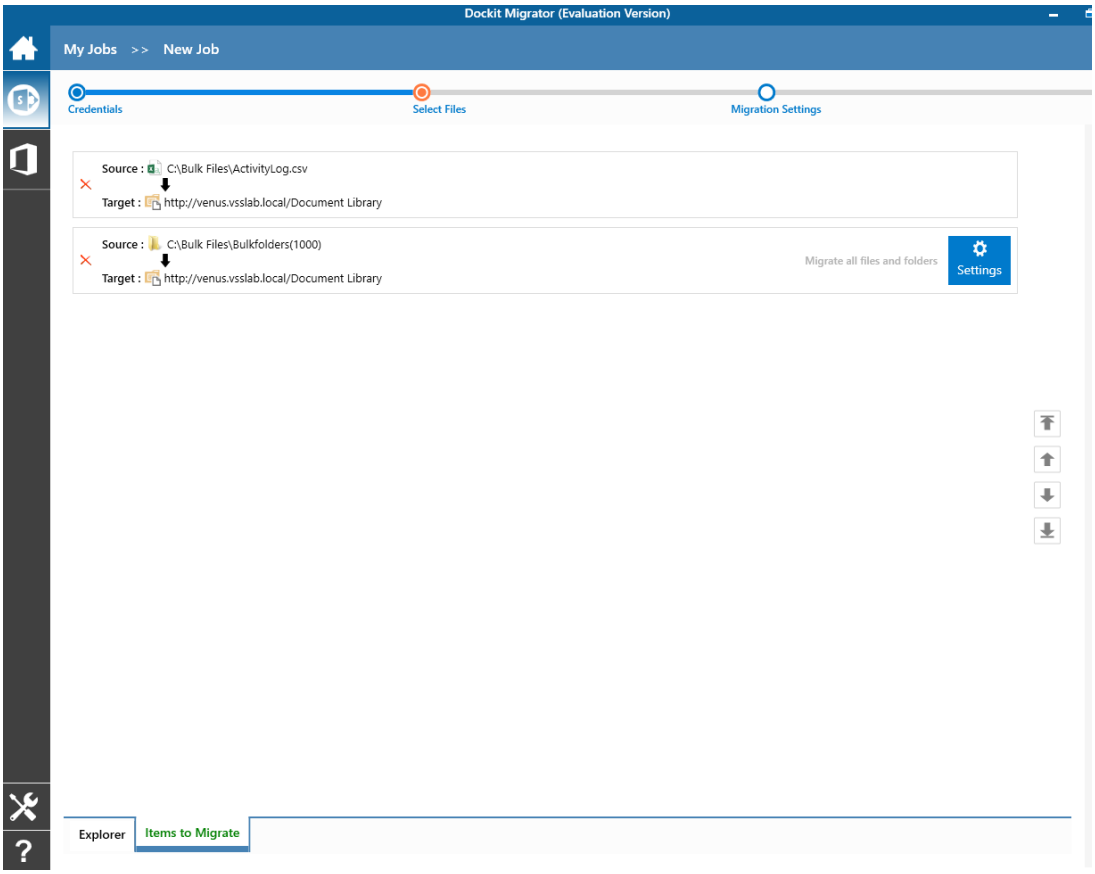
Importing file versions: You may use this order sequence feature appropriately, when you have to import different file versions (with the same name) in the specified sequence. This feature is extremely powerful when you have different file versions organized in version folder names.

You can add the folders version1, version2, version3 etc. to the destination location in this intended order or use the navigation buttons to the right of the grid to order them. Dockit will automatically process the added folders / files in the order in which it appears in the grid. Specify the appropriate settings in the File Settings wizard step to handle file versions correctly.

5. If you need to import different versions of files that are suffixed with its version number as - D:\Document Store\Sample_v1.txt, D:\Document Store\Sample_v2.txt, D:\Document Store\Sample_v3.txt etc, click Import Document Versions... for step by step guide to import them as a single file with versions.

6. Click **'Next'** button to proceed or click **'Back'** to discard the changes.

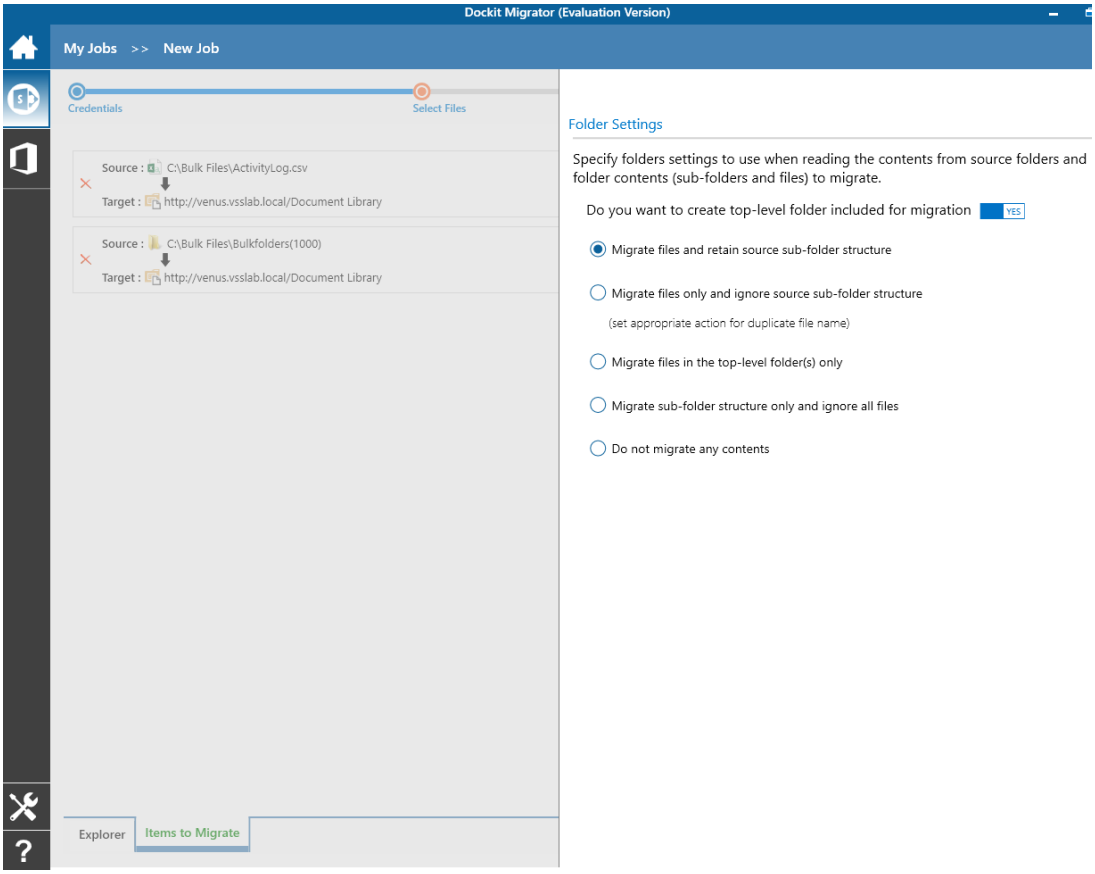
7. **Items to Migrate** page contains the folders and files added for import as shown below:



8. To make the import process easier for users, Dockit provides an ability to specify the content to import from the source folder structure. To specify the folder settings to use in the destination SharePoint library and the necessary files to import, perform the steps as given below:

   Use **'Settings'** button to edit the folder traversal option for folders that are added in **Items to Migrate** tab view.

   A Folder Settings page appears as shown below.



The top-level folder is the folder added or specified for import by the user. Dockit will commence the import process from this top-level folder. **Select** the appropriate option to create the top-level folder by selecting the option buttons (Yes/No).

Select any of the following folder options given below to specify the content to be imported from the source folders in file system:

a. **Migrate files and retain source sub-folder structure -** This option imports folders and files exactly as they are in source file system. The source folder structure in the file system will be retained in the destination location.
b. **Migrate files only and ignore source sub-folder structure -** This option imports files only and ignore its source folder structure in the file system. Note: Specify the appropriate options in **File Settings** step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).
c. **Migrate files in the top-level folders only -** This option imports files available in the top-level folders only. Dockit will not traverse the sub-folders within the top level folders.
d. **Migrate sub-folder structure only and ignore all files** - This option creates the sub-folder structure in the destination location and ignores all files that are available within the added folder and sub-folders.
e. **Do not migrate any contents** - This option does not import any content (sub-folders and files) from the source folder added for import. This option will be useful when you want to create the top-level folder only and ignore all its content.

Note: Folder Traversal option is not applicable for file.

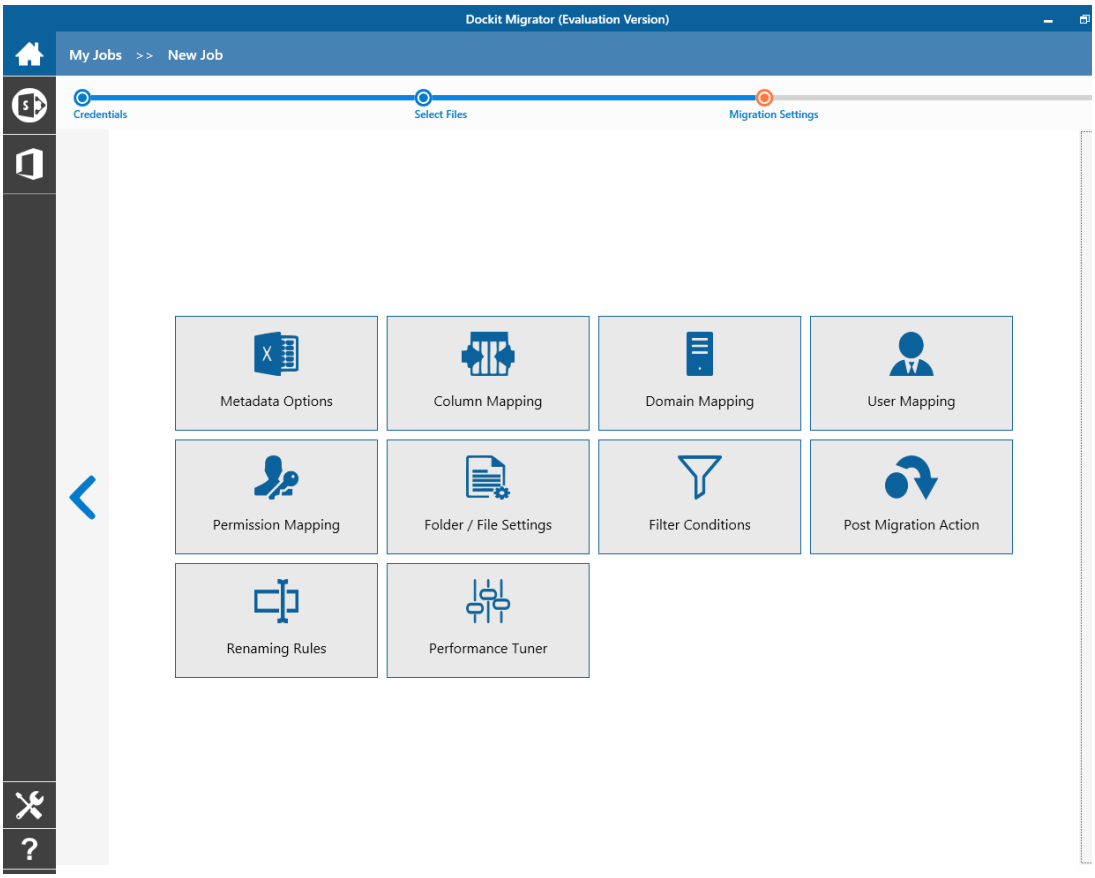
9. Click **Next** to proceed.

4.1.1.1.4 Migration Settings

1. Migration Settings allows the user to specify various migration configuration information to use in the task. To specify Migration Settings inputs to use for the task:

-- The **Migration Settings** page will appear as shown in the screen below:

>



You can provide external metadata file to assign metadata, filter conditions to filter folders or files, renaming rules to rename folders/files with invalid characters, map permissions, users and columns.

The various Migration Settings are listed below:

1. Metadata Options

2. Column Mapping

3. Domain Mapping

4. User / Group Mapping

5. Permission Mapping

6 Folder / File Settings
.

7 Filter Conditions
.

8 Post Migration Action
.

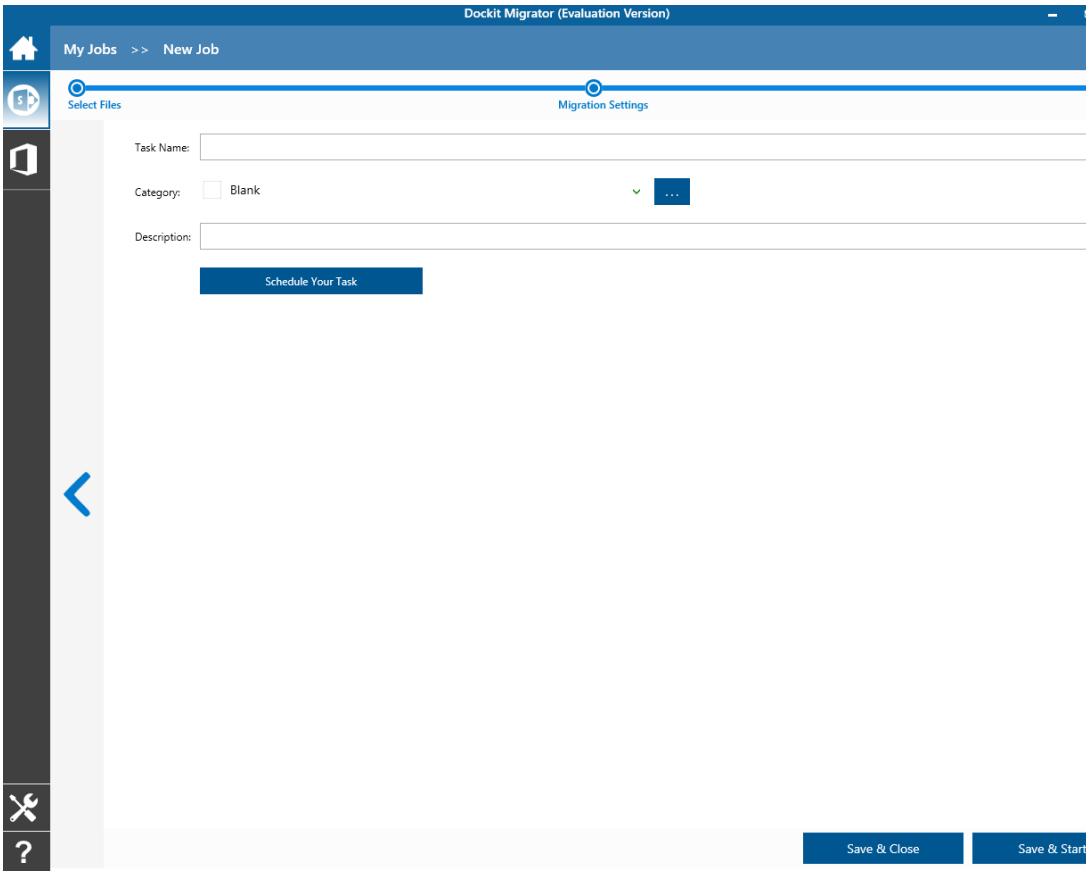
9 Renaming Rules
.

Click **Next** to proceed.

4.1.1.1.5 Task Schedule Settings

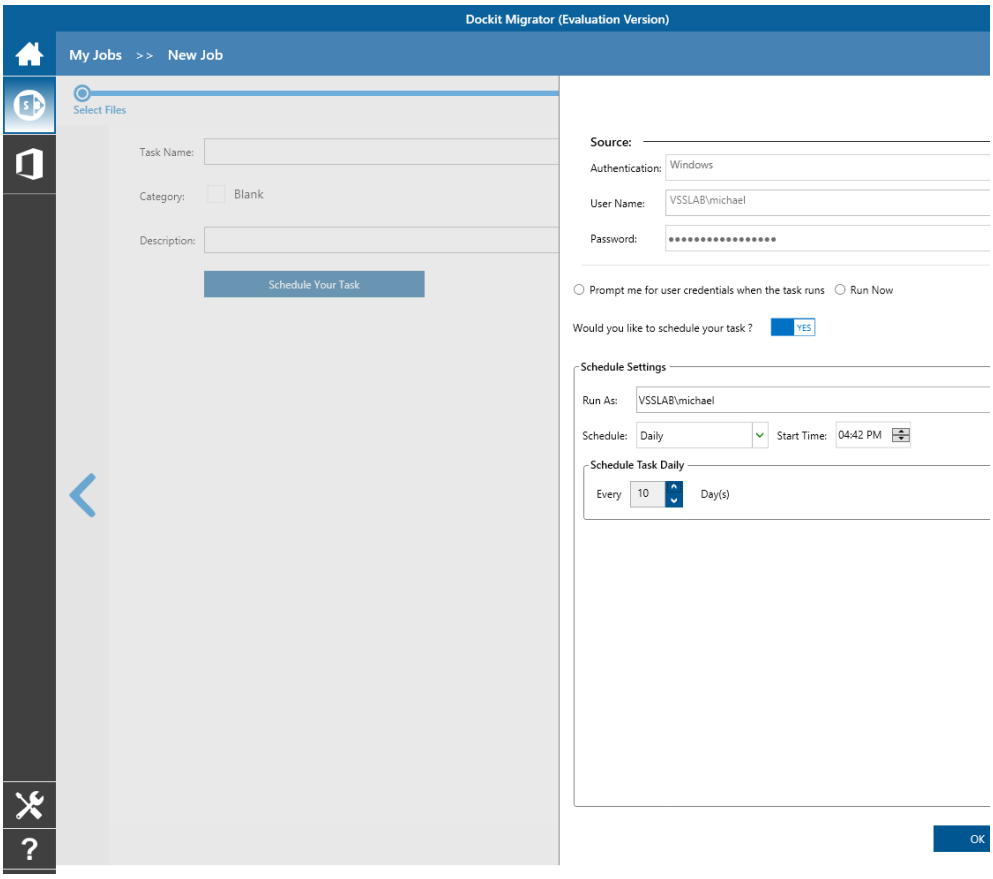
To specify the task name and schedule settings for the Dockit import task, perform the steps given below.

1. The **Task Schedule Settings (Finish)** page will appear as shown below:



2. Enter a unique task name in **Task Name** textbox.

3. To create a Windows scheduled task, **click 'Schedule Your Task'** button. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.



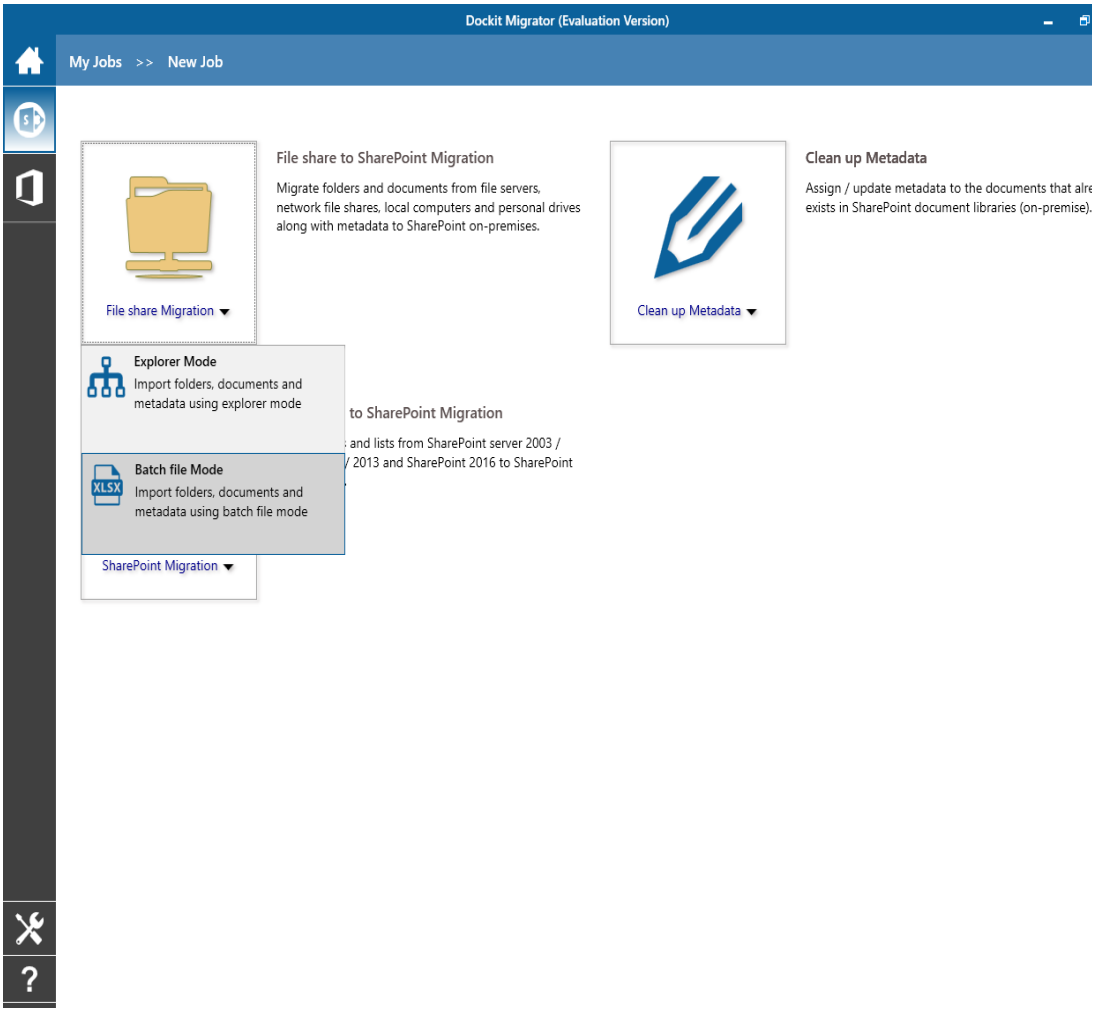
Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled **Run As** user context for the export task.

5. Click **'OK'** button to proceed or click **'Cancel'** to discard changes.
6. After creating schedule task. Click **'Finish'** button to run the task.

4.1.1.2 Batch File Mode

Create a task to import folders and files along with metadata from file system to SharePoint Library based on the entries in the descriptor file. Dockit will process the files in the order in which they appear in the batch descriptor file.

Click **Batch file Mode** from **File share to SharePoint Migration** option in **New Job** page as shown below.

1. 

2. Specify Batch File Options.

3. Specify Migration Settings.

4. Specify Task Settings.

5. Click **Finish** button to create the task, or click **Back** button to change any task settings.

4.1.1.2.1 Metadata file structure

The following section gives you the guidelines to create an external metadata file for **Import folders, files and metadata to SharePoint Libraries (Explorer Mode)** and **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** task type.

The first row of the metadata file is reserved for the headers and should contain the field names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint columns that are read-only will not be updated by Dockit.

The one of the fields (headers) in the metadata file should be named as '**Path**', as 'Path' is reserved header to lookup the path of the document whose metadata to be updated. The delimiter character used to separate the headers in the external metadata file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text). The comonly used separator is comma (,).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	**Equivalent Format String**
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

Be consistent with the drive letters and UNC path when adding folders and file into SharePoint library using Dockit user interface and the path field values in the metadata file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\MyDocs\File1.xlsx). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine_Name\Share_Name\Sample File1.xlsx).

You can also use wildcard notations in order to assign the same or different metadata for the folders, sub-folders & files. Please see the wildcard usage below:

Wildcard characters	**Example**	**Description**
.	D:\My Documents\folder1*.*	Assigns same metadata as the parent folder ‘folder1’ for all files and sub-folders.
*	D:\My Documents\folder2*	Assigns same metadata as the parent folder ‘folder2’ for all its sub-folders.
.*	D:\My Documents\folder3\.*	Assigns same metadata as the parent folder ‘folder3’ for all files in the parent folder and its sub-folders.

For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (“ ”) e.g., “John Doe”. When using accented characters

such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.

The following section describes the data types supported by SharePoint and an example of how to state the value in the metadata file for import.

SharePoint Data Type	**Remarks**	**Example**
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"

Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 7;Windows Vista;Windows 2003;Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"

People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	" http://sharepoint/Shared Documents/My Sample File.doc " "http://sharepoint/Pictures/chart.bmp"

Target Audiences (Multiple value) *(Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)*	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP / Services. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require *Dockit Server Agent* component to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010 and above).	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers
Publishing Schedule Start Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2010 10:50 AM" "1/25/2009"
Publishing Schedule End Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2009 10:50 AM" "1/25/2010"

Publishing Image *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Pictures/chart.bmp" "Pictures/chart.bmp"
Publishing Hyperlink *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Documents/Sample File.doc" "/Documents/Sample File.doc" " NewsArticleImage.jpg"
Publishing HTML *(Applicable only for Collaboration Portal / Publishing Portal Site)*	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) *(Applicable only for SharePoint Enterprise Edition)*	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in *filter name: value* format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:*filter name* , **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit also automatically fills-up the column values associated with the BDC	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator" If the filter name contains colon (:) in its name, use the following syntax: "FILTER:Product:Product ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:1000AX"

	/ BCS column during import.	
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Alaska" "Alaska"
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple.	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States|

	Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	States|Alaska" "Washington;California;Alaska"
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values separated by ':'. The latitude value must be between -90 and +90 and longitude value must be between -180 and +180.	"30:-60" "New York, United States"

Task Outcome	Text or Numeric value can be given to this field. Do not use multiple values for this column type.	"Complete" "4"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated by ';'.	"http://sharepoint/Documents/Sample 1.doc; http://sharepoint/Documents/Sample 2.xlsx " "http://sharepoint/Lists/Custom List/1_.000"

The following tables below describe the syntax to be used in the external metadata file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

Single Value	**Example**	**Final Result**
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. ** - The delimiter ';#' is a reserved character pattern in the Choice field column. The single value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#"	Windows Live;#Mail

Multi-Value	**Example**	**Final Result**
In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Windows Live Spaces; Mesh ;Windows Azure;Windows HPC

In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. * - *The delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail ;Windows Photo Gallery

Sample format of a CSV / TEXT metadata file:

Note: Refer Point #2 for the separator to be used in the metadata file

"Path","Modified Date","Author Name","Designation","Department"
"C:\My Documents\Sample Brochure.doc","11/06/2006","John Doe","Director","Senior Management"
"C:\My Sales\Sample Sales Template.xlsx","11/24/2006","Jane Doe","VP Sales","Corporate Sales"
"C:\My Sales\Sample Product Demo.ppt","09/09/1999","David Blake","Sales Manager","Consumer Sales"

4.1.1.2.2 Batch file structure

The following section gives you the guidelines to create a batch file for **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** and **Import folders, files and metadata to SharePoint Libraries (Batch File Mode)** task type.

The first row of the batch file should contain the following field names as headers. The reserved headers used by Dockit in batch file are as follows:

1. **Path:** The 'Path' column should contain the path of the source document / folder.
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
3. **New Name:** The 'New Name' should contain the name in which the source document(s) gets moved to target location.
4. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the content. For instance, please see the batch descriptor file snippet given below:

Path	**Destination Path**	**New Folder**
M:\My Document\Sample File.xlsx	http://sharepoint/technical documents/folder1	folder2/folder3

Dockit automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'Sample File.xlsx' will be

imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

5. **Link Name:** The column **Link Name** is an *optional* column in the batch descriptor file, created specifically to handle **Link to a document** content types in SharePoint. Using this column, you can provide the **Document Name** to create a link with the given name in the respective destination location. Dockit enables this feature for **Link to a document** content type and its child content types only.

Path	Destination Path	Link Name	URL	Content Type	Manager
M:\file1.aspx	http://vyapin/project documents/folder1	Sample Test.doc	http://www.google.com	Link to a document	John Doe
M:\file1.aspx	http://vyapin/project documents/folder1/sub1	Microsoft Corporation	http://www.microsoft.com	External URL	John Doe

In the above examples, the 'External URL' content type is a derived / child content type of '**Link to a document**' content type. Since Dockit expects a file in the '**Path**' column to be available in the source location, you must provide an existing file's path (dummy file) in the '**Path**' column. Dockit does not import the dummy file during the import process. In the above example, the file 'M:\file1.dummy' is available in the specified location, but will not be imported to the document library.

6. You can also use wildcard notations in order to process the sub-folders & files in the given folder. Please see the wildcard usage below:

Wildcard characters	Example	Description
.	D:\My Documents\folder1*.*	Process all folders and files underneath the folder added for import
*	D:\My Documents\folder2*	Process all folders only (excluding files) underneath the folder added for import
.*	D:\My Documents\folder3\.*	Process all files only (excluding folders) underneath the folder added for import
.	D:\My Documents\folder4\.	Process top level files only.

The field names should be followed separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String

, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

Sample format of a CSV / TEXT batch file:

Note: Refer the above Point for the separator to be used in the batch file

"Path","Destination Path","New Folder"
"C:\My Documents\Sample Brochure.doc","http://sharepoint/libone1","Folder1"
"C:\My Sales\Sample Sales Template.xlsx","http://sharepoint/libone2","FolderA/FolderAA/FolderAAA"
"C:\My Sales\Sample Product Demo.ppt","http://sharepoint/libone3/folder","Folder3"

You can also use the same batch file as metadata file by adding the required custom columns in headers (in addition to default headers 'Path' and 'Destination Path'). Sample format of a file is as follows:

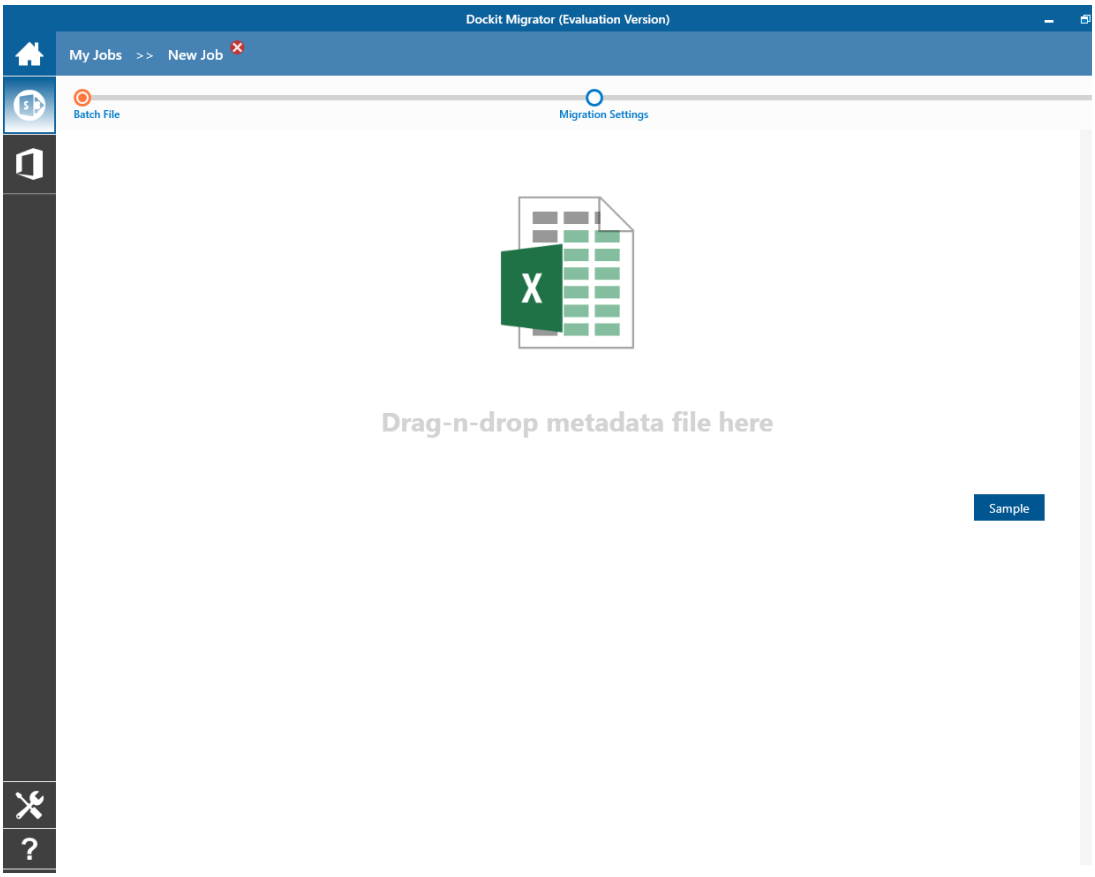
"Path","Destination Path","New Folder","Title","Description"
"C:\My Documents\Sample Brochure.doc","http://sharepoint/libone1","Folder1","Test Document1", "To add custom columns"
"C:\My Sales\Sample Sales Template.xlsx","http://sharepoint/libone2","FolderA/FolderAA/FolderAAA","Test Document2", "To add custom columns"
"C:\My Sales\Sample Product Demo.ppt","http://sharepoint/libone3/folder","Folder3","Test Document2", "To add custom columns"

Alternatively you can use separate CSV / XLSX file as metadata file. For more information about how to prepare metadata file, click Create Metadatafile

4.1.1.2.3 Batch File Options

Specify a batch descriptor file to use to migrate folders and files to SharePoint:

1
. The **Batch File Options** page will appear as shown below:



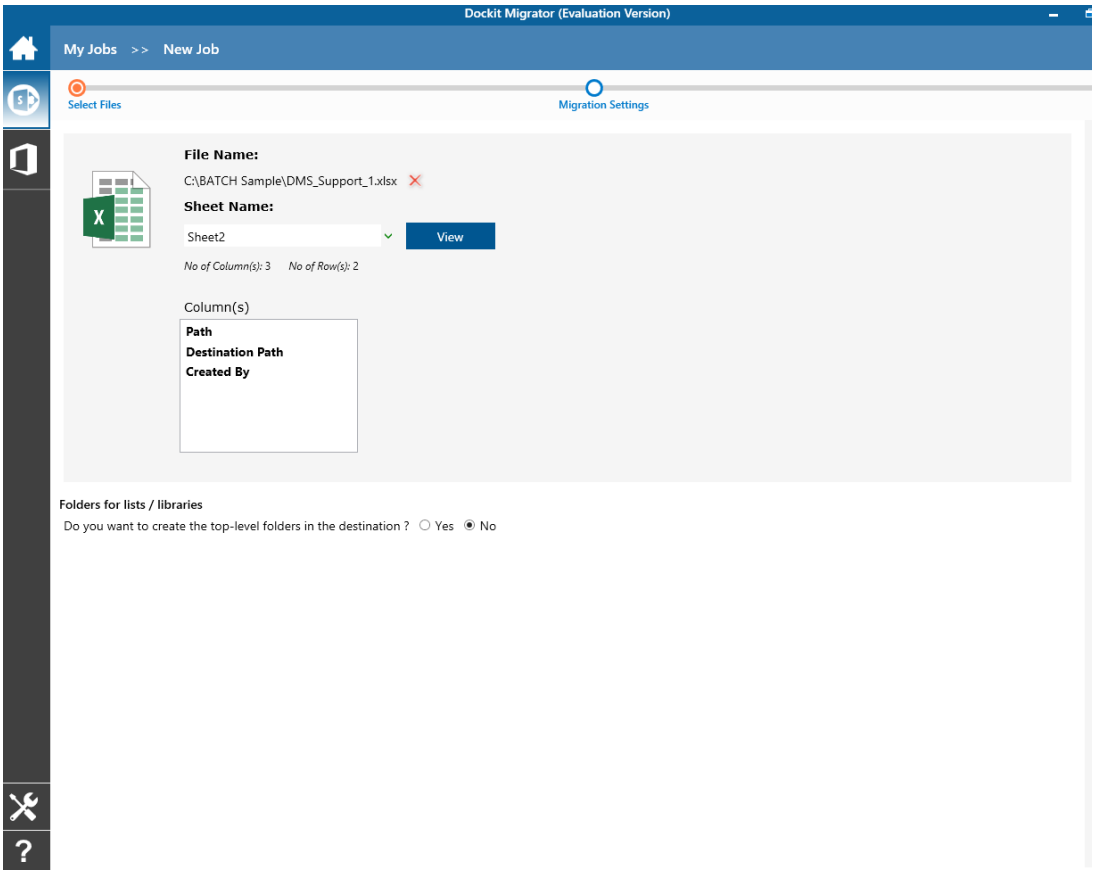
2. **Click** Sample drop down button to see a sample batch descriptor file (Comma delimited, MS-Excel file) and how it should be formatted in a batch descriptor file.

3. **Click** button to specify the batch file. The batch file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).

   For more information about how to create batch file, click here.

4. File selection dialog opens. Drag and drop the batch file from the explorer to the window or double click on the batch file.

5. The selected batch file will automatically be extracted and its contents will be loaded in the window. If you select a Microsoft Excel metadata file, then select the sheet name to use from the dropdown.



6. **Click** View button to see the contents of selected batch file in the associated native application.

7. If you want to replace with a different batch file, **click** button and select the new batch file as before.

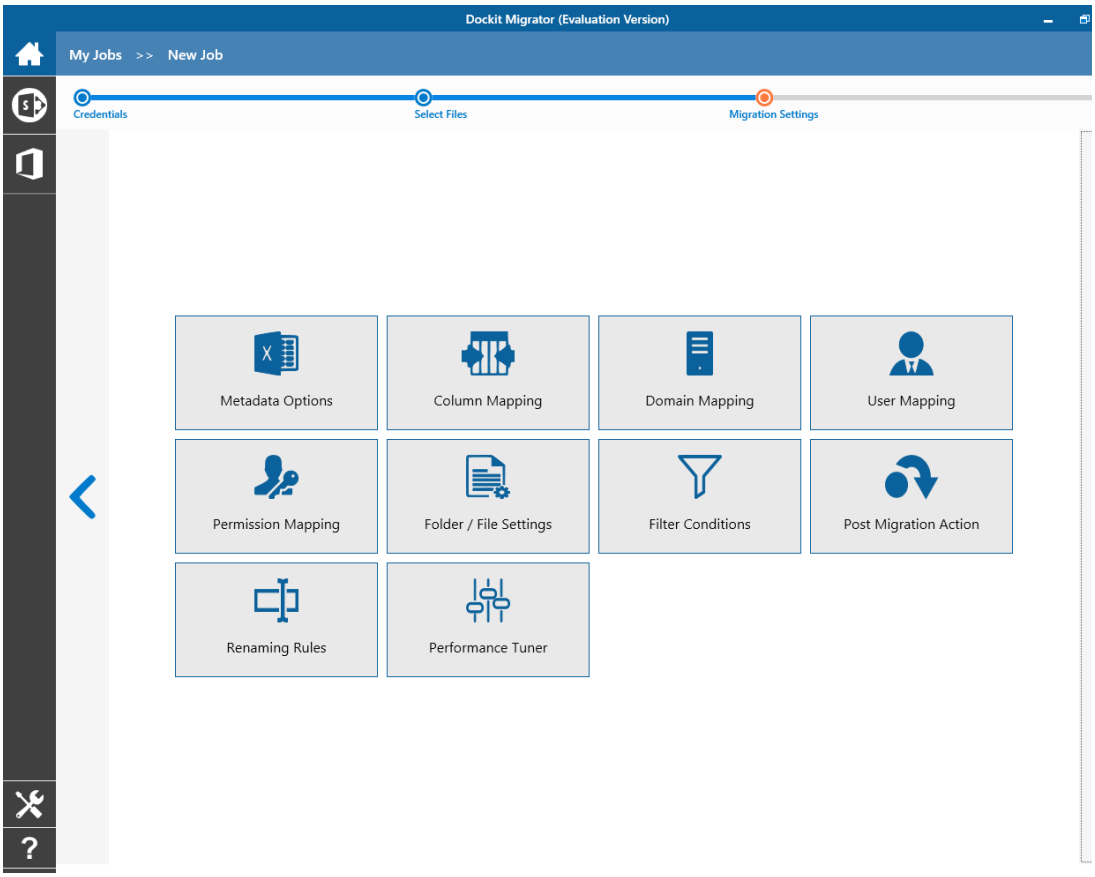
8. The top-level folder is the folder specified for migration by the user. Dockit will commence the migration process from this top-level folder. Select the appropriate option to create this top-level folder by selecting the option buttons (Yes/No).

9. Click **Next** to proceed.

4.1.1.2.4 Migration Settings

1. Migration Settings allows the user to specify various migration configuration information to use in the task. To specify Migration Settings inputs to use for the task:

-- The **Migration Settings** page will appear as shown in the screen below:
>



You can provide external metadata file to assign metadata, filter conditions to filter folders or files, renaming rules to rename folders/files with invalid characters, map permissions, users and columns.

The various Migration Settings are listed below:

1. Metadata Options

2. Column Mapping

3. Domain Mapping

4. User / Group Mapping

5. Permission Mapping

6. Folder / File Settings

7. Filter Conditions

8. Post Migration Action

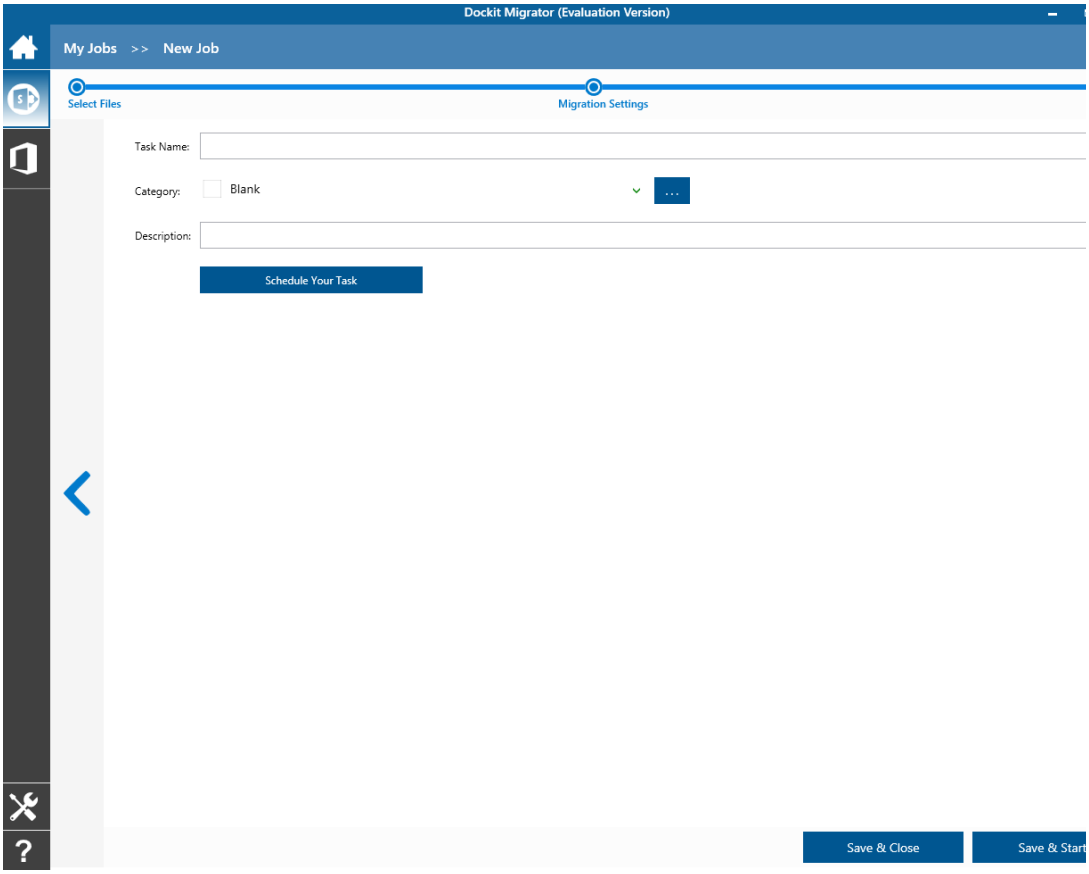
9 Renaming Rules
.

Click **Next** to proceed.

4.1.1.2.5 Task Schedule Settings

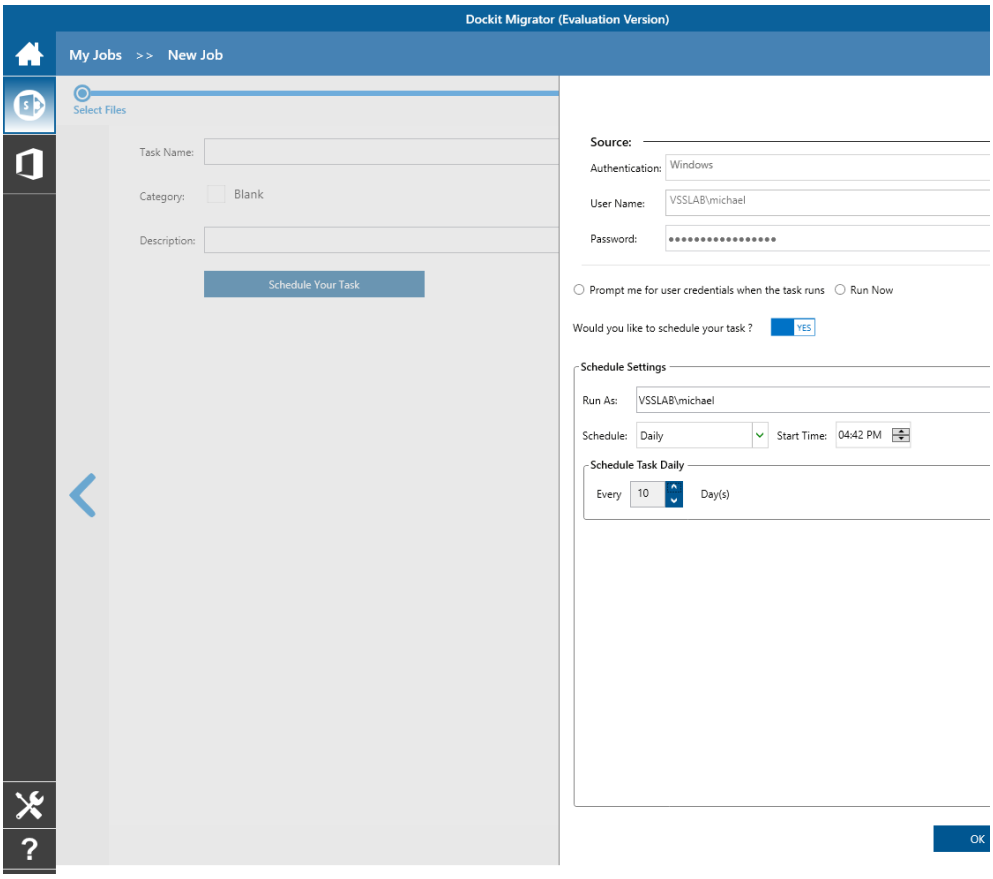
To specify the task name and schedule settings for the Dockit import task, perform the steps given below.

1. The **Task Schedule Settings (Finish)** page will appear as shown below:



2. Enter a unique task name in **Task Name** textbox.

3. To create a Windows scheduled task, **click 'Schedule Your Task'** button. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.



Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled **Run As** user context for the export task.

5. Click **'OK'** button to proceed or click **'Cancel'** to discard changes.
6. After creating schedule task. Click **'Finish'** button to run the task.

4.1.2 SharePoint to SharePoint Migration

Task Manager

Change Application Data folder location

Task History

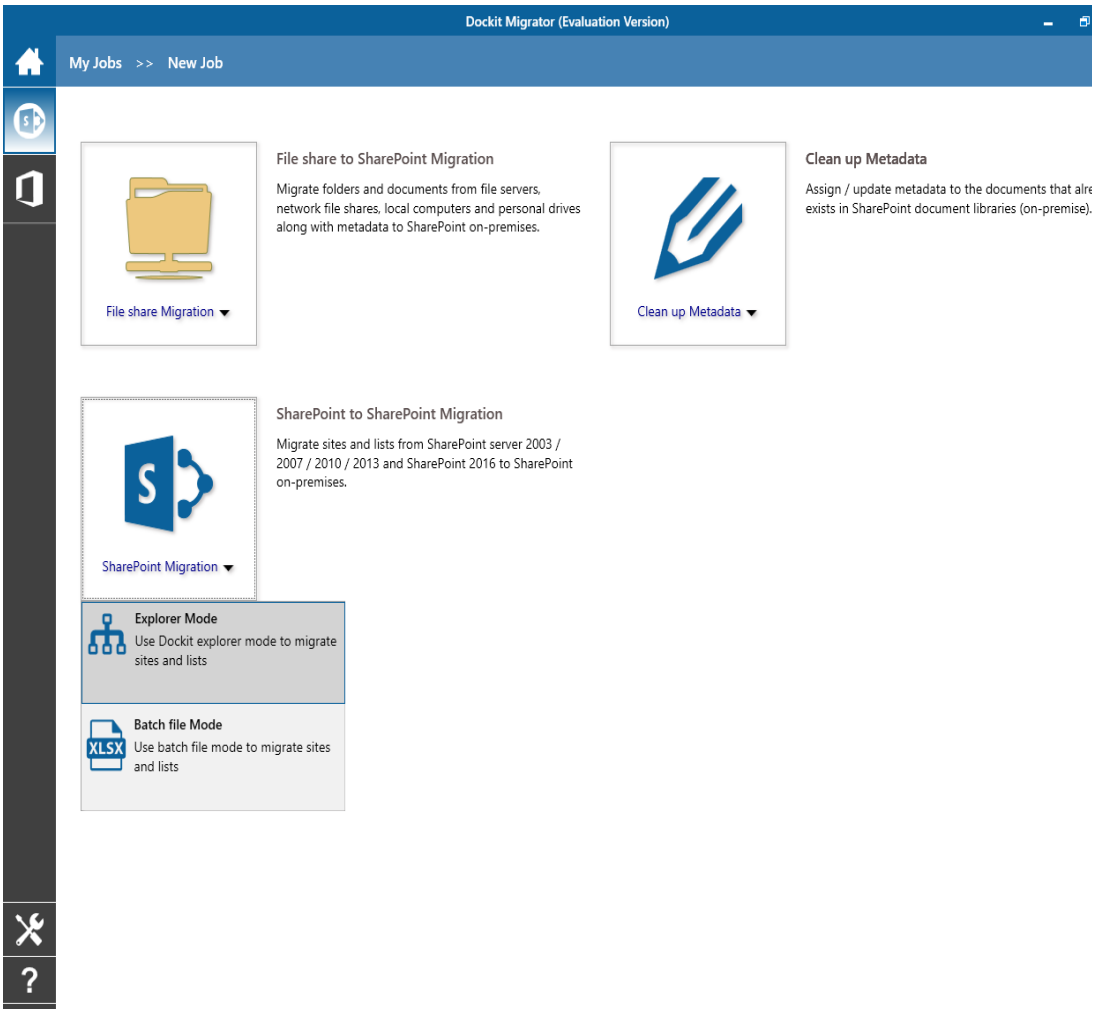
-->

- Explorer Mode
- Batch File Mode

4.1.2.1 Explorer mode

To create a task to migrate folders, files and list items along with metadata from one SharePoint list to another SharePoint list:

1. Click **SharePoint Migration** from New Job of Dockit Migrator screen.
2. Select 'Explorer mode' task type under the list of available task types (as shown below).



2. Specify SharePoint location.

3. Add Items to migrate.

4. Specify Site / List elements to migrate.

5. Specify Migration Settings.

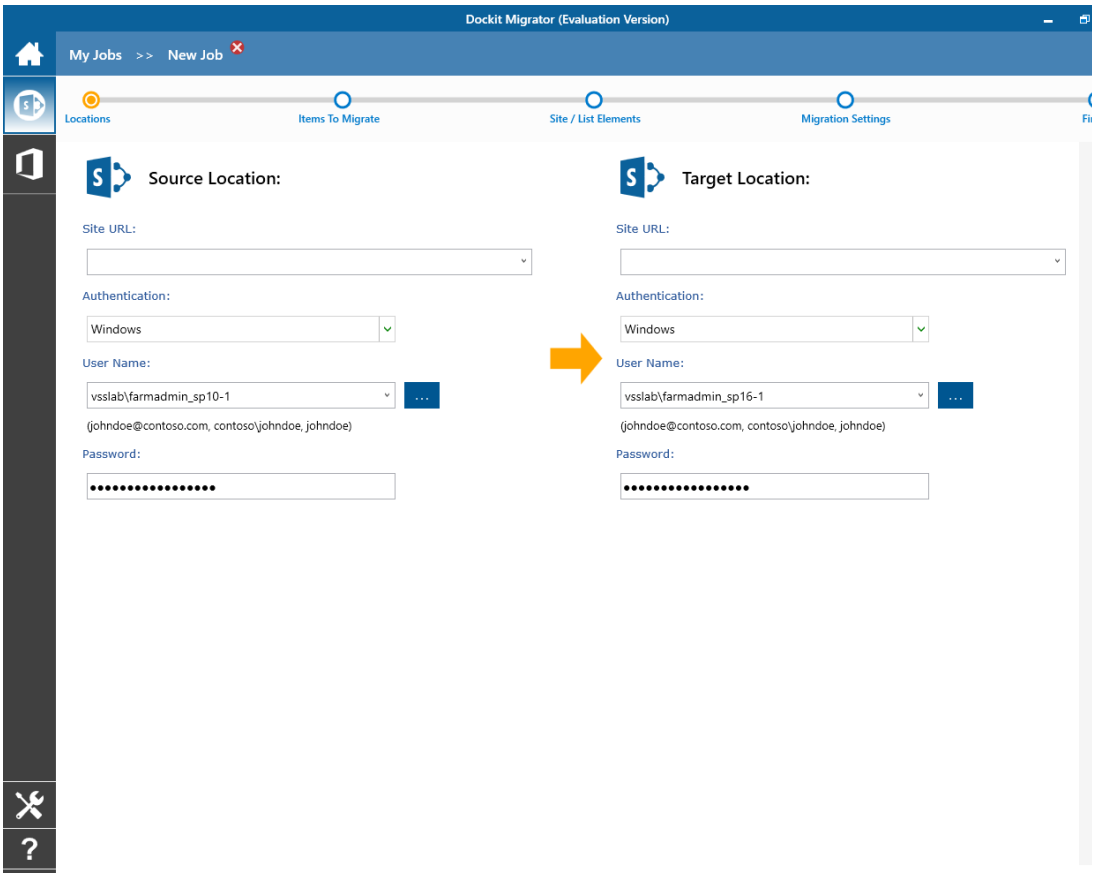
6. Specify Task Settings.

7. Click **Finish** button to create the task, or click **Back** button to change the task settings.

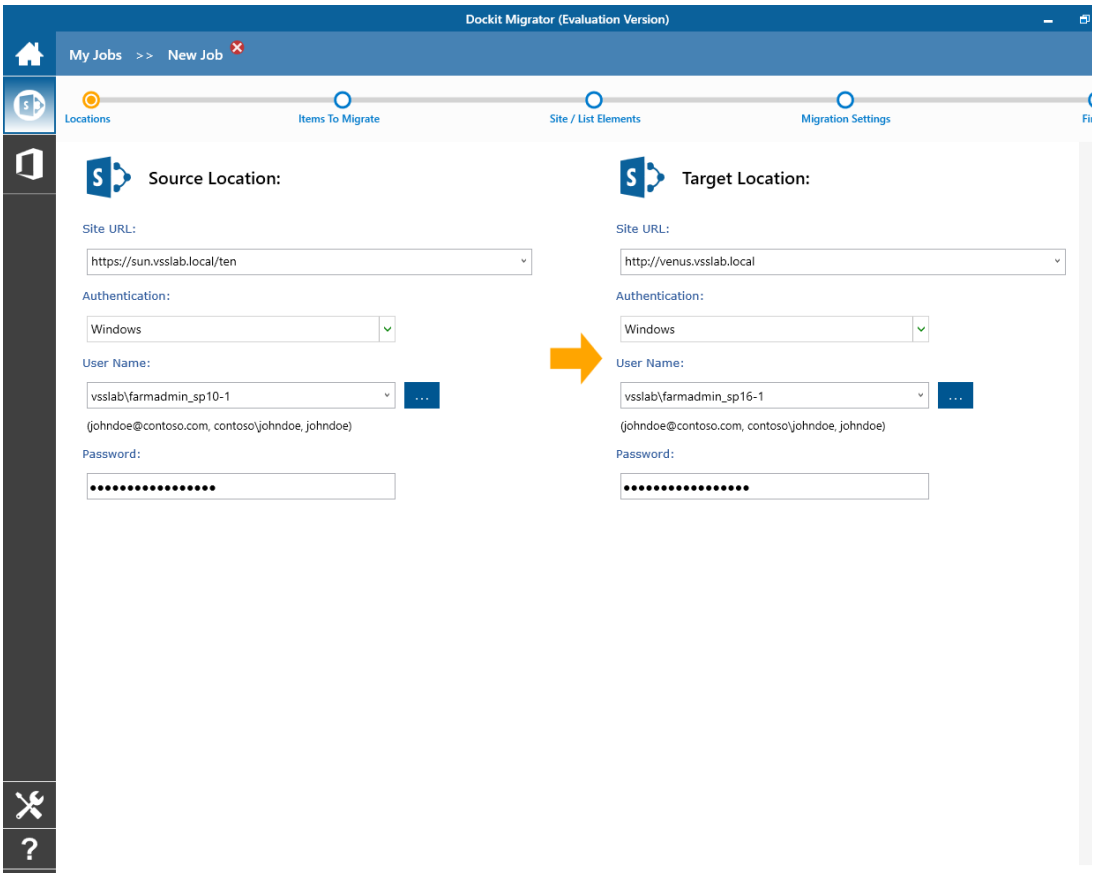
4.1.2.1.1 SharePoint location

To specify a SharePoint site URL (both source and target SharePoint) of a site / list / folder location from which you wish to migrate folders, files and list items, perform the steps given below:

1. The **Credentials** page appears as shown below:



2. Specify a valid SharePoint site URL (both source and target SharePoint) in the respective Site URL textbox. You can specify a SharePoint site, list or folder location in the URL textbox. Dockit will load the tree view of the location from the level specified in this textbox.



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

a. Specify the **Authentication Type**

- Windows
- Forms
- Office 365 Cloud Identity
- Federated Identity

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: **<DOMAIN NAME>\<USER NAME>,UserName@DomainName, UserName** and its corresponding password.

3. Dockit will initiate Windows authentication or Forms authentication depending on configuration in the SharePoint site.

In scheduled migration process, Dockit allows the user to enter different user credentials to connect to SharePoint and to create a scheduled migration task (unattended mode). By default, Dockit will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

Dockit 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.

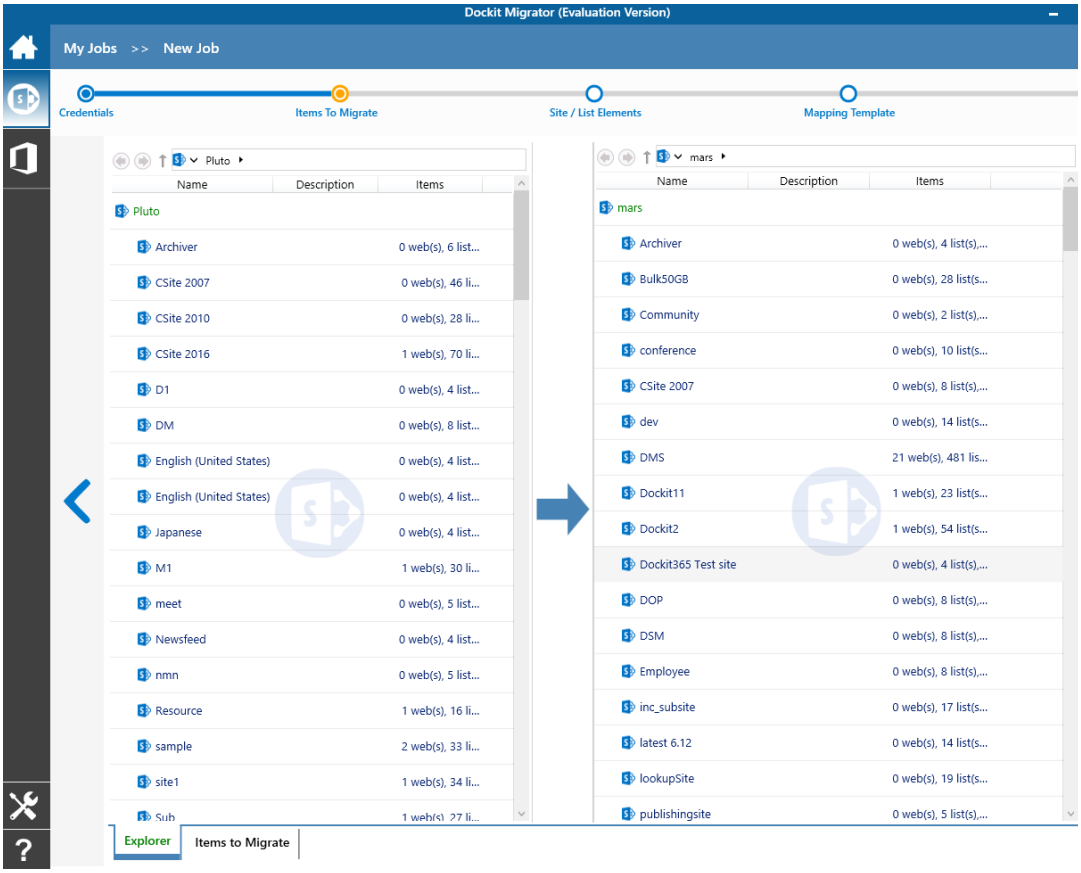
Click **...** button to create new user profile. Click here to view the details about Profile Manager page.

4 Click **Next** button to proceed.

4.1.2.1.2 Items to migrate

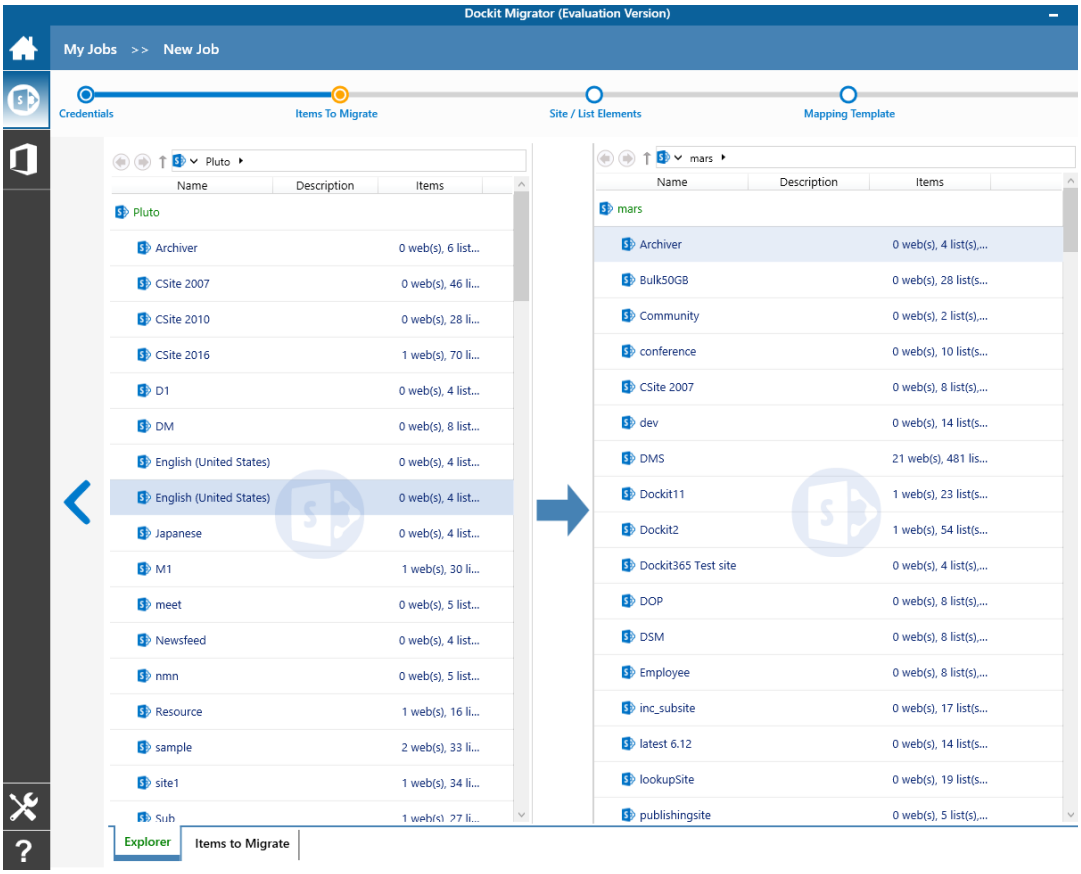
To add folders, files and list items to migrate to the destination location in SharePoint:

The **Items to migrate** page will appear as shown below:



1.

The **Items to Migrate** page has two tabs.They are **Explorer** tab, and **Items to Migrate** tab.

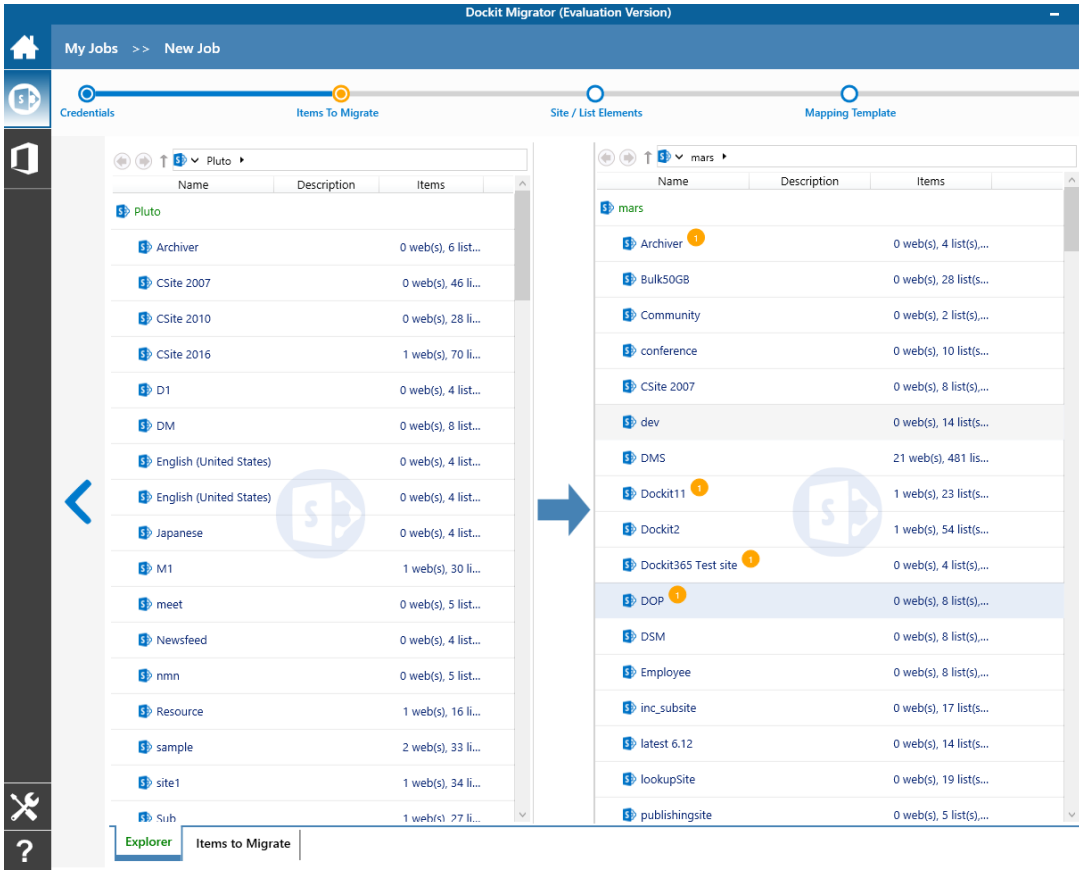


2.

Explorer tab contains a two list-view (left and right), which provides explorer like view to select sites / list / library to migrate. The left side list-view contains source list-view and the right side list-view contains the target list-view. The source list-view allows you to directly browse the specified folder location in the connected source SharePoint list. Also, the target list-view allows you to directly browse the specified folder location in the connected target SharePoint list. You must specify the folder's relative path and Click the arrow button to mount the specified folder as a root item in the explorer view. This option will be very useful if the connected list contains large number of folders and sub-folders. The source search textbox allows you to search for

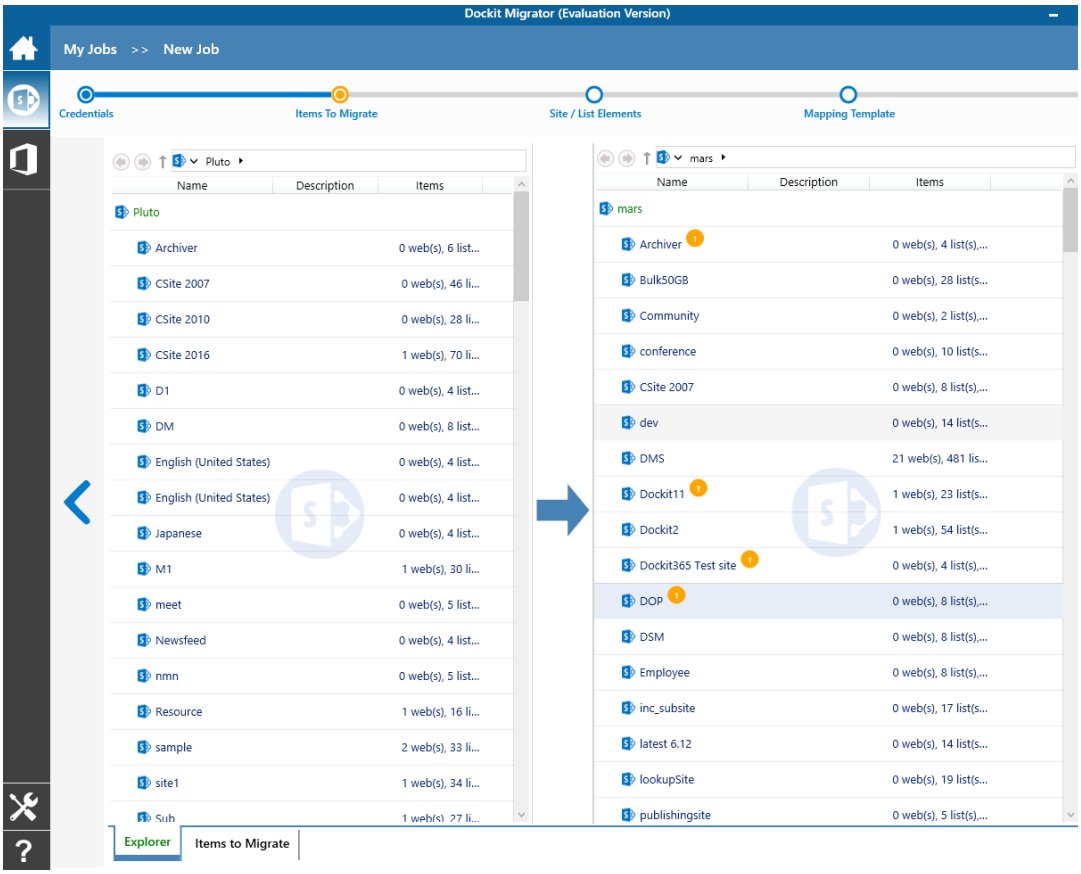
4.

list items for the keyword specified in search textbox. Advanced Search Link will be enabled for site that has office search service.



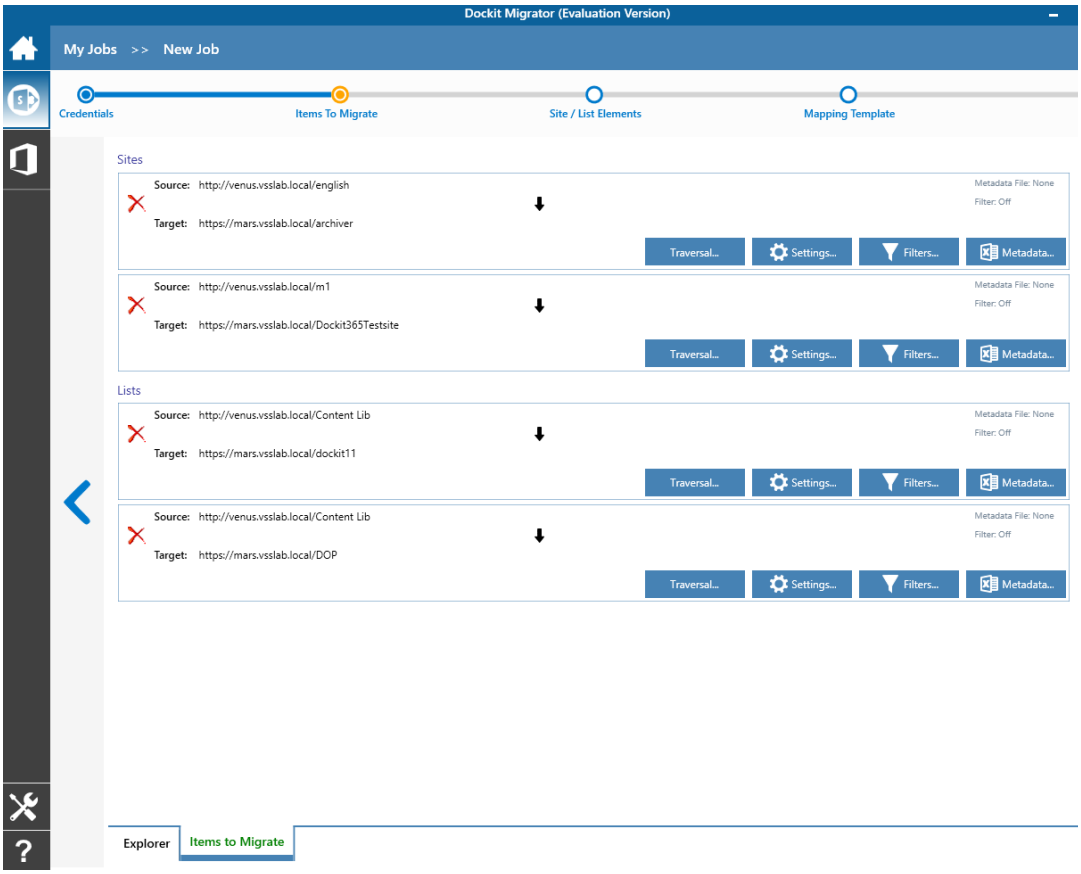
Browse the source folders, files and list items of source SharePoint list and select the required folders, files and list items from source list-view. Select a destination location in the destination list-view and click **Arrow (->)** button to add selected items for migration.

5. You are also having another options.(i.e,) drag-and-drop option. You can drag a souce site / library / list item from source list-view and drop it in to the required target list-view.



The selected folders, files and list items added for migration will be displayed in the **Items to Migrate** tab. Dockit processes the top-level folders, files and list items added for migration in the order in which it appears in the **Items to Migrate** tab. The migration process order can be changed by the **navigation** buttons available in the right side of the grid.

6. The selected items to migrate will appear in the 'Items to migrate' page as shown below:



Dockit will migrate the folders, list items and associated metadata based on Traversal Options.

Use

button to specify the traversal option for site / list / folder that are added for migration .

Traversal Options page will appear depending on the items added for migration.

To specify traversal options for site, click Site Traversal Options

To specify traversal option for list, click List Traversal Options

To specify traversal option for list, click Library Traversal Options

7.

Dockit will migrate the folders, list items and associated metadata based on migration Options.

Use

button to specify the migration option for site / list / folder that are added for migration.

Migration Options page will appear depending on the items added for migration.

To specify migration options for site, click Site Migration Options

8.

To specify migration option for list, click List Migration Options

To specify migration option for list, click Library Migration Options

You can also filter out the sites / lists / folders / items based on certain conditions.

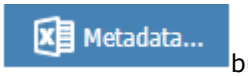
Use

button to apply filter condition for site / list / folder that are added for migration.

Filter condition page will appear and you can specify the filter conditions.

9. To specify filter condition, click Filter Condition

Dockit will update the list items and associated metadata based on metadata file.

use 

button to update metadata for folders / items that are added for migration based on the external reference file .

10. 'Link metadata file' page will appear one you click the 'Metadata File...' button of the respective item and you can link the metadata file for the selected item.

11. Click **OK** button to proceed or click **Cancel** to discard the changes.

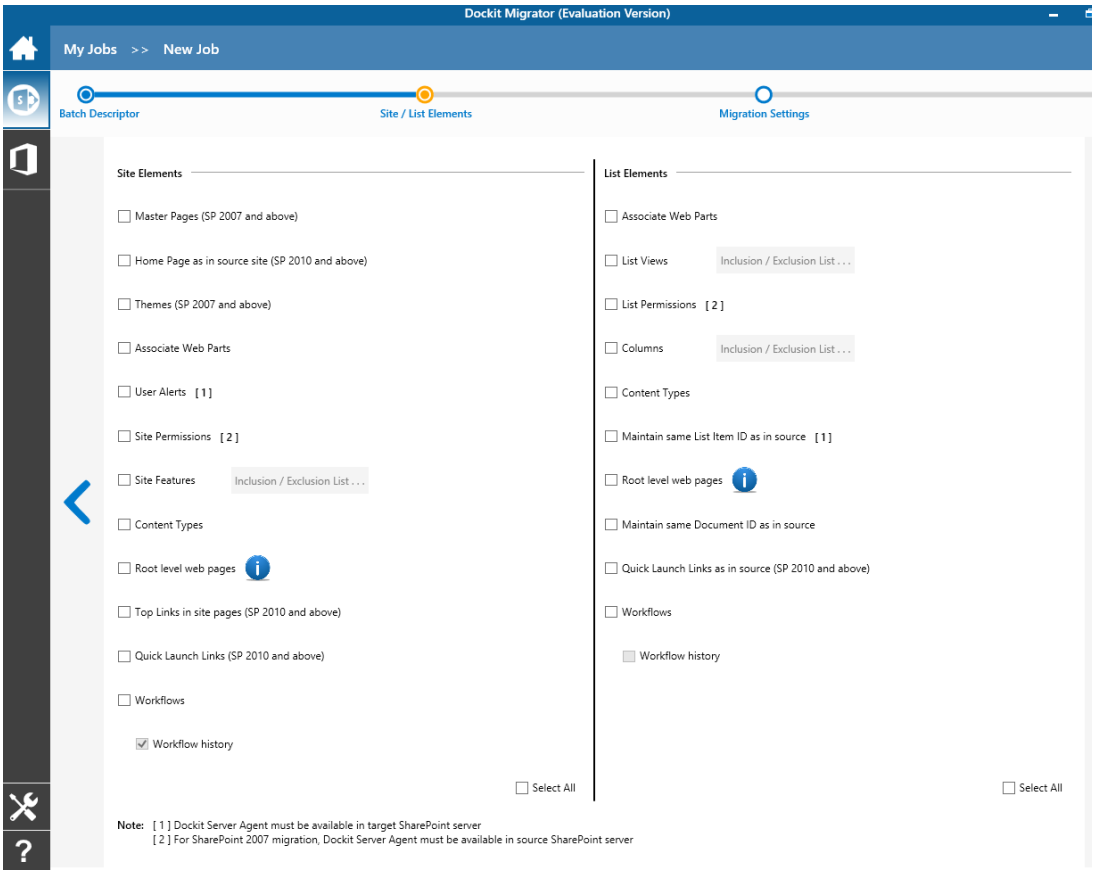
12. Click **Next** to proceed.

4.1.2.1.3 Site / List elements to migrate

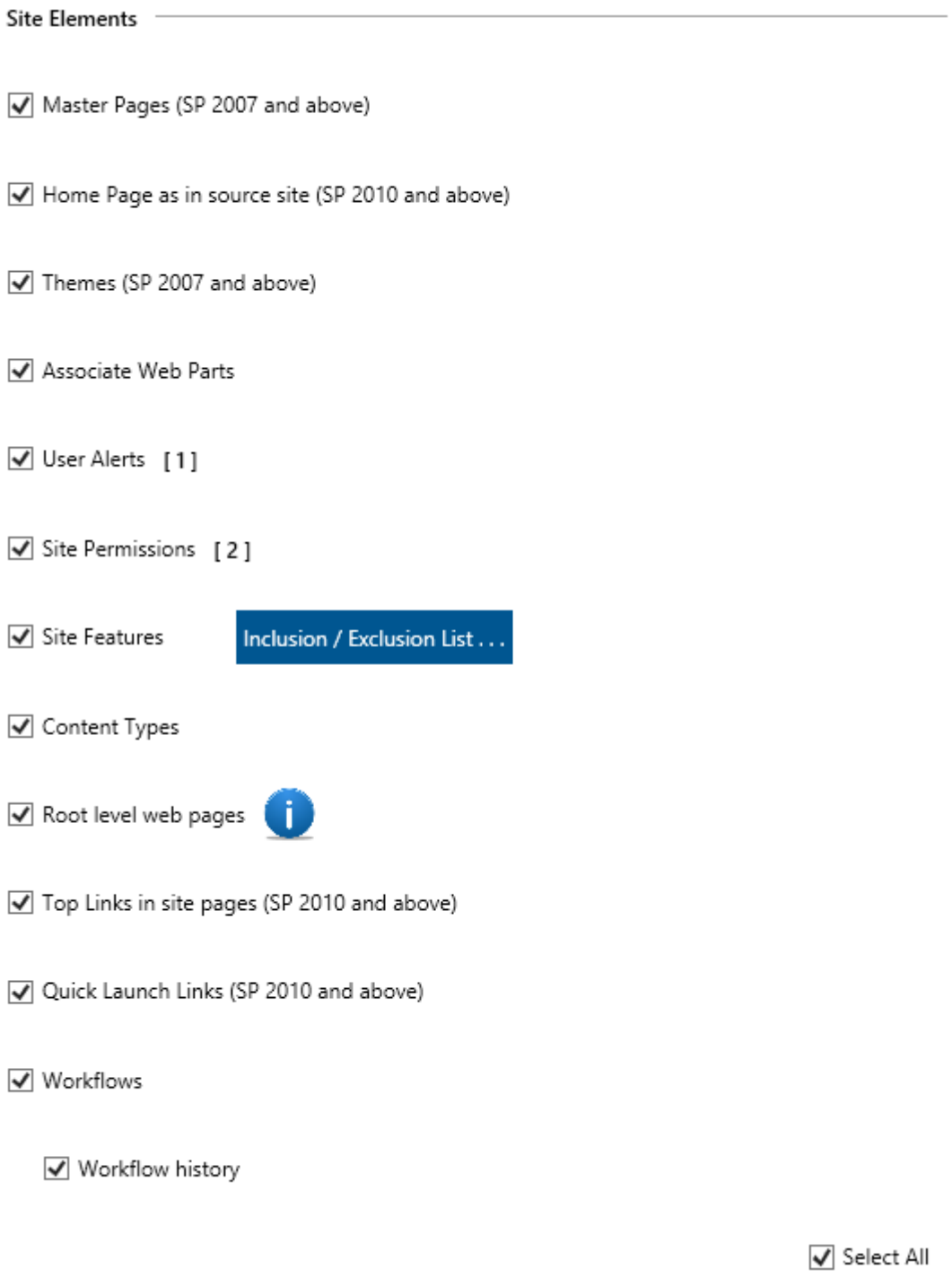
--
>

Specify Site / List elements page to migrate Site elements (masterpages, themes, top links, quick launch link, web parts, workflows, user alerts, site permissions and to set home page) and List elements (web part, list view, list permission, maintain same list item ID, maintain same document ID and quick launch links) from one SharePoint environment to another.

1. The **Site / List elements to migrate** page will appear as shown below:



2. Specify the site elements to migrate during a Site / Web level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.

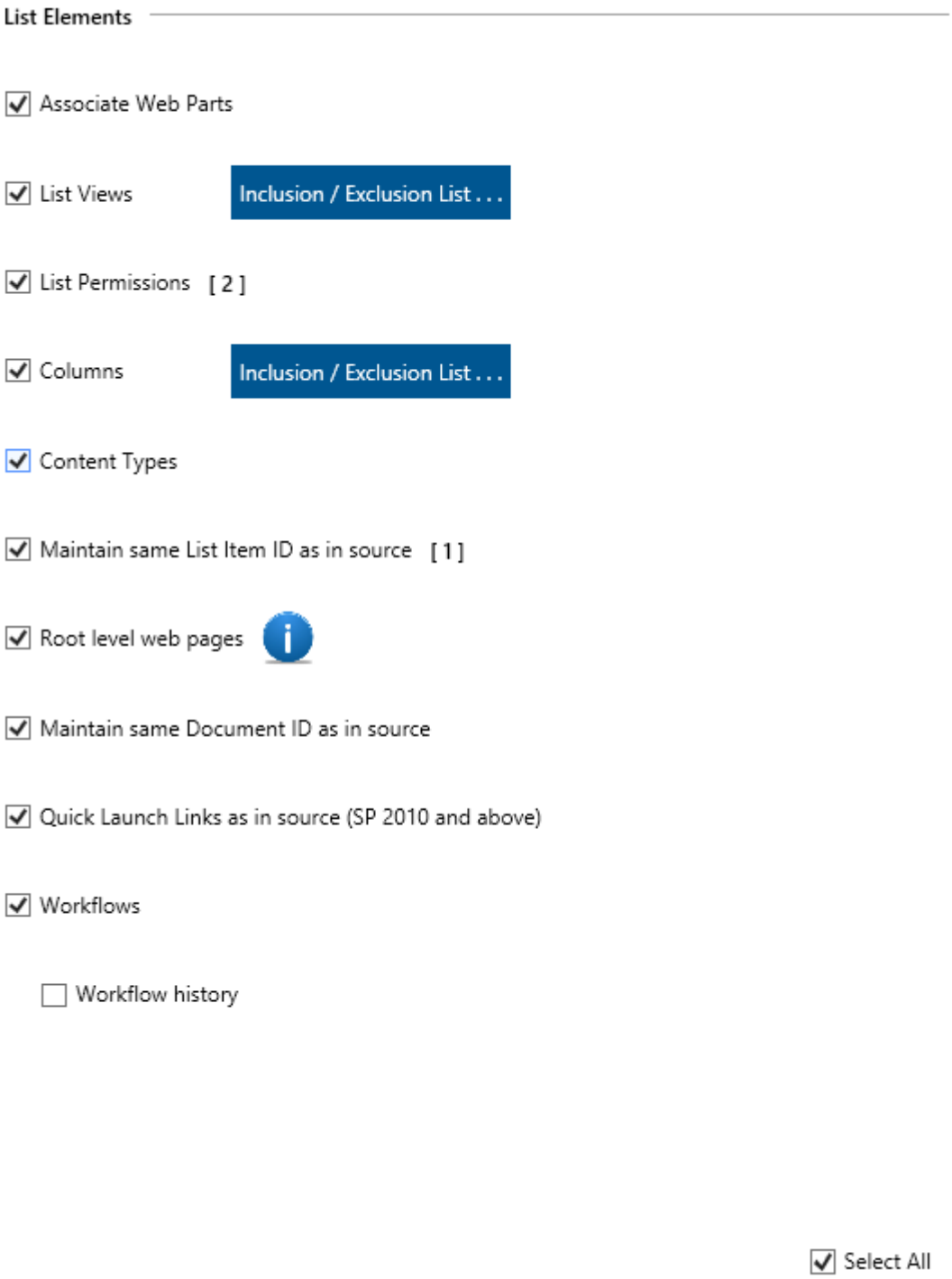


Master Pages	Migrate master pages. This can be done when migrating content from SharePoint 2007 and above.

Home Page as in source site	Set the home page as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Themes	Migrate the themes. This can be done when migrating content from SharePoint 2007 and above.
Web Part:	To migrate the Web Parts (Landing pages, Form pages, List view and Web Part pages and Publishing Pages) during a Site / Web level migration. **Note:** • Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • **Dockit Server Agent** is required in the target SharePoint server for link correction in web pages. • Custom Web Parts will not be migrated and must be available in the target SharePoint server prior to migration.
User Alerts:	To migrate user alerts to the target SharePoint lists, libraries and their content. **Note: Dockit Server Agent** is required in the target SharePoint server to migrate user alerts for on-premise.
Site Permissions:	To migrate site permissions. **Note: Dockit Server Agent** is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Top Links in site pages:	Set the top links as same as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above
Quick Launch Links:	Set the quick launch links as same as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Workflows:	To migrate the site level workflows during a Site / Web level migration. **Note:** • **Dockit Server Agent for SharePoint 2007** is required in the SharePoint server to retrieve the associated workflows from SharePoint 2007 or to associate workflows in SharePoint 2007.

	• Custom Workflows will be handled only during a Site / Web level migration. • It starts the workflows in the target which have running state in the source.
Activate Features:	To activate Site collection feature and site feature. **Note**: Click 'Inclusion/Exclusion button' and specify the feature id's that should be excluded during feature activation.

3. Specify the list elements to migrate during a list level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.



Web Part:	To migrate the Web Parts (Landing pages, Form pages, List view and Web Part pages and Publishing Pages) during a Site / Web level migration. **Note:**

	• Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • **Dockit Server Agent** is required in the target SharePoint server for link correction in web pages. • Custom Web Parts will not be migrated and must be available in the target SharePoint server prior to migration.
List Views:	To migrate list views.
List Permissions:	To migrate list permissions. **Note: Dockit Server Agent** is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint.
Maintain same List Item ID as in source:	To retain the list item IDs as same as source list item. **Note: Dockit Server Agent** is required in the target SharePoint server to retain list item ID.
Quick Launch Links as in source:	Set the quick launch links as same as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Maintain same Document ID as in source:	To retain the document ID for the migrated document as same as source document (when Document ID Services feature is activated in both source and target SharePoint servers).
Workflows:	To migrate the site level workflows during a Site / Web level migration. **Note:** • **Dockit Server Agent for SharePoint 2007** is required in the SharePoint server to retrieve the associated workflows from SharePoint 2007 or to associate workflows in SharePoint 2007.

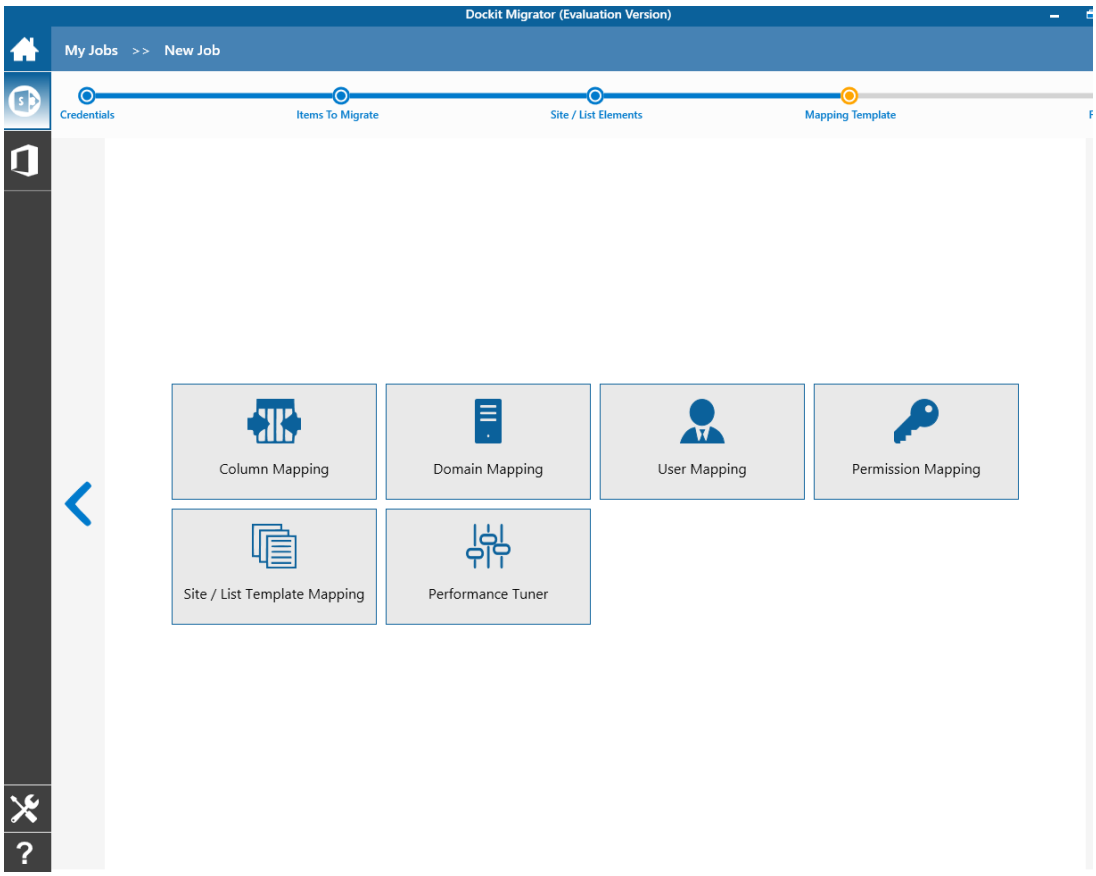
	• Custom Workflows will be handled only during a Site / Web level migration. • It starts the workflows in the target which have running state in the source.

4.1.2.1.4 Migration Settings

1. Migration Settings allows the user to specify various migration configuration information to use in the task. To specify Migration Settings inputs to use for the task:

-- The **Migration Settings** page will appear as shown in the screen below:

>



You can provide external metadata file to assign metadata, filter conditions to filter folders or files, renaming rules to rename folders/files with invalid characters, map permissions, users and columns.

The various Migration Settings are listed below:

1. Column Mapping

2. Domain Mapping

3 User / Group Mapping
.

4 Permission Mapping
.

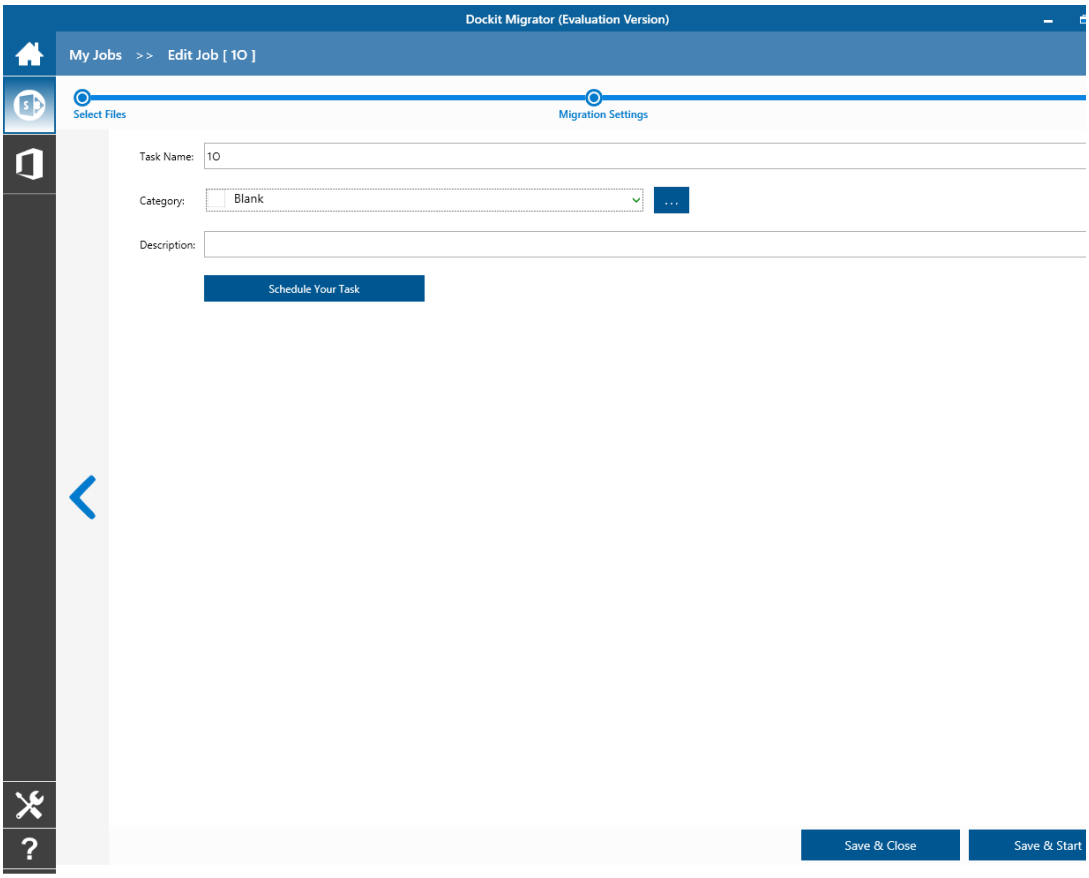
5 Site and List Mapping
.

Click **Next** to proceed.

4.1.2.1.5 Task Settings

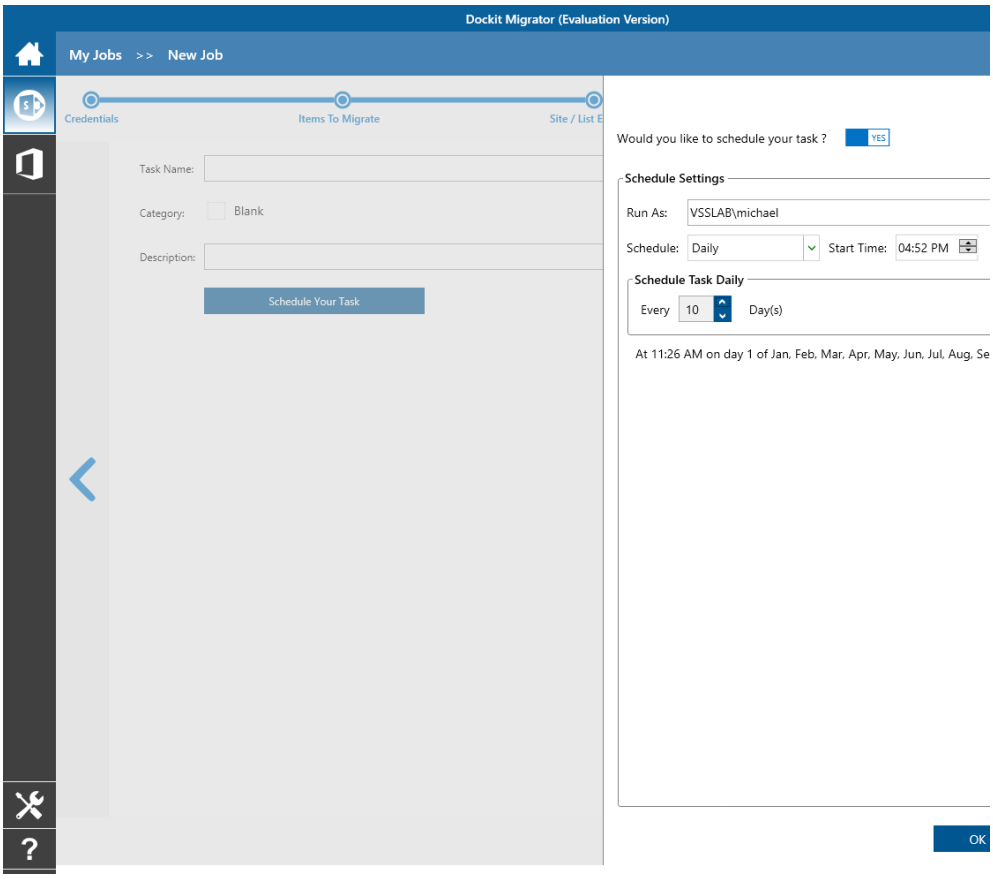
To specify the task name and schedule settings for the Dockit import task, perform the steps given below.

1. The **Task Schedule Settings (Finish)** page will appear as shown below:



2. Enter a unique task name in **Task Name** textbox.

3. To create a Windows scheduled task ,**click 'Schedule Your Task'** button. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.



Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled **Run As** user context for the export task.

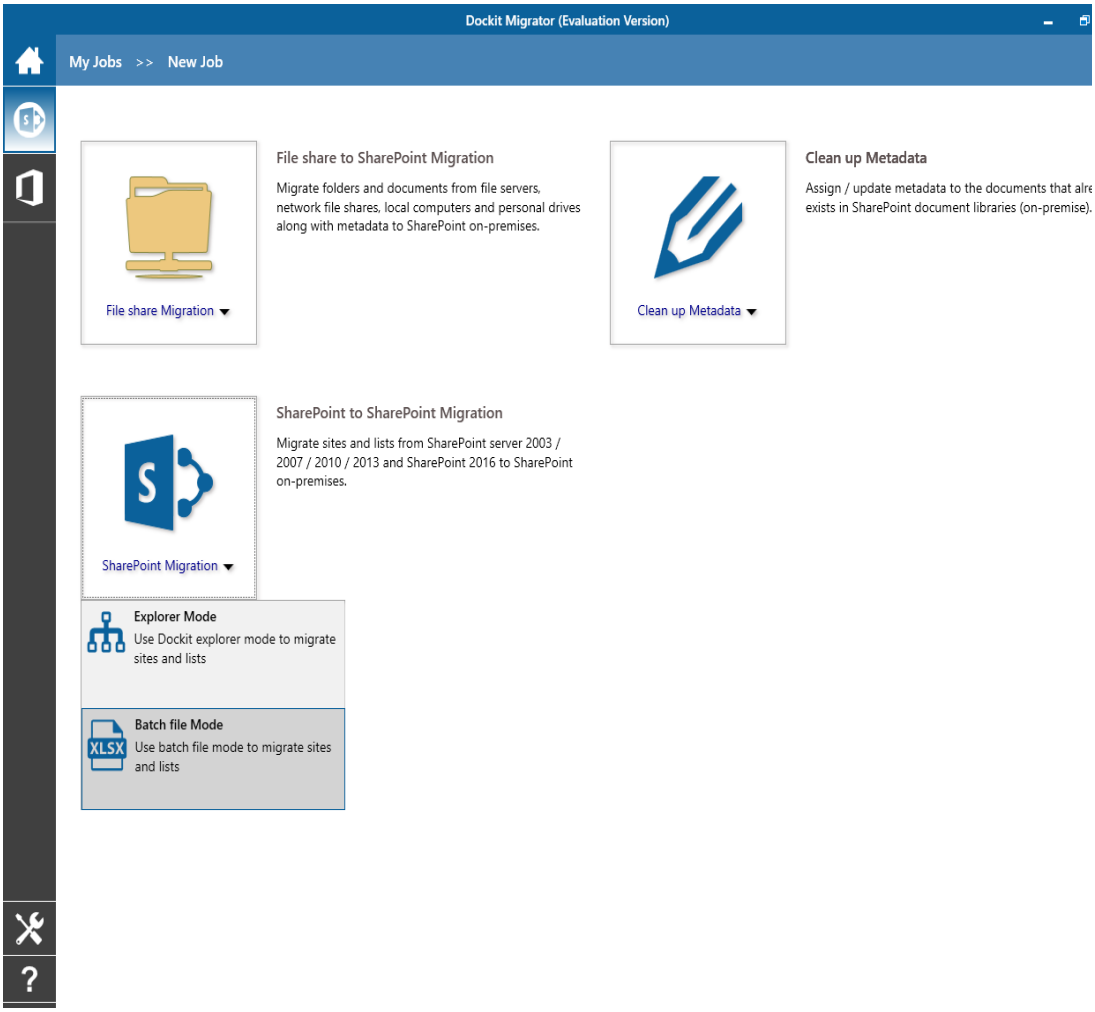
5. Click **'OK'** button to proceed or click **'Cancel'** to discard changes.
6. After creating schedule task. Click **Finish** button to run the task.

4.1.2.2 Batch file mode

To create a task to migrate folders, files and list items along with metadata from one SharePoint list to another SharePoint list:

Click **SharePoint Migration** from New Job menu of Dockit Migrator screen.

Select 'Batch file mode' task type under the list of available task types (as shown below).



1.

2. Specify Batch Descriptor File.

3. Specify Site / List elements to migrate.

4. Specify Migration Settings.

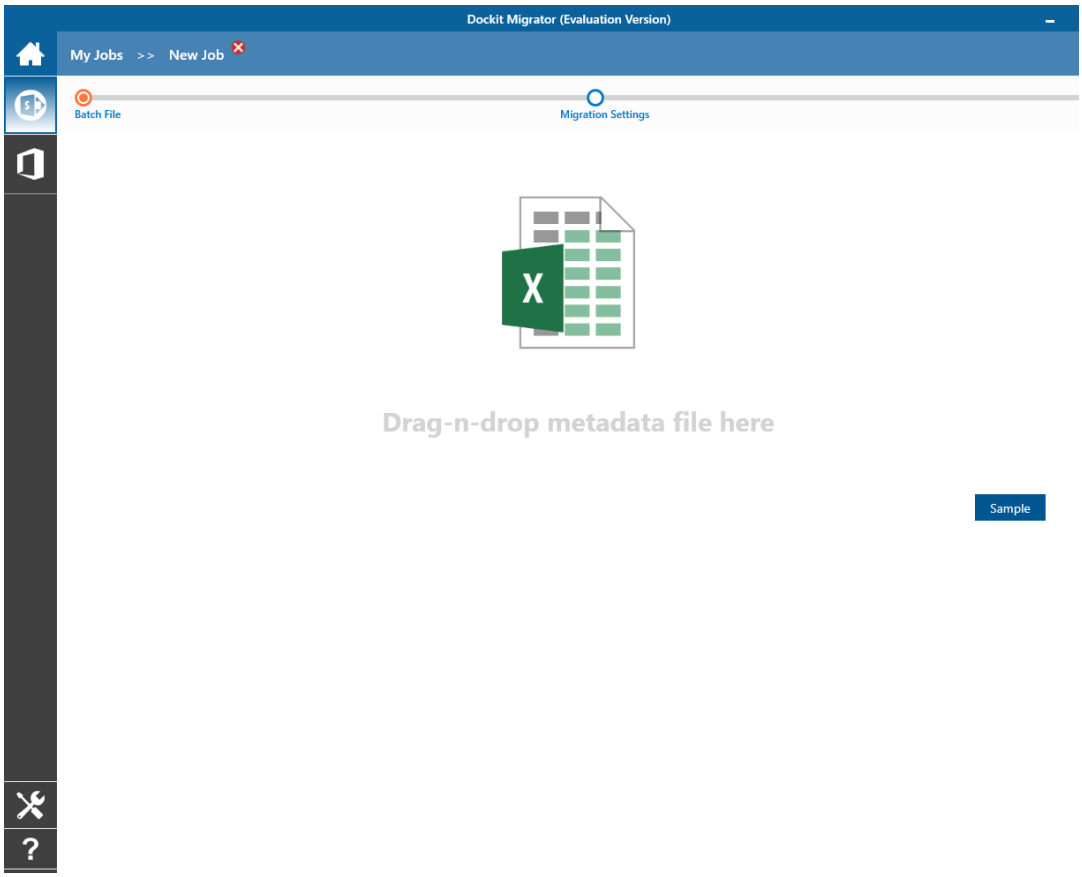
5. Specify Task Settings.

6. Click **Finish** button to create the task, or click **Back** button to change the task settings.

4.1.2.2.1 Batch File Options

To specify the batch descriptor file to migrate folders, files and list items from one SharePoint list to another SharePoint list:

1. The **Batch descriptor file** page will appear as shown below:



2. **Click**

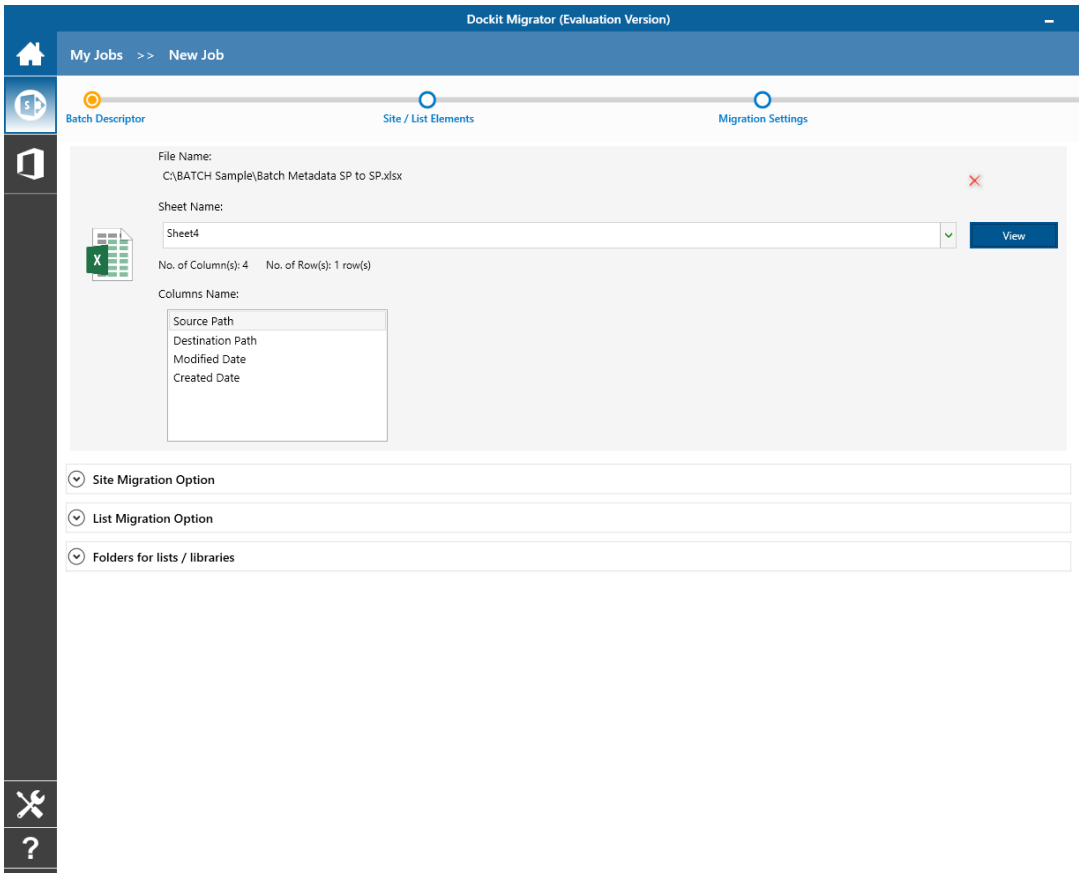
drop down button to see a sample batch descriptor file (Comma delimited, MS-Excel file) and how it should be formatted in a batch descriptor file.

3. **Click** button to specify the batch descriptor file. The reference file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLS) or Text file (TXT).

   For more information about how to create batch file, click here.

4. File selection dialog opens. Drag and drop the batch file from the explorer to the window or double click on the batch file.

5. The batch descriptor file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based batch descriptor file, select the sheet name to use from the drop-down.



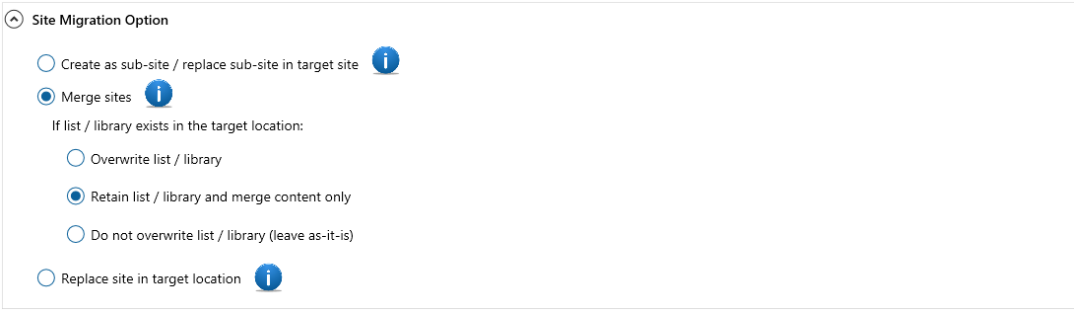
6. **Click** View button to see the contents of selected batch file in the associated native application.

7. If you want to replace with a different batch file, **click** button and select the new batch file as before.

Select anyone of the following options given below to specify the content to be migrated from the source sites:

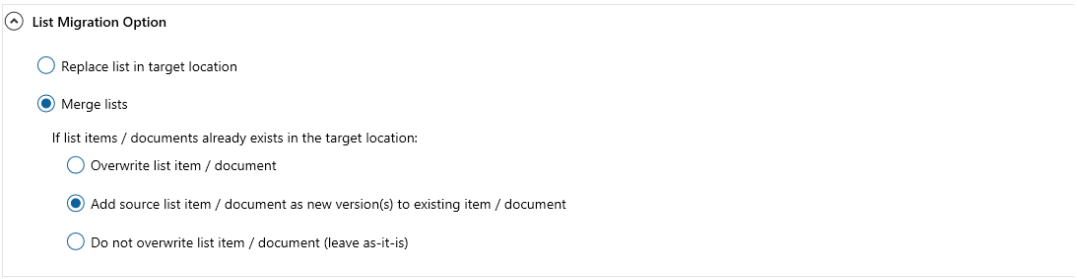
- **Create as sub site / replace sub site in target site** - The selected site in source SharePoint site will be created as a sub site in the target location. In case the target location contains a sub-site with the same title as the selected source site, then the sub-site in the target location will be deleted and created afresh (same as source site).
- **Merge sites** - The source site content will be migrated to the target site while retaining all site content in the target site location
- **Overwrite list / library** - This option overwrites list / library in the target location.
- **Retain list / library and merge content only** - This option retain list / library and merge contents only in the target location.
- **Do not overwrite list / library (leave as-is)** - This option will not overwrite list / library and it's contents in the target location
- **Replace site in target location** - The selected target site will be deleted and completely replaced by the selected source site.

8.



Select anyone of the list migration options given below to specify the contents to be migrated from source lists:

a. **Replace list in target location** - This option replaces the list in the target location, if the list already exists in the target location.
b. **Merge list. If the list items / documents already exists in the target location** - This option merge the list contents only with the following options
c. **Overwrite list item / document** - This option overwrites list items in the target location.
d. **Add source list item / document as new version(s) to existing item / document** - This option creates list item / document as a new version in the target location.
e. **Do not overwrite list item / document (leave as-is)** - This option will not overwrite list item / document in the target location



9. **Select** the appropriate option for 'Do you want to replace the site, if it already exists in destination location?' by selecting the option buttons (Yes/No).

10. The top-level folder is the folder added or specified for migration by the user. Dockit will commence the migration process from this top-level folder. **Select** the appropriate option for 'Do you want to create the top-level folder in the destination?' by selecting the option buttons (Yes/No).

Select the appropriate option for 'Do you want to replace the list / library, if it already exists in destination location?' by selecting the option buttons (Yes/No).

11. By default, Dockit expects the destination folder location to exist in SharePoint. If the destination folder is not available in the destination location, Dockit fails to migrate the file / list item to the specified folder in SharePoint. You can change this behavior by selecting the option **Create unavailable folder hierarchy if the destination location does not exist.**

In this case, Dockit will automatically create the unavailable folder hierarchy (folder and sub-folders) in destination SharePoint during migration process. After creating them, it will commence the migration to the required folder in SharePoint. By using this option, you can simply avoid the error message 'Unable to locate destination folder with the specified URL' reported in Activity Log Viewer, since Dockit will take care of creating the new folder structure in the destination location.

12. Click **Next** to proceed.

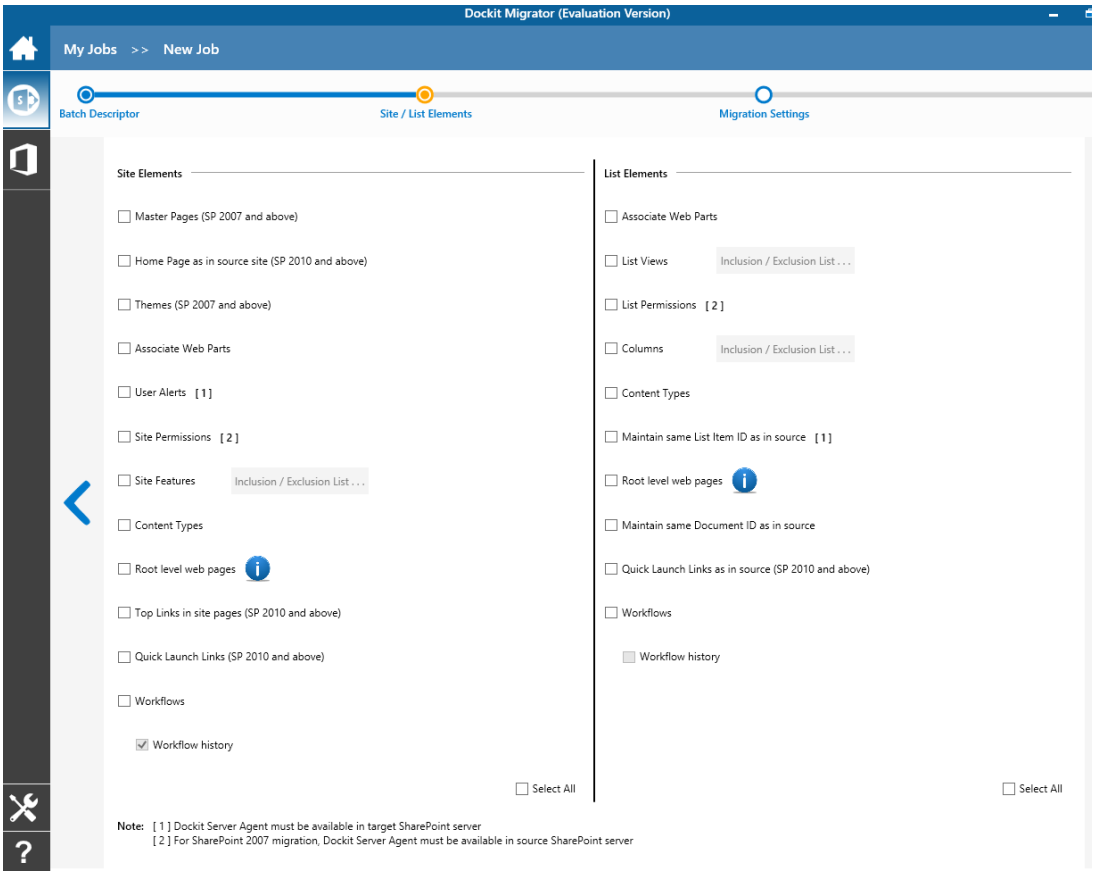
4.1.2.2.2 Site / List elements to migrate

--

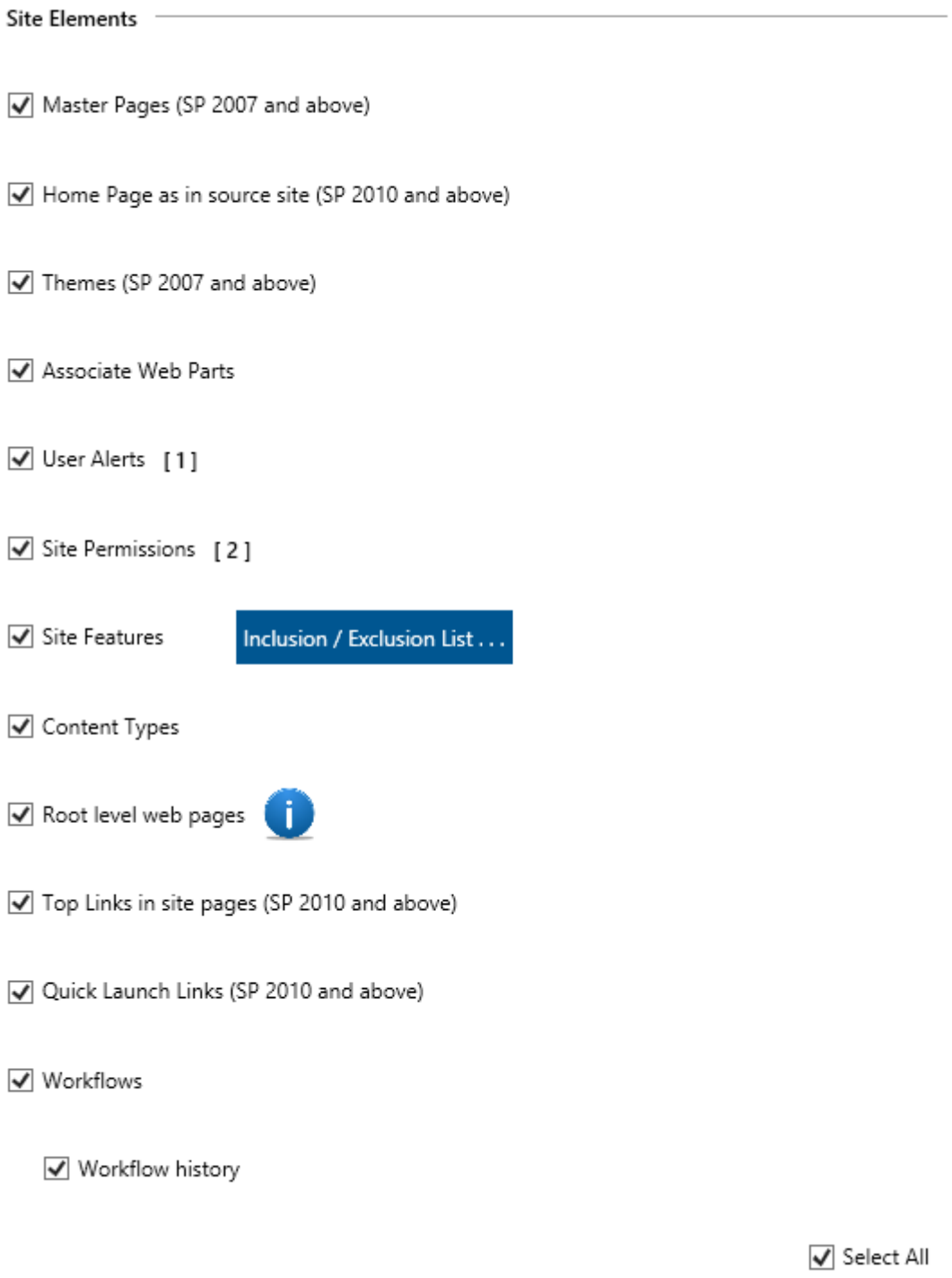
>

Specify Site / List elements page to migrate Site elements (masterpages, themes, top links, quick launch link, web parts, workflows, user alerts, site permissions and to set home page) and List elements (web part, list view, list permission, maintain same list item ID, maintain same document ID and quick launch links) from one SharePoint environment to another.

1. The **Site / List elements to migrate** page will appear as shown below:



2. Specify the site elements to migrate during a Site / Web level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.

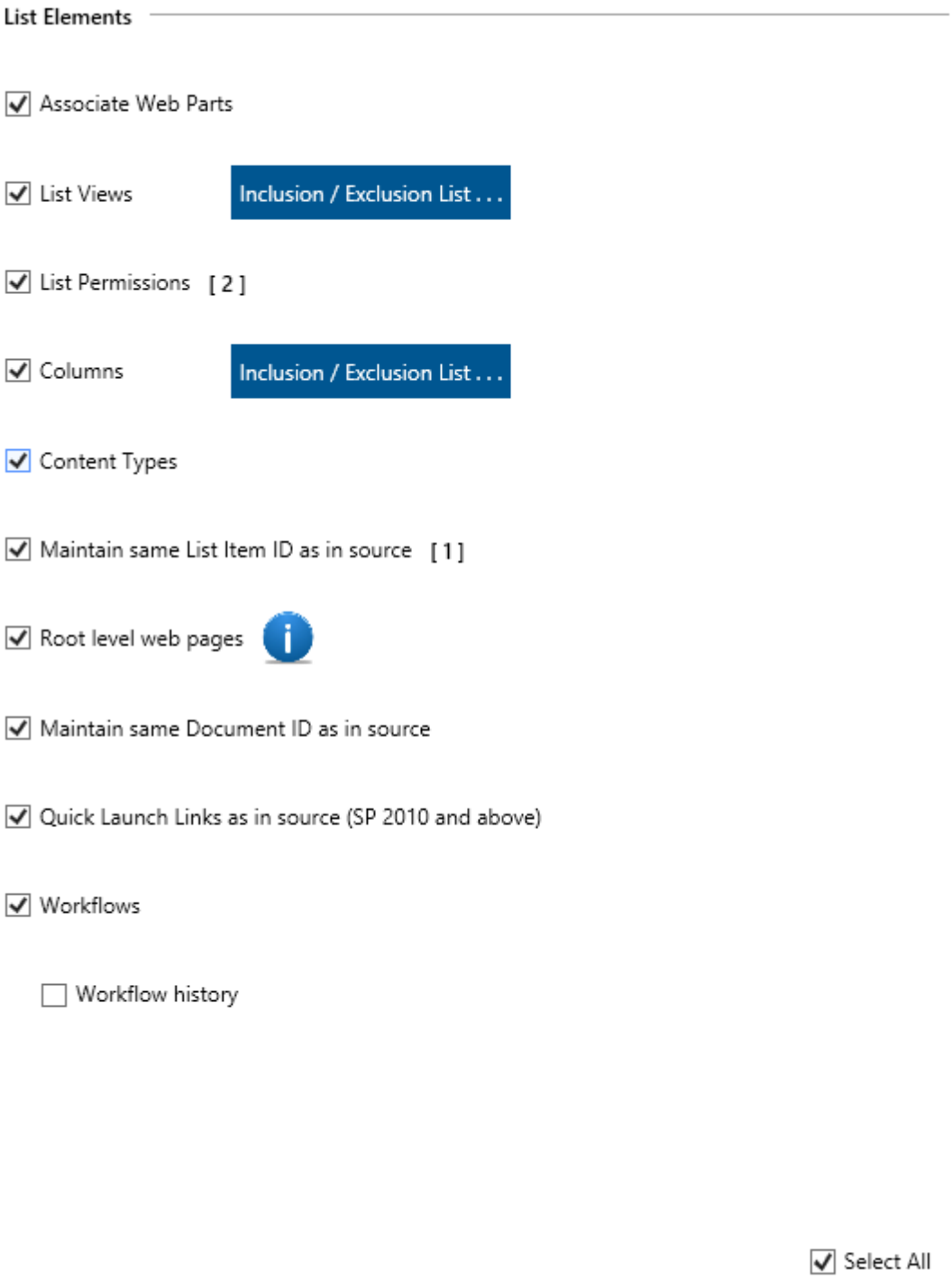


Master Pages	Migrate master pages. This can be done when migrating content from SharePoint 2007 and above.

Home Page as in source site	Set the home page as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Themes	Migrate the themes. This can be done when migrating content from SharePoint 2007 and above.
Web Part:	To migrate the Web Parts (Landing pages, Form pages, List view and Web Part pages and Publishing Pages) during a Site / Web level migration. **Note:** • Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • **Dockit Server Agent** is required in the target SharePoint server for link correction in web pages. • Custom Web Parts will not be migrated and must be available in the target SharePoint server prior to migration.
User Alerts:	To migrate user alerts to the target SharePoint lists, libraries and their content. **Note: Dockit Server Agent** is required in the target SharePoint server to migrate user alerts for on-premise.
Site Permissions:	To migrate site permissions. **Note: Dockit Server Agent** is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Top Links in site pages:	Set the top links as same as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above
Quick Launch Links:	Set the quick launch links as same as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Workflows:	To migrate the site level workflows during a Site / Web level migration. **Note:** • **Dockit Server Agent for SharePoint 2007** is required in the SharePoint server to retrieve the associated workflows from SharePoint 2007 or to associate workflows in SharePoint 2007.

	• Custom Workflows will be handled only during a Site / Web level migration. • It starts the workflows in the target which have running state in the source.
Activate Features:	To activate Site collection feature and site feature. **Note**: Click 'Inclusion/Exclusion button' and specify the feature id's that should be excluded during feature activation.

3. Specify the list elements to migrate during a list level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.



Web Part:	To migrate the Web Parts (Landing pages, Form pages, List view and Web Part pages and Publishing Pages) during a Site / Web level migration. **Note:**

	• Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • **Dockit Server Agent** is required in the target SharePoint server for link correction in web pages. • Custom Web Parts will not be migrated and must be available in the target SharePoint server prior to migration.
List Views:	To migrate list views.
List Permissions:	To migrate list permissions. **Note: Dockit Server Agent** is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Content Types:	To create content types which are not available in the target SharePoint.
Maintain same List Item ID as in source:	To retain the list item IDs as same as source list item. **Note: Dockit Server Agent** is required in the target SharePoint server to retain list item ID.
Quick Launch Links as in source:	Set the quick launch links as same as in source SharePoint site. This can be done when migrating content from SharePoint 2010 and above.
Maintain same Document ID as in source:	To retain the document ID for the migrated document as same as source document (when Document ID Services feature is activated in both source and target SharePoint servers).
Workflows:	To migrate the site level workflows during a Site / Web level migration. **Note:** • **Dockit Server Agent for SharePoint 2007** is required in the SharePoint server to retrieve the associated workflows from SharePoint 2007 or to associate workflows in SharePoint 2007.

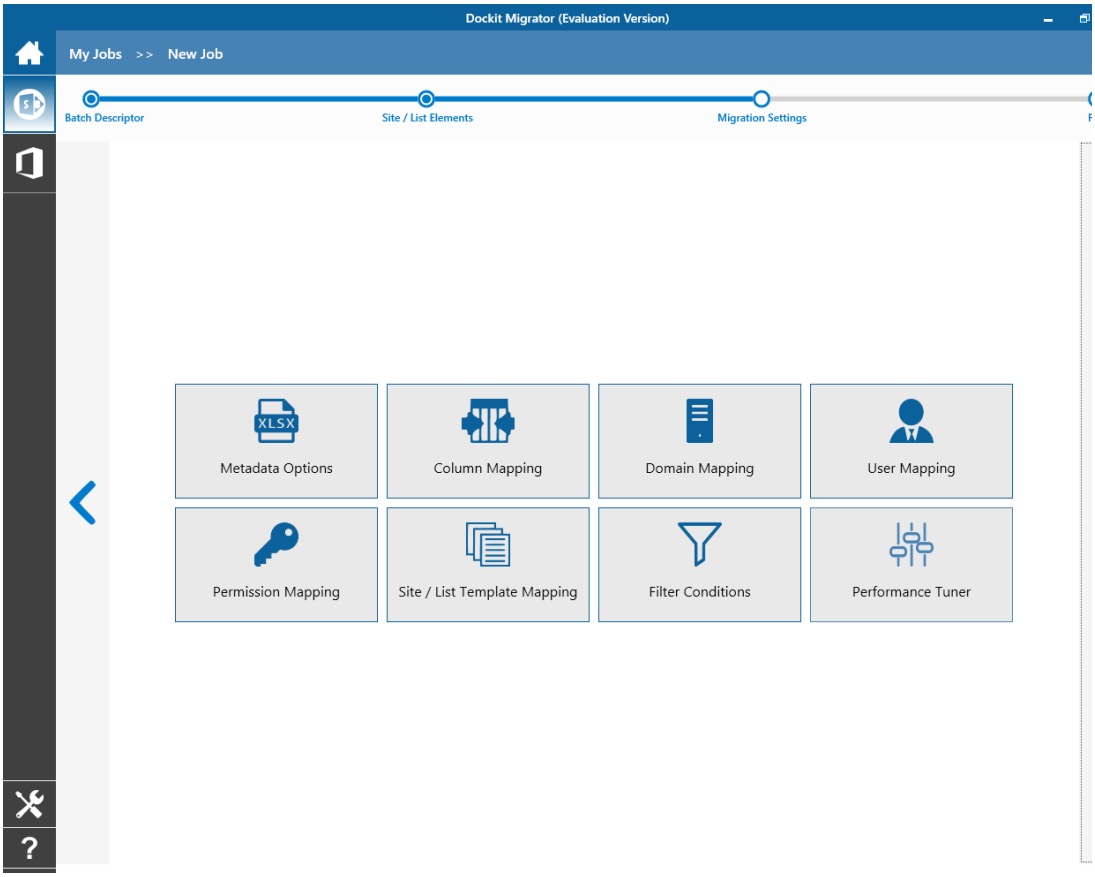
	• Custom Workflows will be handled only during a Site / Web level migration. • It starts the workflows in the target which have running state in the source.

4.1.2.2.3 Migration Settings

1. Migration Settings allows the user to specify various migration configuration information to use in the task. To specify Migration Settings inputs to use for the task:

-- The **Migration Settings** page will appear as shown in the screen below:

>



You can provide external metadata file to assign metadata, filter conditions to filter folders or files, renaming rules to rename folders/files with invalid characters, map permissions, users and columns.

The various Migration Settings are listed below:

1. Metadata Options

2. Column Mapping

3 Domain Mapping
.

4 User / Group Mapping
.

5 Permission Mapping
.

6 Site and List Template
.

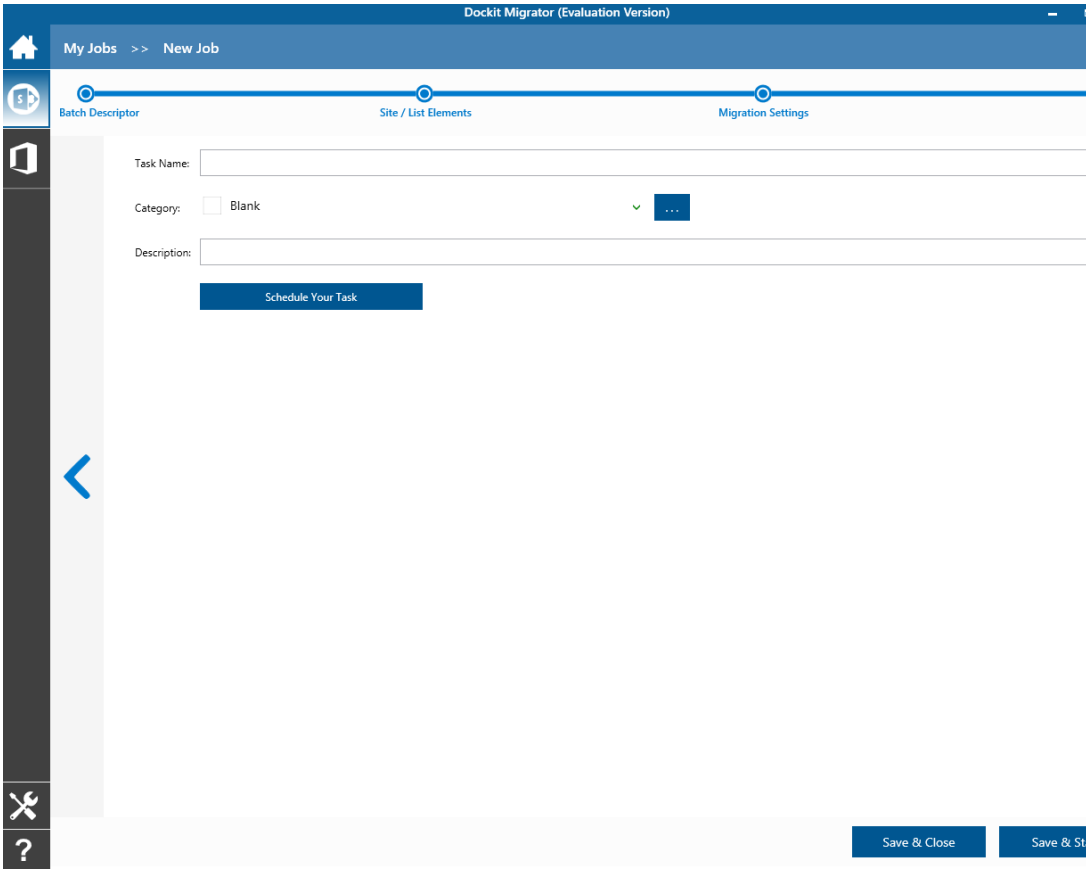
7 Filter Conditions
.

Click **Next** to proceed.

4.1.2.2.4 Task Settings

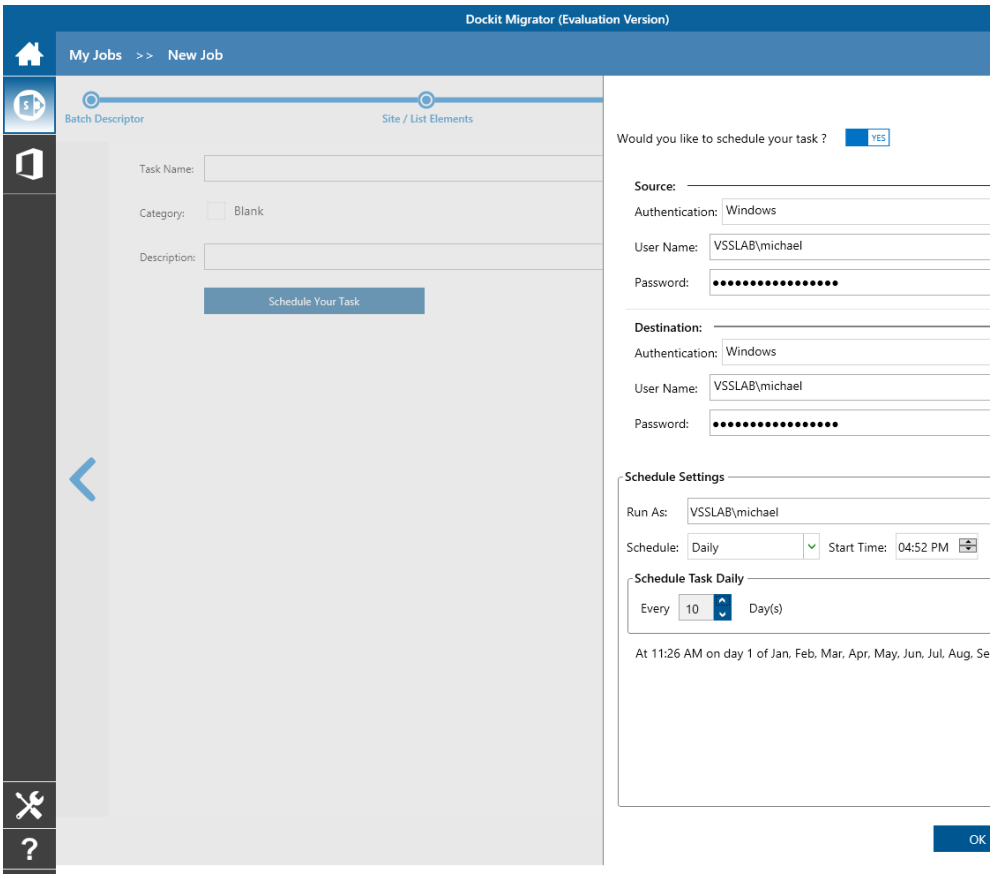
To specify the task name and schedule settings for the Dockit import task, perform the steps given below.

1. The **Task Schedule Settings (Finish)** page will appear as shown below:



2. Enter a unique task name in **Task Name** textbox.

3. To create a Windows scheduled task, **click 'Schedule Your Task'** button. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.



Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled **Run As** user context for the export task.

5. Click **'OK'** button to proceed or click **'Cancel'** to discard changes.
6. After creating schedule task. Click **'Finish'** button to run the task.

4.1.3 Clean Up Metadata

Task Manager

Change Application Data folder location

Task History

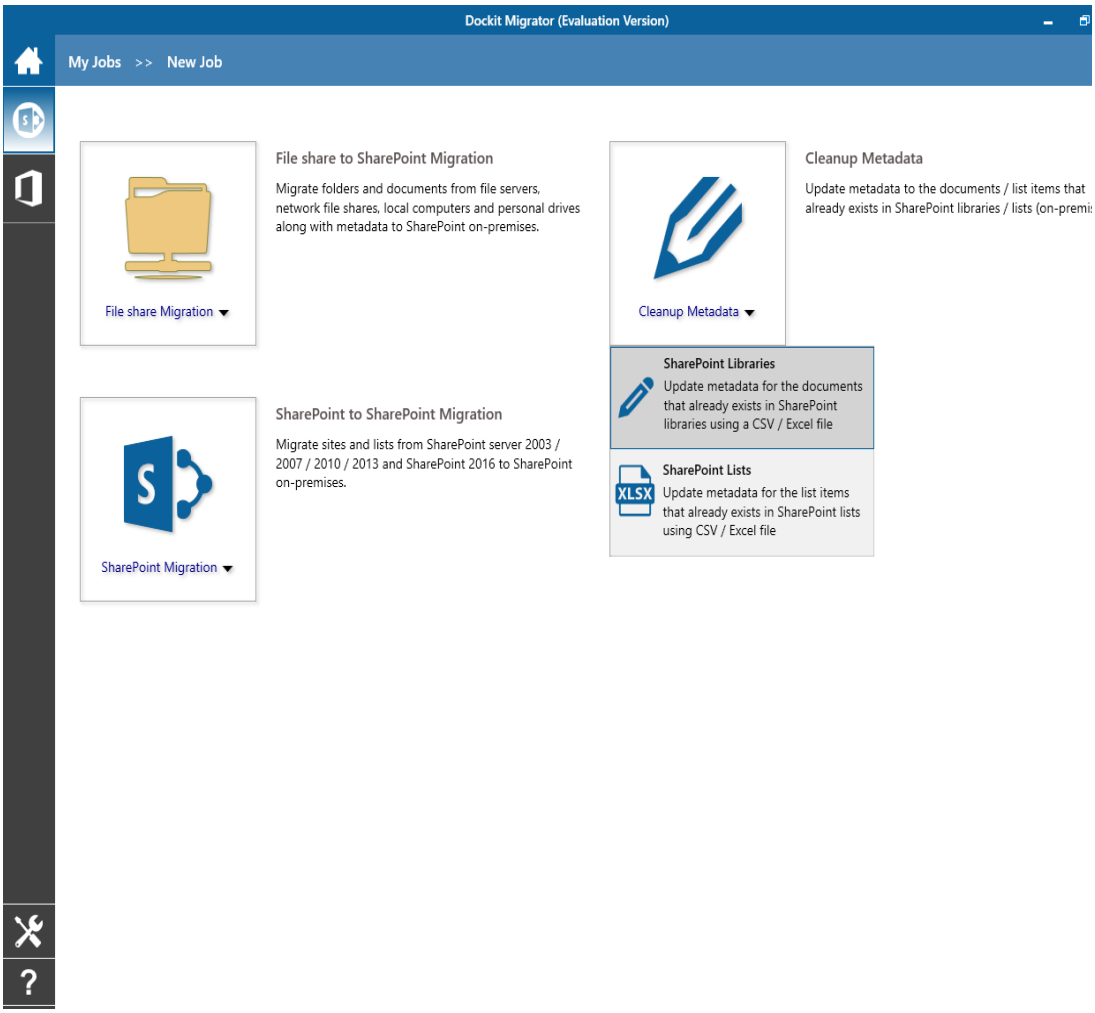
-->

- SharePoint Libraries
- SharePoint Lists

4.1.3.1 SharePoint Libraries

To create a task to update document properties to documents already residing in SharePoint library using the values specified in the metadata file:

1. Select **Batch File Mode** from **Clean Up Metadata** option in **New Job** page as shown below.



2. Specify Metadata Options.

3. Specify Migration Settings.

4. Specify Task Settings.

5. Click **Finish** button to create the task, or click **Back** button to change the any task settings.

4.1.3.1.1 Create Metadata File

The following section gives you the guidelines to create an external metadata file for **Assign Metadata to the documents in SharePoint Libraries** task option.

1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by Dockit.

2. The first field should be named as '**Destination Path**'. 'Destination Path' field should be followed by other field names separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be

same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

3. The first column of all the rows should contain the full destination path of the file e.g., http://sharepointserver/sample sales documents/sample folder/sample file.xlsx.

Use vertical pipeline character (|) as a separator between SharePoint site and Document ID in order to locate documents using their unique Document ID.

Syntax: Site URL|Document ID

where,
Site URL - indicates the site from which Dockit can lookup the document using the specified Document ID.
Document ID - indicates unique Document ID of the document to be updated.

For exampe:

Destination Path	Document Author
http://sharepoint:9000|62WZ4WH5D27C-1-1	John Doe
http://sharepoint:9000|62WZ4WH5D27C-1-2	Peter

4. The column '**New Name**' is an optional column in the metadata file. By using this column, you can provide the new name for your existing folder and/or file to be renamed in the destination SharePoint library. Please see the sample snippet below:

Destination Path	New Name
http://sharepoint/technical documents/Sample File.txt	New Document.txt

5. Dockit will rename the file 'Sample File.txt' as 'New Document.txt'. While this renaming operation does not create any new versions, it will change the values of 'Modified Date' and 'Modified By' to the current import time and user respectively. Please note that the file name (to be renamed) should contain its extension, since Dockit uses the value under **New Name** column as the alternate name of the respective file regardless of its type / extension.

6. Use wildcard representations (* and *.*) in order to update the same metadata for the existing items underneath the destination folder or library. Please see wildcard characters usage for this purpose:

Wildcard characters	Example	Description
*	http://sharepoint/library1/folder1/*	Update all folders and sub-folders only, but skip files
.	http://sharepoint/library1/folder1/*.*	Update all files and sub-folders

Please see the sample snippet below:

Destination Path	Team Name
http://sharepoint/technical documents/project1/*.*	voyager
http://sharepoint/technical documents/project2/*	conqueror

7. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.

8. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.

9. Ensure date values are in 'Date Only' or 'Date And Time' format.

10. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.

11. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

12. The **New Name** field will not be carried forward as a metadata field into SharePoint.

13. Business Data (BDC) / External Data (BCS) column values must be provided with the appropriate filter name to use in order to query the LOB records. Dockit will be unable to update the BDC column values if the filter name is incorrect or does not exist. You must provide the BDC column value in the format: *<filter name>:<value>*. For example: *"Company Name:NorthWind"*

14. The Managed Metadata column values can be term labels or synonyms of term labels or full path of the term value (full term path). Dockit will search the specified term value under the specified parent term of the corresponding term set and assign the ID of the matching term value for the managed metadata column. You must provide the path of the term label in the format: *ParentTerm|TermLabel1|TermLabel2|TermLabel3.*

For example: *"Continent|North America|Country|United States|States|Alaska"*.

In the example above, if the specified term value 'Alaska' does not exist in the selected term set of the managed metadata column, Dockit checks if the term set is open to creating new terms / values. If yes, Dockit will create the new term / value 'Alaska' under the specified term path "Continent|North America|Country|United States|States" automatically. If the term set does not have the provision to create new terms / values, the specified managed metadata column value 'Alaska' will not be added in the specified term path.

The full term path is required only if the selected term set (for managed metadata column) contains any duplicate values. As a best practice, we recommend you to provide the full term path to update the desired term value.

Please note that the new term value creation depends upon the 'Allow Fill-in settings' option selected in Dockit task wizard, which has the option to override the library settings.

Note: The term path should be separated by '|' and multiple term values should be separated by ';'

The following section describes the data types supported by SharePoint and an example of how to state the value in the metadata file for import.

SharePoint Data Type	**Remarks**	**Example**
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text.\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"

Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 2000;Windows XP;Windows 2003;Windows Vista"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows XP"
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value	"Stock Details;Accounts;Product Details"

	in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: if the specified column value is of folder type, the ID of the folder will not be assigned.	
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"

	The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepointserver:5000/Shared Documents/My sample file.doc" "http://sharepointserver/Pictures/sample chart.bmp"
Target Audiences (Multiple value) *(Applicable only for a MOSS / Microsoft SharePoint Server 2010 library)*	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require ***Dockit Server Agent*** to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010).	"All site users; Admins; Viewers; Administrators; RD60SPUsers; Contributors; Designers

Publishing Schedule Start Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Publishing Schedule End Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Publishing Image *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Pictures/chart.bmp" "Pictures/chart.bmp"
Publishing Hyperlink *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	"http://sharepoint:5010/Documents/Sample File.doc" "/Documents/Sample File.doc" " NewsArticleImage.jpg"
Publishing HTML *(Applicable only for Collaboration Portal / Publishing Portal Site)*	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS)	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit for SharePoint" If the filter name contains colon (:) in its name, use the following syntax:

(Applicable only for SharePoint Enterprise Edition)	entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in *filter name: value* format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:*filter name*, **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"FILTER:Product:Product ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file,	"Continent|North America|Country|United States|States|Washington;Continent |North America|Country|United States| States|California;Continent |North America|Country|United States| States|Alaska" "Washington;California;Alaska"

	Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values seperated by ';'.	"30: -60" "New York, United States"
Task Outcome	Text or Number value can be given to this field. Do not use multiple values for these column type.	"Success" "1"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"http://sharepoint/Documents/Sample File.doc; http://sharepoint/Documents/Sample File1.doc " "http://sharepoint/Lists/Custom List/1_.000"

The following tables below describe the syntax to be used in the external metadata file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

Single Value	**Example**	**Final Result**
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. *Note: The delimiter ';#' is a reserved character pattern in*	";#Windows Live;;#Mail;#"	Windows Live;#Mail

the Choice field column. The single value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.		

Multi-Value	**Example**	**Final Result**
In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Windows Live Spaces; Mesh; Windows Azure; Windows HPC
In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. *Note: The delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail; Windows Photo Gallery

Sample format of a CSV / TEXT metadata file:

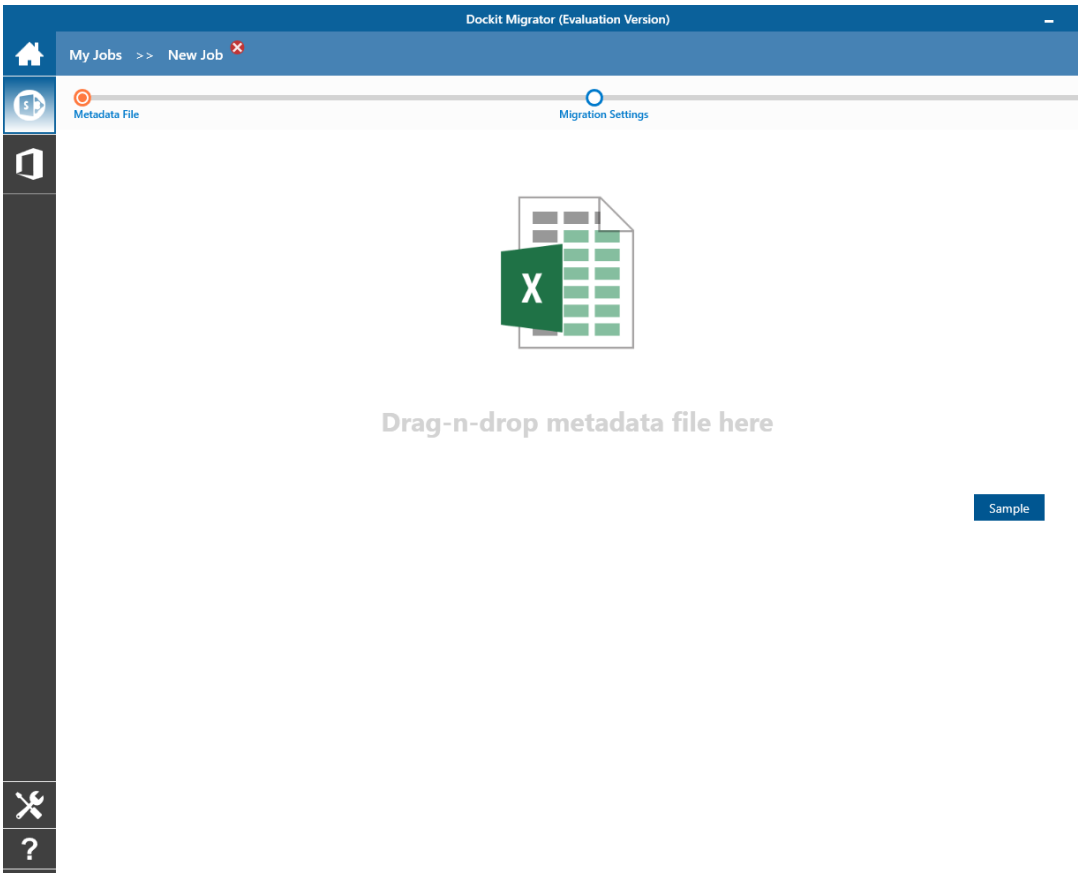
Note: Refer Point #2 for the separator to be used in the metadata file

"Destination Path","New Name","Issue Date","Author Name","Position","Department"
"http://sharepoint/libone1/Sample Brochure.doc","Sample File.doc","11/06/2006","John Doe","Director","Senior Management"
"http://sharepoint/libone1/Sample Sales Template.xlsx","Sales Target.xlsx","11/24/2006","Jane Doe","VP Sales","Corporate Sales"
"http://sharepoint/libone1/Sample Product Demo.ppt","Product Demonstration.ppt","10/4/2006","David Blake","Sales Manager","Consumer Sales"

4.1.3.1.2 Metadata Options

To specify the external metadata file to use to assign document properties in SharePoint:

1. The **Metadata Options** page will appear as shown below:



2. **Click**

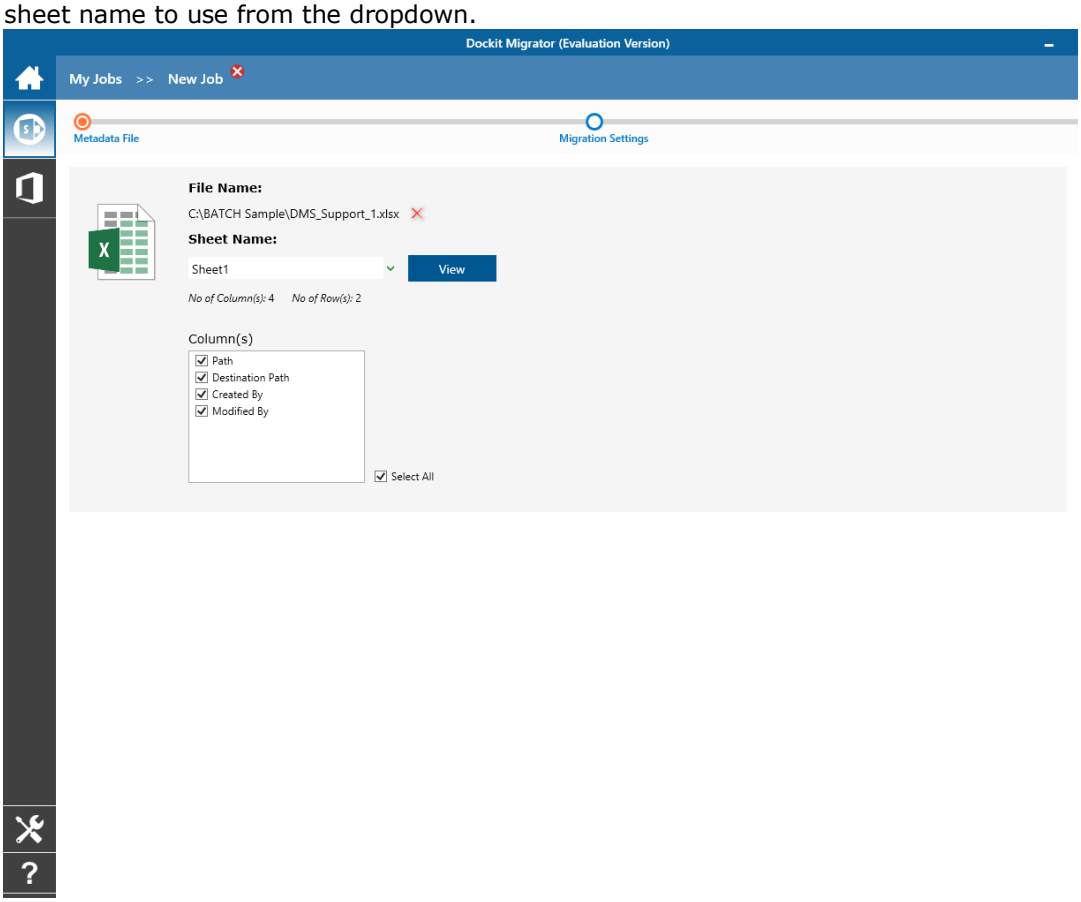
drop down button if you want to see a sample external metadata file (in Comma delimited (CSV) file , Excel (XLSX) file formats) to know how the columns should be arranged in an external metadata file.

3. **Click** button to specify the external metadata file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).

4. File selection dialog opens. Drag and drop the metadata file from the explorer to the window or double click on the metadata file.

5. The selected metadata file will automatically be extracted and its contents will be loaded in the window. If you select a Microsoft Excel metadata file, then select the

sheet name to use from the dropdown.



6. **Click**

button if you want to see the contents of selected metadata file in the associated native application.

7. For more information about how to create external metadata file, click here.

8. Select the desired columns for which you wish to assign metadata.

9. If you want to replace with a different metadata file, **click** button and select the new metadata file as before.

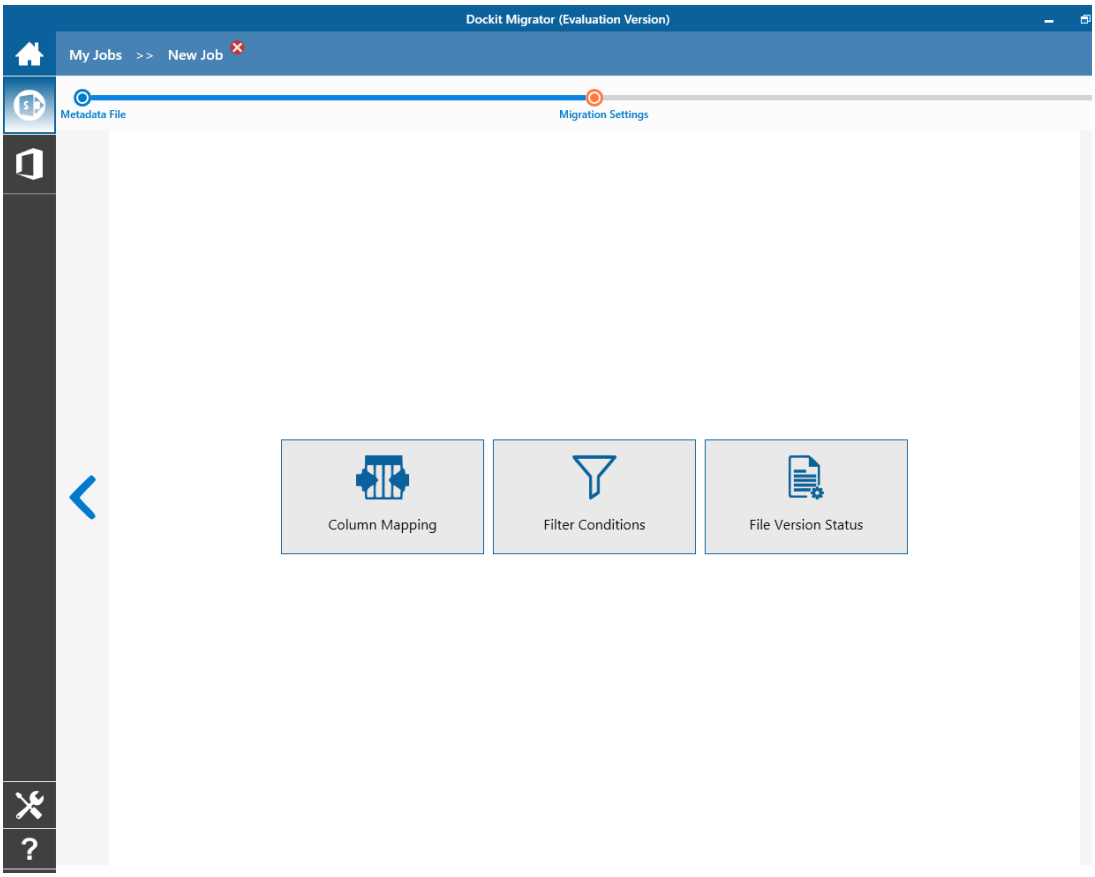
10. If any of the selected columns contains date and time values, specify **Date and Time format** to parse the date values. The default value is the current system settings.

11. Click **Next** to proceed.

4.1.3.1.3 Migration Settings

1. Migration Settings allows the user to specify various migration configuration information to use in the task. To specify Migration Settings inputs to use for the task:

-- The **Migration Settings** page will appear as shown below:
>



You can provide external metadata file to assign metadata, filter conditions to filter folders or files, renaming rules to rename folders/files with invalid characters, map permissions, users and columns.

The various Migration Settings are listed below:

1. Column Mapping

2. Filter Conditions

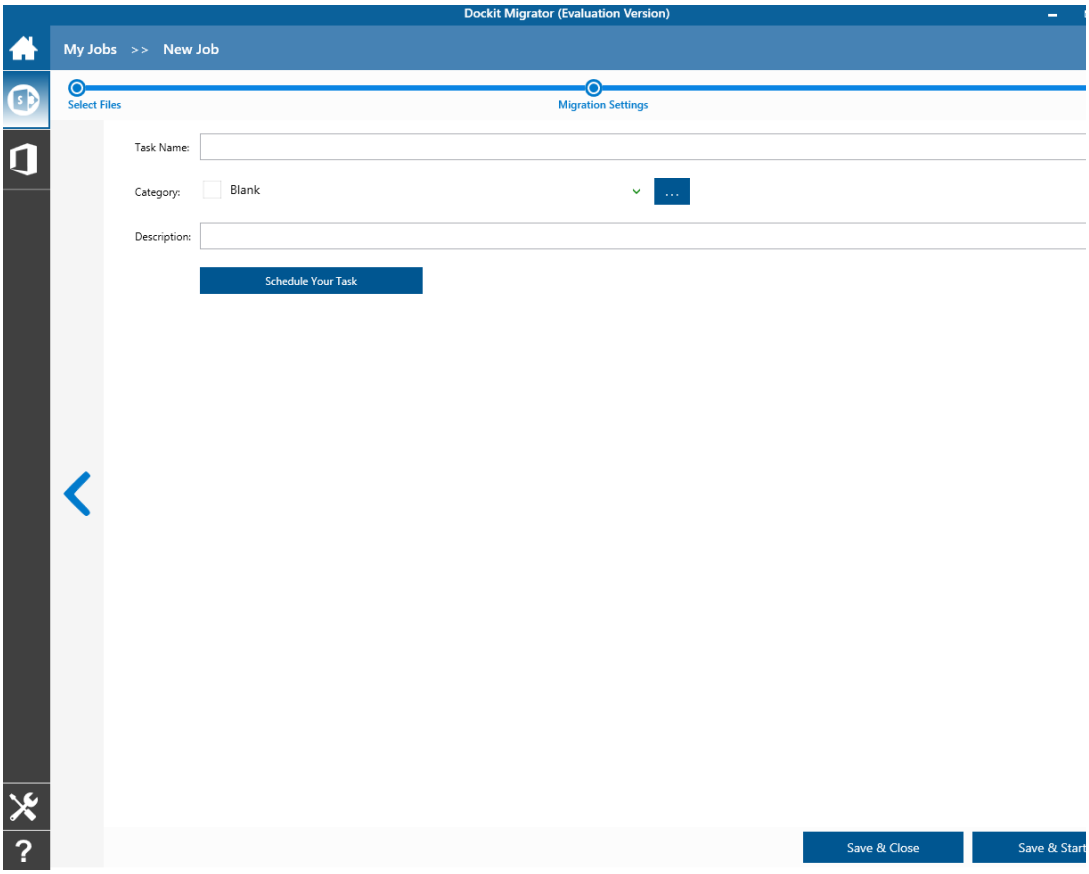
3. File Version Status

Click **Next** to proceed.

4.1.3.1.4 Task Schedule Settings

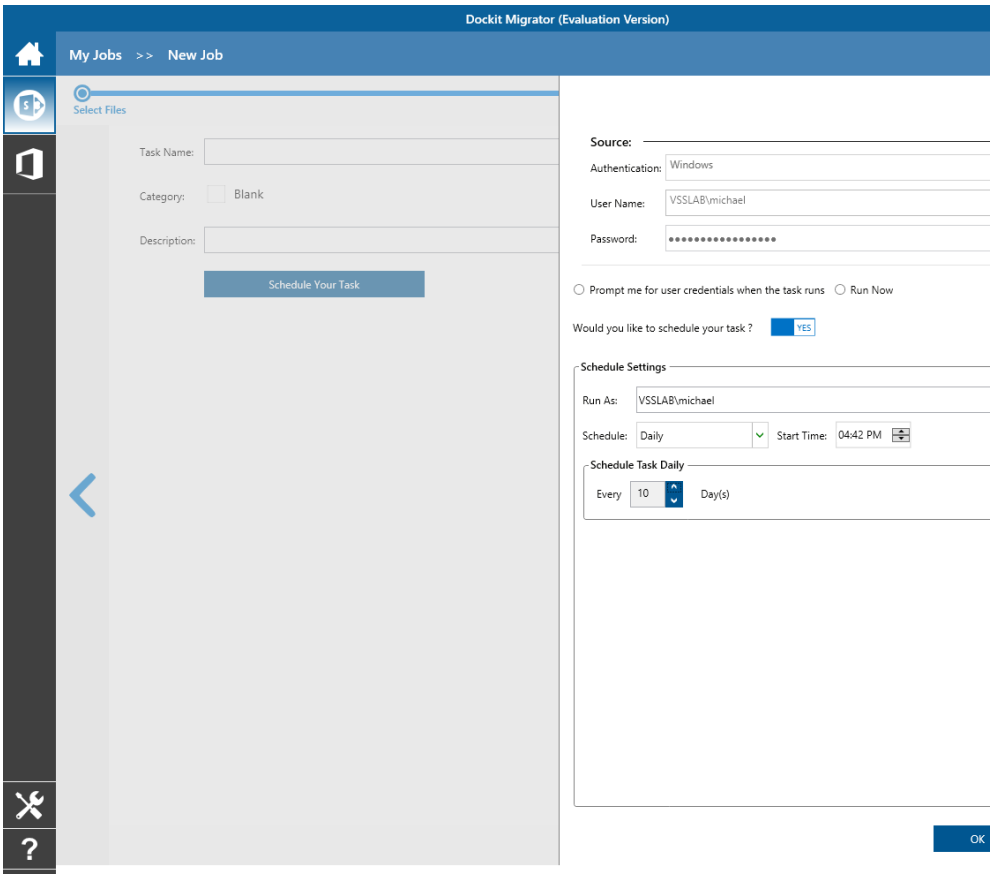
To specify the task name and schedule settings for the Dockit import task, perform the steps given below.

1. The **Task Schedule Settings (Finish)** page will appear as shown below:



2. Enter a unique task name in **Task Name** textbox.

3. To create a Windows scheduled task, **click 'Schedule Your Task'** button. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.



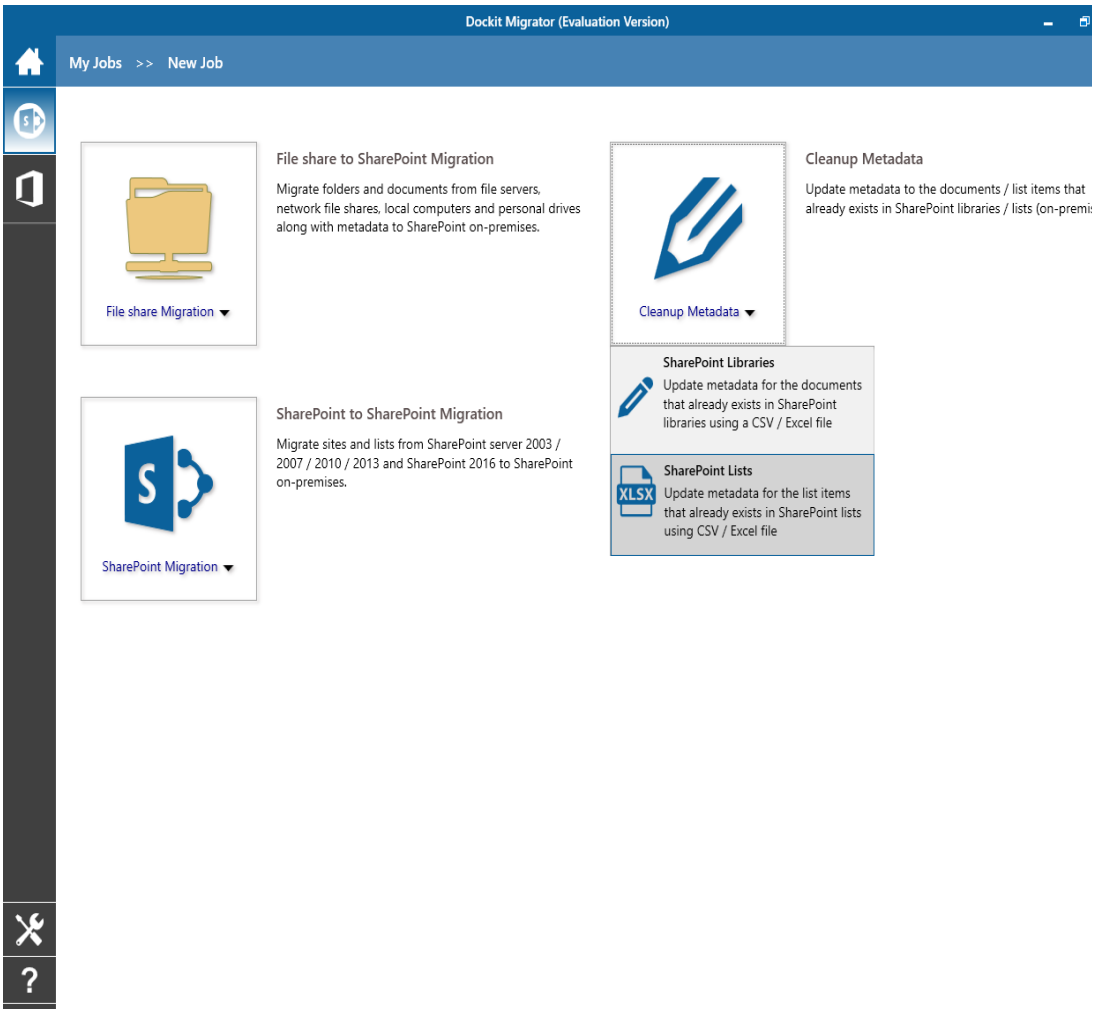
Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled **Run As** user context for the export task.

5. Click **'OK'** button to proceed or click **'Cancel'** to discard changes.
6. After creating schedule task. Click **'Finish'** button to run the task.

4.1.3.2 SharePoint Lists

Create a task to import list items in SharePoint based on the entries in the batch file. Dockit will process the list items in the order in which they appear in the batch file.

Select **Other List Types (Batch Mode)** from **Clean Up Metadata** option in **New Job** page as shown below.

1. 

2. Specify Batch Import Settings.

3. Specify Migration Settings.

4. Specify Task Settings.

5. Click **Finish** button to create the task, or click **Back** button to change any task settings.

4.1.3.2.1 Batch file structure

The following section gives you the guidelines to create a batch file for **Import metadata to all SharePoint Lists (Batch File Mode)** task option.

1. The first row of the batch file should contain the **Field Names as headers**. In manage metadata task, data type of the columns must be the same across all lists. SharePoint Columns that are read-only will not be updated by Dockit.

2. The first field should be named as **Destination Path**. The 'Destination Path' field should be followed by other field names separated by delimiter characters such as comma (,), semi-colon (;) etc. The delimiter character used in the batch file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

   The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

3. The first column of all the rows should contain the **Destination Path** of an item e.g., http://sharepoint/engg documents/samplefolder1. In this case, the Destination Path should be either list URL or sub-folder URL in a SharePoint list.

   Reference column: Reference column is one of the columns in the batch file (unique reference), which will be used to identify the list item in the SharePoint list. Dockit will search the specified reference value under the specified Destination Path. Dockit will then retrieve the Absolute URL of the matching list item or matching folder from the SharePoint list automatically and then proceed to perform the specified action.

   The **Reference** column can be any of the following:

   a. Name - The column contains the filename or folder name or item ID or wild card characters.
   b. Title or any metadata column value in SharePoint [The column value must be a unique record].

4. The following table explains the behavior of wild card characters:

Destination Path	Name	Description
http://sharepoint/engg documents/Folder1	*	Traverse all items and sub-folders presented in the **Base URL** and

	perform the specified action.
http://sharepoint/lists/technical lists/Folder2	It will perform the specified action for the top level folder only.

Note: Dockit provides an option to select the reference column as '**Name**' in 'Batch File Options' step in task setup wizard.

The column '**Name**' is an optional column in the batch file. By using this column, you can provide the file name (Sample.txt) or item ID (1_.000) or folder name (folder1) under the **Destination Path**. For instance, please see the batch file snippet given below:

Destination Path	Name
http://SharePoint/technical documents/Folder1	Sample File.txt
http://SharePoint/lists/technical lists	1_.000
http://SharePoint/technical documents/Folder1	Folder2
http://SharePoint/technical documents/Folder2	*
http://SharePoint/technical documents/Folder3	

5. Dockit automatically combines the value (Sample File.txt) specified in the '**Name**' column with the Destination Path (Folder1). The combined Absolute URL becomes 'http://SharePoint/technical documents/Folder1/Sample File.txt'. Dockit performs the specified operation (update / delete) for this item.

Dockit provides an option to select an action column in 'Batch File Options' step in the task setup wizard. Dockit also provides an option to select the reference column in 'Batch File Options' step in the task setup wizard.

If you need to perform item level or folder level actions, specify the actions in any one of the metadata columns in the batch file. The specified actions to be performed for the list items in SharePoint as shown in the example below.

Example 1:

6. The example below updates the 'Designation' column in a SharePoint list. The column '**Title**' is a reference column and the column '**Action**' is action column in the batch file.

Note: The reference column 'Title' must have unique values in the SharePoint list. You can also use wildcard character '*' for processing the first few records.

Destination Path	Title	Designation	Description
http://sharepoint/technical documents/Folder1	Sample Title 1	Manager	Updates the 'Designation' column as 'Manager' if the list item under Destination Path has 'Title' as 'Sample Title 1' .
http://sharepoint/lists/Project Tasks	Sample Title 2	Production Executive	If any item or folder has the specified 'Title' value in the specified list or folder, Dockit perform the delete operation for referenced item.
http://sharepoint/lists/Annual Sales	Sample Title 3	Sales Executive	If any item or folder has the specified 'Title' value in the specified list or folder, Dockit performs the update operation. If the list item does not exists, Dockit creates a new item under 'Annual Sales' list.

http://sharepoint/technical documents/Folder2	Sample Title 4	Product Manager	Dockit creates a new item with the specified 'Title' value under 'Folder2' with specified metadata.
http://sharepoint/technical documents/Folder3	*	Marketing Manager	Dockit updates all items and sub-folders under Folder3.
http://sharepoint/technical documents/Folder4	Sample*	Production Manager	Dockit updates all items that start with **Sample** in its reference value under Folder4. The maximum limit of processing list items is 50.
http://sharepoint/technical documents/Folder5	*Title*	Sales Manager	Dockit updates all items that contain **Title** in its reference value under Folder5. The maximum limit of processing list items is 50.

7. The column to specify an **'Attachment'** is also an optional column in the batch file. You can give any name to this column. Using this column, you can specify the files to be attached to the list item. Dockit provides an option to specify an 'Attachment' column from the batch file in 'Metadata Settings' step in the task setup wizard.

If you want to attach a document to a list item in SharePoint, please specify the file path in any one of the metadata column in the batch file as shown in the example below:

Destination Path	Name	Attachment
http://sharepoint/technical list	1_.000	C:\My documents\Sample Workbook.xls
http://sharepoint/technical list	2_.000	C:\My Documents\Sample Folder
http://sharepoint/technical list	3_.000	Sample Workbook.xls; Sample Text.txt;
http://sharepoint/technical list	4_.000	C:\My documents\Sample Workbook 1.xls; C:\My documents\Sample Workbook 2.xls

The column '**New Name**' is an optional column in the batch file. By using this column, you can provide the new name for your existing folder and/or file to be renamed in the destination SharePoint library. Please see the sample snippet below:

Destination Path	Name	New Name
http://sharepoint/technical documents	Sample File.txt	New Document.txt

Dockit will rename the file 'Sample File.txt' as 'New Document.txt'. While this renaming operation does not create any new versions, it will change the values of 'Modified Date' and 'Modified By' to the current update time and user respectively. Please note that the file name (to be renamed) must contain its file extension, since Dockit uses the value under **New Name** column as the alternate name for the list item regardless of its type / extension. The **New Name** field will

8. not be carried forward as a metadata field into SharePoint.

The column '**New Folder**' is an optional column in the batch file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to creating the

9. list items. For instance, please see the batch file snippet given below:

Destination Path	New Folder	Title
http://sharepoint/technical documents/folder1	folder2/folder3	Title1

Dockit automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The new list item 'Title1' will be created in the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

10. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT batch file must be in UNICODE encoded format.

11. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.

12. Ensure date values are in 'Date Only' or 'Date And Time' format.

13. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.

14. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

15. Business Data Catalog (BDC) column values must be provided with the appropriate filter name to use in order to query the LOB records. Dockit will be unable to update the BDC column values if the filter name is incorrect or does not exist. You must provide the BDC column value in the format: *<filter name>:<value>*. For example: *"Company Name:Vyapin"*

The following section describes the data types supported by SharePoint and an example of how to state the value in the batch file for update/create.

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the batch	"Yes" "No"

	file, other than Yes/No, default value will be assigned.	
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text.\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in the batch file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 2000;Windows XP;Windows 2003;Windows Vista"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless	"Windows XP"

	defined in SharePoint to accept multiple values. In this case, you must specify the column value in the batch file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of an updated item, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the batch file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of an updated item, only if the column value exists. Note: if the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John*	"VSSDomain\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"

	Doe) or E-mail address (someone@example.com) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of an updated item, only if the user or group name exists.	
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com)* can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of an updated item, only if the user or group name exists.	"VSSDomain\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepoint/Shared Documents/My sample file.doc" "http://sharepoint/Pictures/sample chart.bmp"

Target Audiences (Multiple value) *(Applicable only for a MOSS / Microsoft SharePoint Server 2010 library)*	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution Group should be crawled and stored in User Profile Store of SSP. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the existing file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require Dockit Server Agent to be installed in the destination SharePoint server.	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers
Publishing Schedule Start Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in batch file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Publishing Schedule End Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in batch file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"

Publishing Image *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Pictures/chart.bmp" "Pictures/chart.bmp"
Publishing Hyperlink *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Documents/Sample File.doc" "/Documents/Sample File.doc" " NewsArticleImage.jpg"
Business Data (BDC) / External Data (BCS) *(Applicable only for SharePoint Enterprise Edition)*	The BDC column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC column value match is found) of the LOB record to the BDC column in SharePoint. Specify this value in *filter name: value* format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:*filter name*, **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit also automatically fills-up the column values associated with the BDC column during update or create.	"Company Name:Vyapin" "ID:1000" "Description:Dockit Migrator software" If the filter name contains colon (:) in its name, please use the following syntax, "**Filter:**<*Filter Name*>,**Query:**<*Query Value*>" For ex: "Filter:Company Name,Query:Vyapin" "Filter:ID,Query:1000" "Filter:Description,Query:Dockit Migrator software" Note: The '**Filter:**' and '**Query:**' are reserved words.
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term	"Continent|North America|Country|United States|States|Washington;Continent|North America|Country|United States|States|California;Continent|North America|Country|United States|States|Alaska" "Washington;California;Alaska"

	label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values seperated by ';'.	"30, -60" "New York, United States"
Task Outcome	Text or Number value can be given to this field. Do not use multiple values for these column type.	"Success" "1"

Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"http://sharepoint/Documents/Sample File.doc; http://sharepoint/Documents/Sample File.doc1" "http://sharepoint/Lists/Custom List/1.000""

The following tables below describe the syntax to be used in the batch file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

Single Value	**Example**	**Final Result**
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. ** - The proposed delimiter ';#' is a reserved character pattern in the Choice field column. The single value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#"	Windows Live;#Mail

Multi-Value	**Example**	**Final Result**
In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Windows Live Spaces; Mesh; Windows Azure; Windows HPC

In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. ** - The proposed delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail; Windows Photo Gallery

Sample format of a CSV / TEXT batch file:

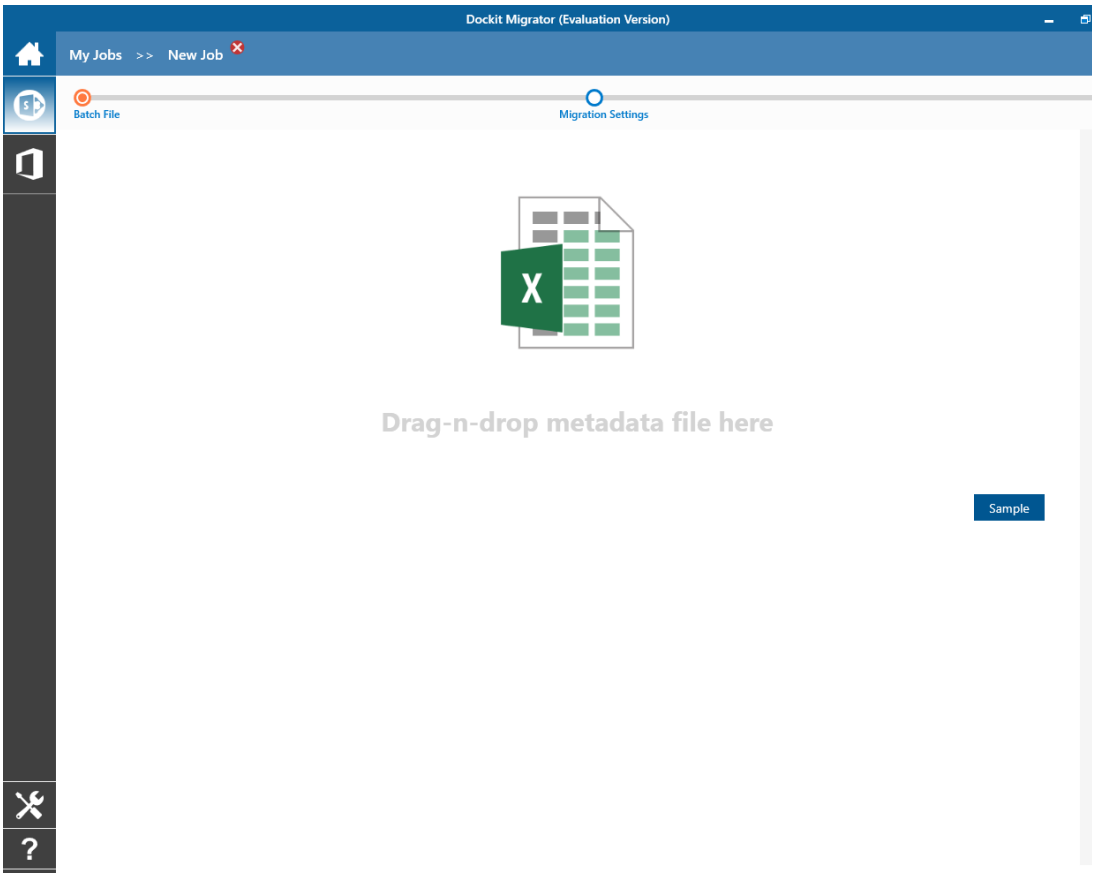
Note: Refer Point #2 for the separator to be used in the batch file

"Destination Path","Name","Title","Issue Date","Designation","Department","Action","Attachment"
"http://sharepoint/Shared Documents","Sample Brochure.doc","Sample Brochure",”11/06/2006”,”Director”,"Senior Management","Update","C:\My Documents\Sample Brochure.doc;C:\My Sales\Sample Sales Template.xls"
"http://sharepoint/list/Sales List","10_.000","Title10","12/05/2008","Sales Manager","Sales","Delete"
"http://sharepoint/list/Sales List/Folder1","","Title11",12/06/2008","VP Sales","Corporate Sales","New","C:\My Sales\Sample Product Demo.ppt"

4.1.3.2.2 Batch Import Settings

To specify the batch file to use to create or update list items in SharePoint:

1. The **Batch Import Settings** page will appear as shown below:

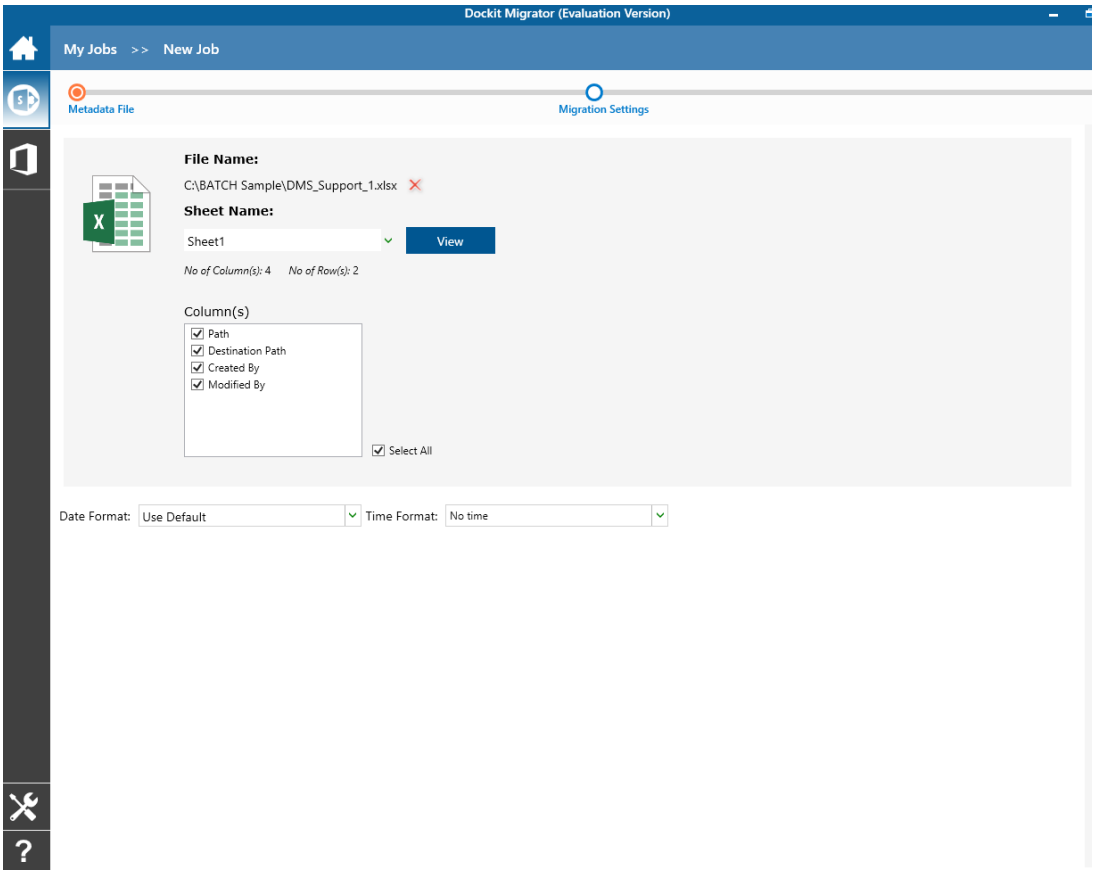


2. **Click** button to specify the external batch file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT). For more information about how to create a batch file, click here.

3. **Click** drop down button if you want to see a sample batch file (such as, Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in a batch file.

4. File selection dialog opens. Drag and drop the metadata file from the explorer to the window or double click on the metadata file.

5. The selected batch file will automatically be extracted and its contents will be loaded in the window. If you are using a Microsoft Excel based metadata file, then select the sheet name from the drop-down.



6. **Click**

button if you want to see the contents of selected batch file in the associated native application.

7. Select the desired columns for which you wish to assign metadata.

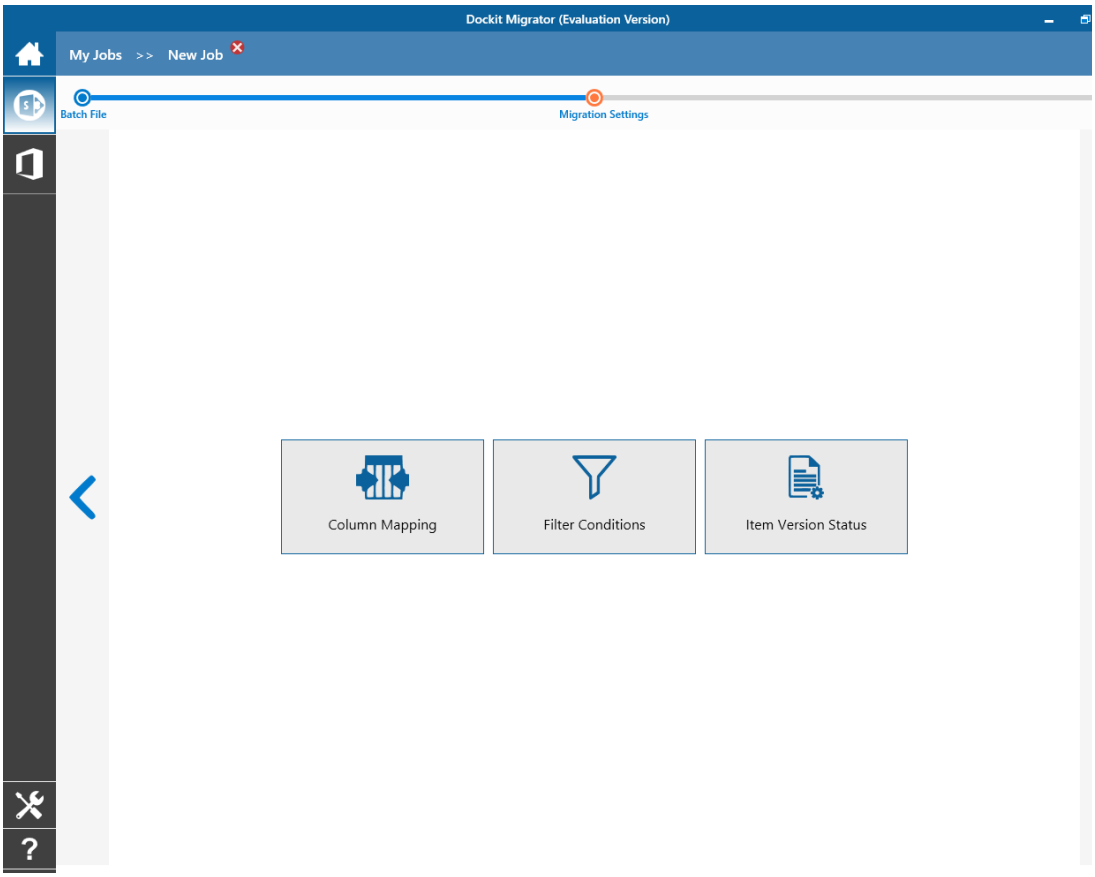
8. If you want to replace with a different batch file, **click** button and select the new batch file as before.

9. Specify the **Date and Time format** for the date fields used in the batch file. If the columns selected to update contains date and time values, specify the date mask to parse the date values correctly. The default value is the current system settings.

4.1.3.2.3 Migration Settings

1. Migration Settings allows the user to specify various migration configuration information to use in the task. To specify Migration Settings inputs to use for the task:

-- The **Migration Settings** page will appear as shown below:
>



You can provide external metadata file to assign metadata, filter conditions to filter folders or files, renaming rules to rename folders/files with invalid characters, map permissions, users and columns.

The various Migration Settings are listed below:

1. Column Mapping

2. Filter Conditions

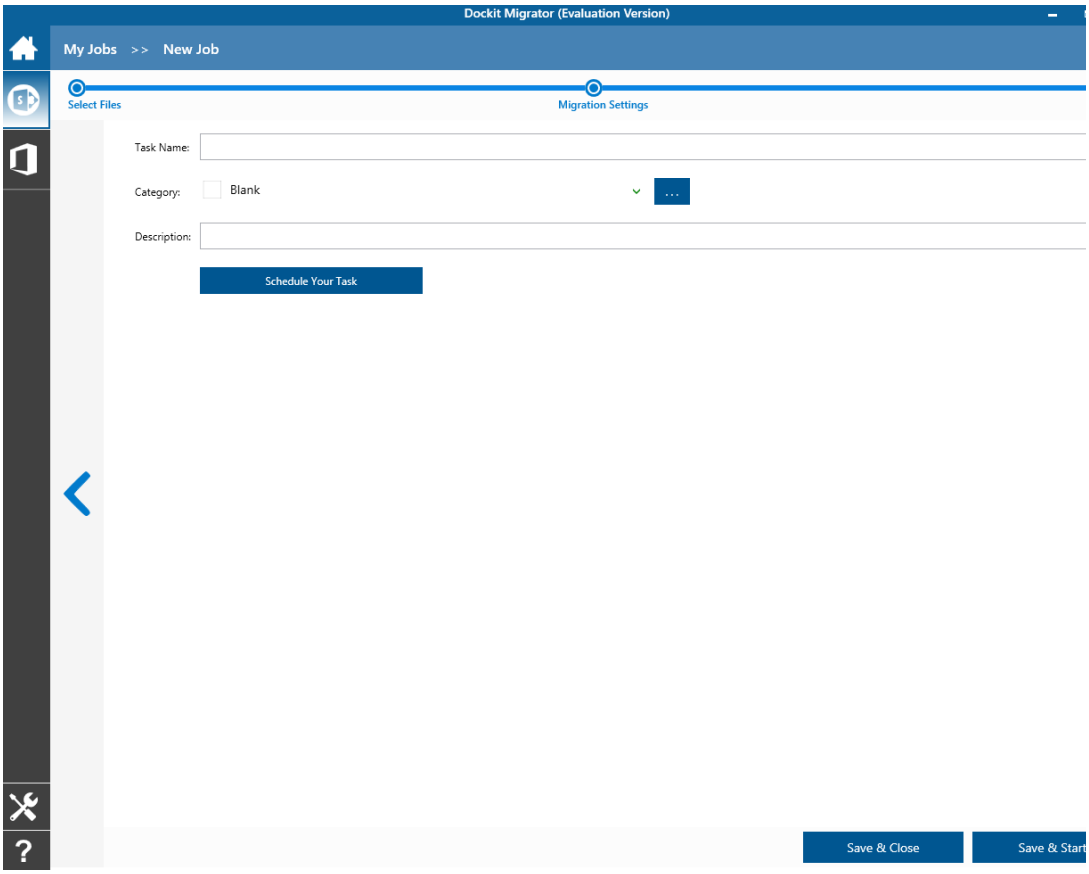
3. Item Version Status

Click **Next** to proceed.

4.1.3.2.4 Task Schedule Settings

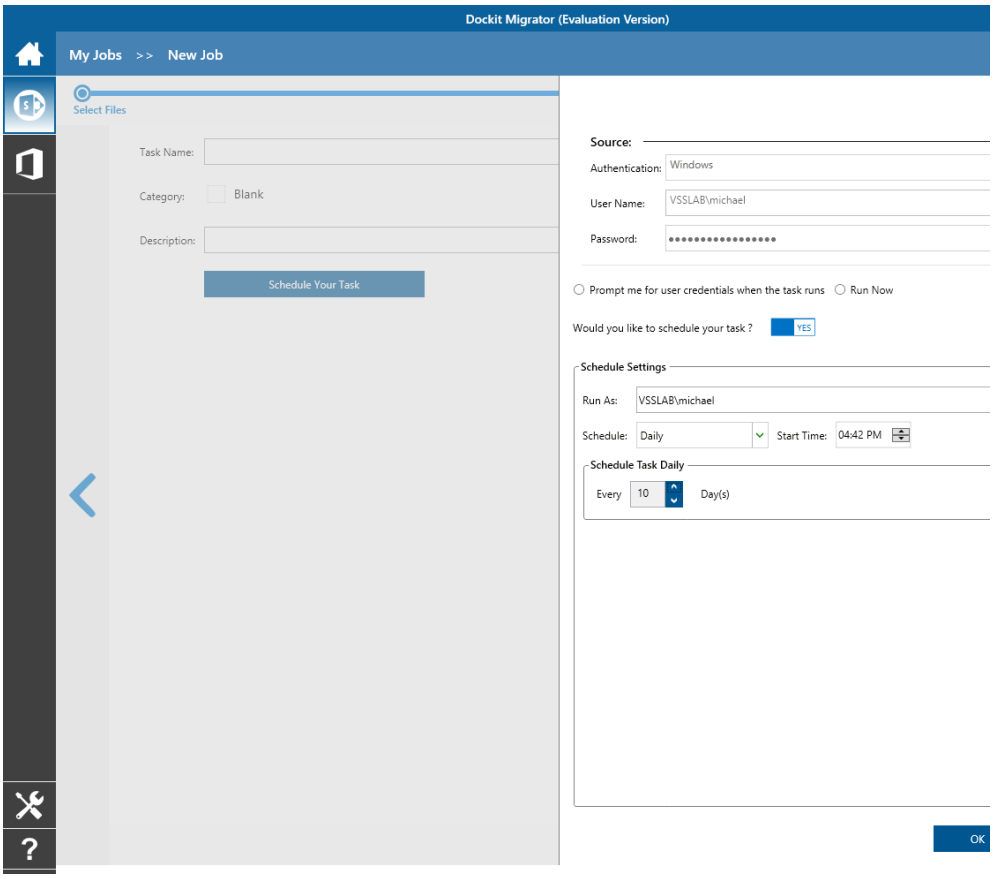
To specify the task name and schedule settings for the Dockit import task, perform the steps given below.

1. The **Task Schedule Settings (Finish)** page will appear as shown below:



2. Enter a unique task name in **Task Name** textbox.

3. To create a Windows scheduled task, **click 'Schedule Your Task'** button. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.



Dockit will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled **Run As** user context for the export task.

5. Click **'OK'** button to proceed or click **'Cancel'** to discard changes.
6. After creating schedule task. Click **'Finish'** button to run the task.

4.2 Online

- SharePoint Online (Office 365) Migration
- SharePoint on-premises to Office 365 Migration
- OneDrive Migration

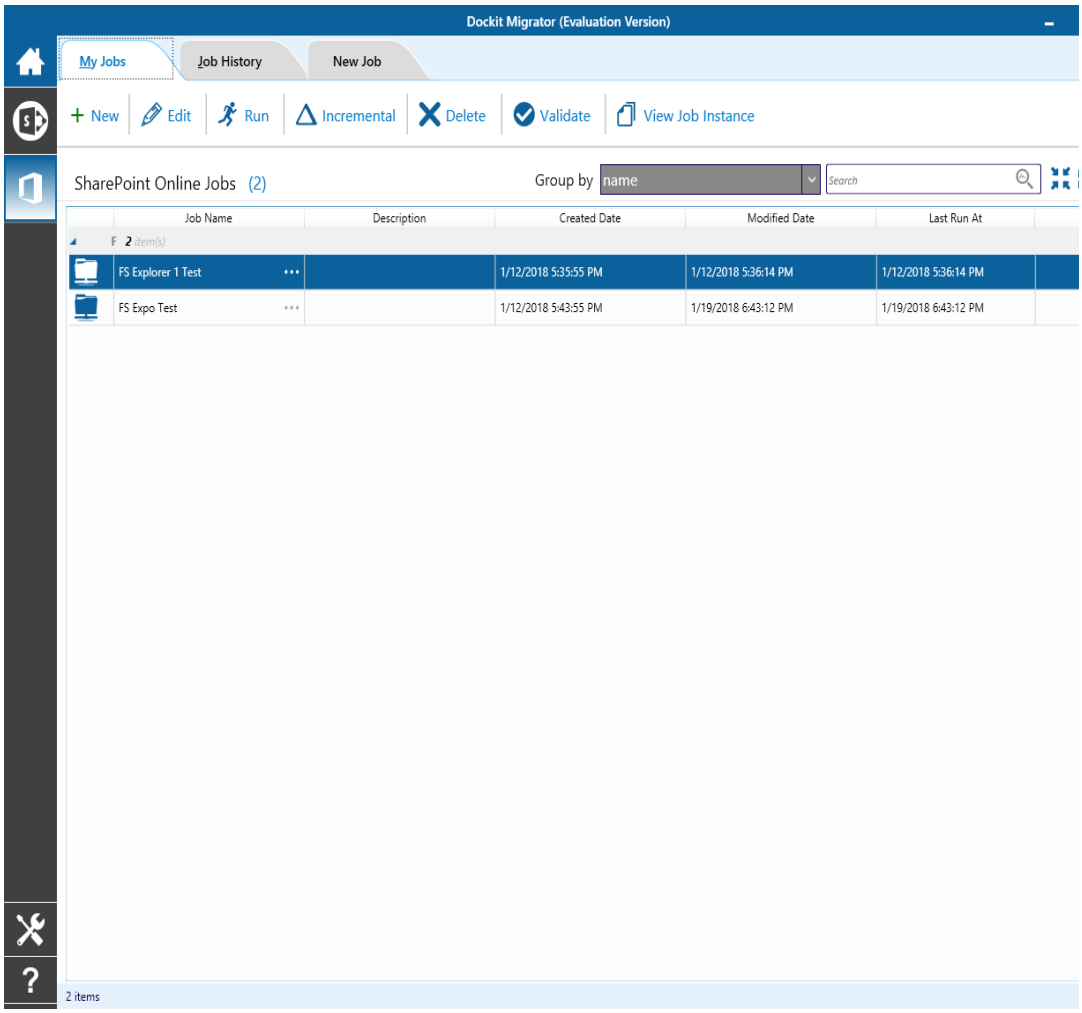
4.2.1 SharePoint Online (Office 365) Migration

- File Share to Office 365
- File Share to OneDrive

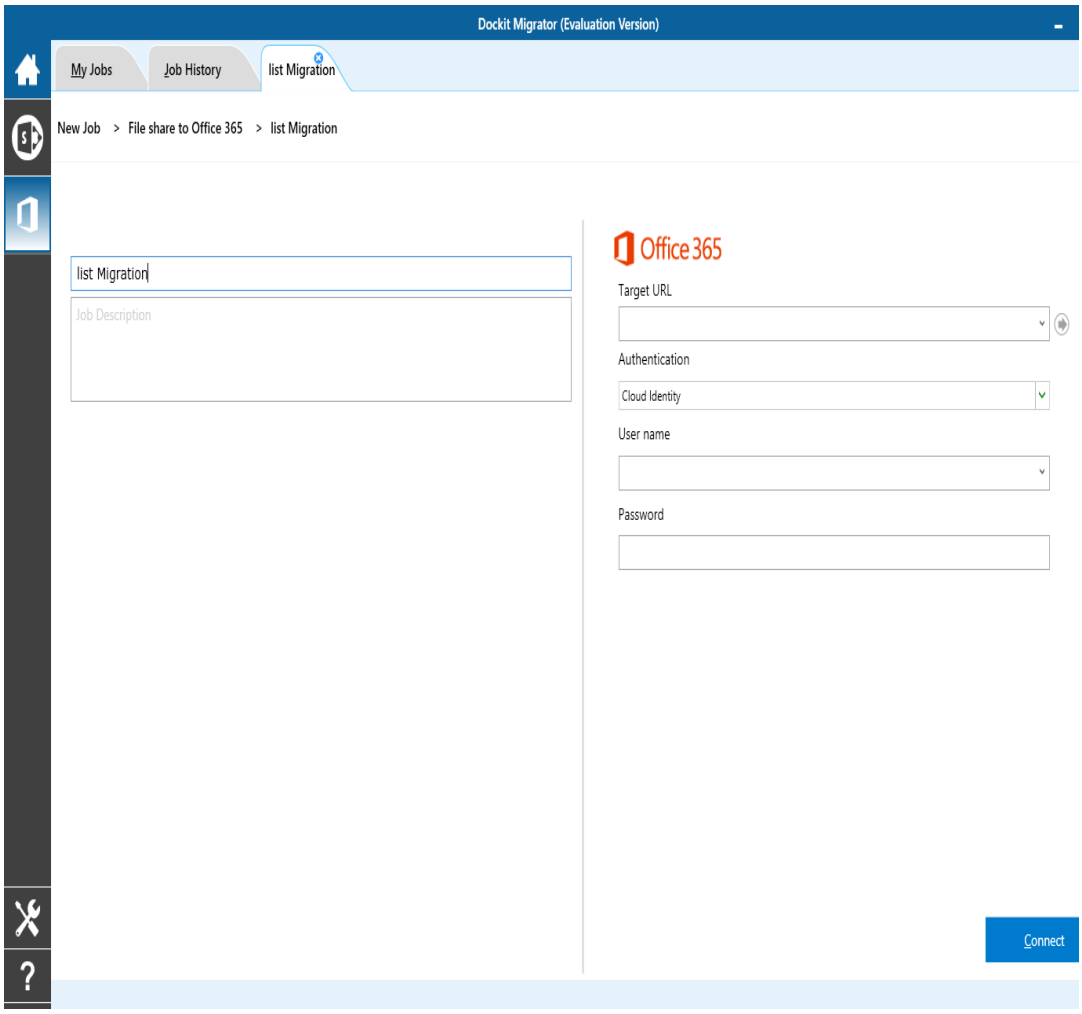
4.2.1.1 File Share To Office365

To create a new migration job to import folders and files along with metadata from File System to SharePoint Library:

1. Click **New** option on **My Jobs** tab on Sharepoint Online migration page.



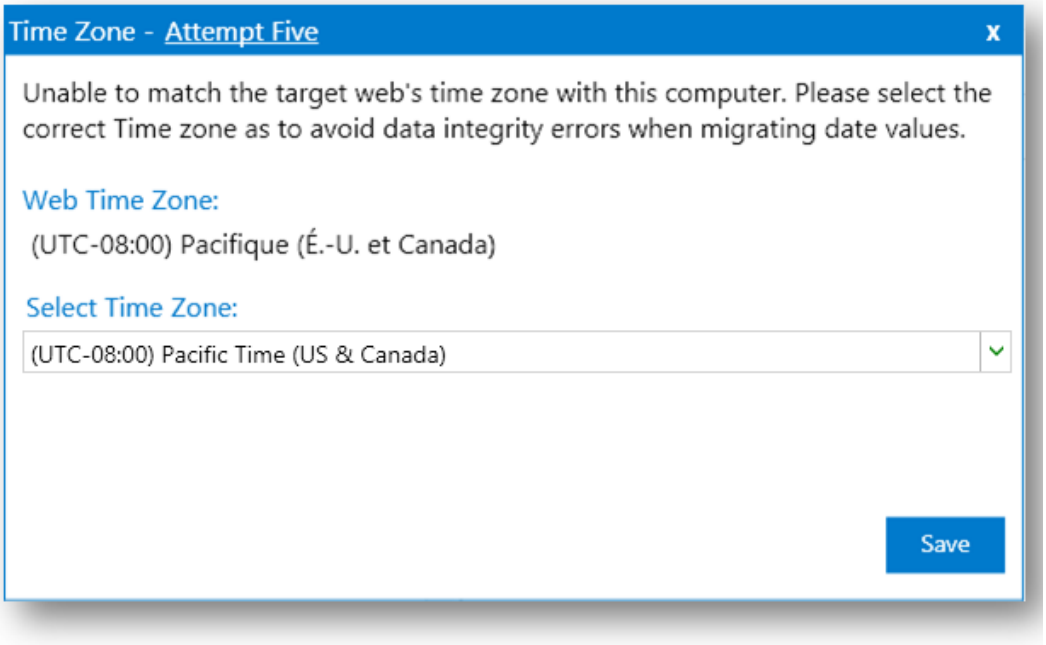
2. The **New Job** page appears as shown below



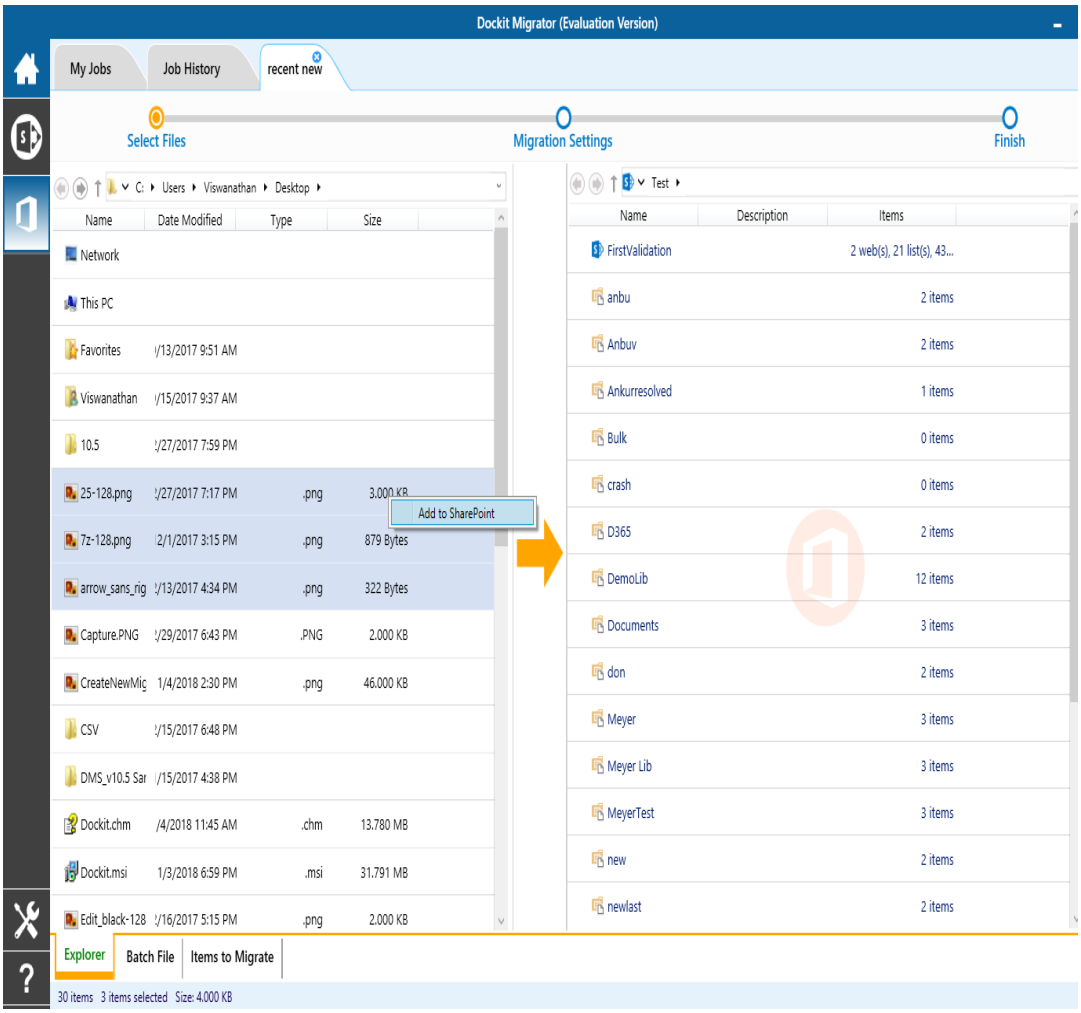
3. Enter **Job Name, Description (Optional).**.

4. Specify Office 365 site URL in the textbox and click Connect button. You need to provide a valid site administrator credentials to proceed further.

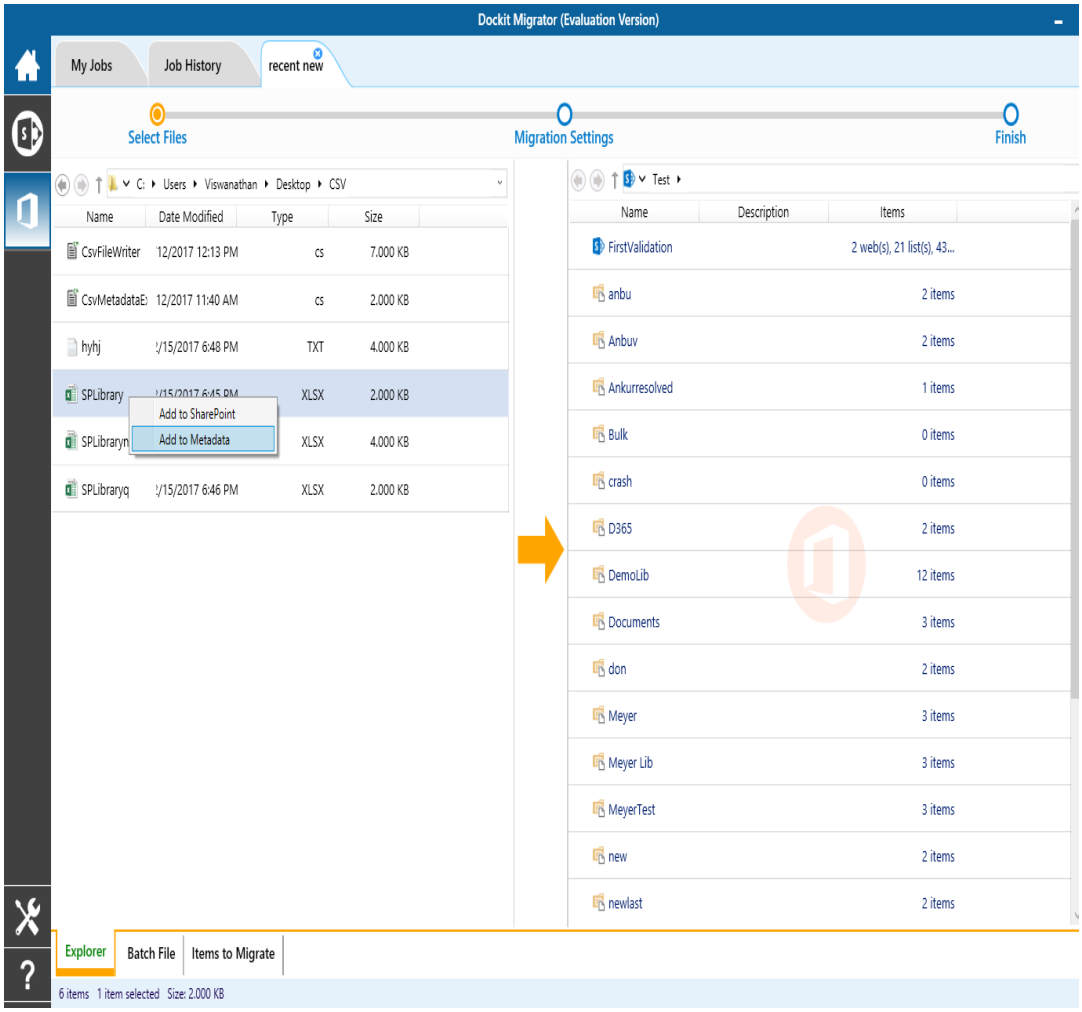
5. If the target site is set with different regional and language settings, it will prompt you to select the equivalent time zone for your computer so as to ensure data integrity in migration.



6. **Drag and Drop** files from File share (Left Pane) to SharePoint site (Right Pane) or Select files and Right click file share, select **Add to SharePoint**.



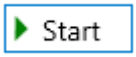
Drag and Drop metadata file from File share (Left Pane) to Metadata page on the Right Pane or Select files and Right click file share, select **Add to Metadata**.

7. 

8. Click **Items to Migrate** on Right pane to check the list of files selected for migration, also you can remove files by clicking the Red **X** .

9. Specify Migration Settings

10. Click **Save** button to create the job, or click **<** button to navigate to previous page to change any job settings.

11. After saving the job, it will be listed on the Job Manager page. You can click on 

to initiate the migration process.

4.2.1.1.1 Batch file

The following section gives you the guidelines to create a batch file for migrate folders, files and metadata to target Libraries.

The first row of the batch file should contain the following field names as headers. The reserved headers used by Dockit Migrator in batch file are as follows:

1. **Path:** The 'Path' column should contain the path of the source document / folder.

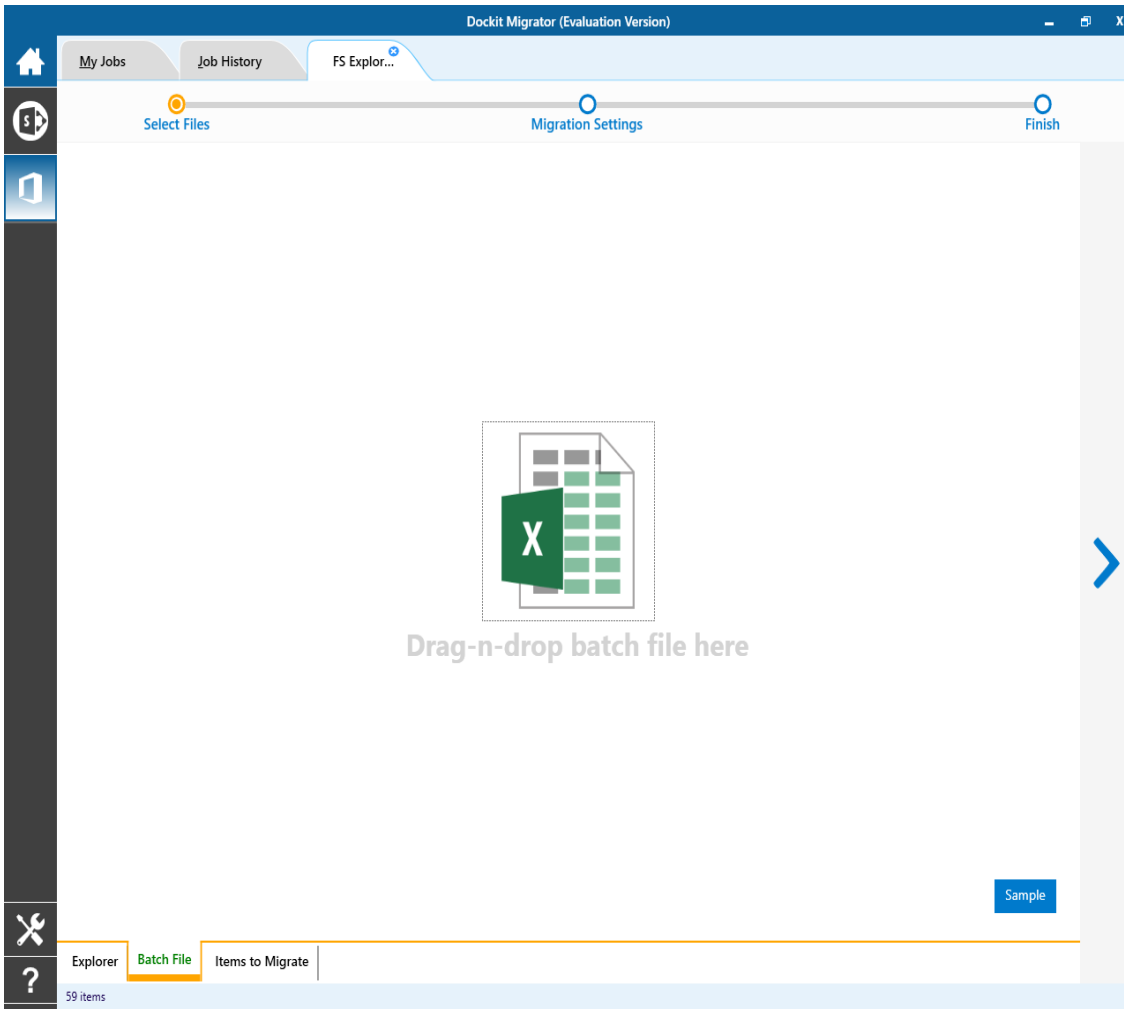
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
3. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor file snippet given below:

Path	Destination Path	New Folder
M:\My Document\Sample File.xlsx	http://sharepoint/technical documents/folder1	folder2/folder3

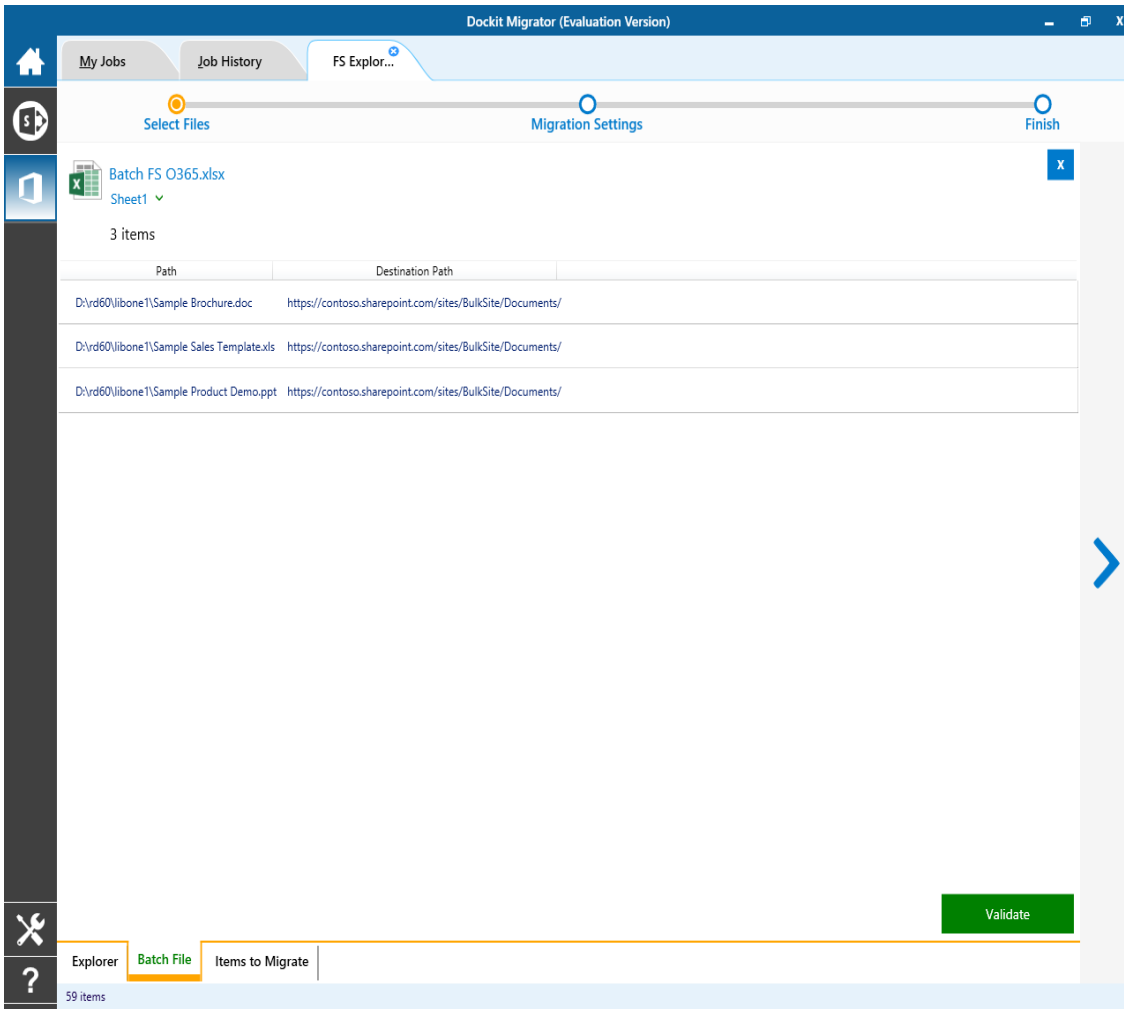
Dockit Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'Sample File.xlsx' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

Follow the steps given below to specify the documents to migrate to the target SharePoint Online location in the batch file

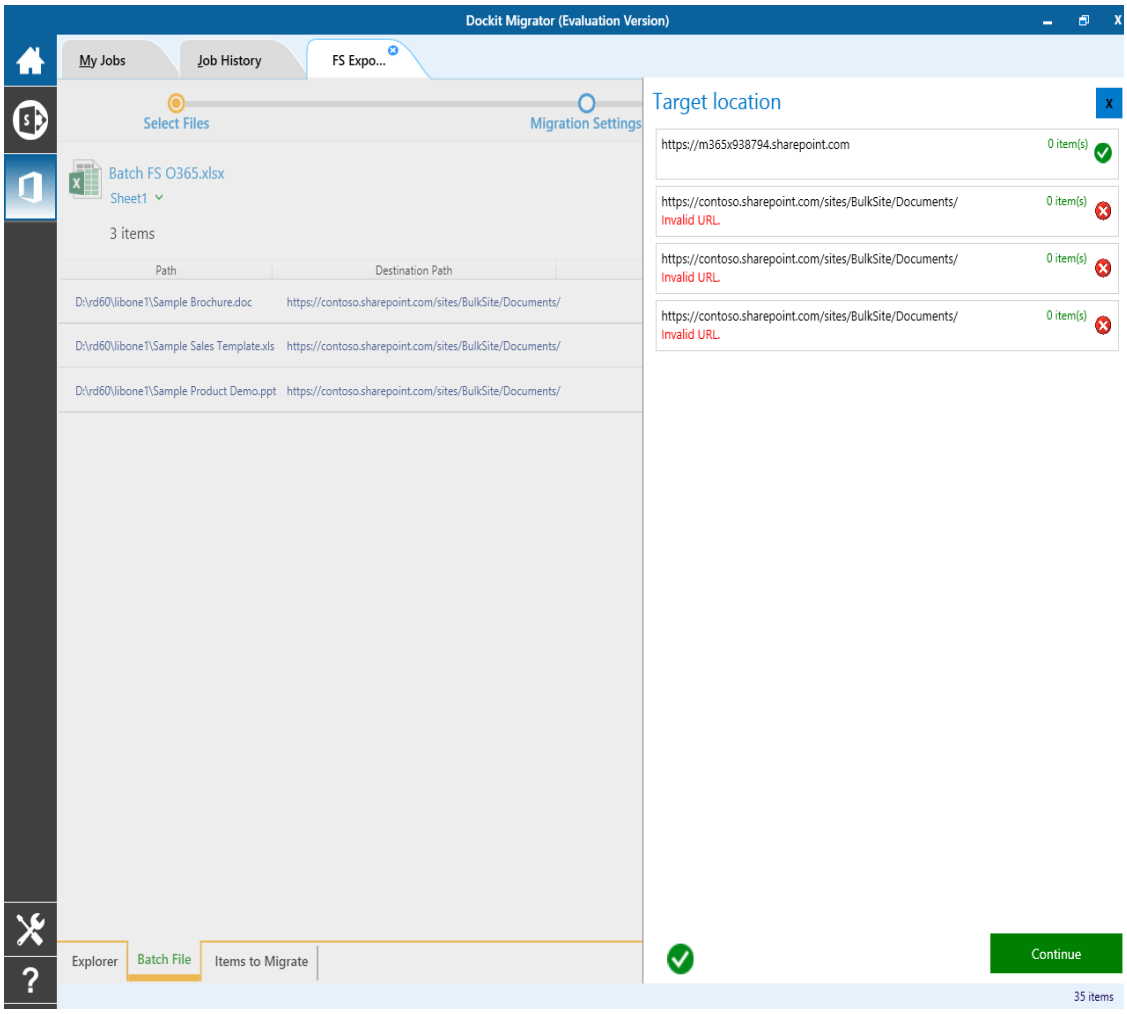
1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below



Batch file content will be shown as below.



2. Click **Validate** button to verify the batch content

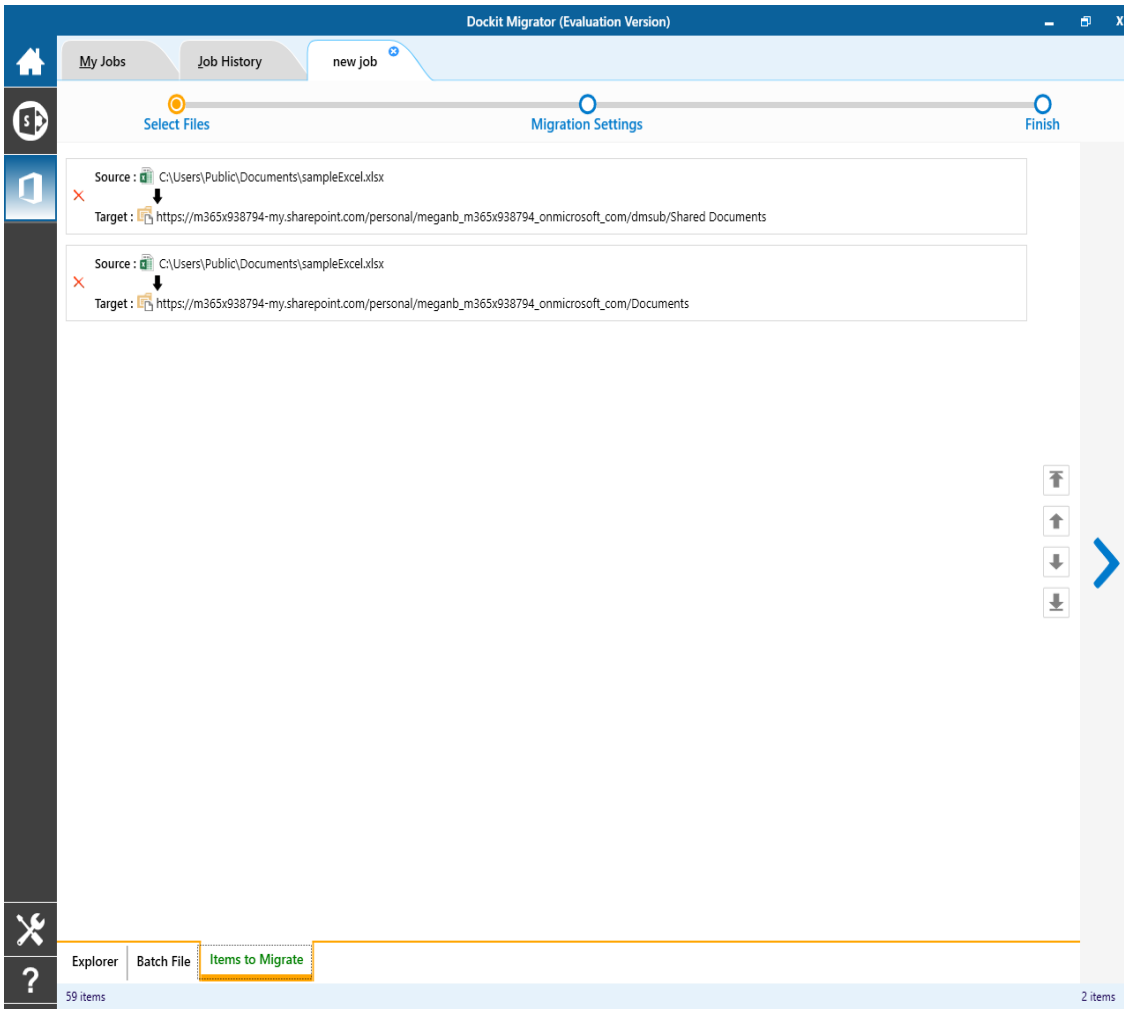


Once the validation is complete, click **Continue** button to proceed for next step. And the batch file content will be added to Items to Migrate tab

4.2.1.1.2 Items to migrate

1. From File explorer you can either drag and drop files to SharePoint explorer or simply select files from file explorer Right Click and Select **Add to SharePoint** to add files to Items to migrate.

The **Items to migrate** appears as shown below:

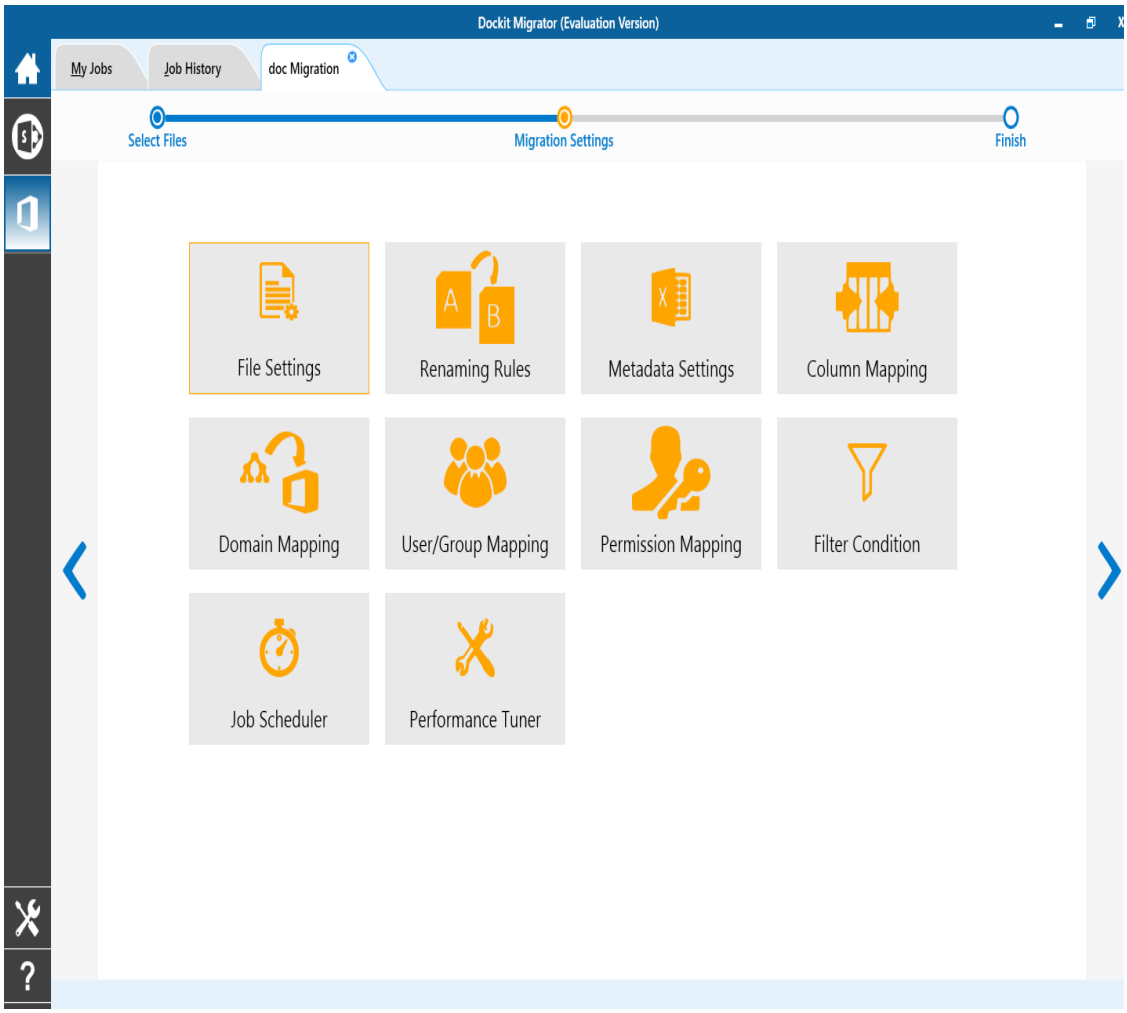


2. The selected folders and files added for import will be displayed in the **Items to Migrate** page. Dockit Migrator processes the top-level folders and files added for import in the order in which it appears in the **Items to Migrate** page. The import process order can be changed by the **navigation** buttons available in the right side of the page. You can remove the files and folders added for import by clicking Red **X** beside the files.

3. Click **>** button to proceed.

4.2.1.1.3 Migration settings

1. Migration Settings will appear as shown below.



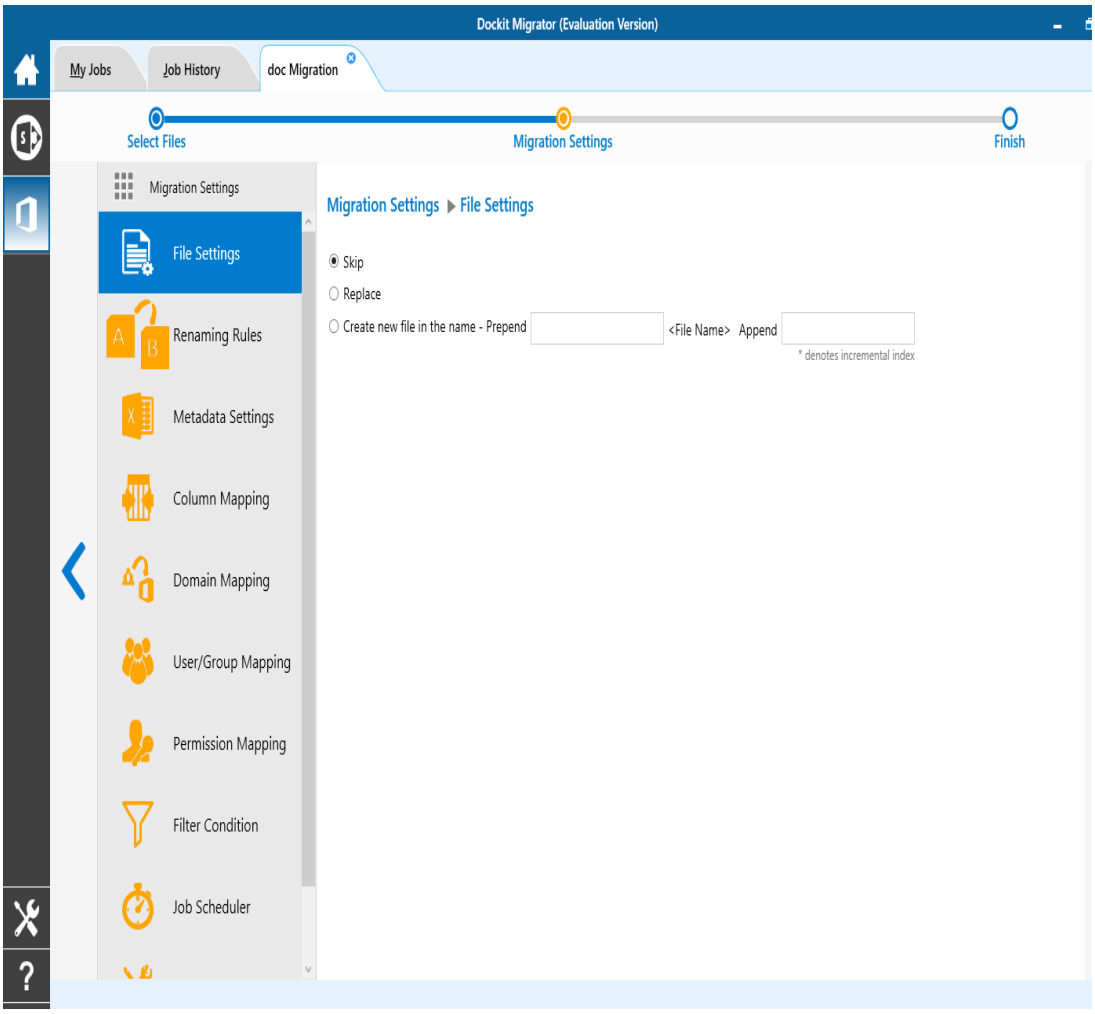
2. From this page, you can :

- File Settings
- Renaming Rules
- Metadata Settings
- Column Mapping
- Permission Mapping
- User/Group Mapping
- Domain Mapping
- Filter Conditions
- Job Scheduler
- Performance Tuner

4.2.1.1.3.1 File settings

To specify the action to be taken by Dockit Migrator when a file with the same name already exists in the destination location:

1
. The **File Settings** step appears as shown below:



2. Select any one of the following options given below:

   a. **Skip** - Skips the file without overwriting.
   b. **Replace** - Deletes the file from the destination location (along with its version history) and imports the source file.
   c. **Create new file** - Creates a new file by appending and prepending the user defined characters with the source file name and imports the newly created file. **Note: *** is the reserved character and denotes incremental index. For example, if a document named 'Sample.docx' already exists in the target location, Dockit Migrator will create a new file with the name as 'Sample1.docx'.

3. Click on **Renaming Rules** or **>** to proceed.

4.2.1.1.3.2 Renaming rules

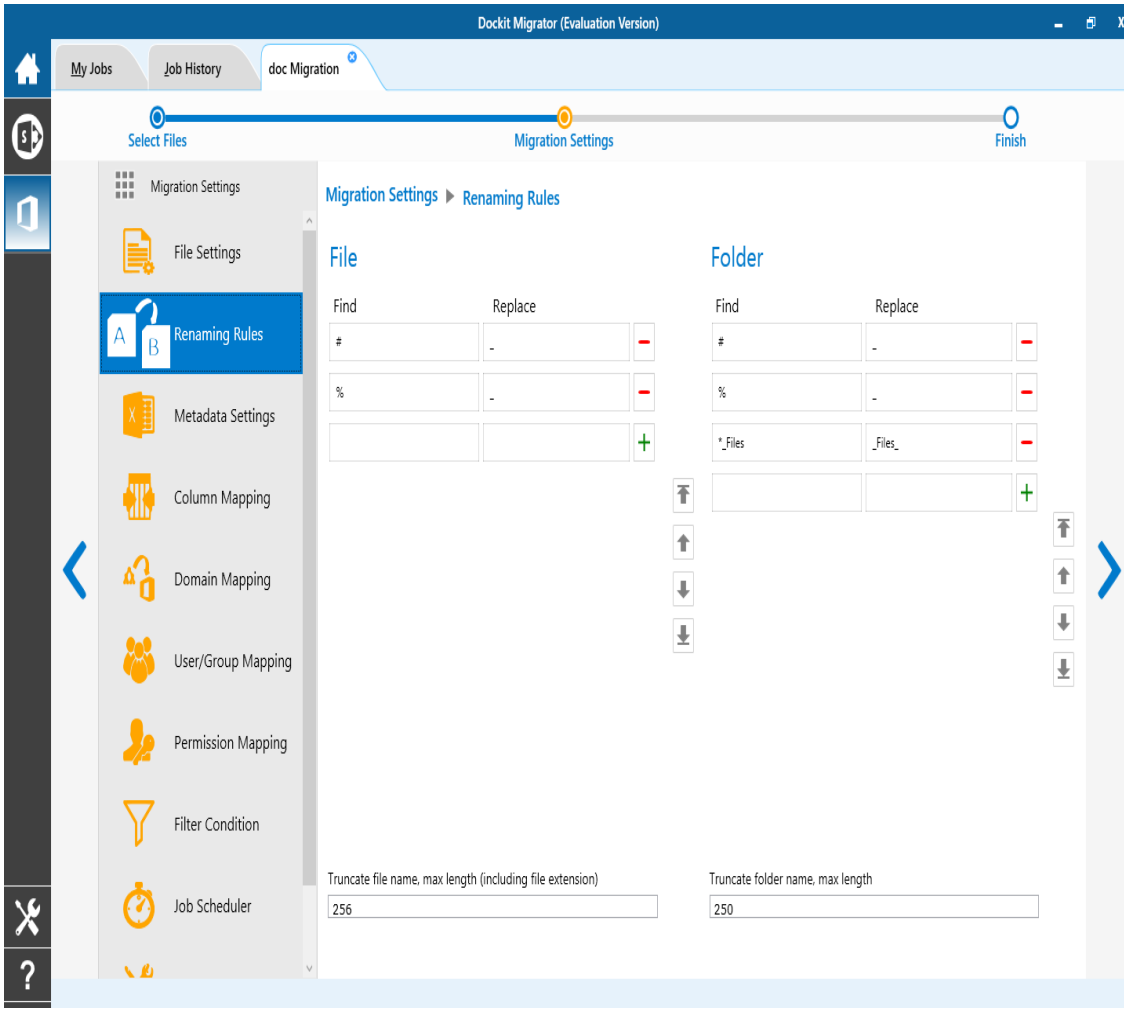
SharePoint does not permit certain characters in folder and file names. Dockit Migrator provides an ability to rename invalid character(s) to valid character(s) and also support any character(s) to be renamed using rules, thereby eliminating the tedious step of renaming the source folders / files.

Dockit Migrator uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Renaming rules

page. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

Also, this technique defines some of the operators ([- ! " $ & ' ( ) * + , . / : ; < = > ? @ [\ ] _ ` { | }] ^) as reserved and have their own meaning in the pattern syntax. If any of these operators are placed in your file name and you wish to replace with some other string, you need to use '\' (backslash) as an escape sequence character in Dockit Migrator Renaming Rules, which will suppress its role and treat them as normal characters like 'A', '1'. Otherwise, there is a chance to misinterpret your rule and hence the resultant file name may not be as expected.

The renaming rules page will appear as shown below :



Folder Renaming Rule :

You can add or remove rules for folder renaming rule. This helps to rename invalid characters in SharePoint to a valid folder name.

Truncate folder names :

Truncate long folders names by specifying the folder name length to use before importing them to a SharePoint library.

1. Select appropriate checkbox for folder and enter a valid character length for folder .

Note : Dockit Migrator leaves the source folder name as-is if the folder name length is

less than the specified value and truncates if the length exceeds the value before importing them to SharePoint.

File Renaming Rule :

You can add or remove rules for file renaming rule. This helps to rename invalid characters in SharePoint to a valid file name.

Truncate file names :

Truncate long file names by specifying the file name length to use before importing them to a SharePoint library.
Select appropriate checkbox for file and enter a valid character length for file name.

2. **Note :** Dockit Migrator leaves the source file name as-is if the file name length is less than the specified value and truncates if the length exceeds the value before importing them to SharePoint.

Sample Renaming Rules

Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	*{empty}*	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	Hello_*	*{empty}*	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	*{empty}*	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	*{empty}*	Sample	Truncate V and the file

				name character following it (immediately succeeding character), if the file names contains V and followed by any one character.
Sample	?p	*{empty}*	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	V??	*{empty}*	Sample	Truncate two characters following the character / letter V in the file name.
SampleFileVersion	*File*	*{empty}*	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	\.	Dot	SampleDotMatrix	Example of escape sequence for .
Sample?File	\?	Text	SampleTextFile	Example of escape sequence for ?
Hello*World	*	*{empty}*	HelloWorld	Example of escape

				sequence for *
Sample$	\$	Dollar	SampleDollar	Example of escape sequence for $
Sample^File	\^	*{empty}*	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello<World	\<	*{empty}*	HelloWorld	Example of escape sequence for <
Hello>World	\>	*{empty}*	HelloWorld	Example of escape sequence for >
[Document	\[	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	\(	Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape

				sequence for)

4.2.1.1.3.3 Metadata File

The following section gives you the guidelines to create an external metadata file to migrate folders, files and metadata to SharePoint Libraries

1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by Dockit Migrator.

2. The Path field will not be carried forward as a metadata field into SharePoint.

3. The first column of all the rows should contain the path of the file e.g., "C:\My Documents\Sample Brochure.doc" (or) " \\ProdServer\My Documents\Sample Sales Template.xlsx".

4. Be consistent with the drive letters and UNC path when adding folders and file into SharePoint library using Dockit Migrator user interface and the path field values in the metadata file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\MyDocs\File1.xlsx). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine_Name\Share_Name\Sample File1.xlsx).

5. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.

6. Ensure date values are in 'Date Only' or 'Date And Time' format.

7. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit Migrator.

8. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit Migrator. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

9. The Managed Metadata column values can be term labels or synonyms of term labels or full path of the term value (full term path). Dockit Migrator will search the specified term value under the specified parent term of the corresponding term set and assign the ID of the matching term value for the managed metadata column. You must provide the path of the term label in the format: *ParentTerm|TermLabel1|TermLabel2|TermLabel3.*

   For example: *"Continent|North America|Country|United States|States|Alaska"* .

   In the example above, if the specified term value 'Alaska' does not exist in the selected term set of the managed metadata column, Dockit Migrator checks if the term set is open to creating new terms / values. If yes, Dockit Migrator will create the new term / value 'Alaska' under the specified term path "Continent|North America|Country|United States|States" automatically. If the term set does not have the provision to create new terms / values, the specified managed metadata column value 'Alaska' will not be added in the specified term path.

The full term path is required only if the selected term set (for managed metadata column) contains any duplicate values. As a best practice, we recommend you to provide the full term path to update the desired term value.

Please note that the new term value creation depends upon the 'Allow Fill-in settings' option available in the library settings.

Note: The term path should be separated by '|' and multiple term values should be separated by ';'

The following section describes the data types supported by SharePoint and an example of how to state the value in the metadata file for import.

SharePoint Data Type	**Remarks**	**Example**
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit Migrator provides an user option to specify the date mask to use for the date fields in metadata file.	"12/30/2009 10:50 AM" "1/25/2010"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"

Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 7;Windows Vista;Windows 2003;Windows XP"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit Migrator will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows 7"
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit Migrator will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"

	be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit Migrator will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit Migrator will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	" http://sharepoint/Shared Documents/My Sample File.doc " "http://sharepoint/Pictures/chart.bmp"
Business Data (BDC) / External Data (BCS)	The value of the primary key column in the LOB record can be given to this field. Dockit Migrator will query for the LOB record using the specified value and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint.	"SBI00008251" "600083" "Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator"

	The BDC / BCS column value along with the filter name can be specified in this field. Dockit Migrator will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:filter name, **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit Migrator also automatically fills-up the column values associated with the BDC / BCS column during migration.	If the filter name contains colon (:) in its name, use the following syntax: "FILTER:Product:Product ID,QUERY:Dockit Migrator" "FILTER:ID:Name,QUERY:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit Migrator will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit Migrator checks if the term set is open to creating new terms. If yes, Dockit Migrator creates the new terms under the term path specified in the metadata	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit Migrator will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit Migrator will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit Migrator checks if the term set is open to creating new terms. If yes, Dockit Migrator creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit Migrator will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent|North America|Country|United States| States|California;Continent|North America|Country|United States| States|Alaska" "Washington;California;Alaska"
Task Outcome	Text or Numeric value can be given to this field. Do not use	"Complete" "4"

	multiple values for this column type.	

The following tables below describe the syntax to be used in the external metadata file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

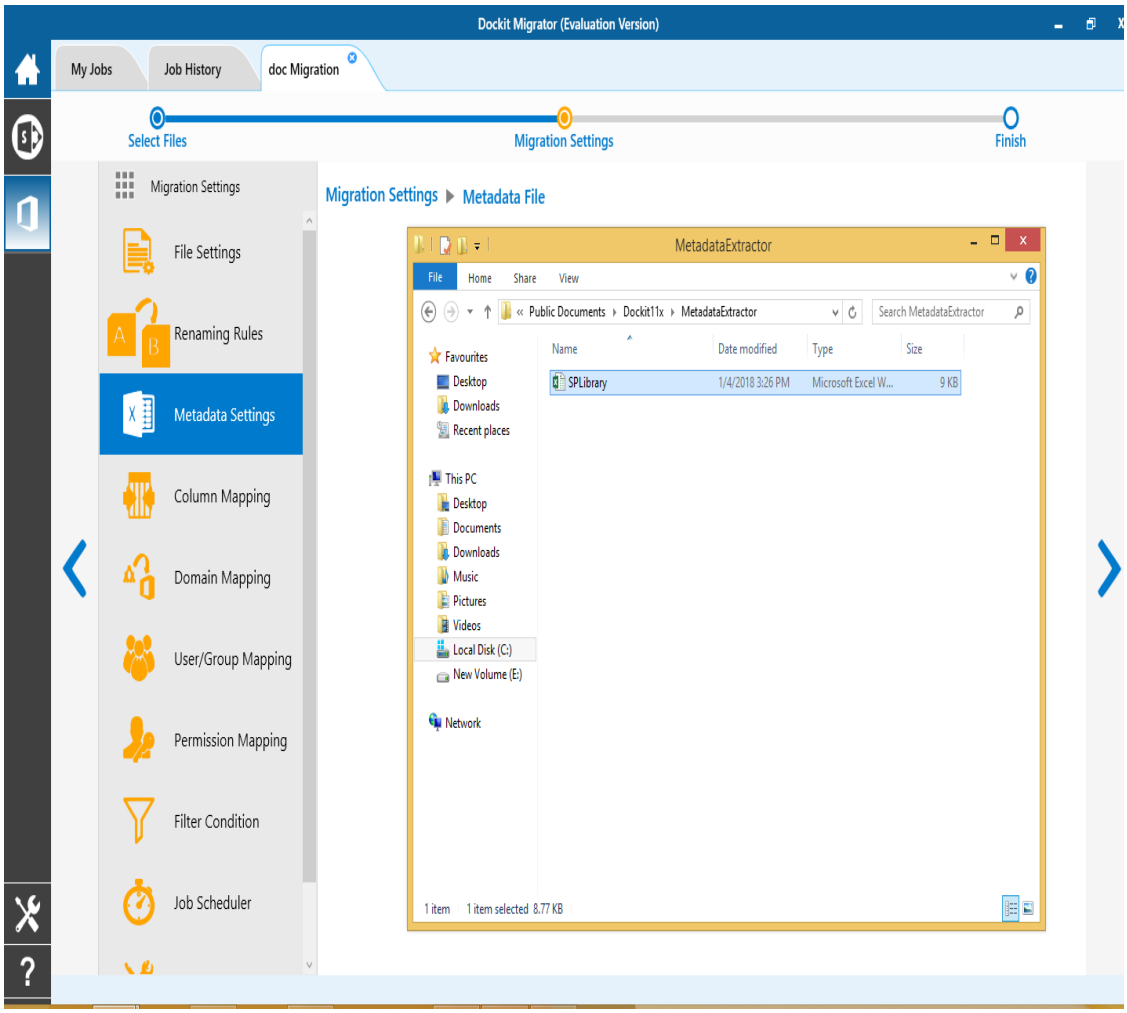
Single Value	**Example**	**Final Result**
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. ** - The delimiter ';#' is a reserved character pattern in the Choice field column. The single value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#"	Windows Live;#Mail

Multi-Value	**Example**	**Final Result**
In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Windows Live Spaces; Mesh ;Windows Azure;Windows HPC
In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. ** - The delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its value to be*	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail ;Windows Photo Gallery

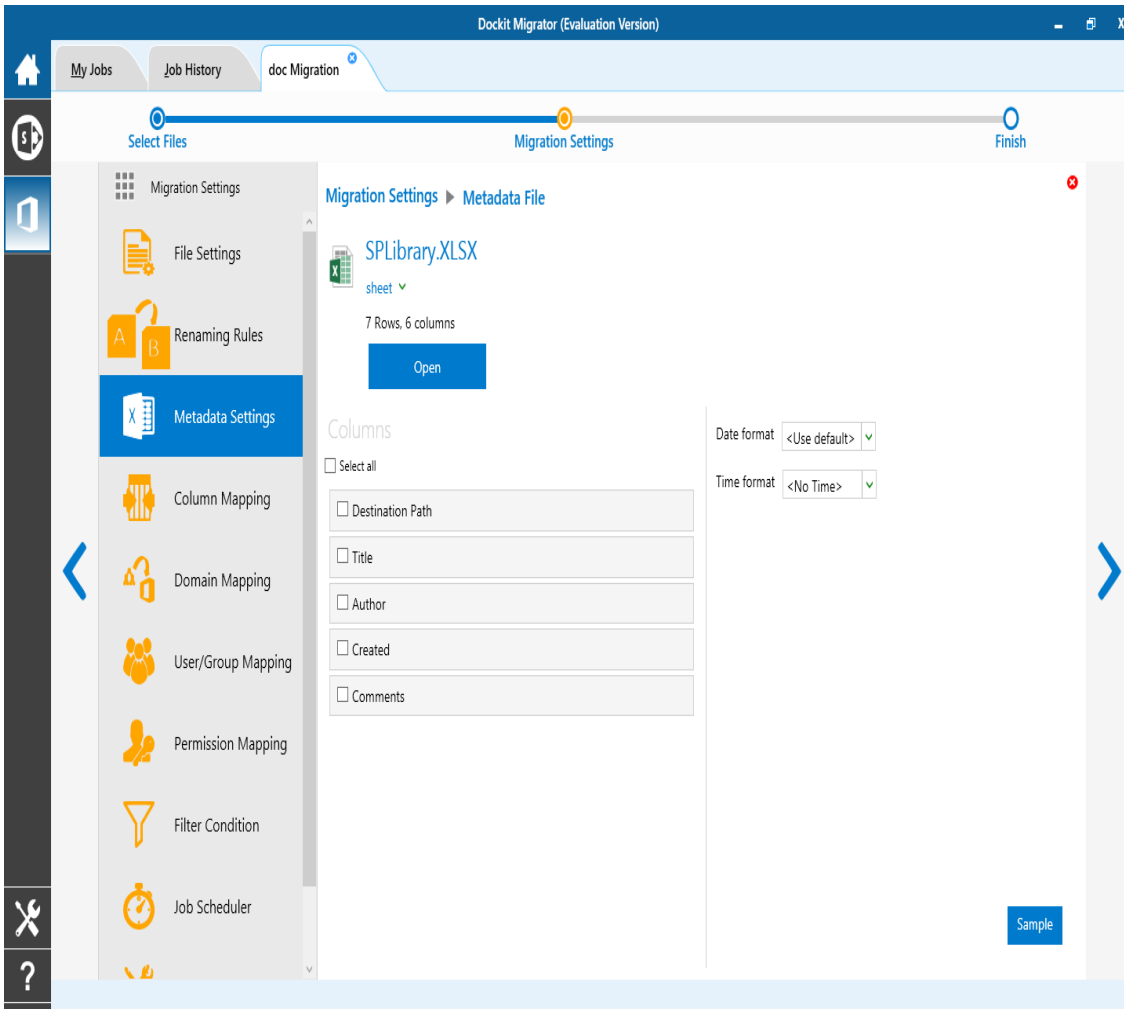
assigned to the Choice field column in SharePoint.		

Follow the steps given below to add metadata file for migration.

1. Click to add the metadata file. It will be shown below

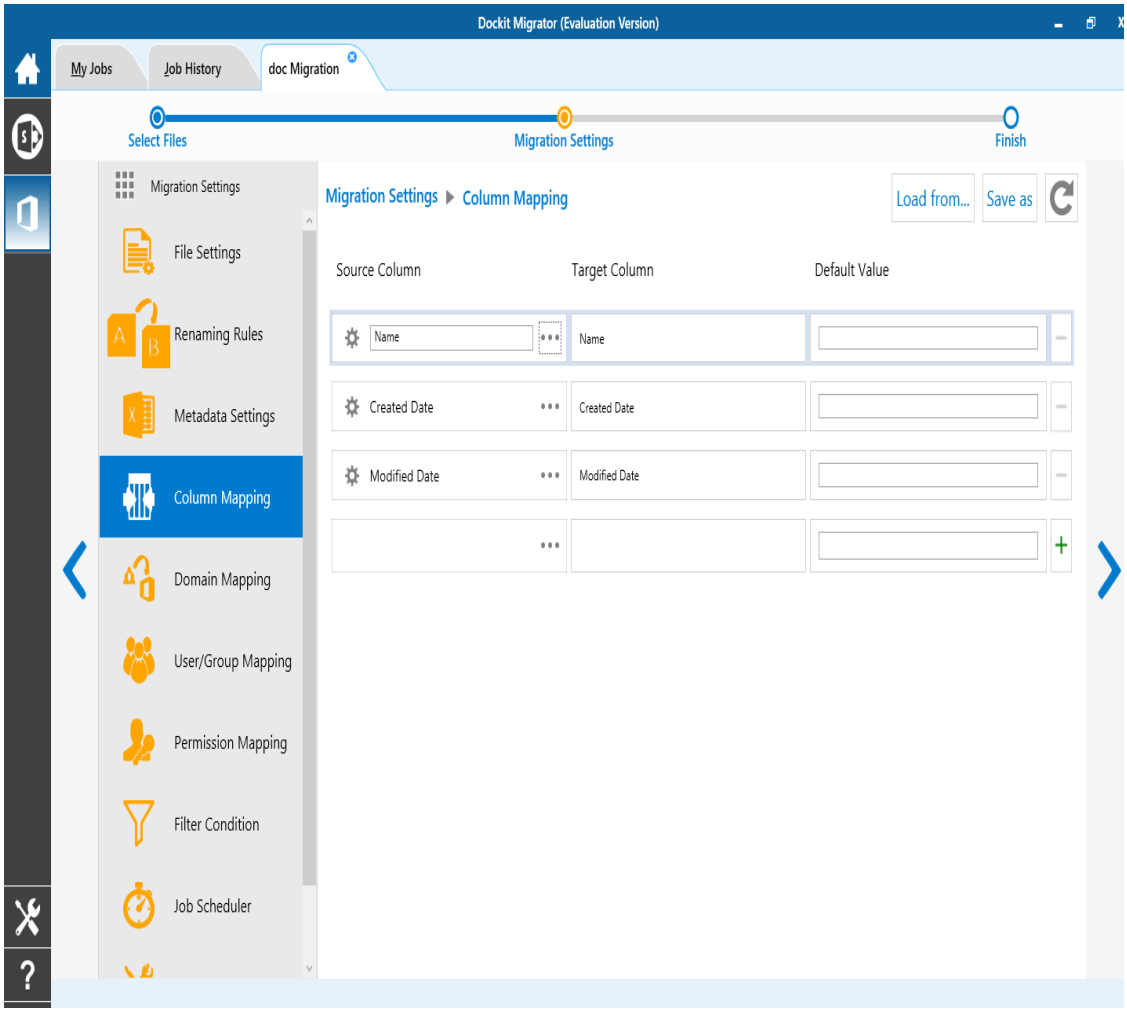


2. Once the metadata file is loaded as shown below, select the desired columns for migration.


Dockit Migrator (Evaluation Version)
My Jobs
Job History
doc Migration
Select Files
Migration Settings
Finish
Migration Settings
File Settings
Renaming Rules
Metadata Settings
Column Mapping
Domain Mapping
User/Group Mapping
Permission Mapping
Filter Condition
Job Scheduler
Migration Settings ▶ Metadata File
SPLibrary.XLSX
sheet
7 Rows, 6 columns
Open
Columns
Select all
Destination Path
Title
Author
Created
Comments
Date format
<Use default>
Time format
<No Time>
Sample

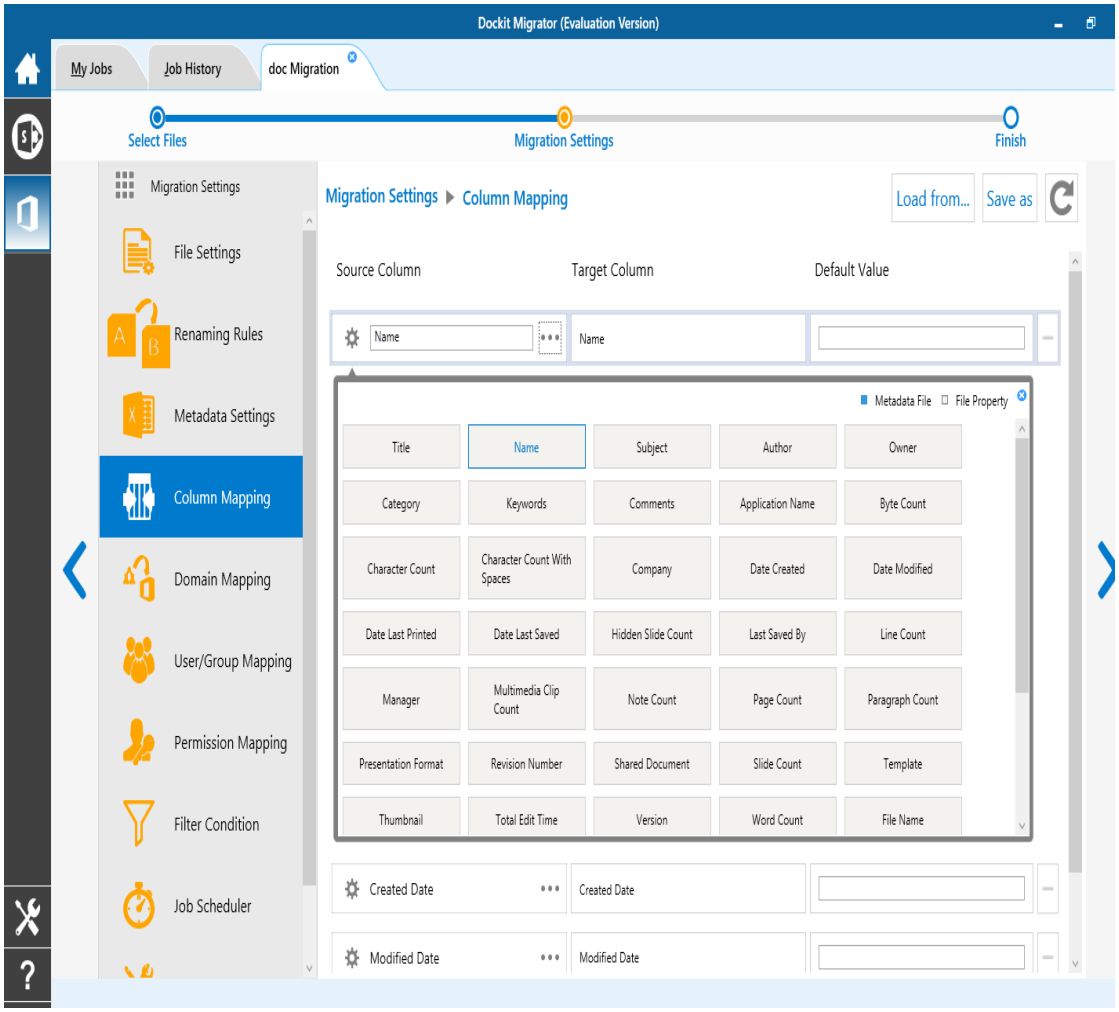
4.2.1.1.3.4 Column Mapping

Column mapping screen will appear as shown below.



1. You can click on to load all columns from metadata file.

You can select a column to map by clicking on to get a list of file and metadata properties.



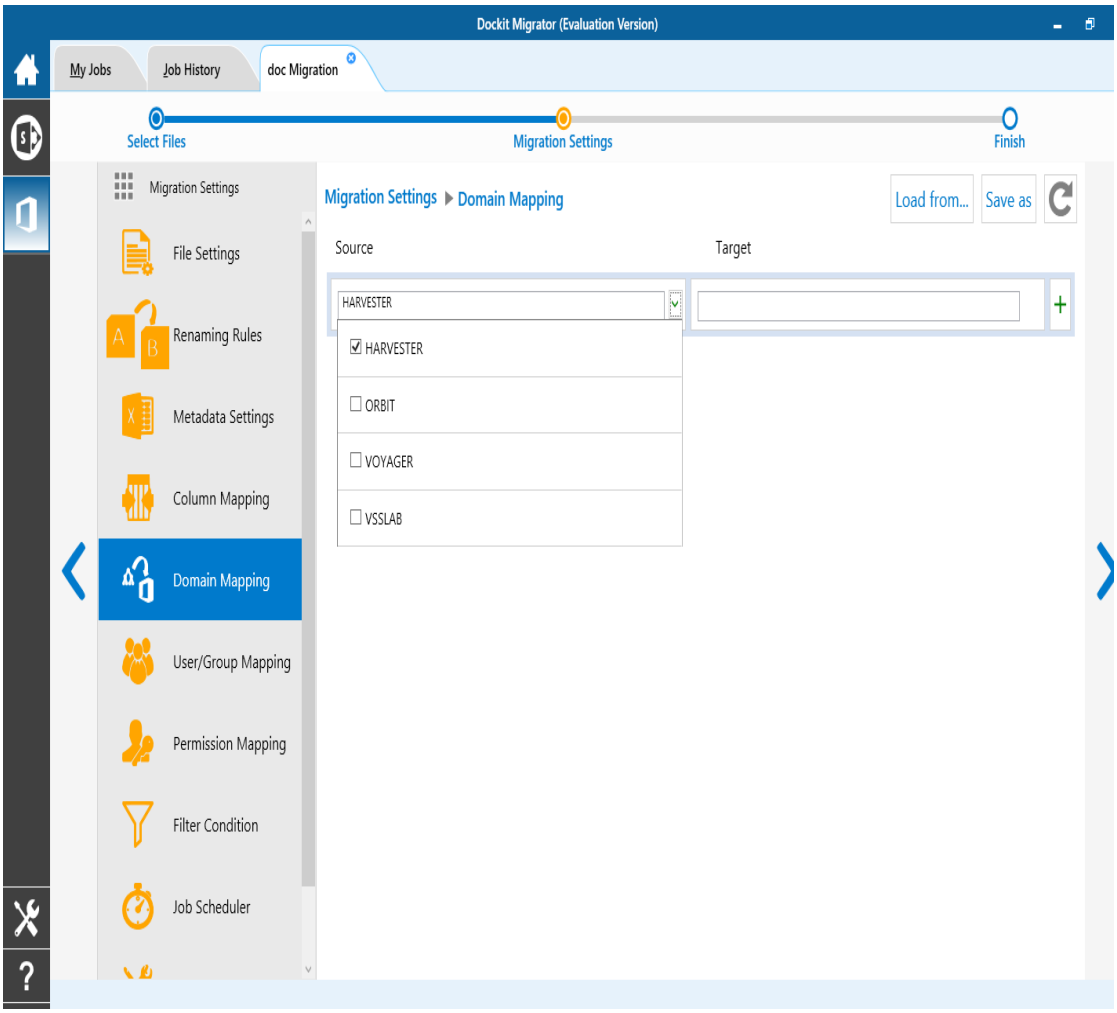
a. **File Properties** - gives a list of available file system columns.
b. **Metadata Properties** - gives a list of columns available in metadata file.

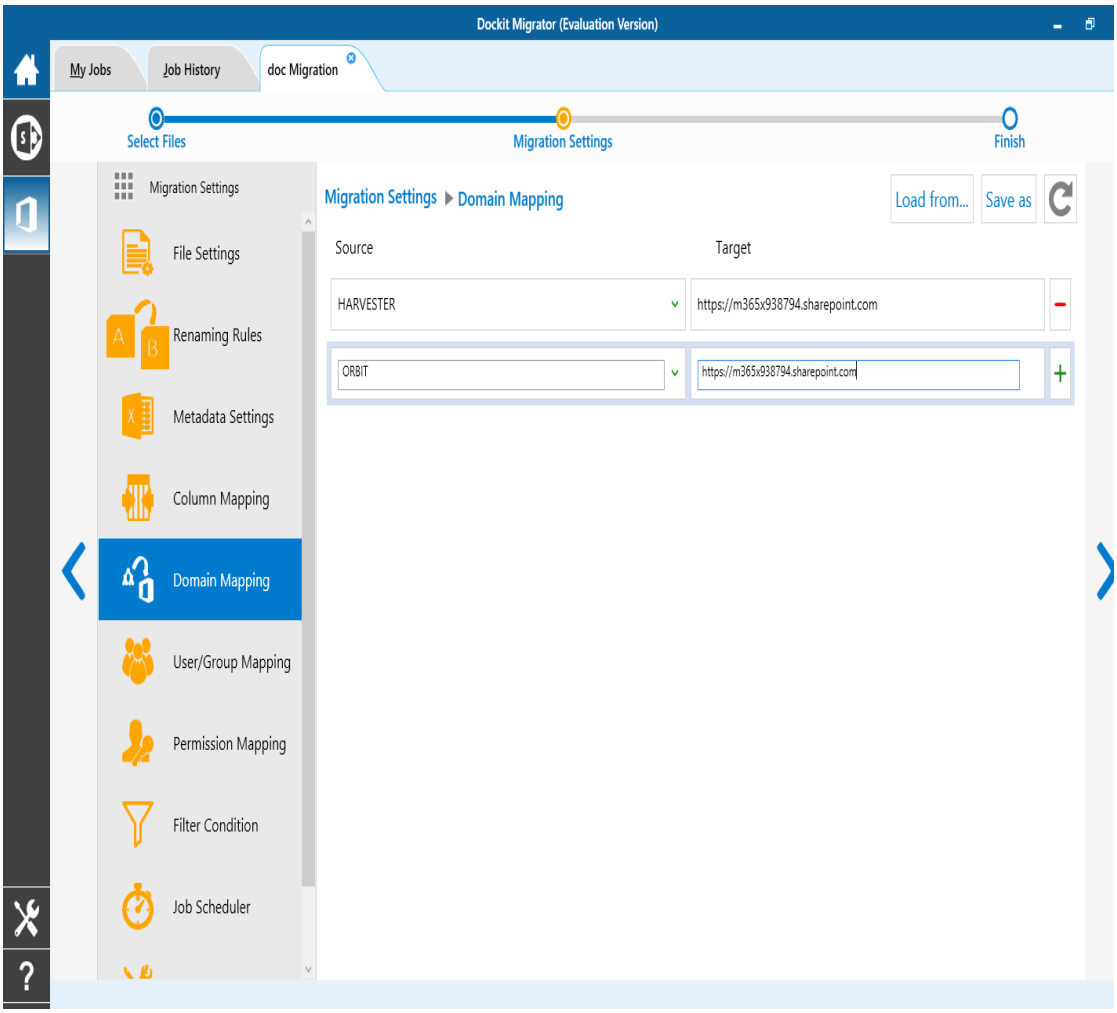
2. Click **>** to proceed.

4.2.1.1.3.5 Domain Mapping

Dockit Migrator uses domain mapping to replace the unavailable domain with the valid domain while assigning permissions (users / groups) for the folder / file imported to SharePoint.

Dockit Migrator domain mapping enables you to load the list of domains available with the network and it appears in both source and target items as shown below.


Dockit Migrator (Evaluation Version)
My Jobs
Job History
doc Migration
Select Files
Migration Settings
Finish
Migration Settings
File Settings
Renaming Rules
Metadata Settings
Column Mapping
Domain Mapping
User/Group Mapping
Permission Mapping
Filter Condition
Job Scheduler
Migration Settings ▸ Domain Mapping
Load from...
Save as
Source
Target
HARVESTER
HARVESTER
ORBIT
VOYAGER
VSSLAB



Select appropriate source domain (s) from the domain list and select the target domain to map from the list of available target domains. And also have the option to enter the domain names of your own in domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research, vyapin.onmicrosoft.com etc...

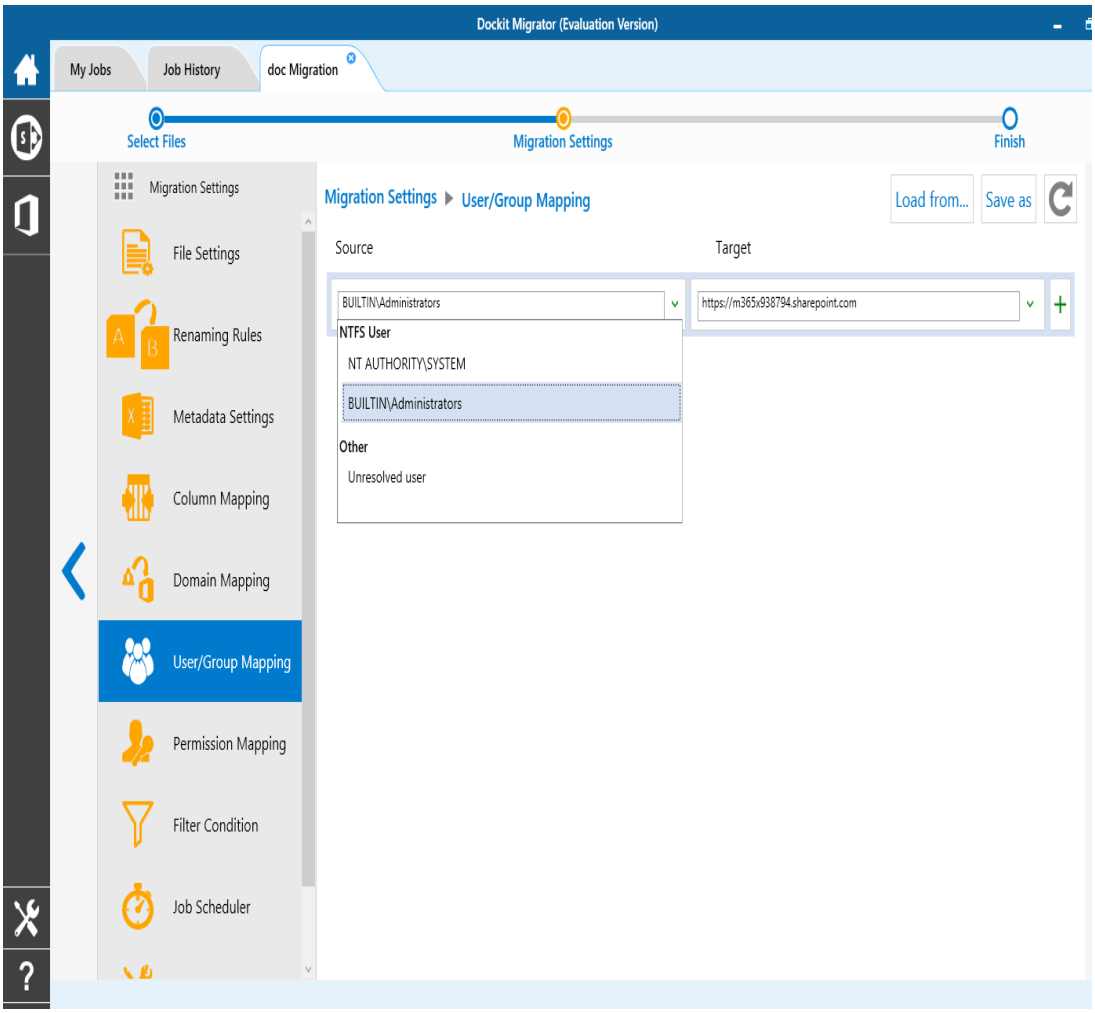
Note: As for entering free texts, multiple source domains can be entered, separated by comma.

4.2.1.1.3.6 User/Group Mapping

Dockit Migrator uses user / group mapping to replace the unavailable user / group with valid SharePoint user / group while migration.

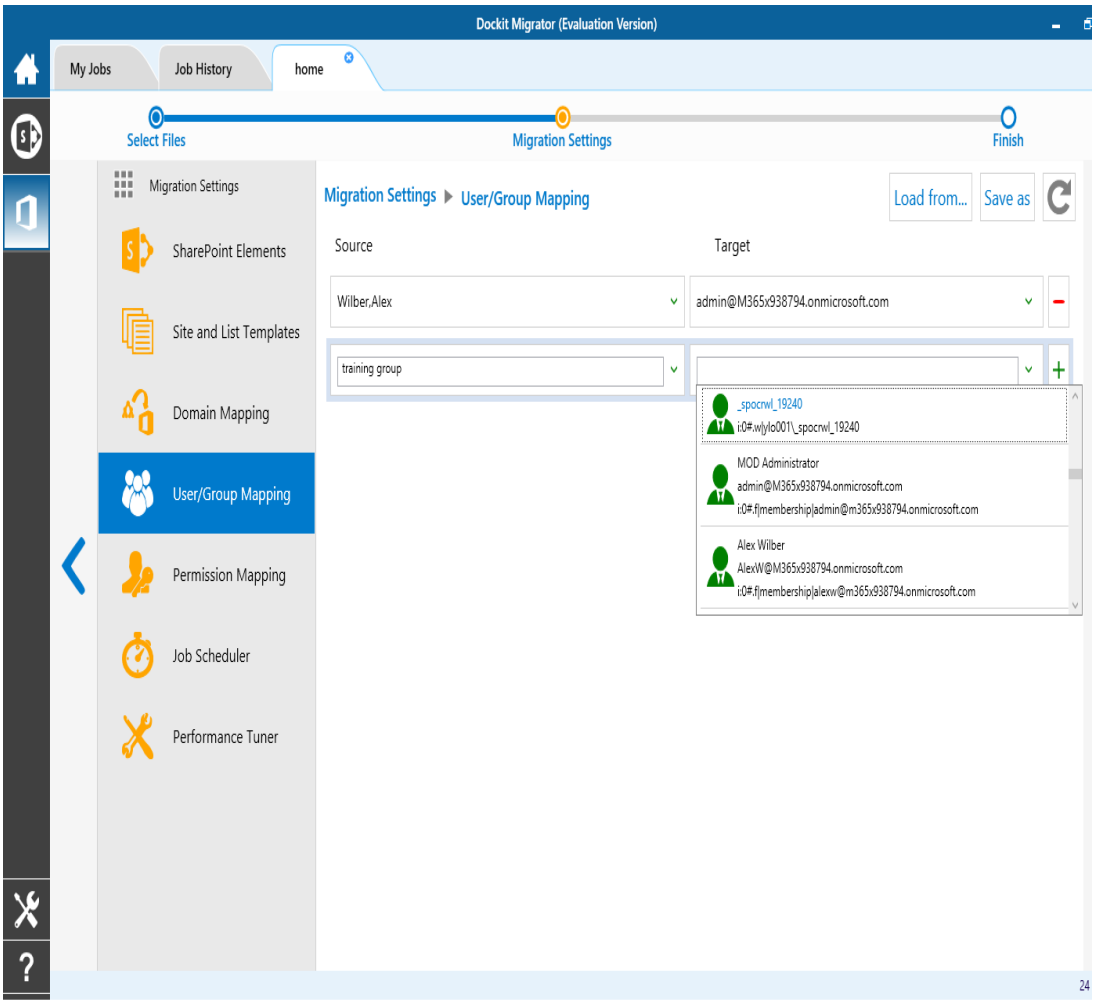
Source User

1. Dockit Migrator user / group mapping enables you to load the list of source users from items to migrate.



Target User

2. Dockit Migrator automatically loads the list of target users / group from the connected site.



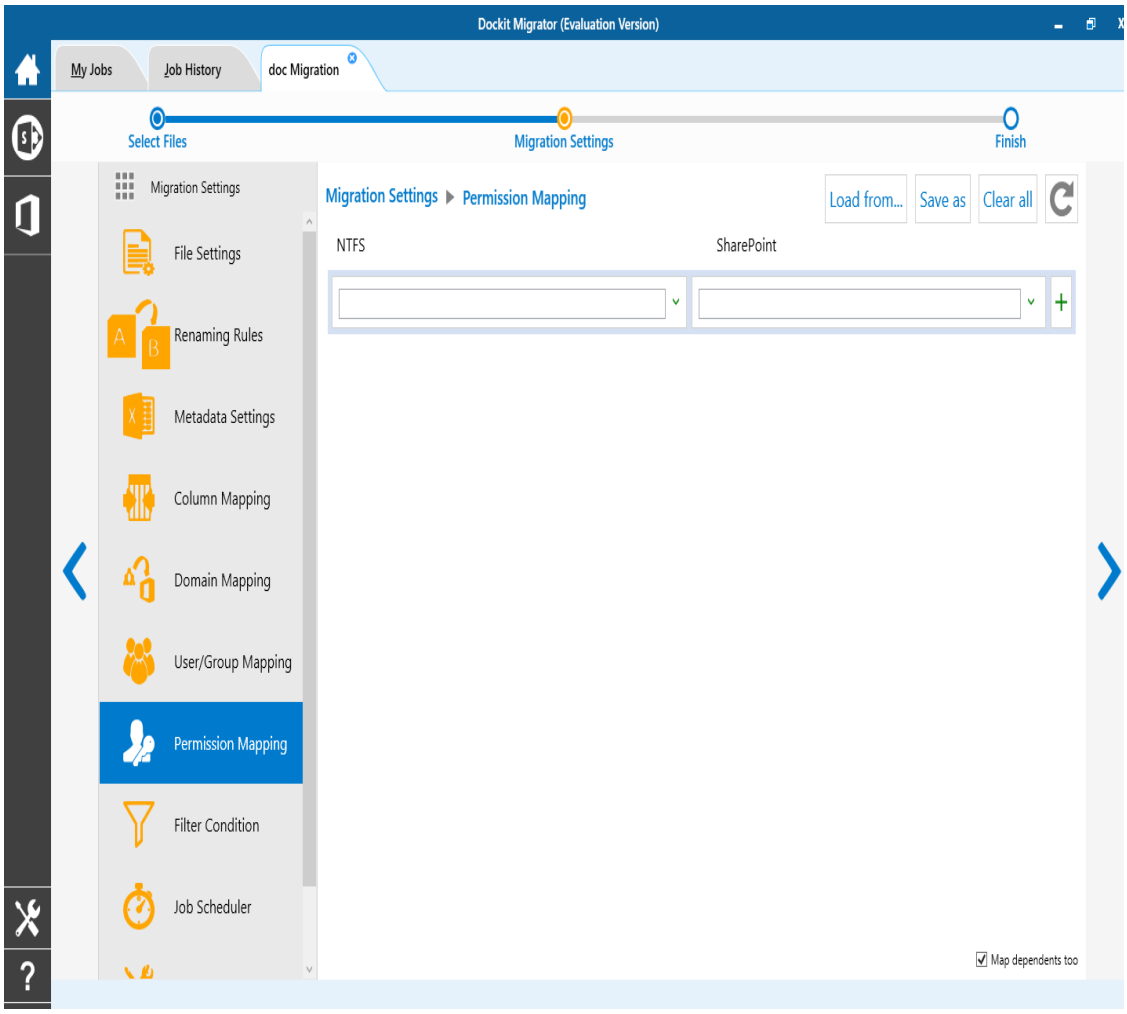
You also have the option to enter the user / group of your own in user mapping.

Select Unresolved user from source combobox to map all unresolved / unavailable users from source user to a valid user in target SharePoint.

4.2.1.1.3.7 Permission Mapping

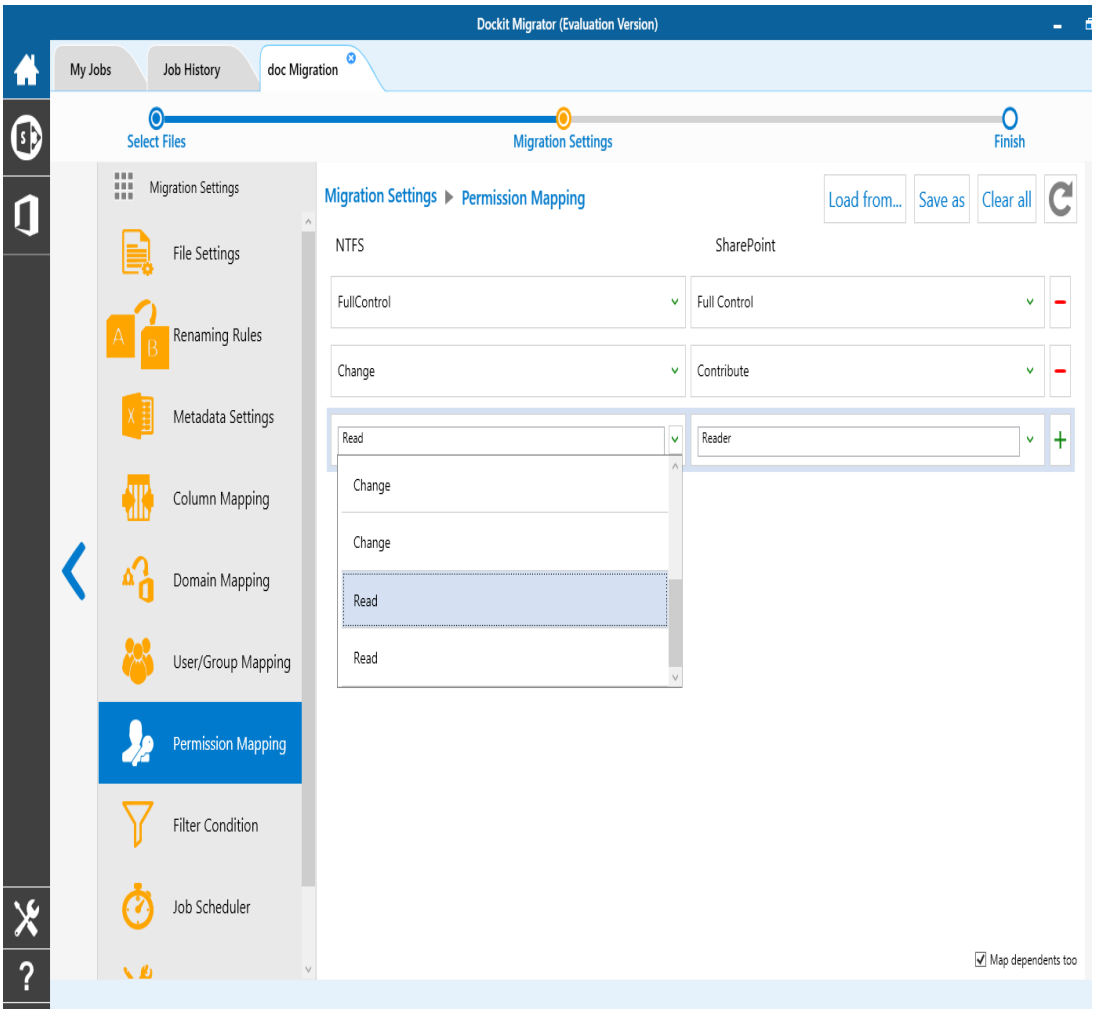
Dockit Migrator uses permission mapping to map the NTFS permissions to its equivalent SharePoint permission levels and it uses various mapping such as user / group and domain mapping in seperate tab.

The Migrate Permission option will allow you to map permission. It appears as shown below.



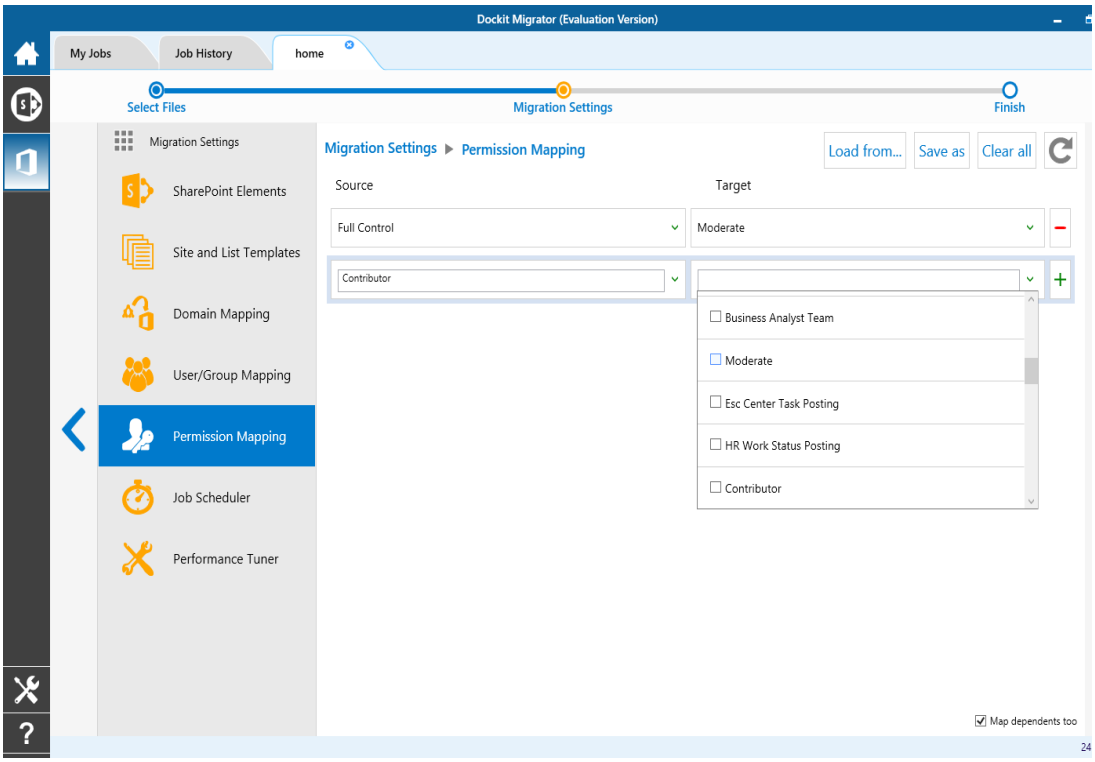
Source Permission

1. Dockit Migrator automatically loads the list of source permissions from items to migrate.



Target Permission

2. Dockit Migrator automatically loads the list of target permissions from the connected site.



See the following sections for more information

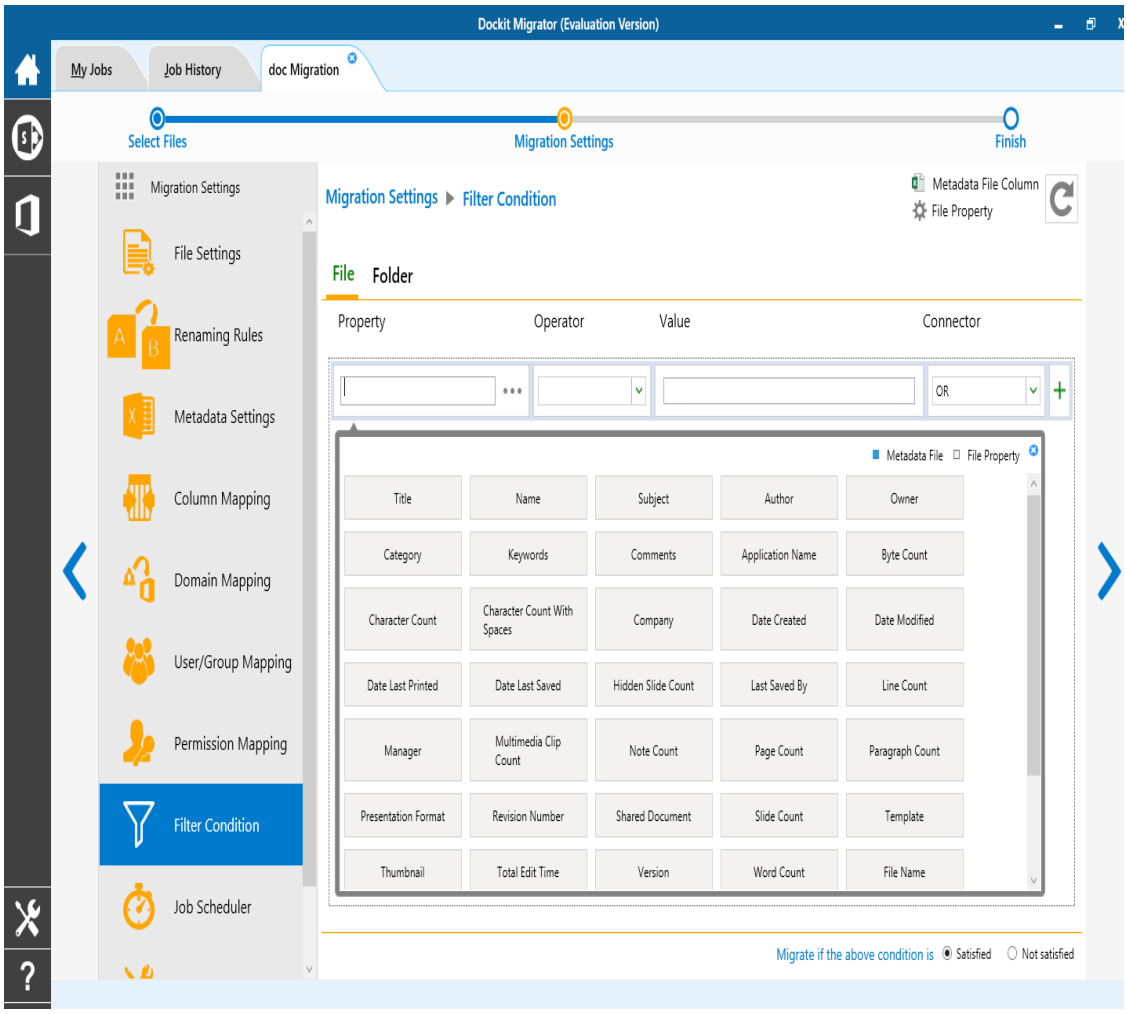
- User Mapping
- Domain Mapping

4.2.1.1.3.8 Filter Conditions

Dockit Migrator can migrate or upload folders and files to target SharePoint Online after they meet certain criteria. Dockit Migrator will migrate folders and files based on these filter conditions. Filters can be created using metadata columns and values (from external metadata file), file properties and file information (created date, modified date and file extension). Use the steps outlined in this section to define an import condition based on folder level and/or file level property filters.

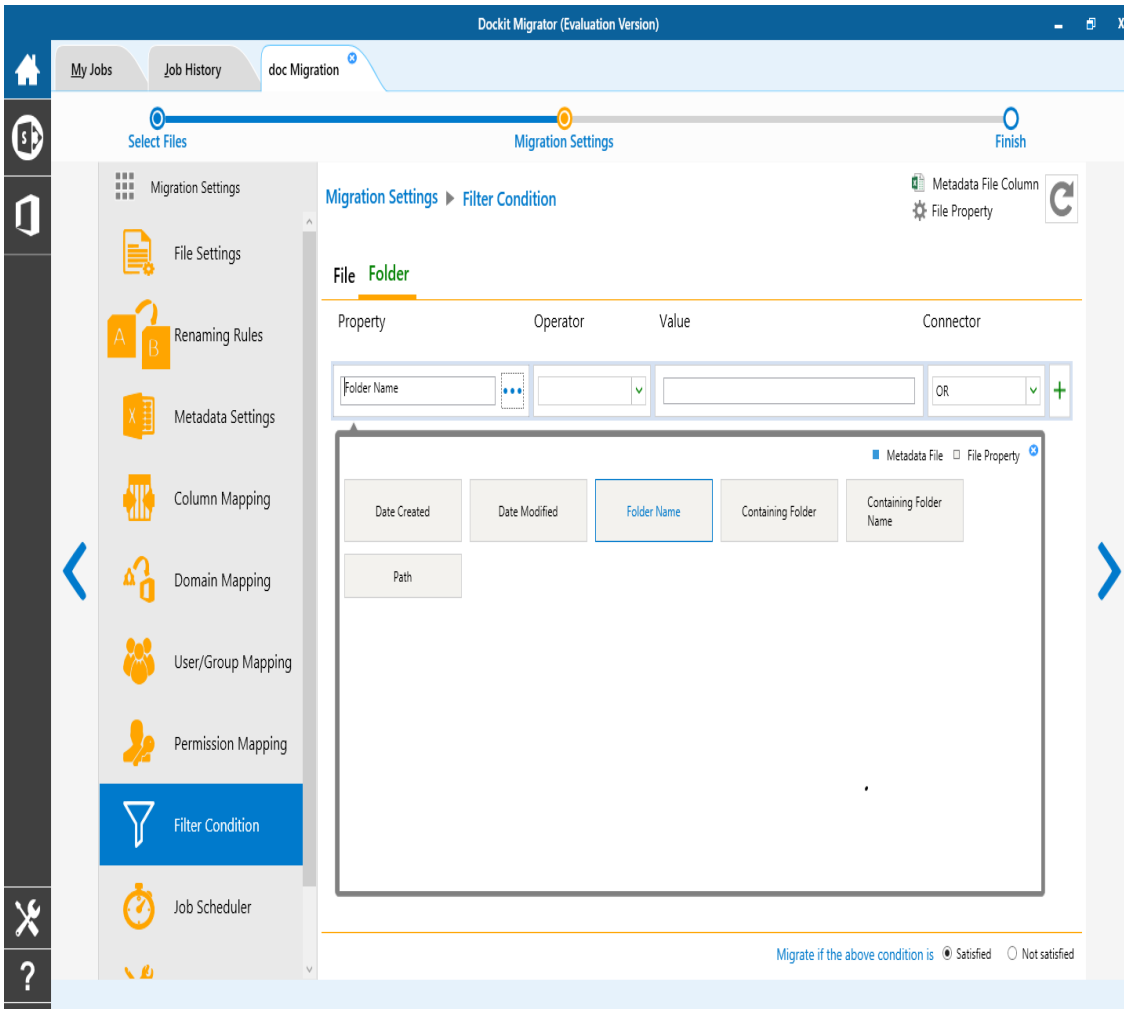
1. Select the filter conditions settings from migration settings. And add filter condtions for File/Folder filter as shown as below.

File Filter



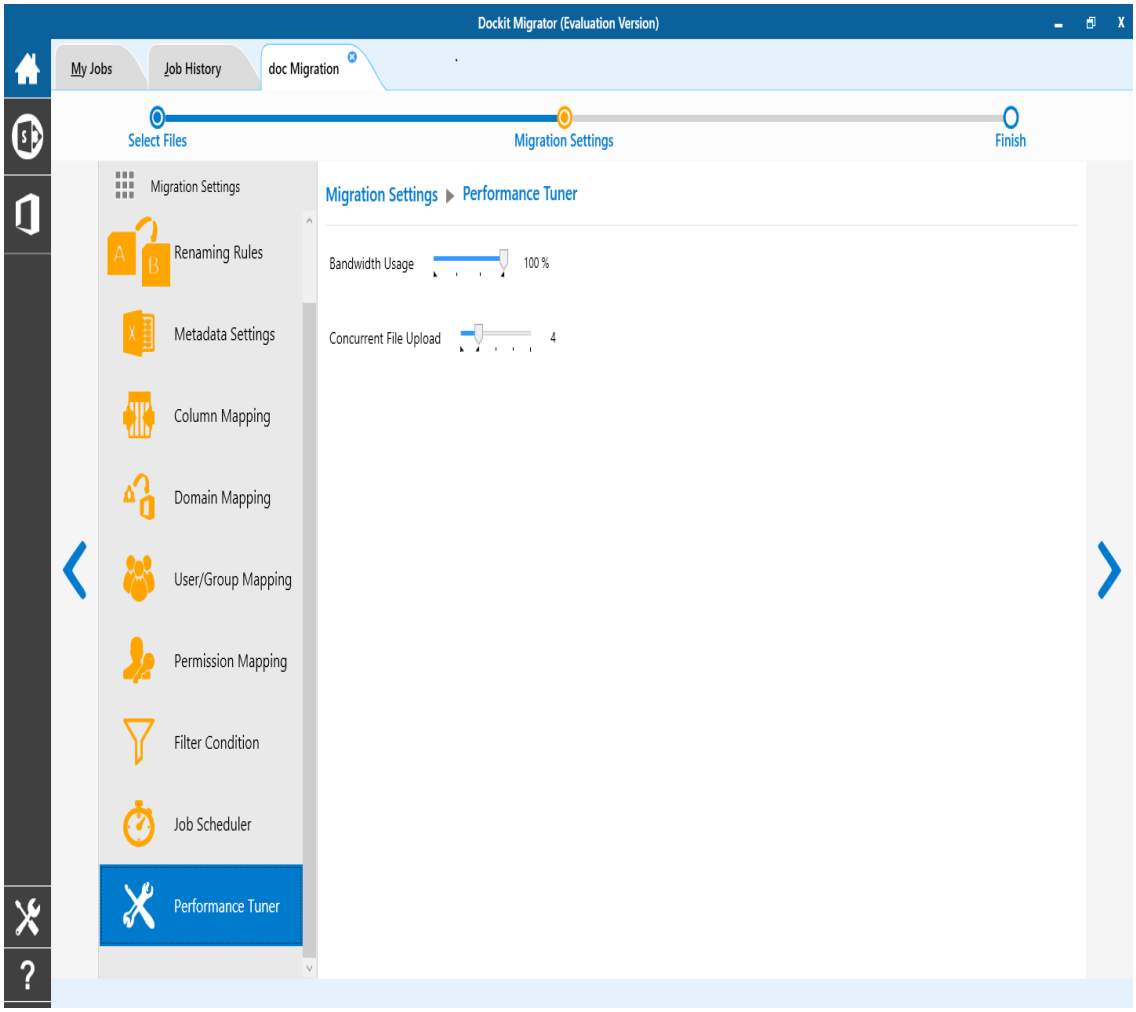
2. Add folder conditions in folder filter tab as shown as below.

Folder Filter



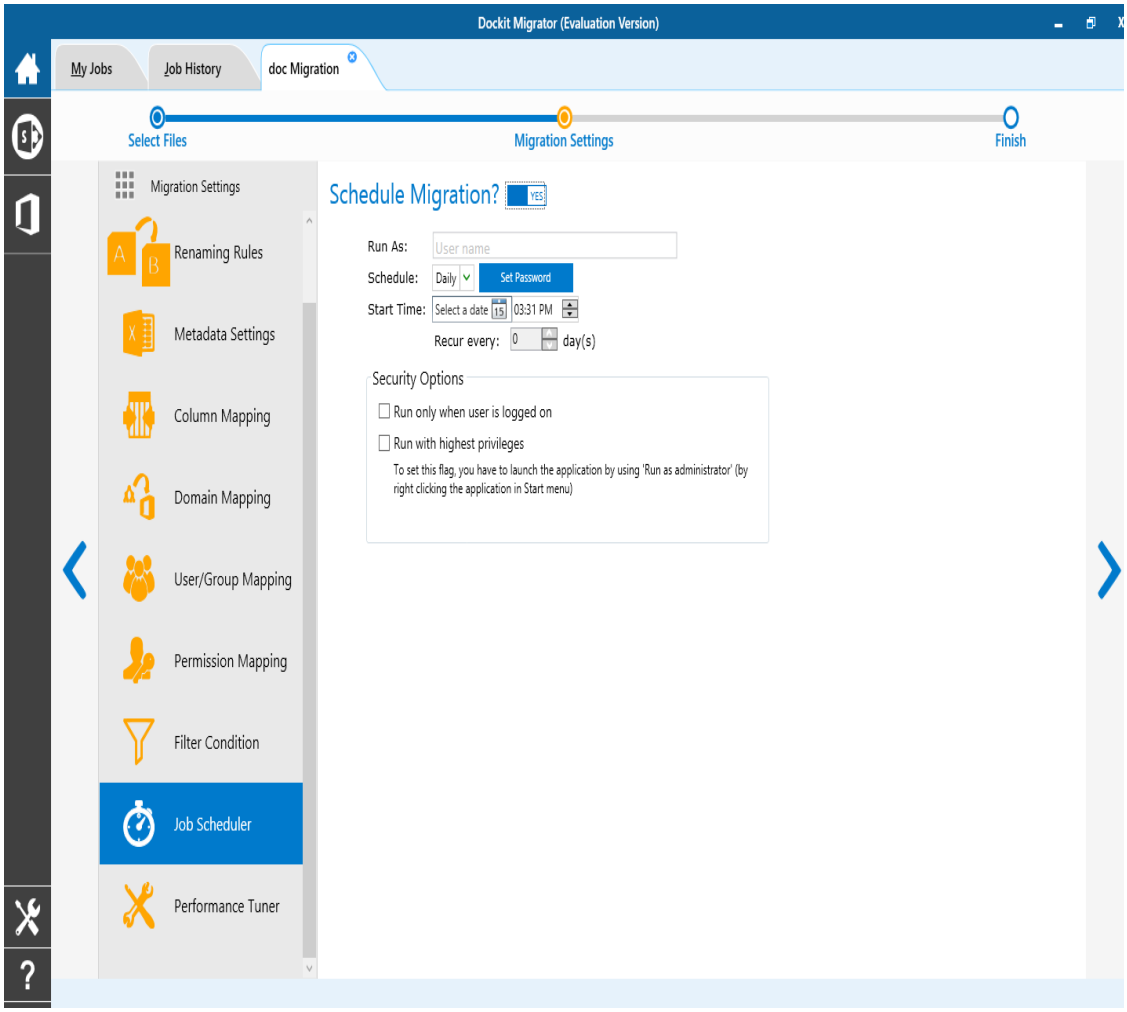
4.2.1.1.3.9 Performance Tuner

To set percentage of Network bandwidth that Dockit Migrator can use during migration and number of files that can be uploaded concurrently to improve performance.


Dockit Migrator (Evaluation Version)
My Jobs
Job History
doc Migration
Select Files
Migration Settings
Finish
Migration Settings
Renaming Rules
Metadata Settings
Column Mapping
Domain Mapping
User/Group Mapping
Permission Mapping
Filter Condition
Job Scheduler
Performance Tuner
Migration Settings ▸ Performance Tuner
Bandwidth Usage
100 %
Concurrent File Upload
4

4.2.1.1.3.10 Job Scheduler

1. The **Job Schedule Settings** step appears as shown below:



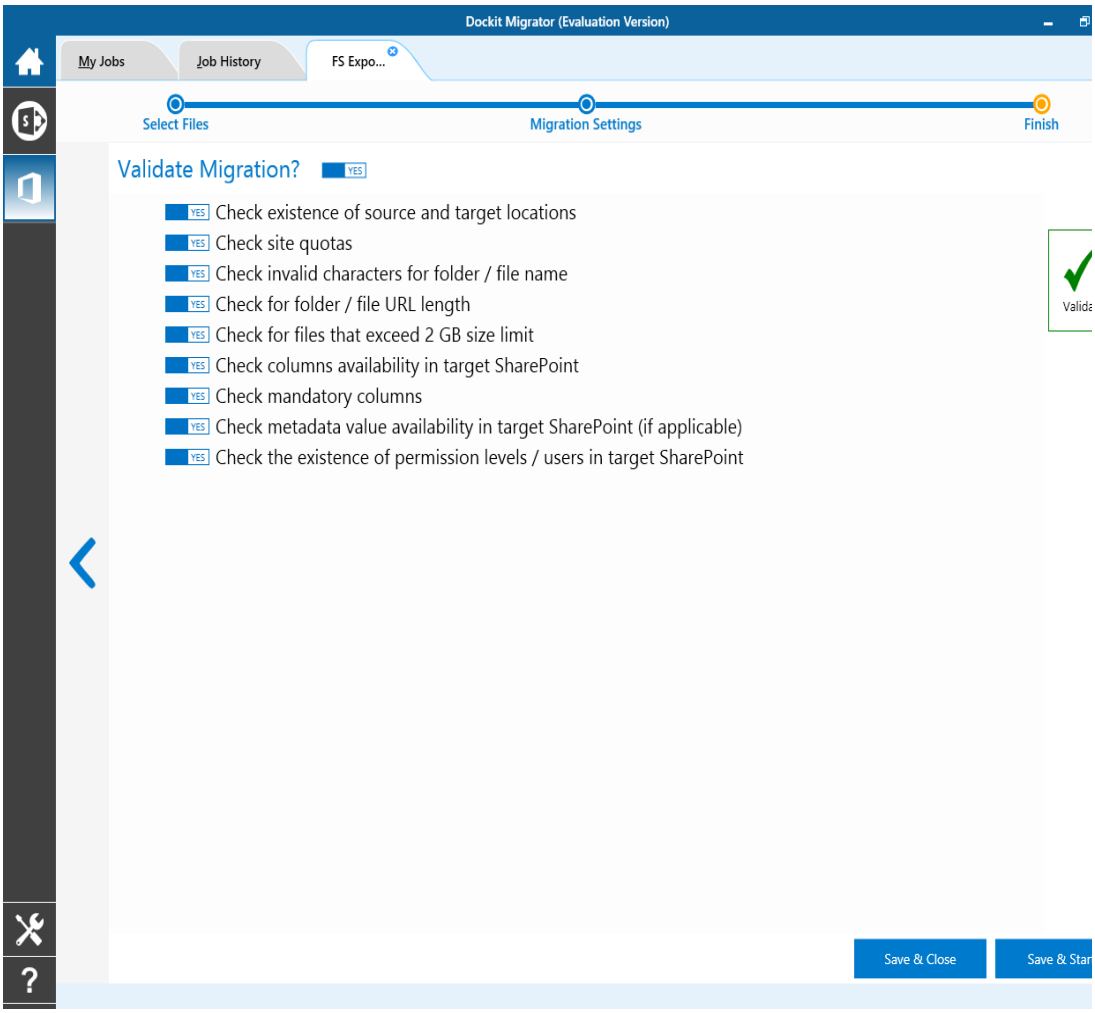
2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

Note: The option **Run with highest privileges** will be available only if you launch the application using **Run as administrator** command.

4.2.1.1.4 Pre-migration Validation

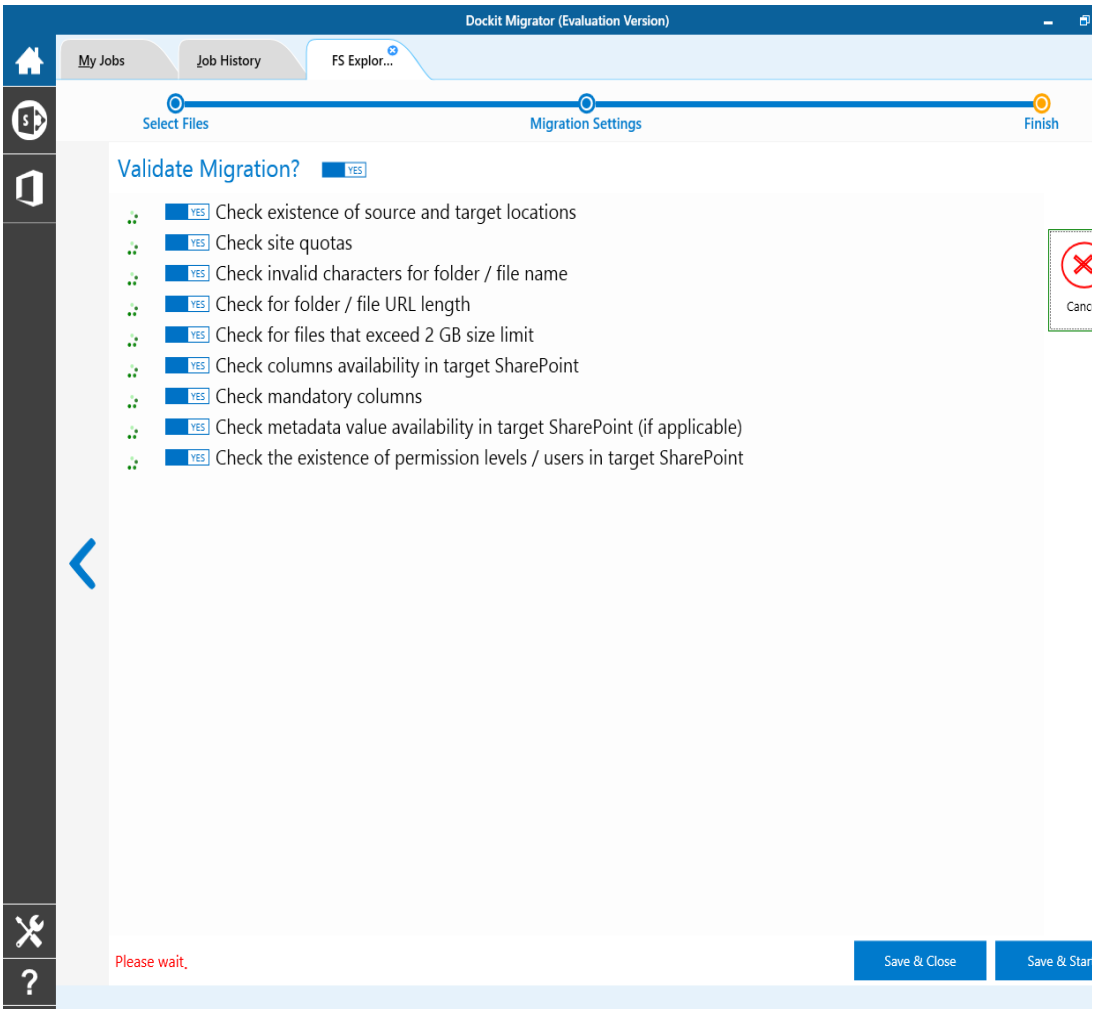
Pre-migration Validation tool helps you validate the exact steps performed by Dockit Migrator during the migration process. This tool does not migrate any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to migrate job settings or any SharePoint settings to ensure correctness.

1. The **Pre-migration Validation** step in the Dockit Migrator validation page appears as shown below:



2. Click **Validate** button to invoke the Pre-migration Validation tool.

3. You will notice the validation progress as shown below.

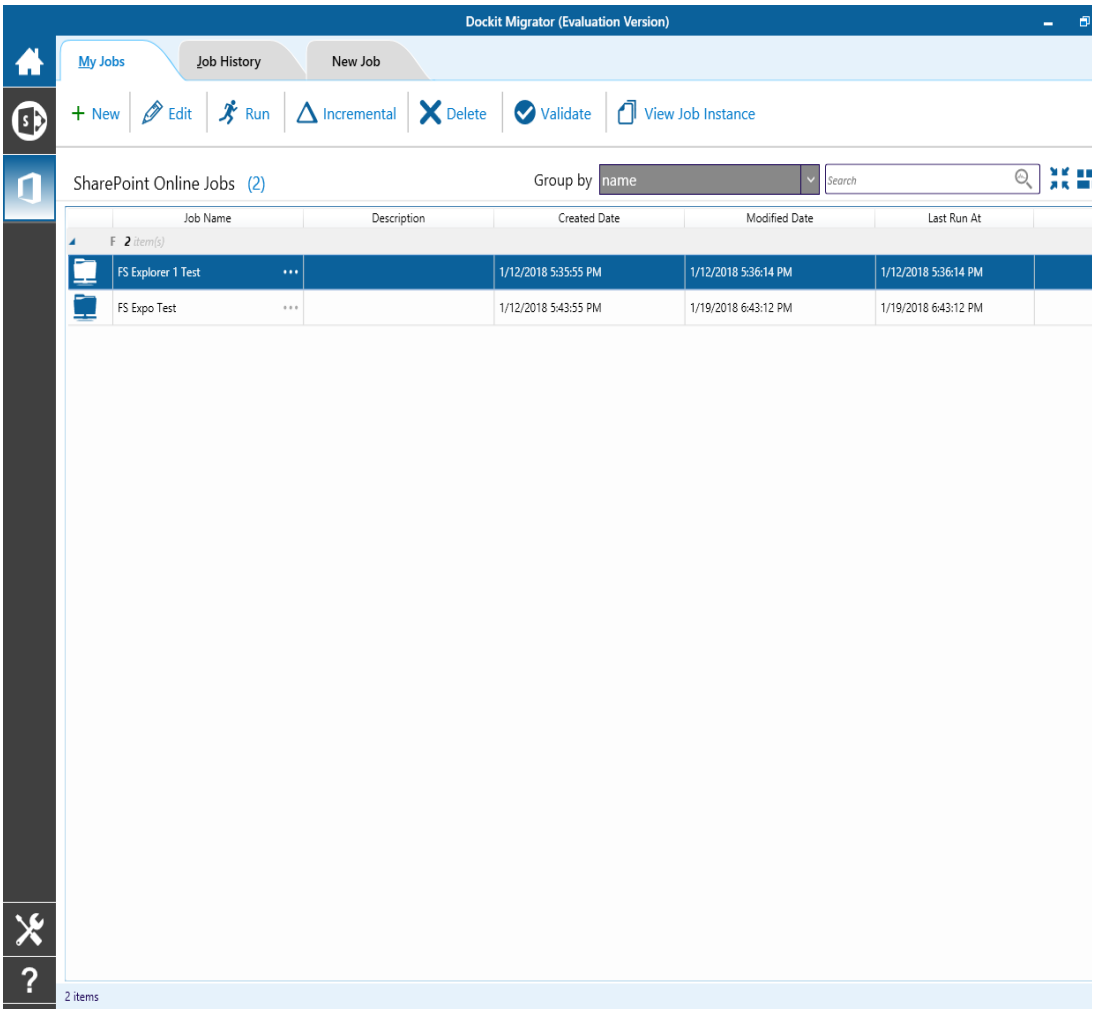


5. Once the Pre-migration validation is complete, icon will be enabled. Click to view the Pre-migration validation test results.

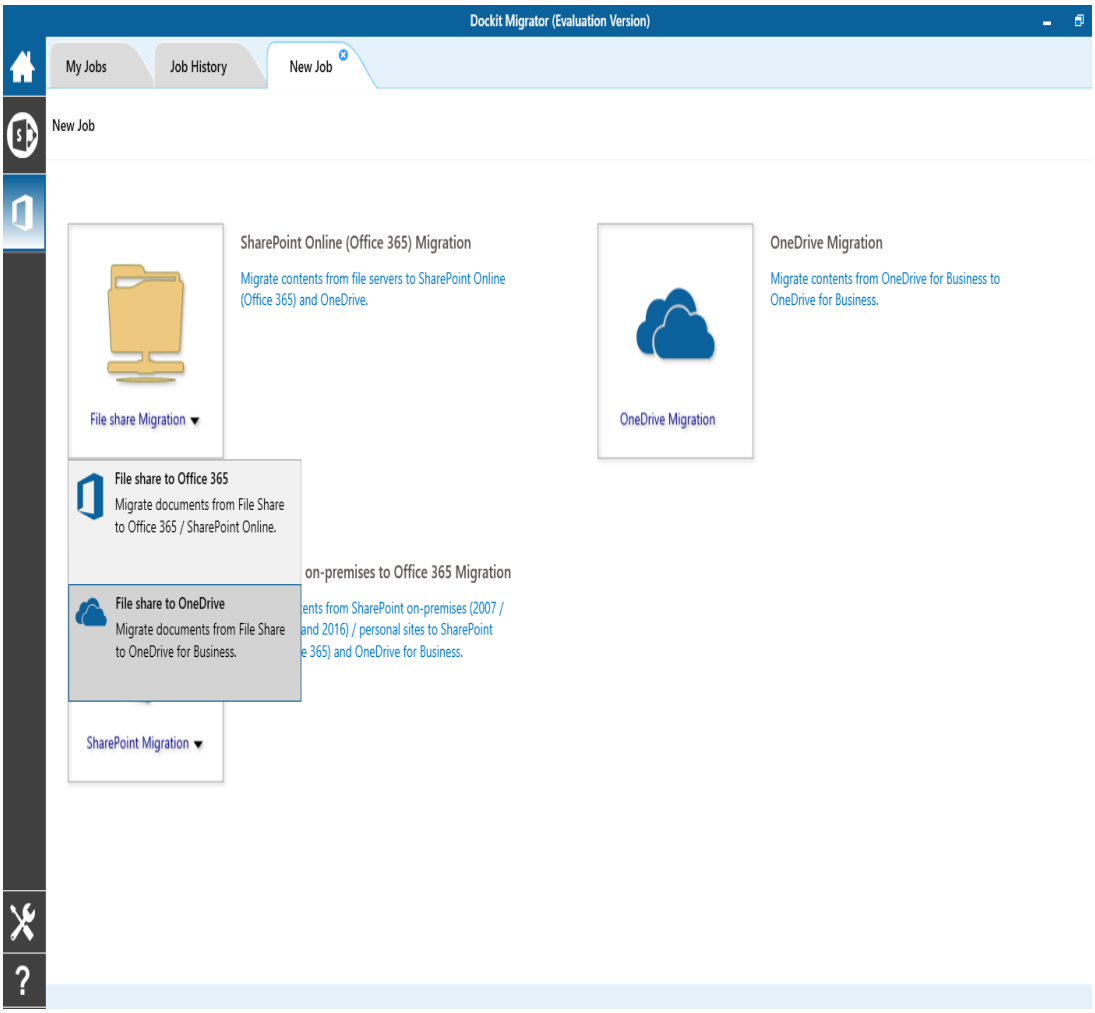
4.2.1.2 File Share to OneDrive

To create a new migration job to import folders and files from File System to OneDrive for Business:

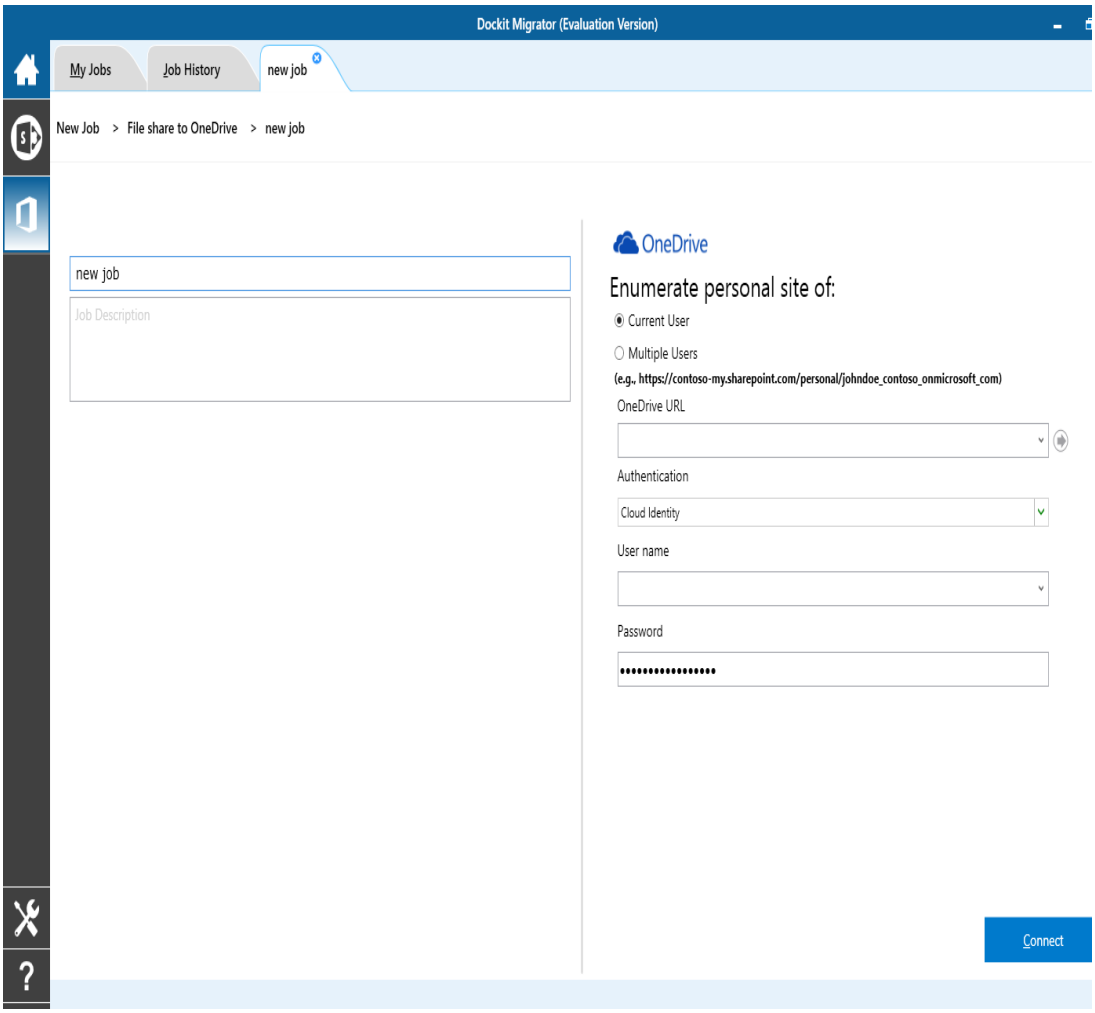
1. Click **New** option on **My Jobs** tab on Sharepoint Online migration page.



2. Select **File share to OneDrive** from **Select Type** popup as shown below.



3. The **New Job** page appears as shown below. Enter **Job Name, Description (Optional)** and specify OneDrive Url based on the selected scope under **Enumerate personal site of:** and click **Connect**

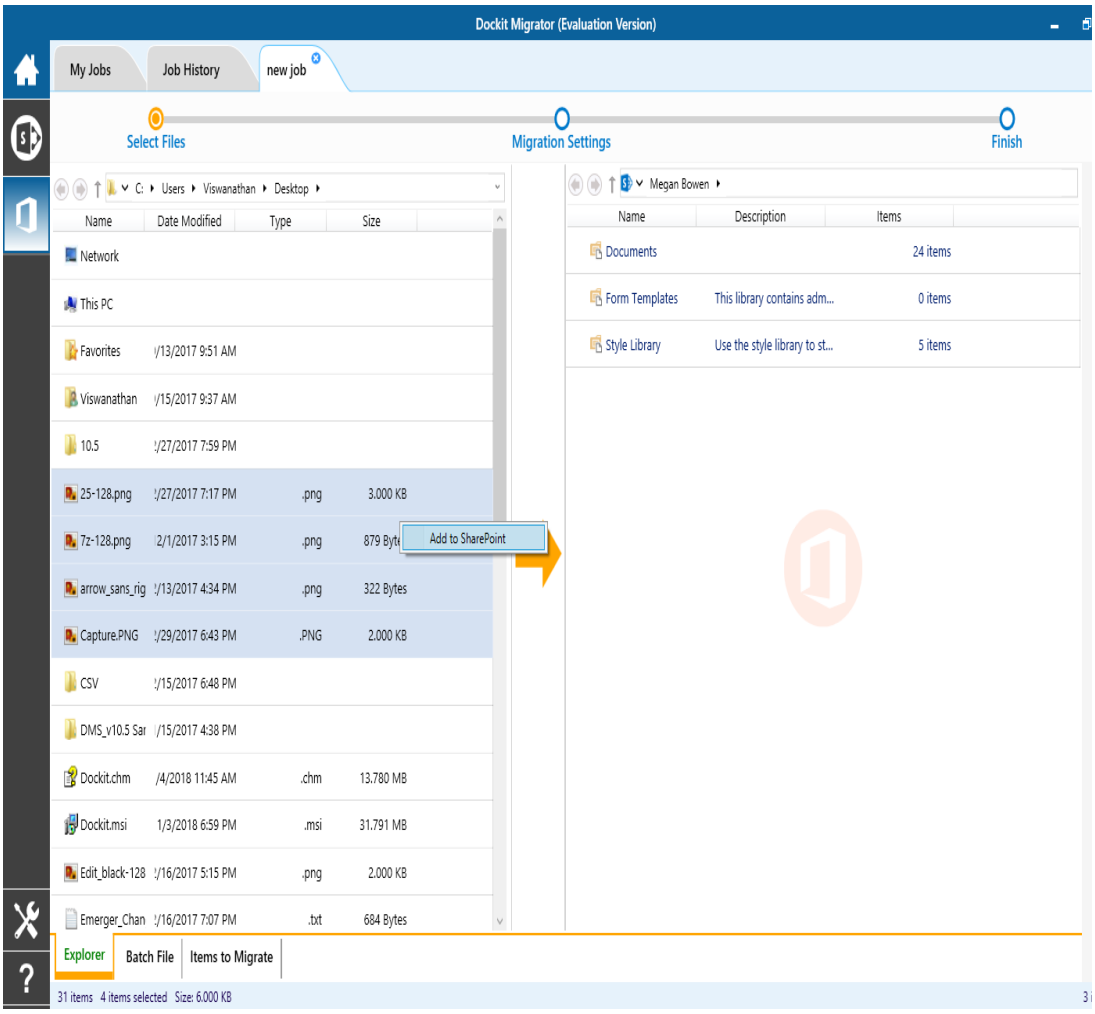


Enumerate personal site of:

a. **Current User:** This option helps you migrate documents to current user's OneDrive location.

b. **Multiple Users:** This option helps you migrate documents to multiple user's OneDrive locations by providing SharePoint admin center URL.

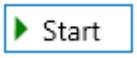
4. **Drag and Drop** files from File share (Left Pane) to OneDrive users (Right Pane) or Select files and Right click file share, select **Add to SharePoint**.



5. Click **Items to Migrate** on Right pane to check the list of files selected for migration, also you can remove files by clicking the Red **X** .

6. Specify Migration Settings

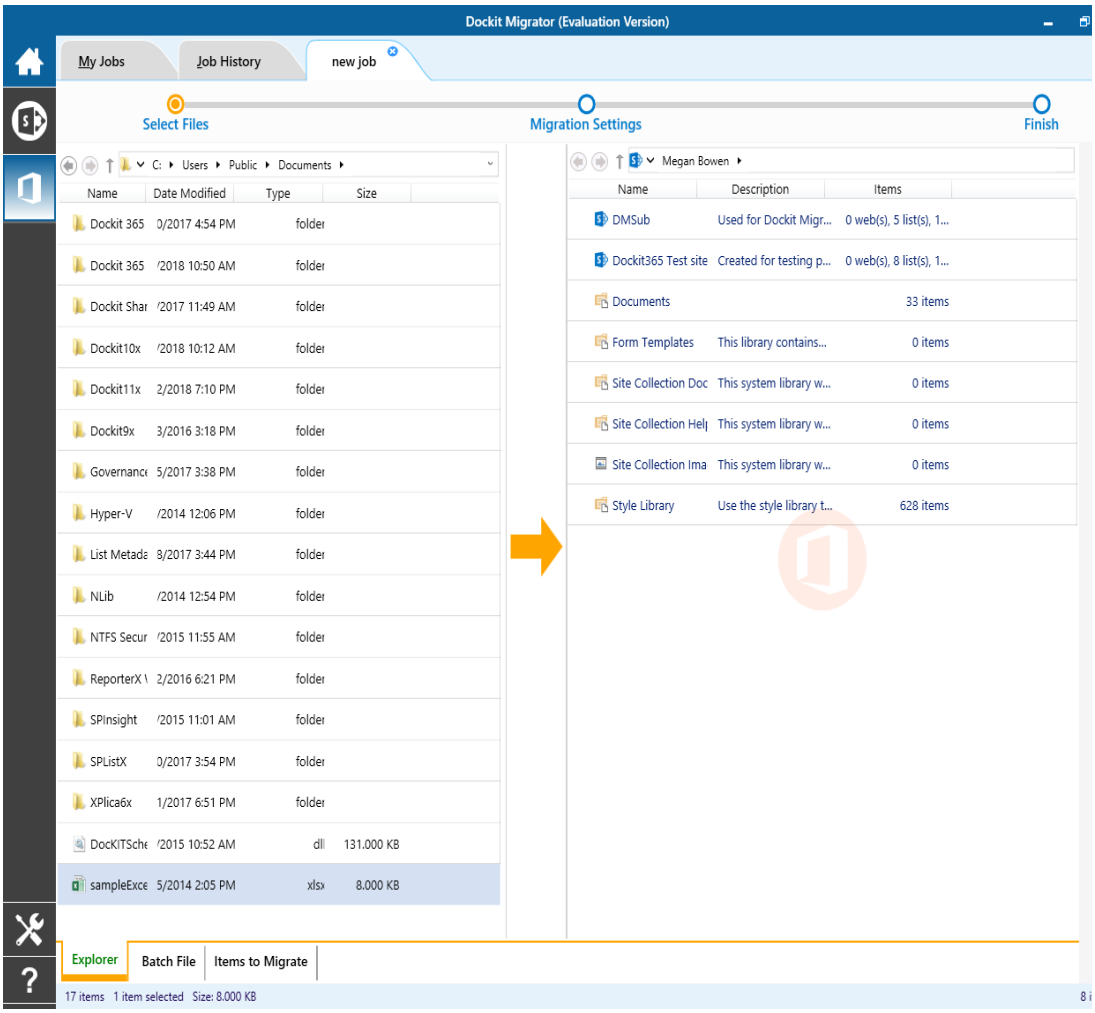
7. Click **Save & Close** button to create and close the job, or click **<** button to navigate to previous page to change any job settings.

8. After saving the job, it will be listed on the Job Manager page. You can click on 

to initiate the migration process.

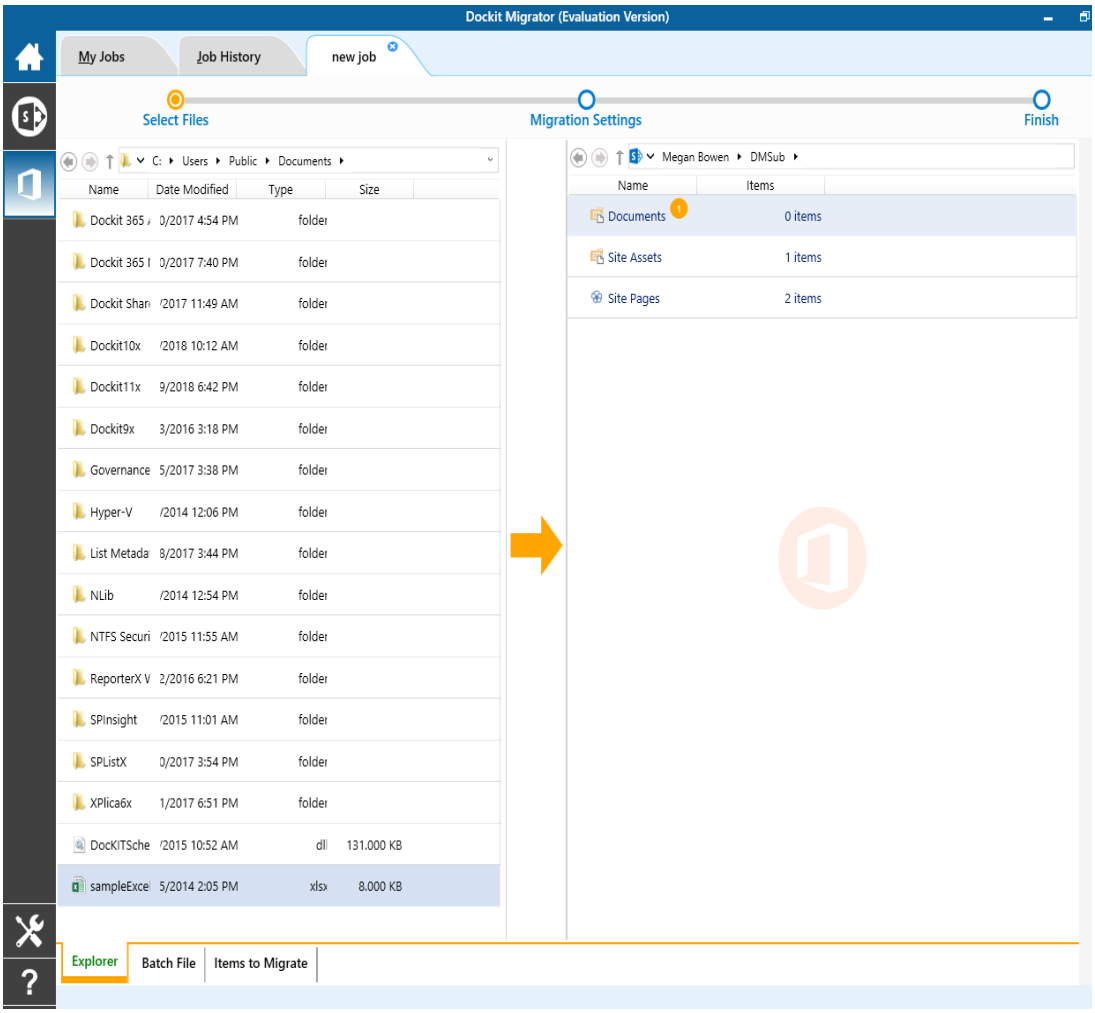
4.2.1.2.1 OneDrive users

1. Upon selecting "Multiple Users" option, you will see all available users in your Office 365 tenancy as shown below.



-->

2. It helps you associate each user's file share to respective OneDrive personal site easily.
   Drag and Drop share folder from Left Pane to respective user.



If OneDrive personal site is not readily available for a user, Dockit Migrator will automatically provision the site and migrate documents to it.

4.2.1.2.2 Batch file

The following section gives you the guidelines to create a batch file(.xlsx) for Import folders, files and metadata to target Libraries.

The first row of the batch file should contain the following field names as headers. The reserved headers used by Dockit Migrator in batch file are as follows:

1. **Path:** The 'Path' column should contain the path of the source document / folder.
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
3. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor file snippet given below:

Path	**Destination Path**	**New Folder**

M:\My Document\Sample File.xlsx	https://contoso-my.sharepoin.com/personal/johndoe_contoso_onmicrosoft_com documents/folder1	folder2/folder3

Dockit Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'Sample File.xlsx' will be imported into the new destination location 'https://contoso-my.sharepoin.com/personal/johndoe_contoso_onmicrosoft_com documents/folder1/folder2/folder3'.

Another batch file structure for OneDrive Multiple users as follows:

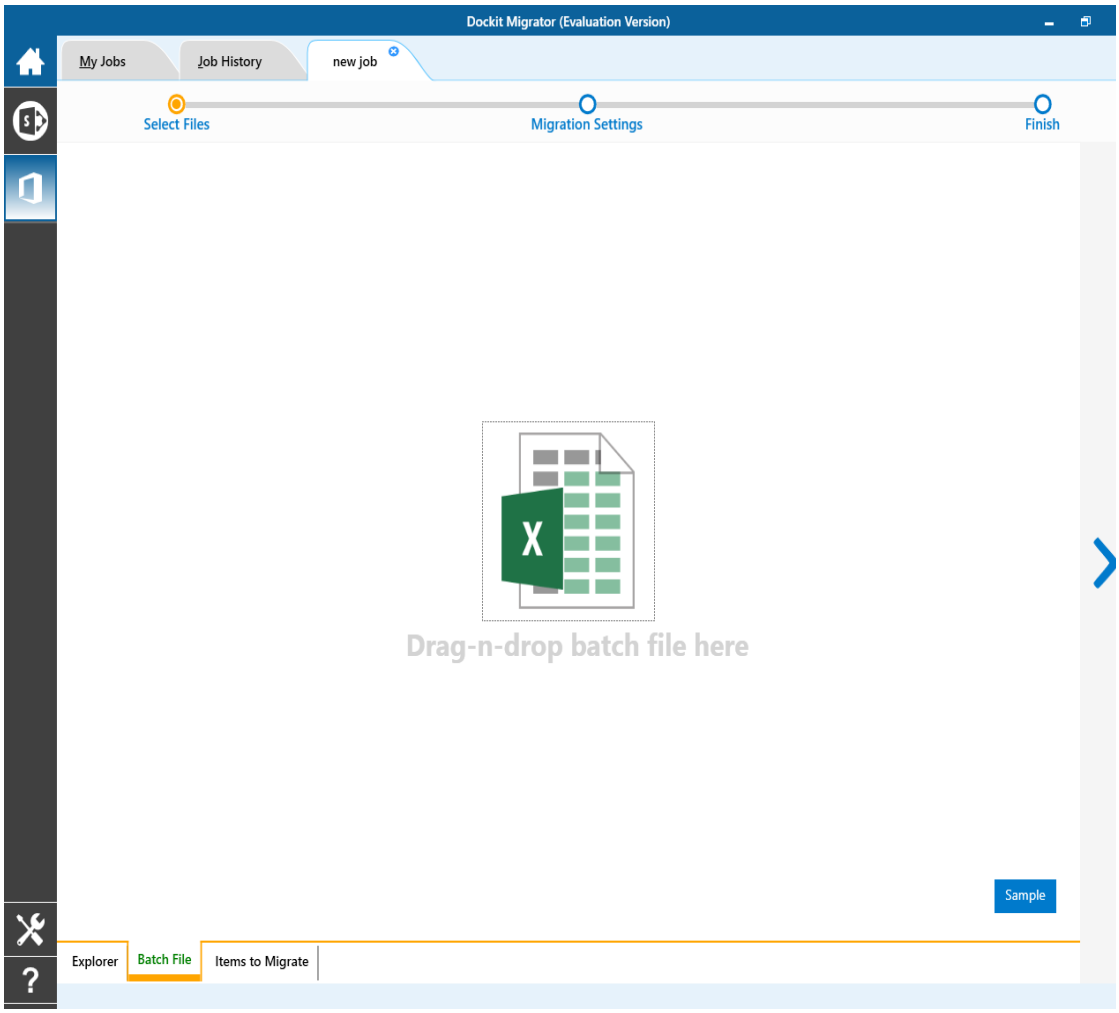
1. **Path:** The 'Path' column should contain the path of the source document / folder.
2. **OneDrive Users:** The 'OneDrive Users' column should contain the target user email where the source gets moved.
3. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor file snippet given below:

Path	**OneDrive Users**	**New Folder**
M:\My Document\Sample File.xlsx	johndoe@contoso.onmicrosoft.com	folder2/folder3

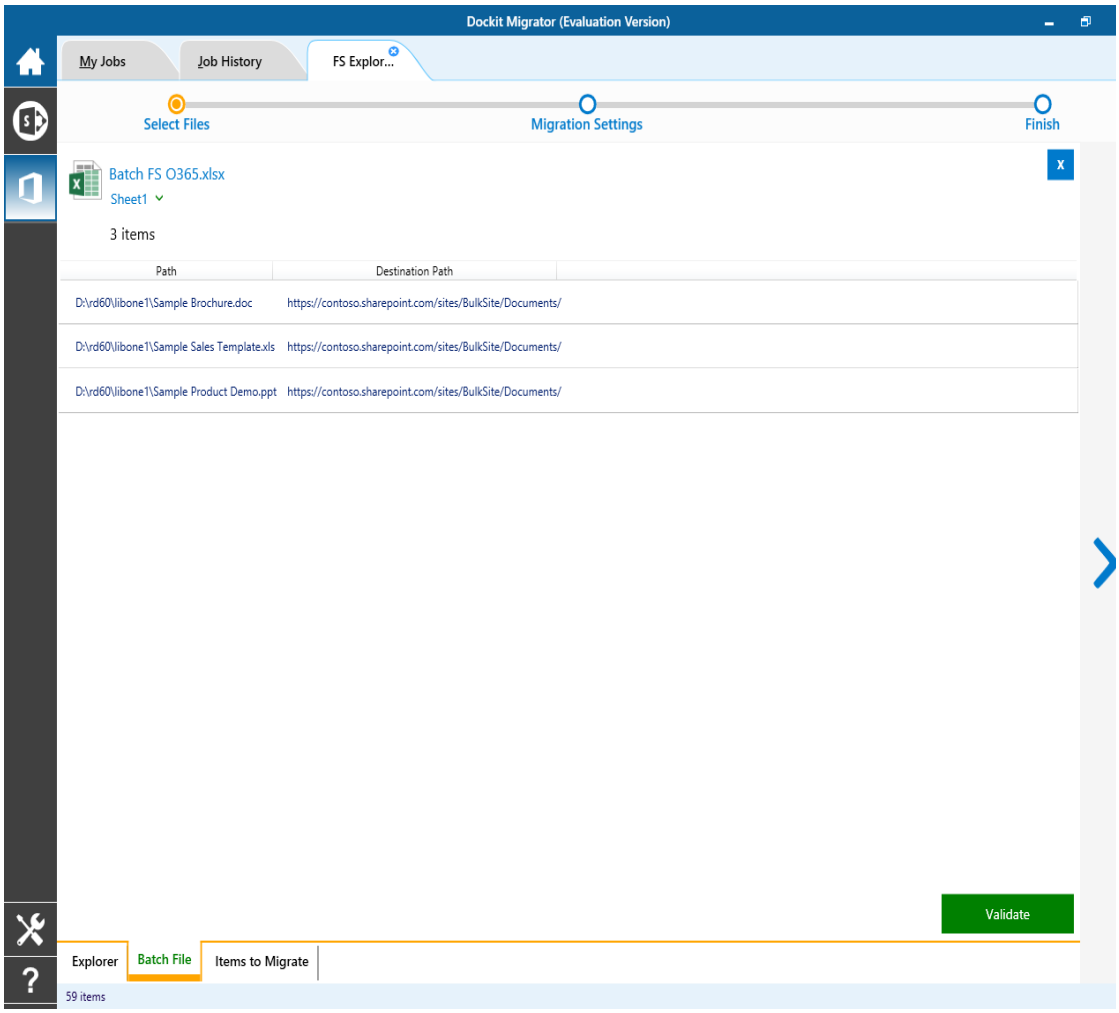
Dockit Migrator automatically provision the OneDrive, if OneDrive is not available for specified user and it creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified OneDrive user's personal site. The 'Sample File.xlsx' will be imported into the new destination location 'https://contoso-my.sharepoin.com/personal/johndoe_contoso_onmicrosoft_com documents/folder1/folder2/folder3'.

Follow the steps given below to specify the documents to migrate to the target SharePoint Online location in the batch file

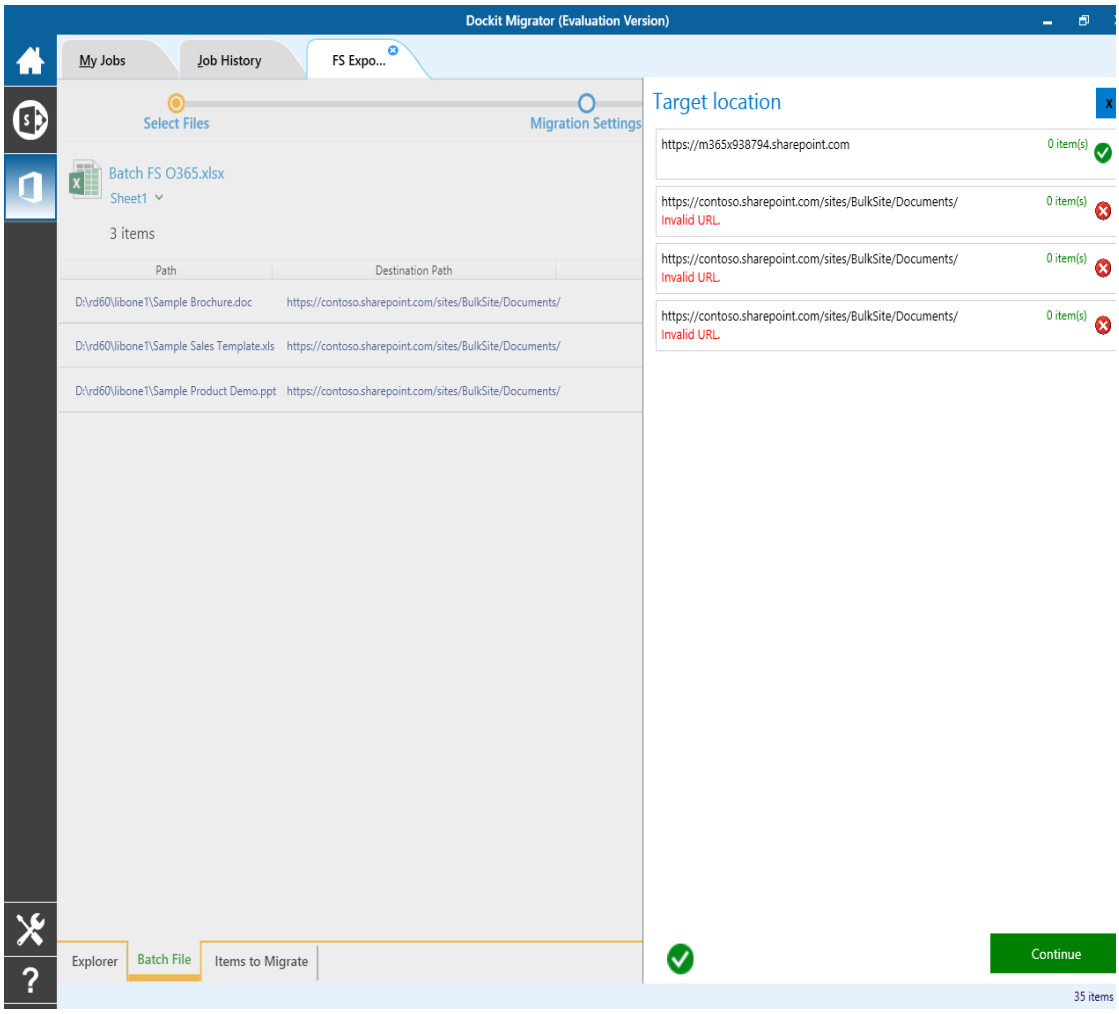
1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below



Batch file content will be shown as below.



2. Click the **Validate** button to verify the batch content to be valid as shown below

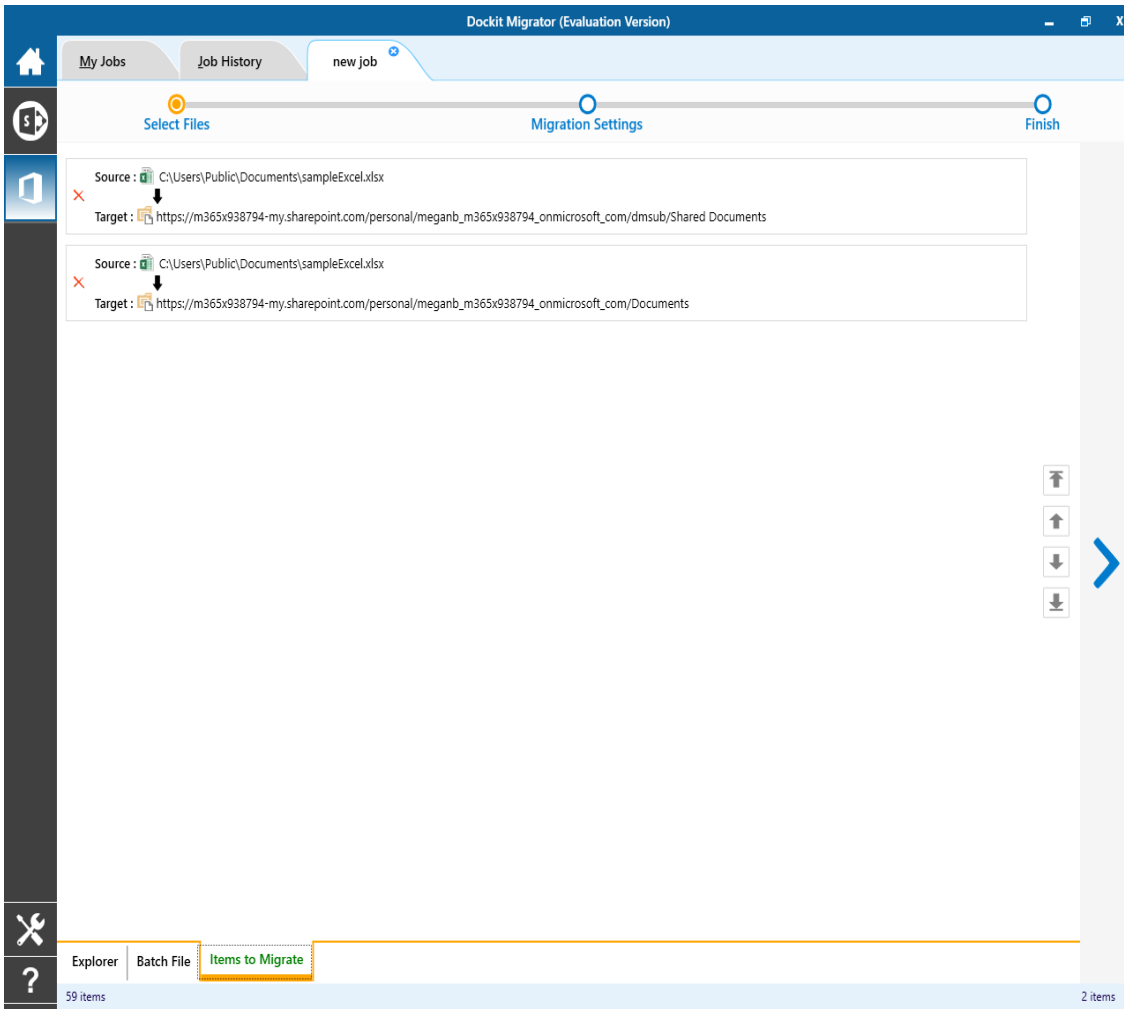


Once the validation is completed click the **Continue** button to proceed for next step. And the batch file content will be added to Items to Migrate tab

4.2.1.2.3 Items to migrate

1. From File explorer you can either drag and drop files to SharePoint explorer or simply select files from file explorer Right Click and Select **Add to SharePoint** to add files to Items to migrate.

The **Items to migrate** appears as shown below:

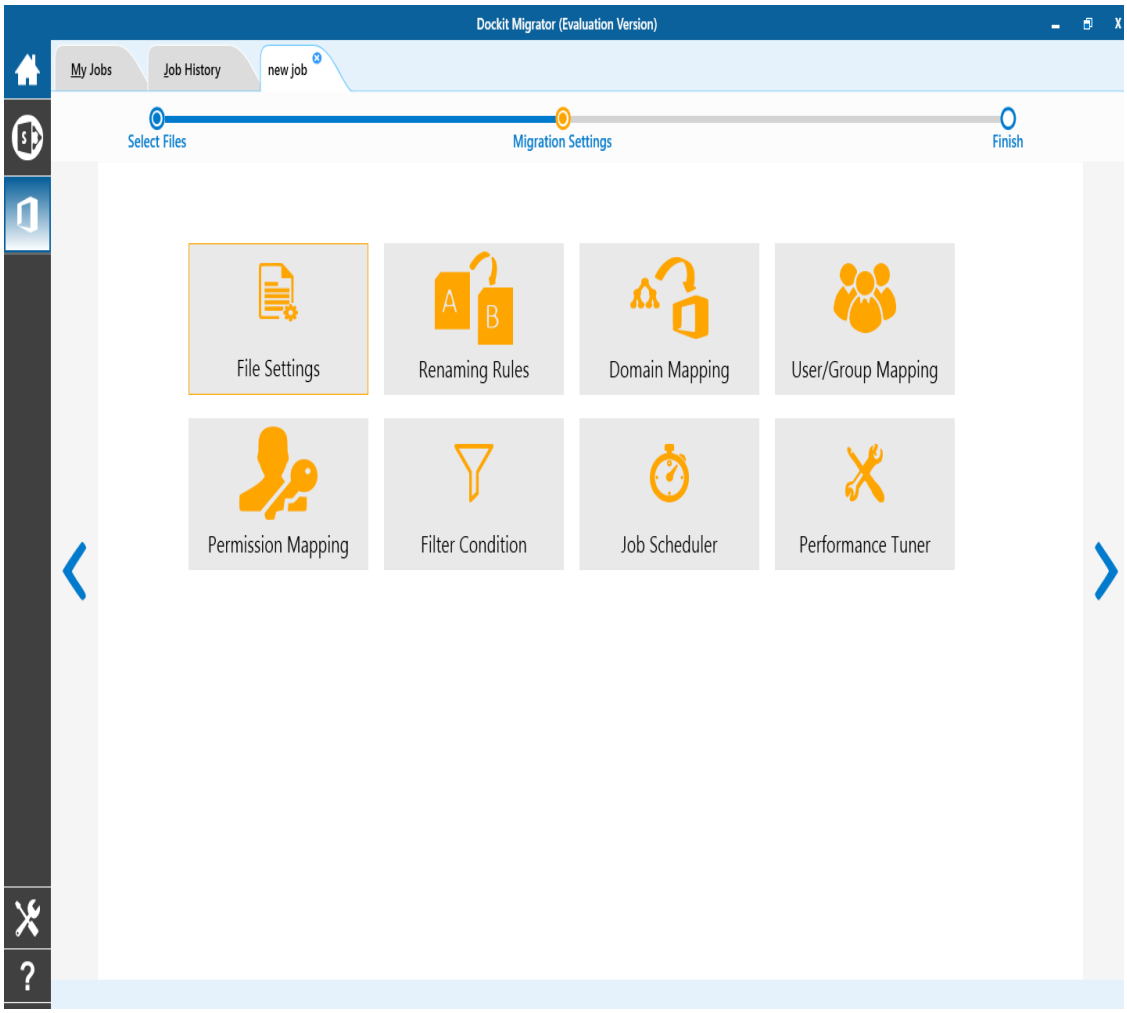


2. The selected folders and files added for import will be displayed in the **Items to Migrate** page. Dockit Migrator processes the top-level folders and files added for import in the order in which it appears in the **Items to Migrate** page. The import process order can be changed by the **navigation** buttons available in the right side of the page. You can remove the files and folders added for import by clicking Red **X** beside the files.

3. Click **>** button to proceed.

4.2.1.2.4 Migration Settings

1. Migration Settings will appear as shown below.



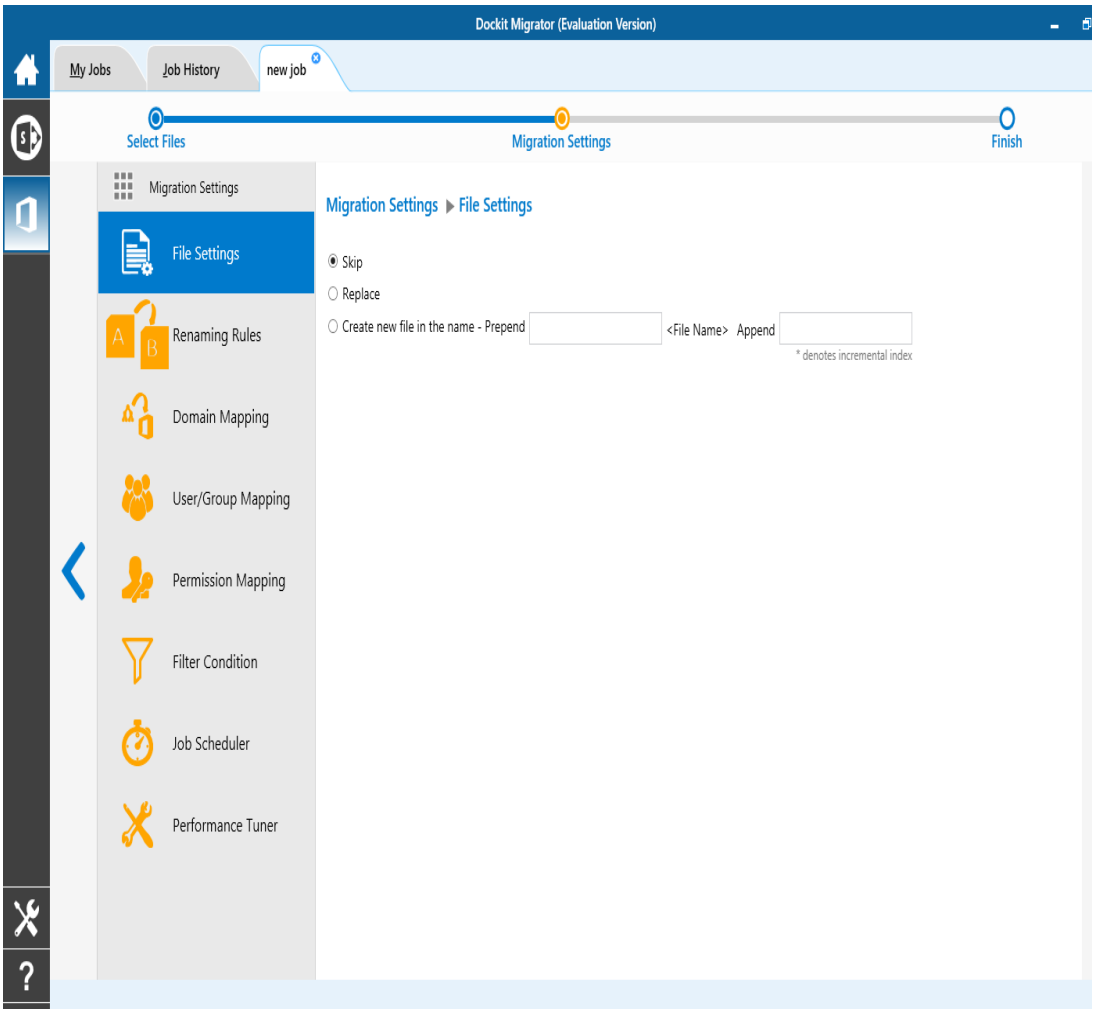
2. From this page, you can :

- File Settings
- Renaming Rules
- Permission Mapping
- User/Group Mapping
- Domain Mapping
- Filter Conditions
- Job Scheduler
- Performance Tuner

4.2.1.2.4.1 File Settings

To specify the action to be taken by Dockit Migrator when a file with the same name already exists in the destination location:

1
. The **File Settings** step appears as shown below:



2. Select any one of the following options given below:

    a. **Skip** - Skips the file without overwriting.
    b. **Replace** - Deletes the file from the destination location (along with its version history) and imports the source file.
    c. **Create new file** - Creates a new file by appending and prepending the user defined characters with the source file name and imports the newly created file. **Note: *** is the reserved character and denotes incremental index. For example, if a document named 'Sample.docx' already exists in the target location, Dockit Migrator will create a new file with the name as 'Sample1.docx'.

3. Click on **Renaming Rules** or **>** to proceed.

4.2.1.2.4.2 Renaming rules

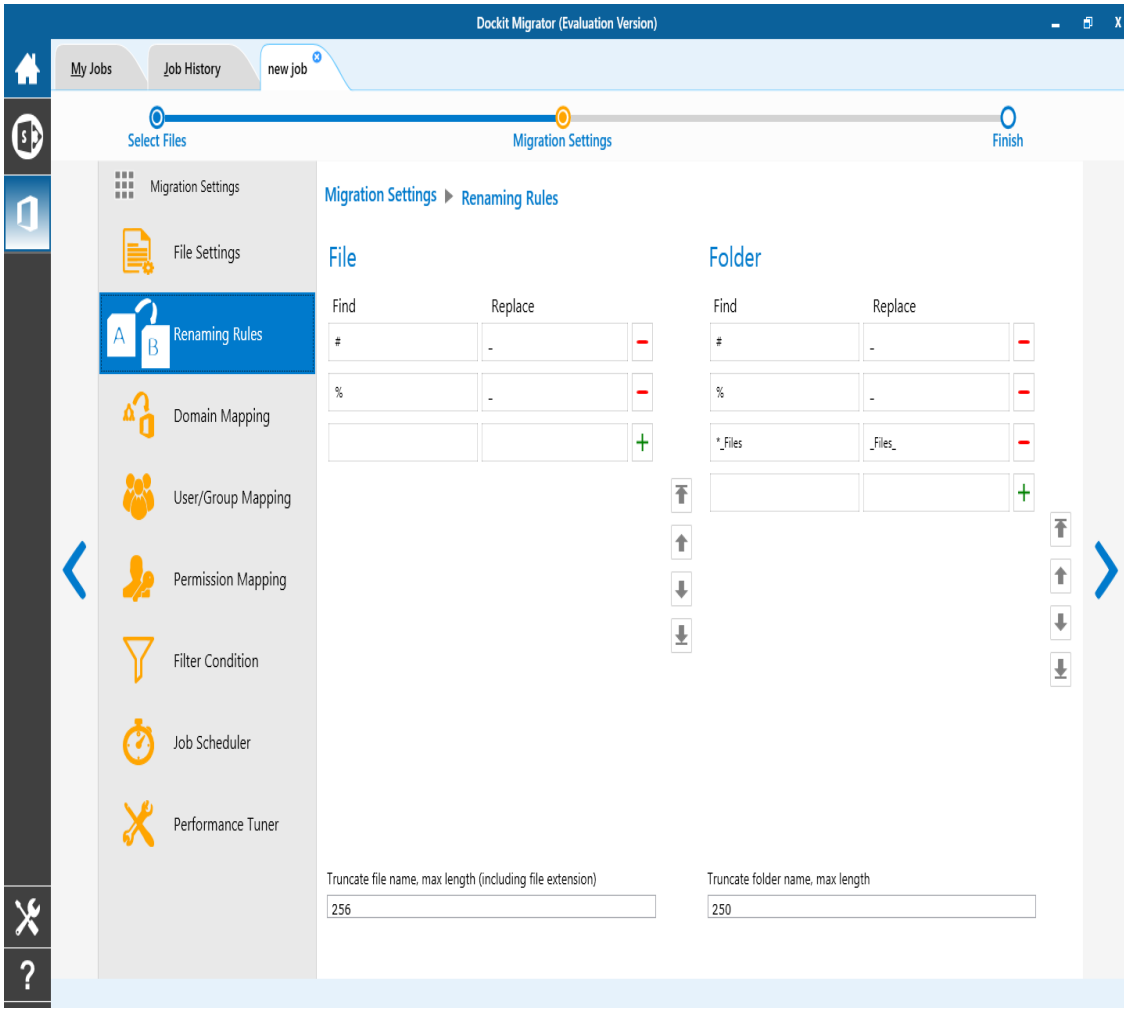
SharePoint does not permit certain characters in folder and file names. Dockit Migrator provides an ability to rename invalid character(s) to valid character(s) and also support any character(s) to be renamed using rules, thereby eliminating the tedious step of renaming the source folders / files.

Dockit Migrator uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Renaming rules

page. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

Also, this technique defines some of the operators ([- ! " $ & ' ( ) * + , . / : ; < = > ? @ [\ ] _ ` { | }] ^) as reserved and have their own meaning in the pattern syntax. If any of these operators are placed in your file name and you wish to replace with some other string, you need to use '\' (backslash) as an escape sequence character in Dockit Migrator Renaming Rules, which will suppress its role and treat them as normal characters like 'A', '1'. Otherwise, there is a chance to misinterpret your rule and hence the resultant file name may not be as expected.

The renaming rules page will appear as shown below :



Folder Renaming Rule :

You can add or remove rules for folder renaming rule. This helps to rename invalid characters in SharePoint to a valid folder name.

Truncate folder names :

Truncate long folders names by specifying the folder name length to use before importing them to a SharePoint library.

1. Select appropriate checkbox for folder and enter a valid character length for folder .

Note : Dockit Migrator leaves the source folder name as-is if the folder name length is

less than the specified value and truncates if the length exceeds the value before importing them to SharePoint.

File Renaming Rule :

You can add or remove rules for file renaming rule. This helps to rename invalid characters in SharePoint to a valid file name.

Truncate file names :

Truncate long file names by specifying the file name length to use before importing them to a SharePoint library.
Select appropriate checkbox for file and enter a valid character length for file name.

2. **Note :** Dockit Migrator leaves the source file name as-is if the file name length is less than the specified value and truncates if the length exceeds the value before importing them to SharePoint.

Sample Renaming Rules

Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	*{empty}*	Sample	Truncate V1, if the file ends with V1
SampleV1	*V1	A	SampleA	Replace V1 with A, if the file name ends with V1
Hello_World	Hello_*	*{empty}*	World	Truncate Hello_, if the file name starts with Hello_
Hello_World	*_World	*{empty}*	Hello	Truncate _World, if file name ends with _World
SampleV1	v?	*{empty}*	Sample	Truncate V and the file

				name character following it (immediately succeeding character), if the file names contains V and followed by any one character.
Sample	?p	*{empty}*	Sale	Truncate one character preceding the letter p in the file name.
SampleV12	V??	*{empty}*	Sample	Truncate two characters following the character / letter V in the file name.
SampleFileVersion	*File*	*{empty}*	SampleVersion	Truncate the word 'File' in any position in the file name.
Sample.Matrix	\.	Dot	SampleDotMatrix	Example of escape sequence for .
Sample?File	\?	Text	SampleTextFile	Example of escape sequence for ?
Hello*World	*	*{empty}*	HelloWorld	Example of escape

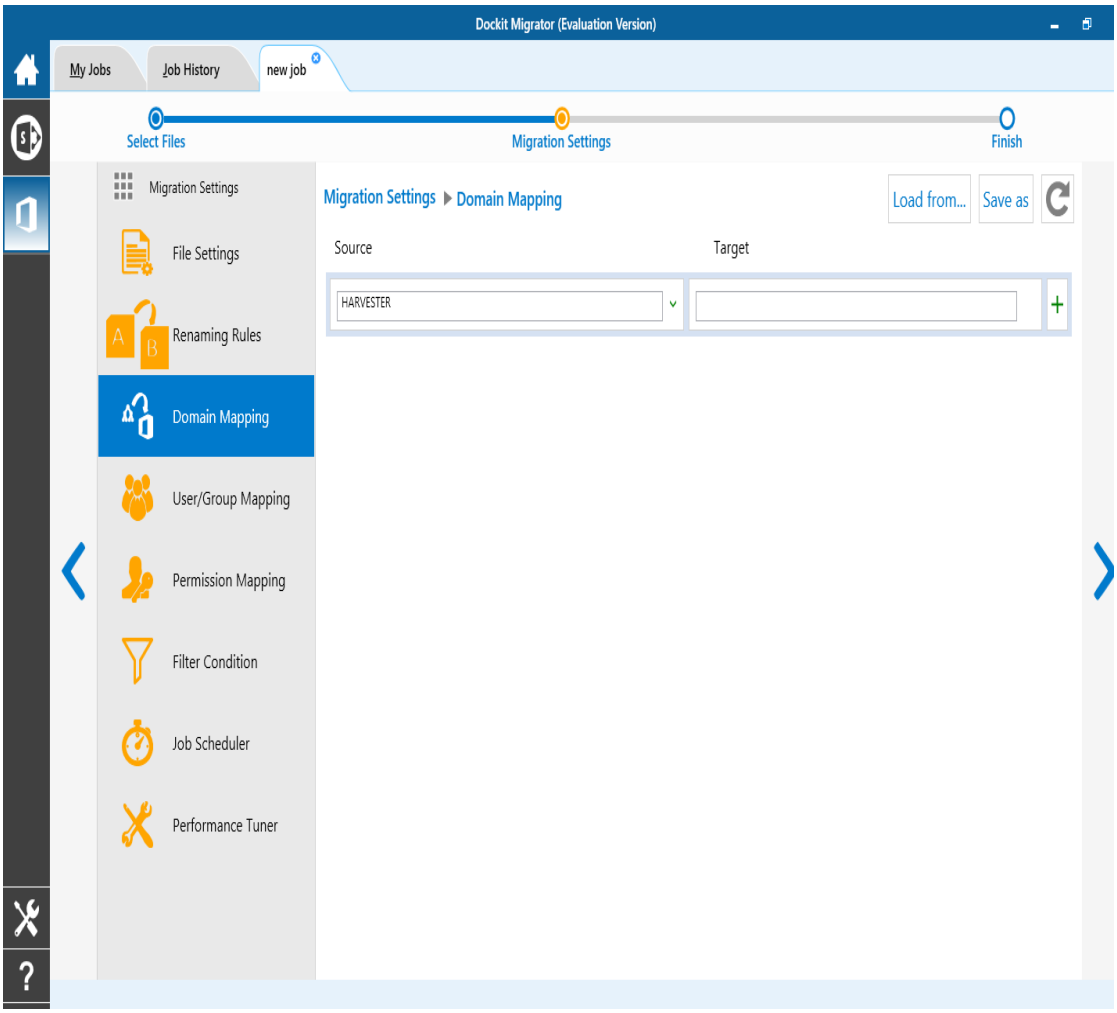
				sequence for *
Sample$	\$	Dollar	SampleDollar	Example of escape sequence for $
Sample^File	\^	*{empty}*	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello<World	\<	*{empty}*	HelloWorld	Example of escape sequence for <
Hello>World	\>	*{empty}*	HelloWorld	Example of escape sequence for >
[Document	\[	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	\(	Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape

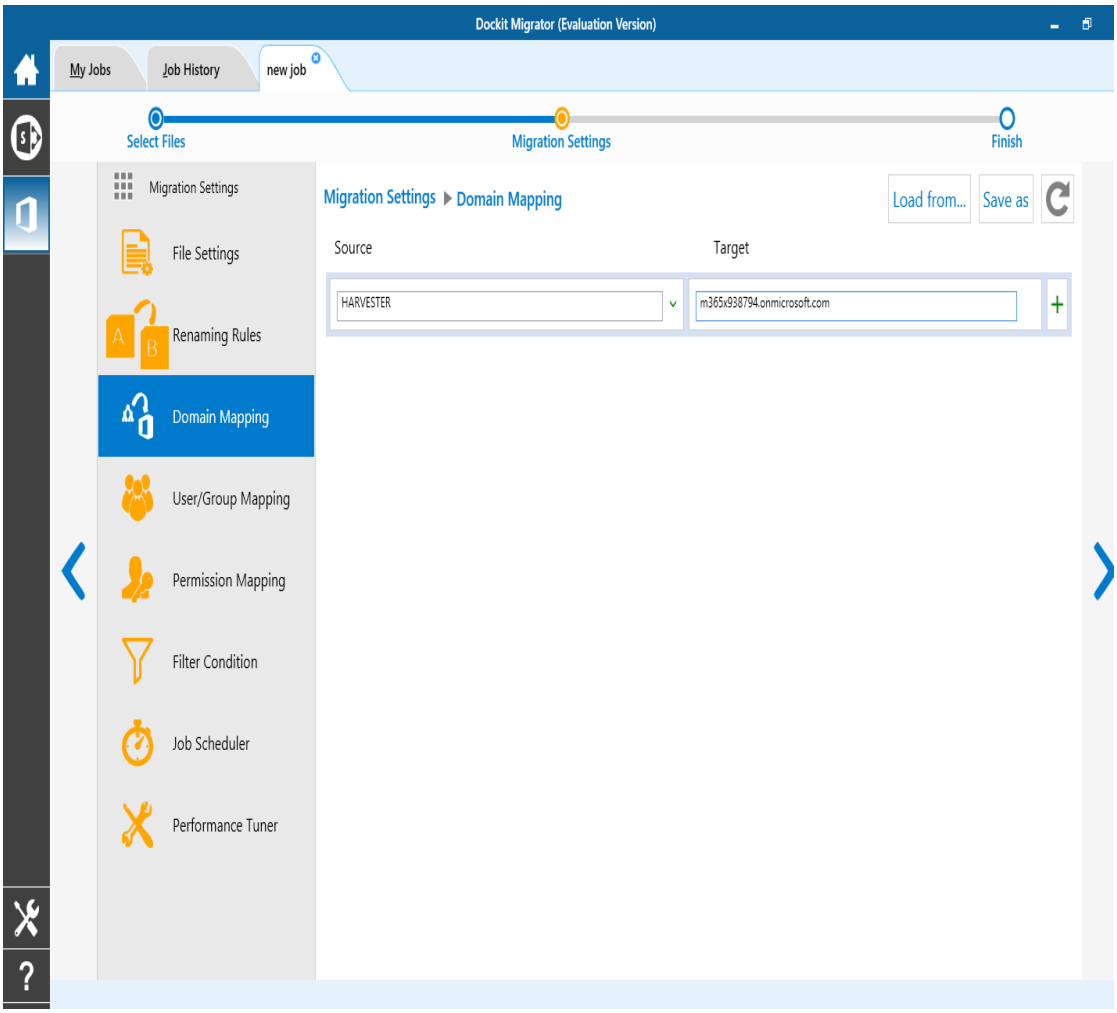
				sequence for)

4.2.1.2.4.3 Domain Mapping

Dockit Migrator uses domain mapping to replace the unavailable domain with the valid domain while assigning permissions (users / groups) for the folder / file imported to SharePoint.

Dockit Migrator domain mapping enables you to load the list of domains available with the network and it appears in both source and target items as shown below.





Select appropriate source domain (s) from the domain list and select the target domain to map from the list of available target domains. And also have the option to enter the domain names of your own in domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research, vyapin.onmicrosoft.com etc...

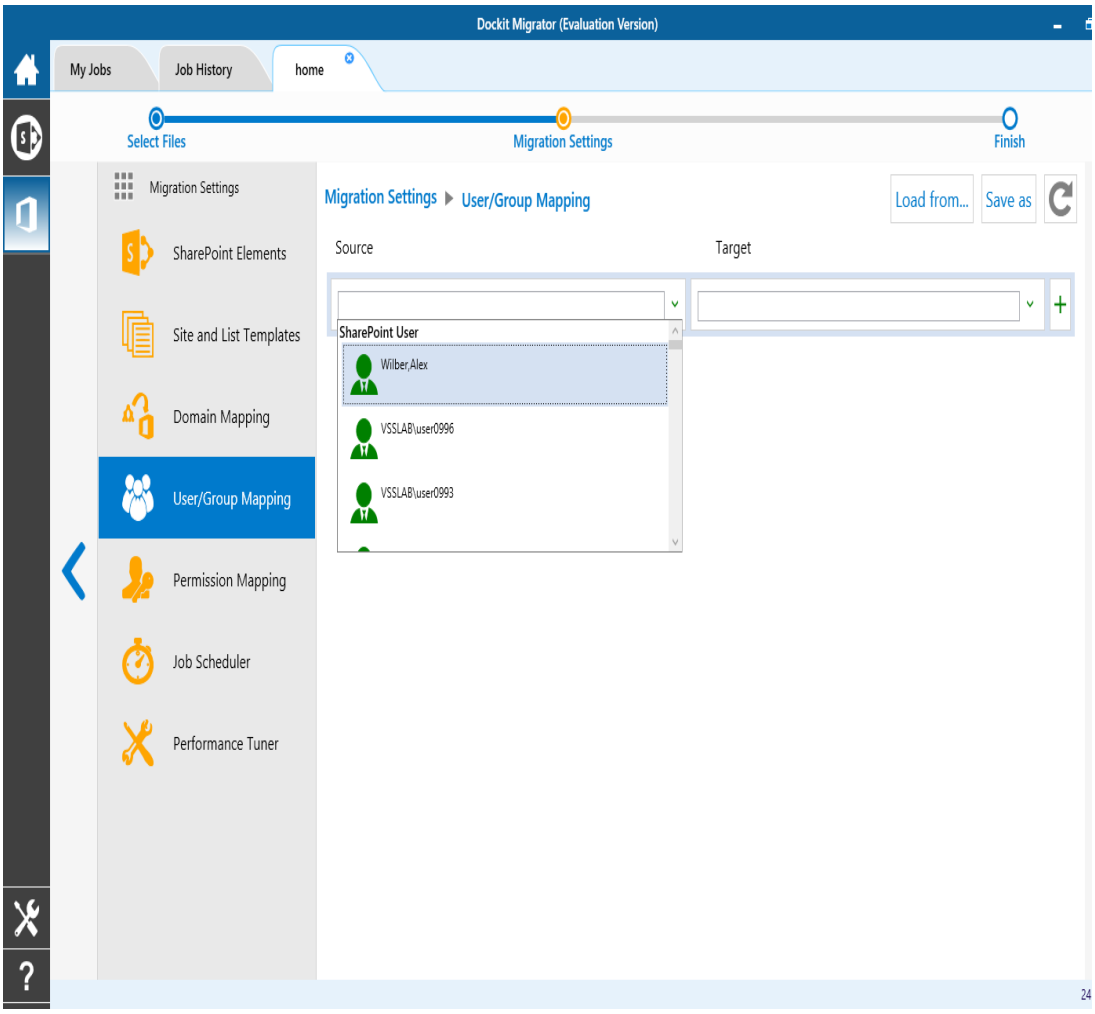
Note: As for entering free texts, multiple source domains can be entered, separated by comma.

4.2.1.2.4.4 User/Group Mapping

Dockit Migrator uses user / group mapping to replace the unavailable user / group with valid SharePoint user / group while migration.

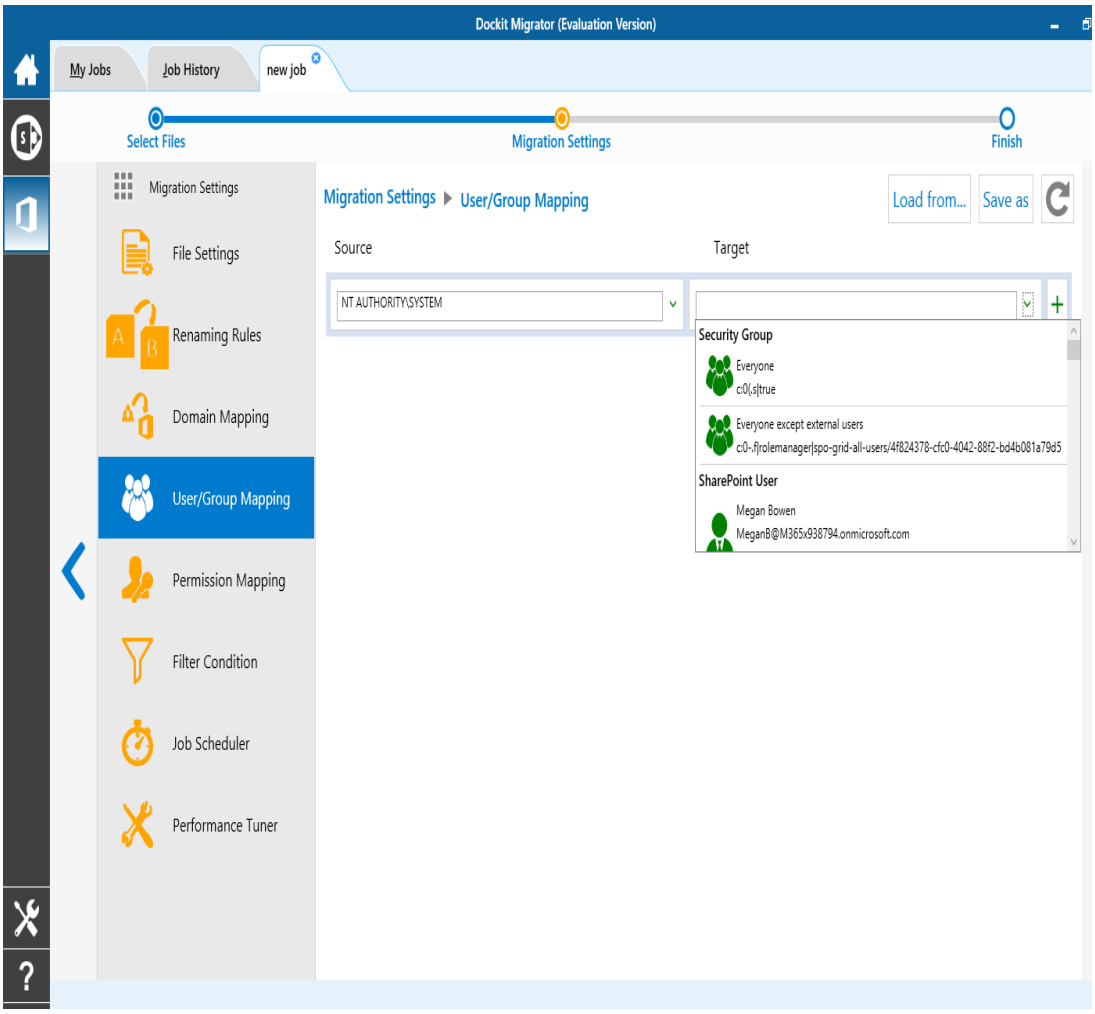
Source User

1. Dockit Migrator user / group mapping enables you to load the list of source users from items to migrate.



Target User

2. Dockit Migrator automatically loads the list of target users / group from the connected site.



You also have the option to enter the user / group of your own in user mapping.

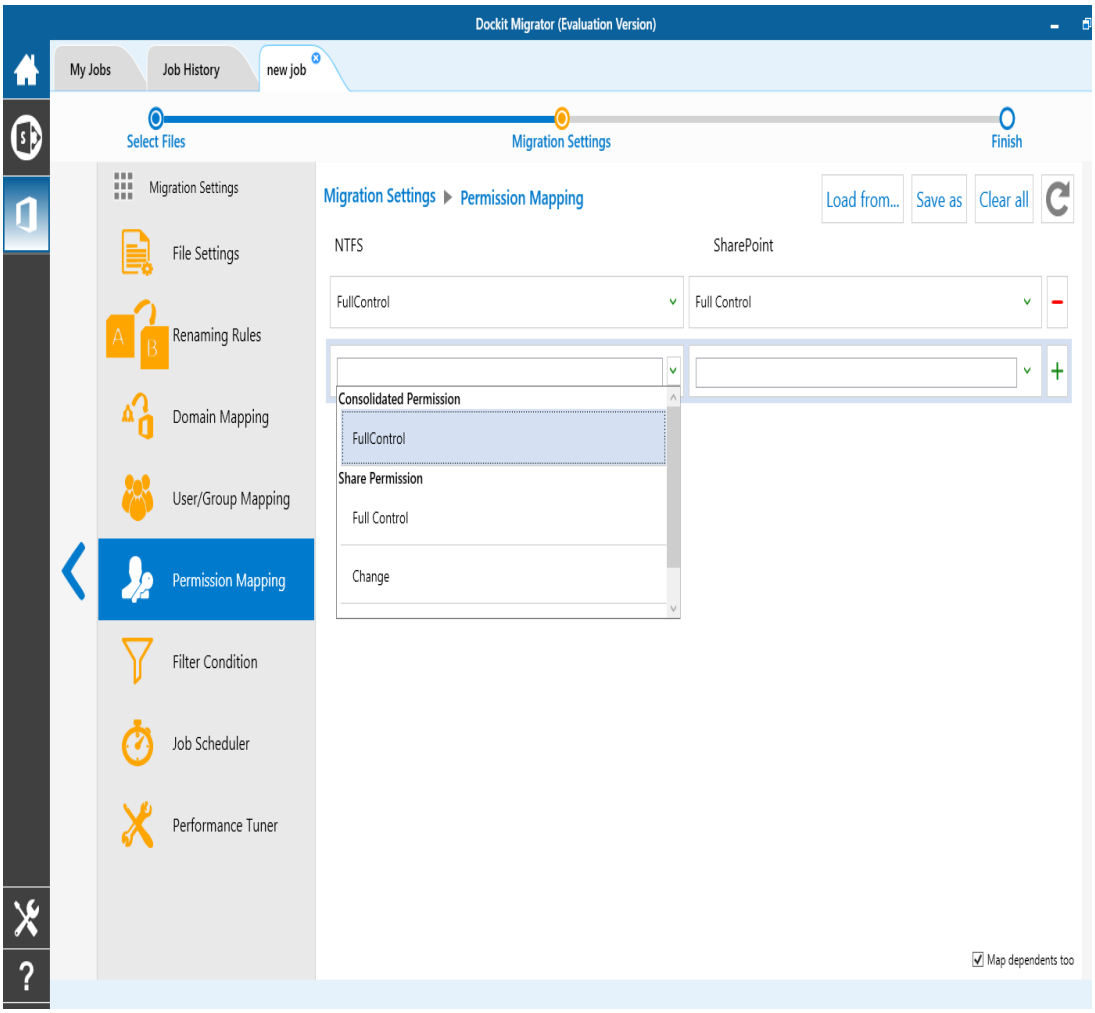
Select Unresolved user from source combobox to map all unresolved / unavailable users from source user to a valid user in target OneDrive site.

4.2.1.2.4.5 Permission Mapping

Dockit Migrator uses permission mapping to map the NTFS permissions to its equivalent SharePoint permission levels and it uses various mapping such as user / group and domain mapping in seperate tab.

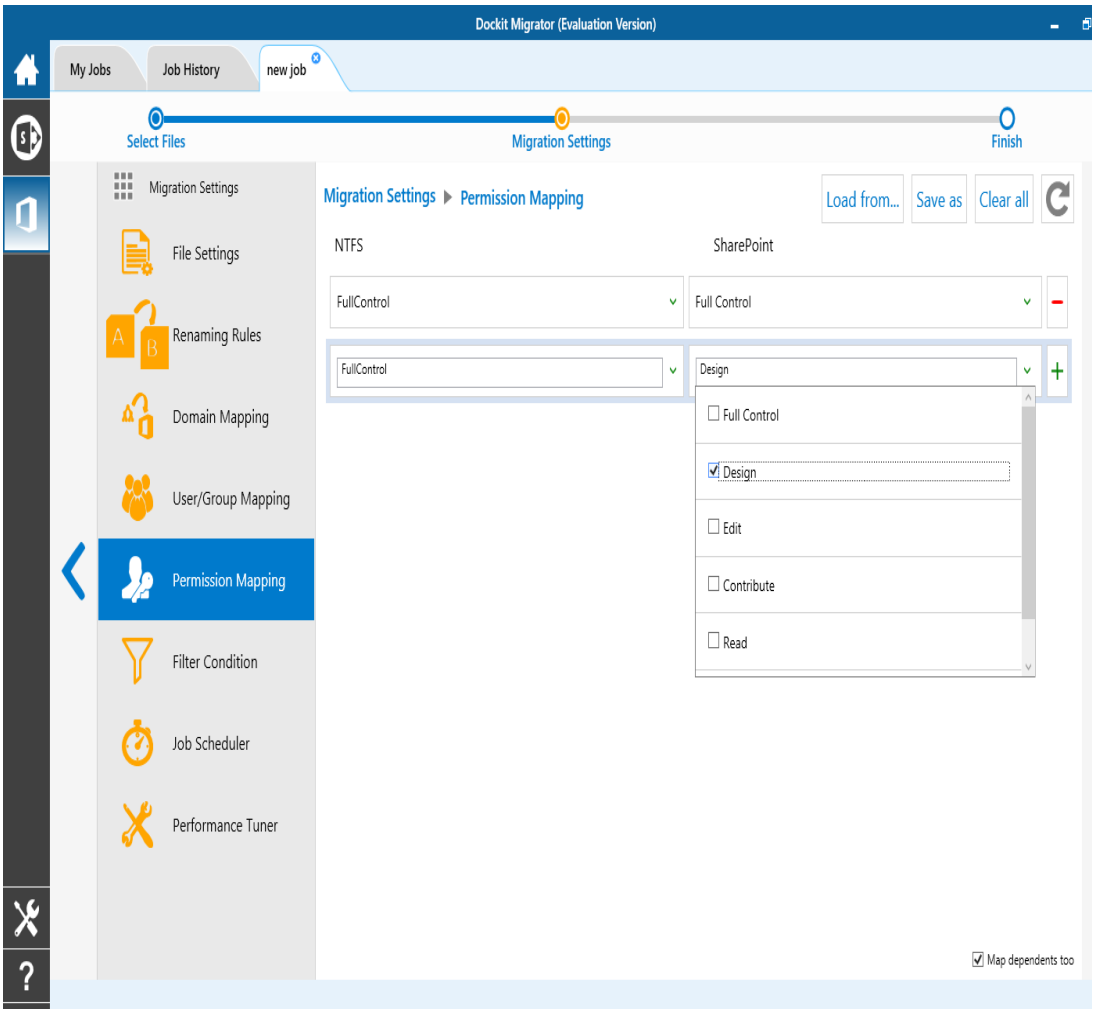
Source Permission

1. Dockit Migrator automatically loads the list of source permissions from items to migrate.



Target Permission

2. Dockit Migrator automatically loads the list of target permissions from the connected site.

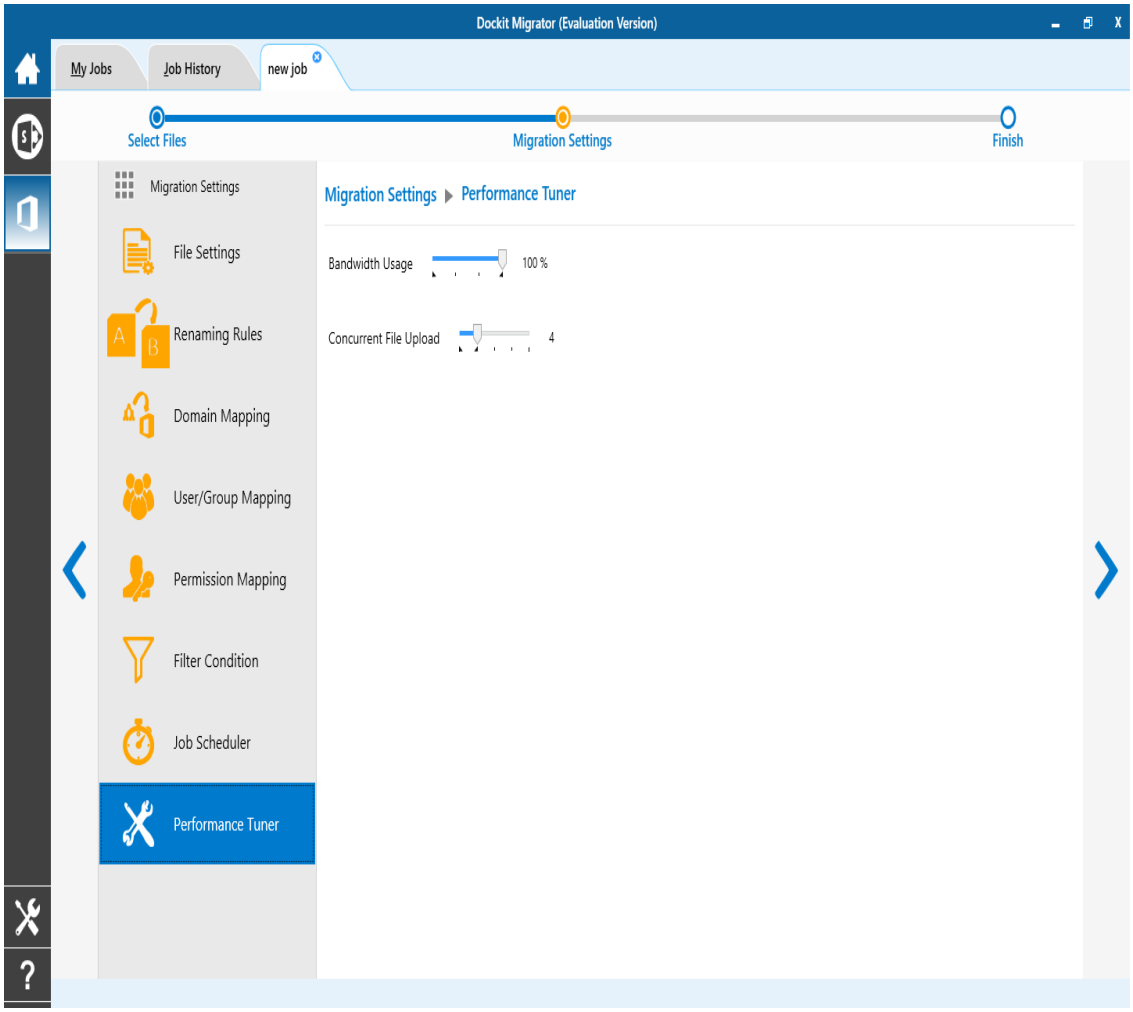


See the following sections for more information

- User Mapping
- Domain Mapping

4.2.1.2.4.6 Performance Tuner

To set percentage of Network bandwidth that Dockit Migrator can use during migration and number of files that can be uploaded concurrently to improve performance.

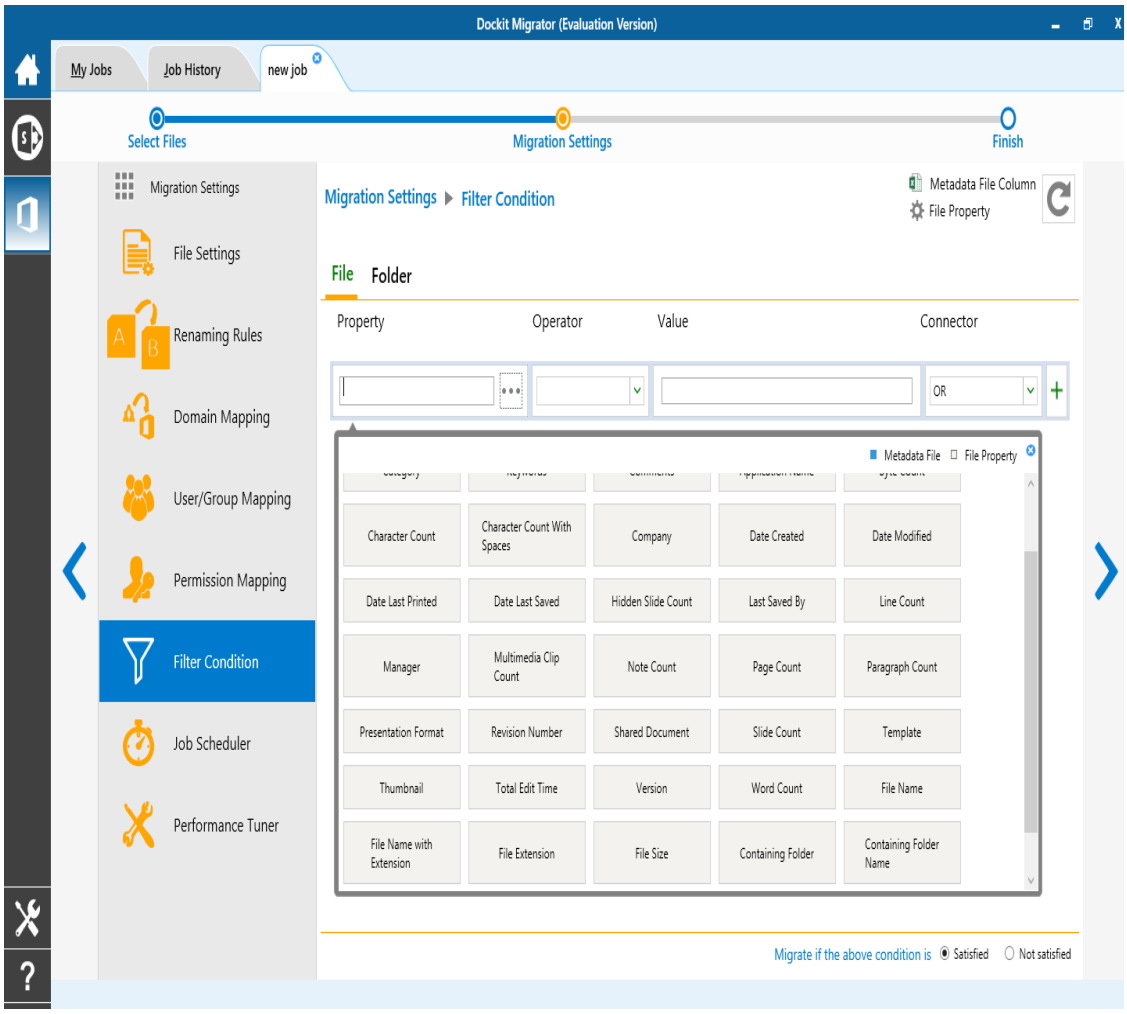


4.2.1.2.4.7 Filter Condition

Dockit Migrator can migrate or upload folders and files to target SharePoint Online after they meet certain criteria. Dockit Migrator will migrate folders and files based on these filter conditions. Filters can be created using metadata columns and values (from external metadata file), file properties and file information (created date, modified date and file extension). Use the steps outlined in this section to define an import condition based on folder level and/or file level property filters.

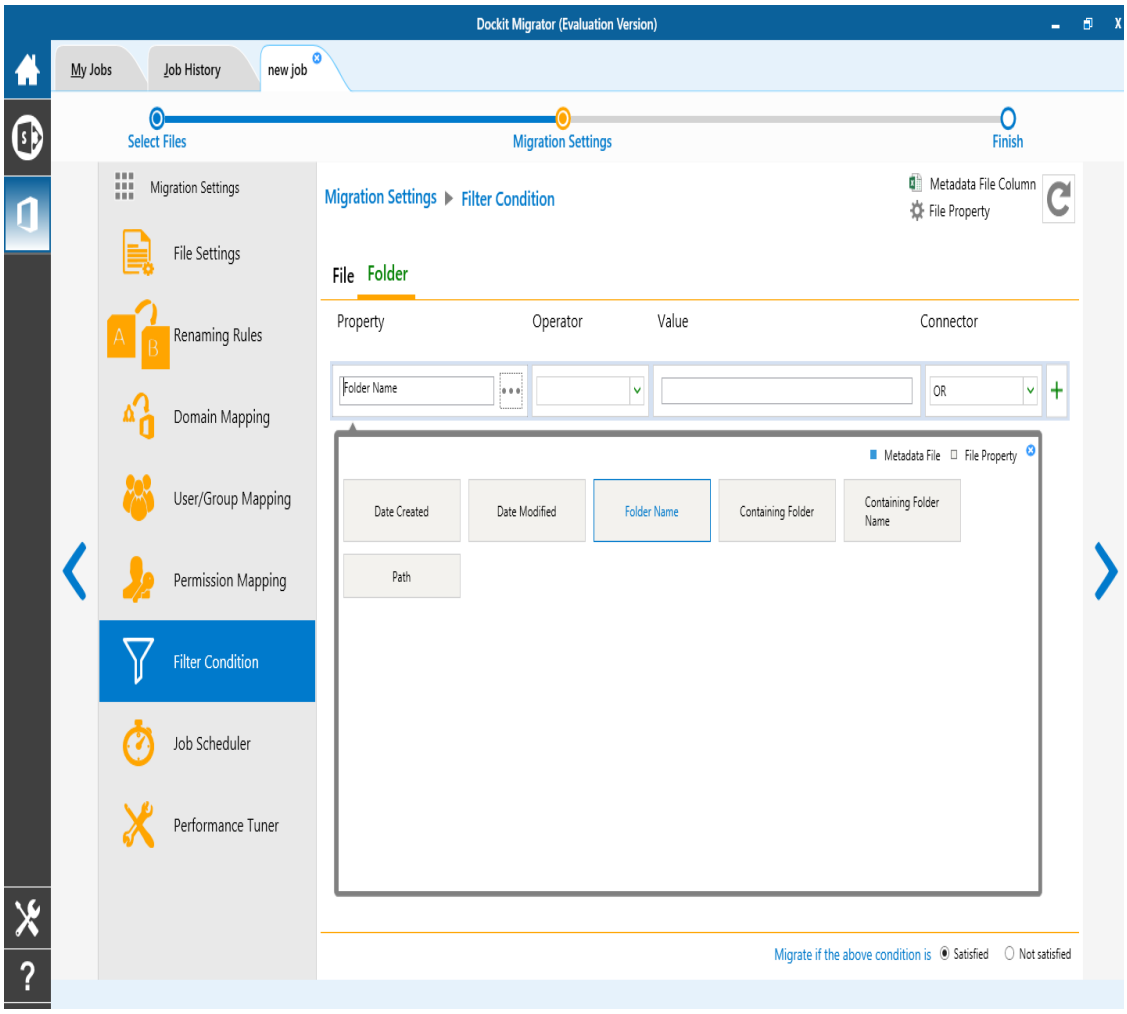
1. Select the filter conditions settings from migration settings. And add filter condtions for File/Folder filter as shown as below.

File Filter



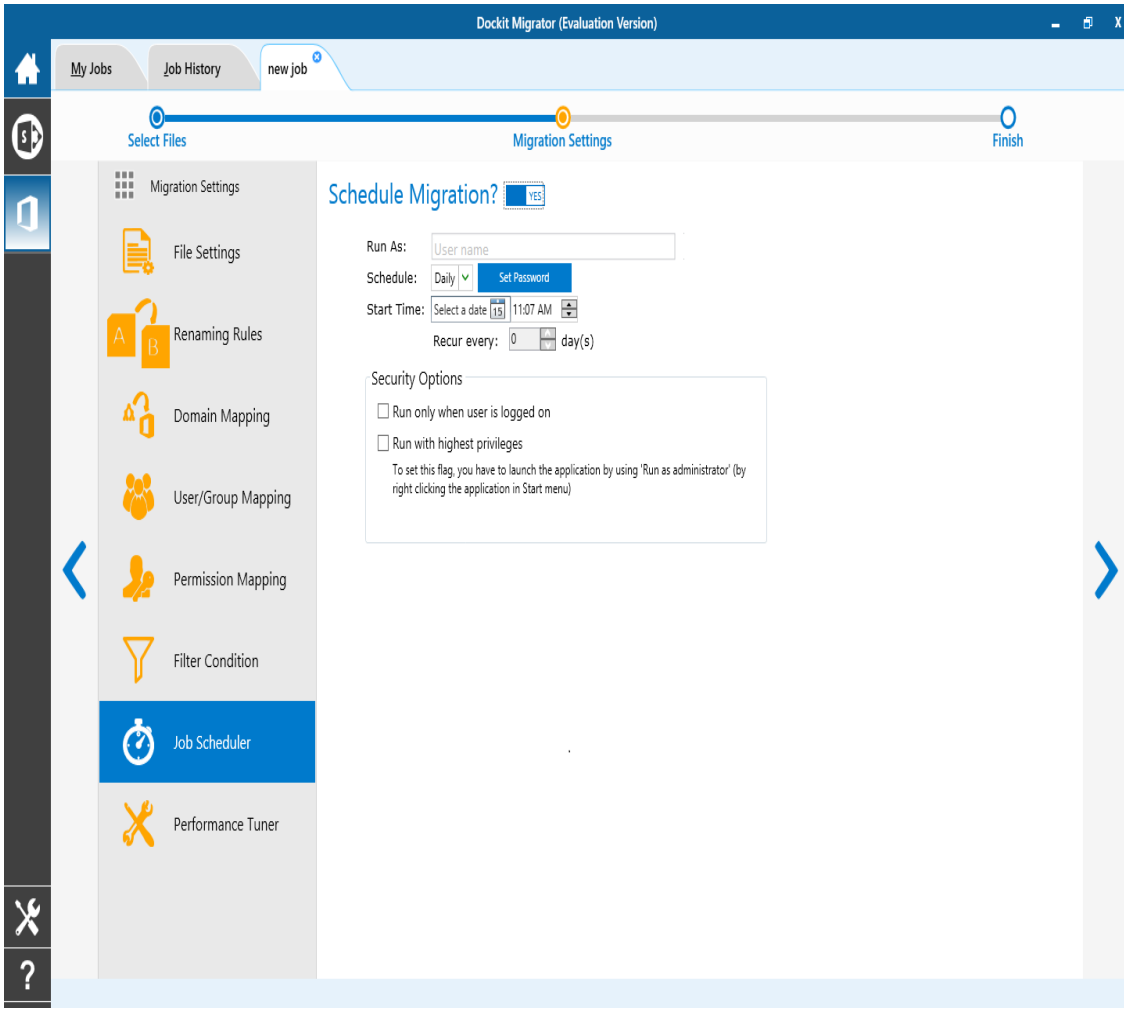
2. Add folder conditions in folder filter tab as shown as below.

Folder Filter


Dockit Migrator (Evaluation Version)
My Jobs
Job History
new job
Select Files
Migration Settings
Finish
Migration Settings
File Settings
Renaming Rules
Domain Mapping
User/Group Mapping
Permission Mapping
Filter Condition
Job Scheduler
Performance Tuner
Migration Settings ▶ Filter Condition
Metadata File Column
File Property
File
Folder
Property
Operator
Value
Connector
Folder Name
OR
Metadata File
File Property
Date Created
Date Modified
Folder Name
Containing Folder
Containing Folder Name
Path
Migrate if the above condition is
Satisfied
Not satisfied

4.2.1.2.4.8 Job Scheduler

1. The **Job Schedule Settings** step appears as shown below:



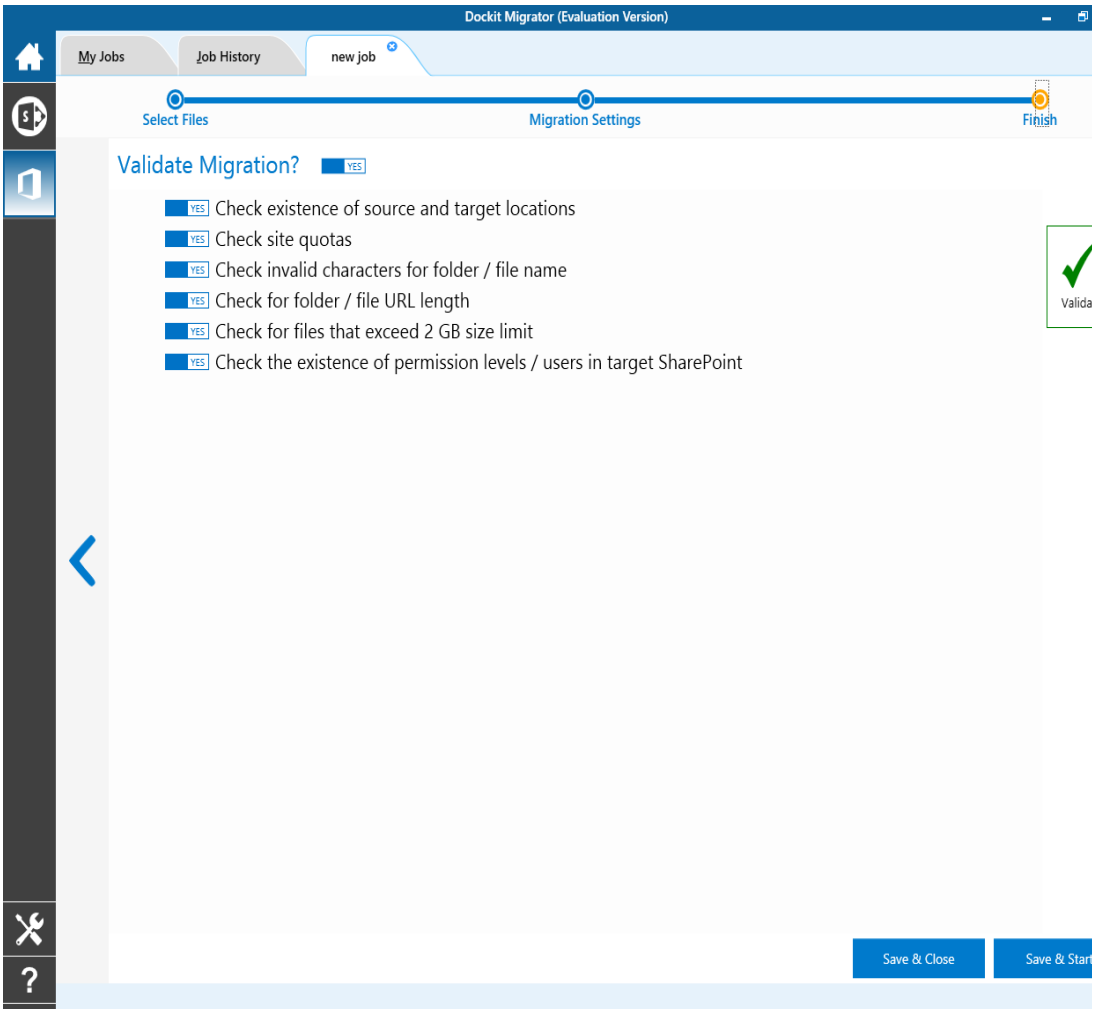
2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

Note: The option **Run with highest privileges** will be available only if you launch the application using **Run as administrator** command.

4.2.1.2.5 Pre-migration validation

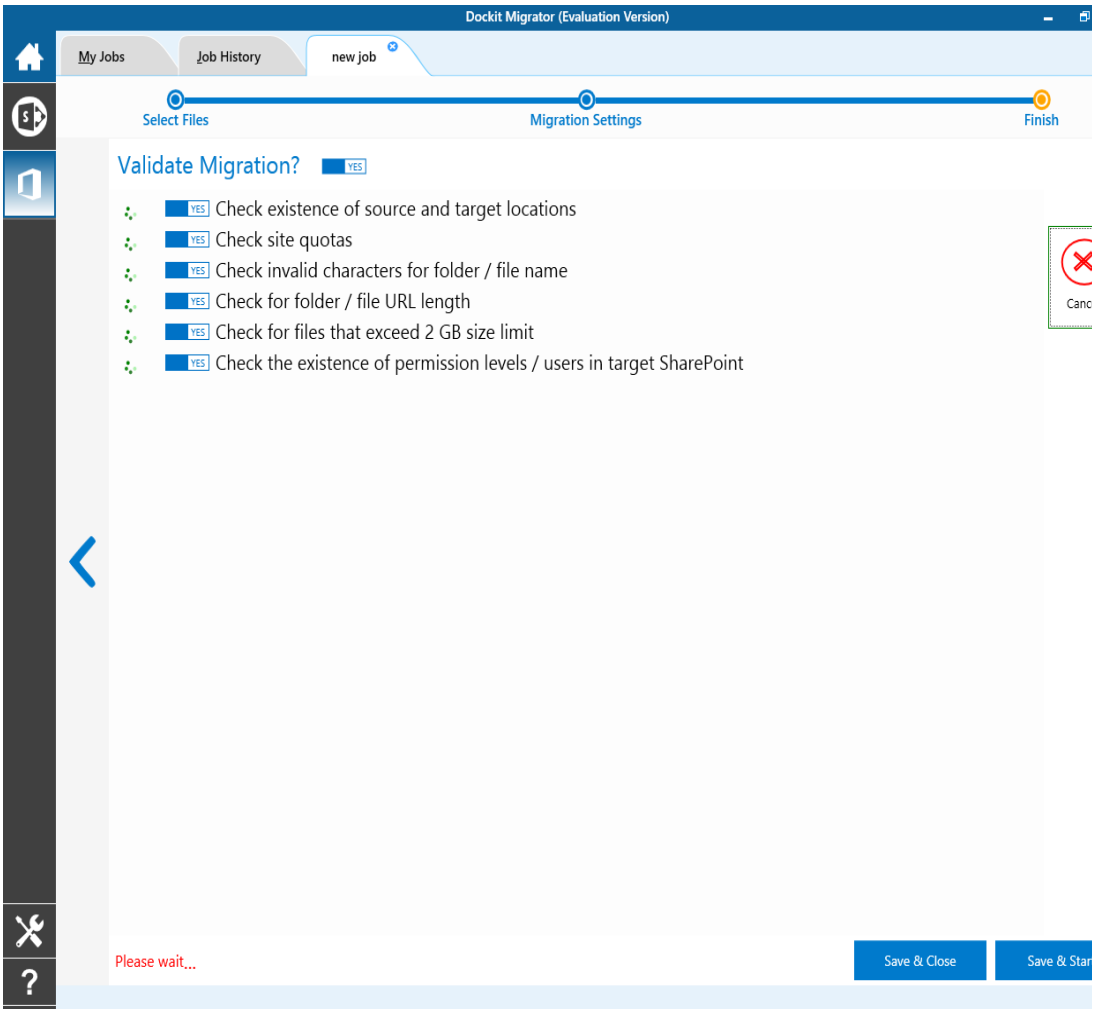
Pre-migration Validation tool helps you validate the exact steps performed by Dockit Migrator during the migration process. This tool does not migrate any files to the destination location. Most common errors can be identified by using this tool. You may run the Pre-migration Validation tool when there are any changes to migrate job settings or any SharePoint settings to ensure correctness.

1. The **Pre-migration Validation** step in the Dockit Migrator validation page appears as shown below:



2. Click **Validate** button to invoke the Pre-migration Validation tool.

3. You will notice the validation progress as shown below.



4. Once the Pre-migration validation is complete, icon will be enabled. Click to view the Pre-migration validation test results.

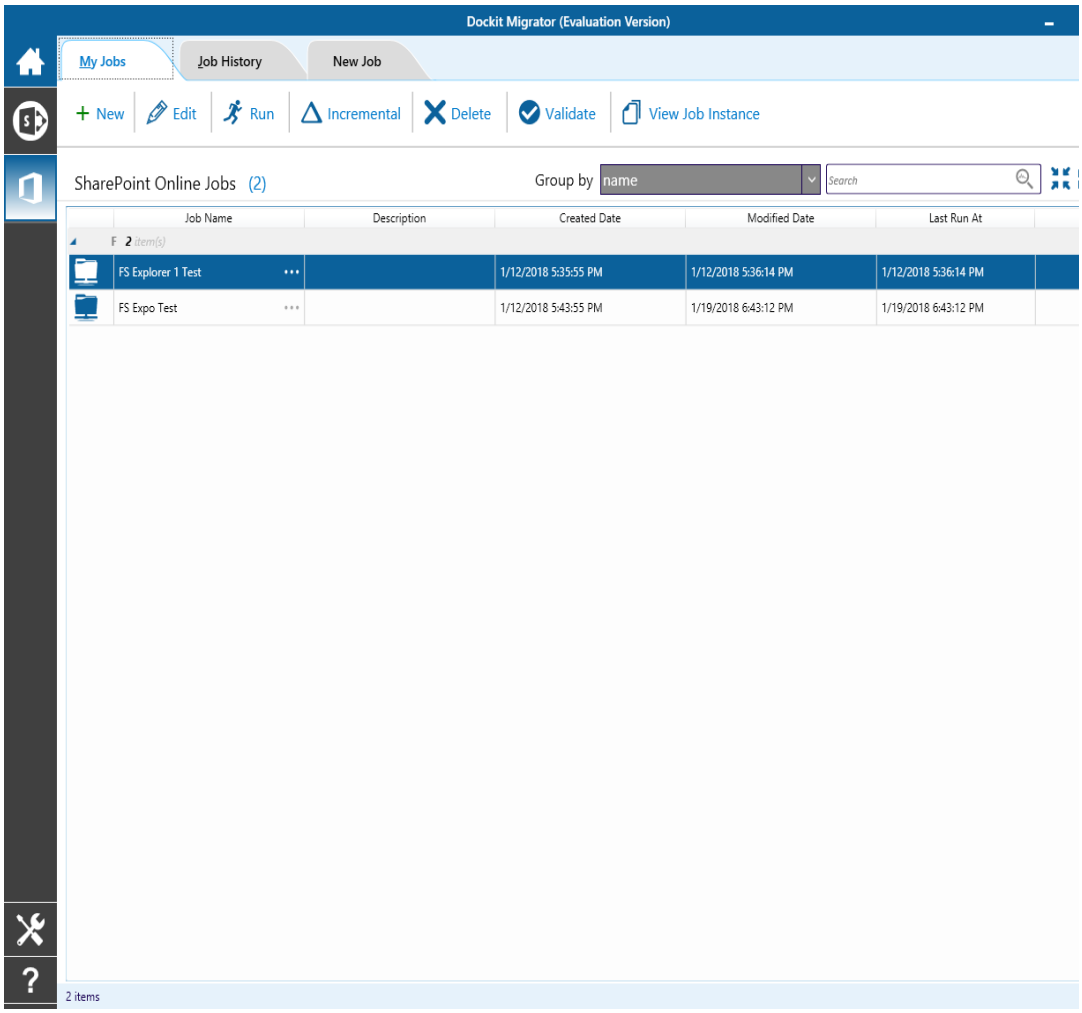
4.2.2 SharePoint on-premises to Office 365 Migration

- SharePoint on-premises to Office 365
- SharePoint on-premises to OneDrive

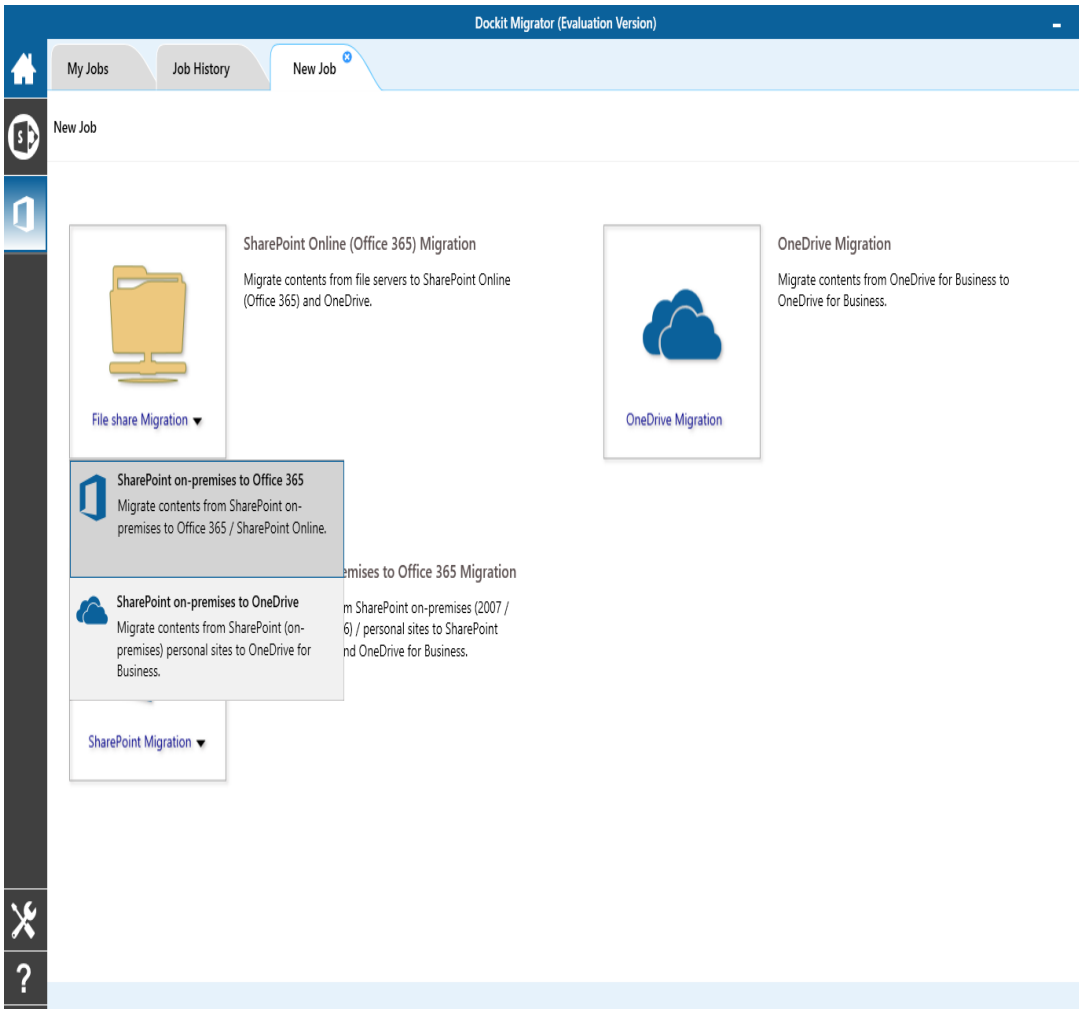
4.2.2.1 SharePoint on-premises To Office365

To create a new migration job to migrate sites, lists and libraries along their settings, metadata and permissions from SharePoint to Office 365:

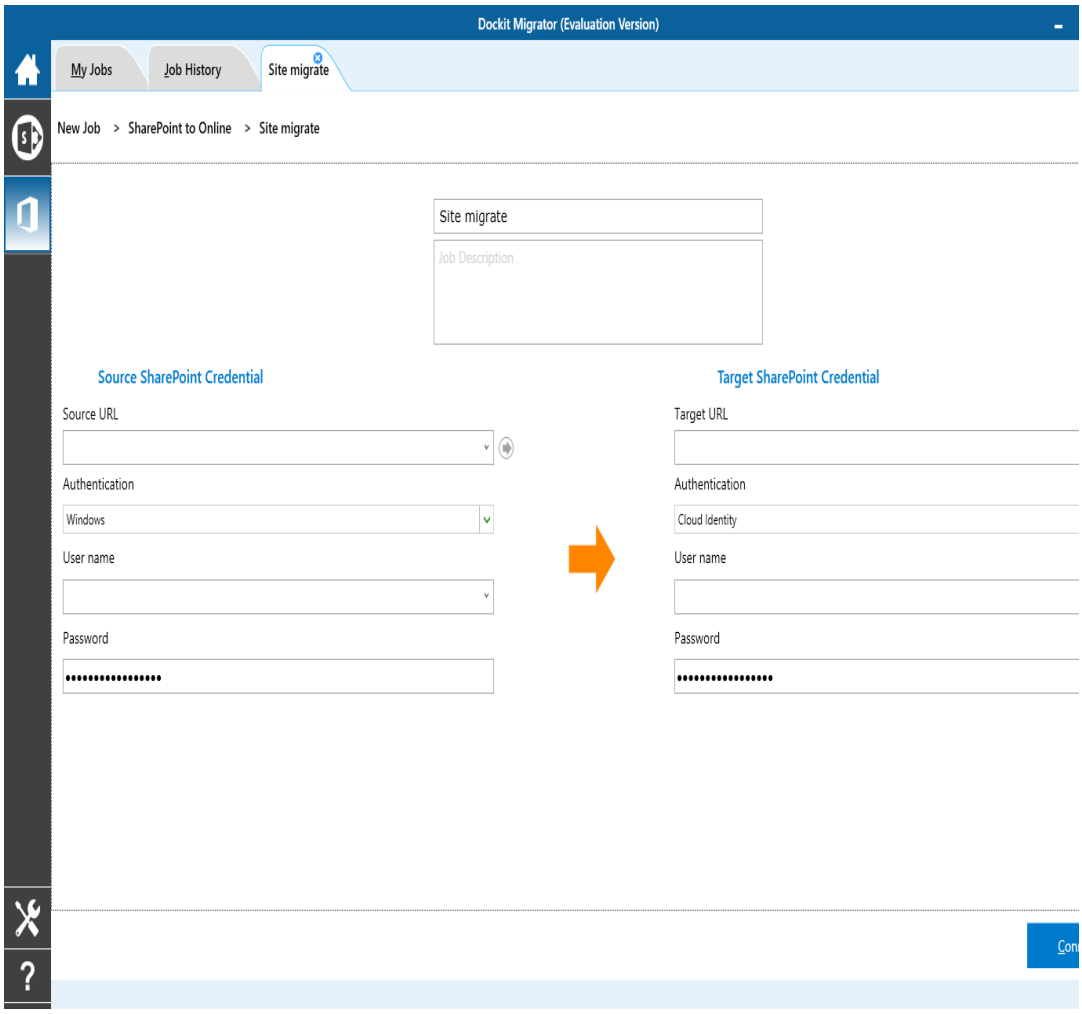
Click **New** option on **My Jobs** tab on Sharepoint Online (Office 365) migration page.



Select **SharePoint Migration** from **job category** page as shown below.



The **New Job** page appears as shown below. Enter **Job Name, Description (Optional)** and specify source sharepoint and target office 365 Url and its credentials and click **Connect**



a. To specify a SharePoint site URL (both source SharePoint and target Office 365) of a site from which you wish to migrate Libraries, Lists, folders, files and list items, perform the steps given below.

1. Specify a valid SharePoint site URL in source and specify valid Office 365 URL in target URL textbox.

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

3. Specify the Authentication Type.

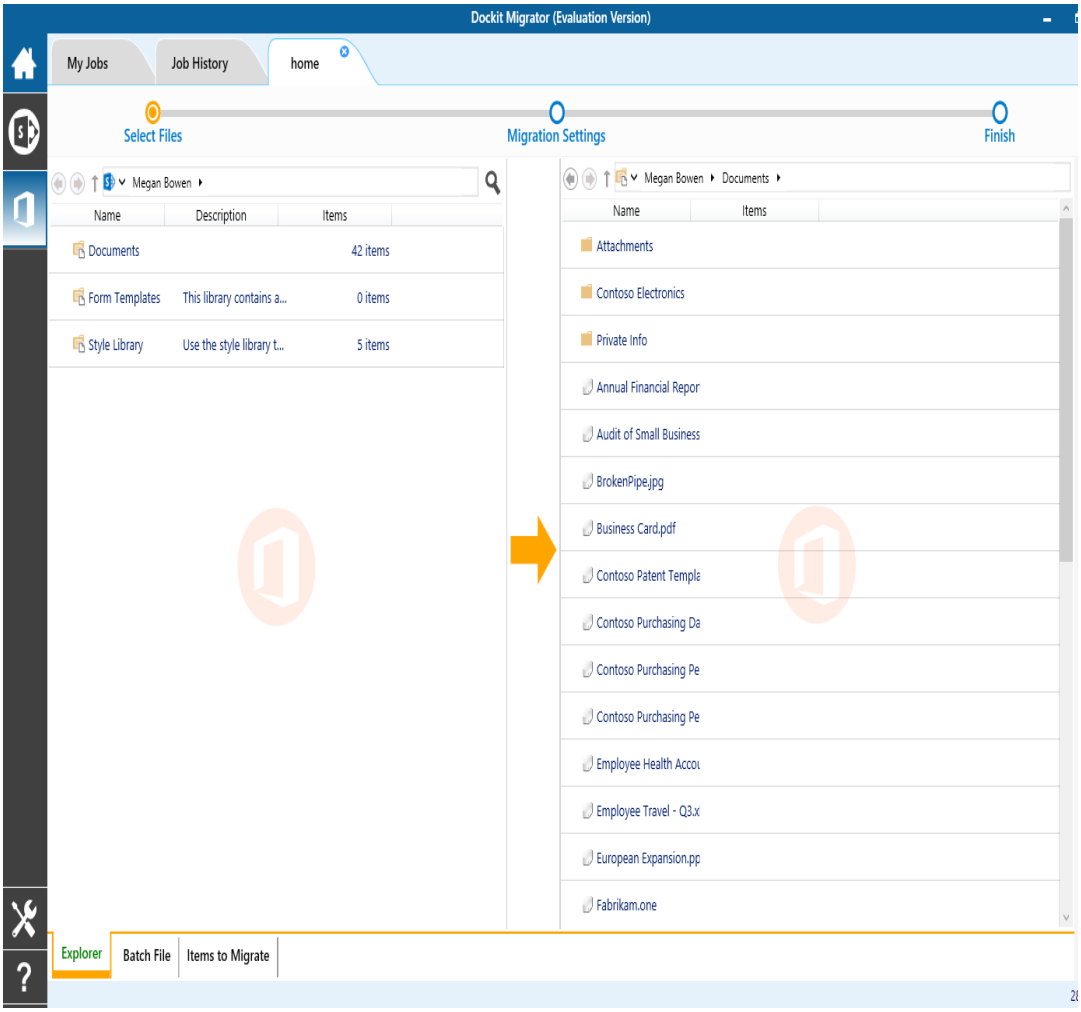
   a. Windows
   b. Forms
   c. Cloud Identity
   d. Federated Identity

4. Specify the **user credentials**

5. Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats:**DOMAIN NAME\USER NAME,UserName@DomainName, UserName** and its corresponding password. Dockit Migrator will initiate Windows authentication or Forms authentication depending on configuration in the SharePoint site.

6. Click **Connect** button to proceed.

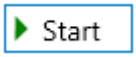
   Drag and Drop files from source SharePoint (Left Pane) to target SharePoint site (Right Pane) or Select content and Right click file share, select **Add to SharePoint**.

7. 

8. Click **Items to Migrate** on Right pane to check the list of items selected for migration, also you can remove files by clicking the Red **X** .

9. Specify Migration Settings

10. Click **Save** button to create the job, or click **<** button to navigate to previous page to change any job settings.

11. After saving the job, it will be listed on the Job Manager page. You can click on 

to initiate the migration process.

4.2.2.1.1 Batch File

The following section gives you the guidelines to create a batch file for migrate folders, files and metadata to target Libraries.

The first row of the batch file should contain the following field names as headers. The reserved headers used by Dockit Migrator in batch file are as follows:

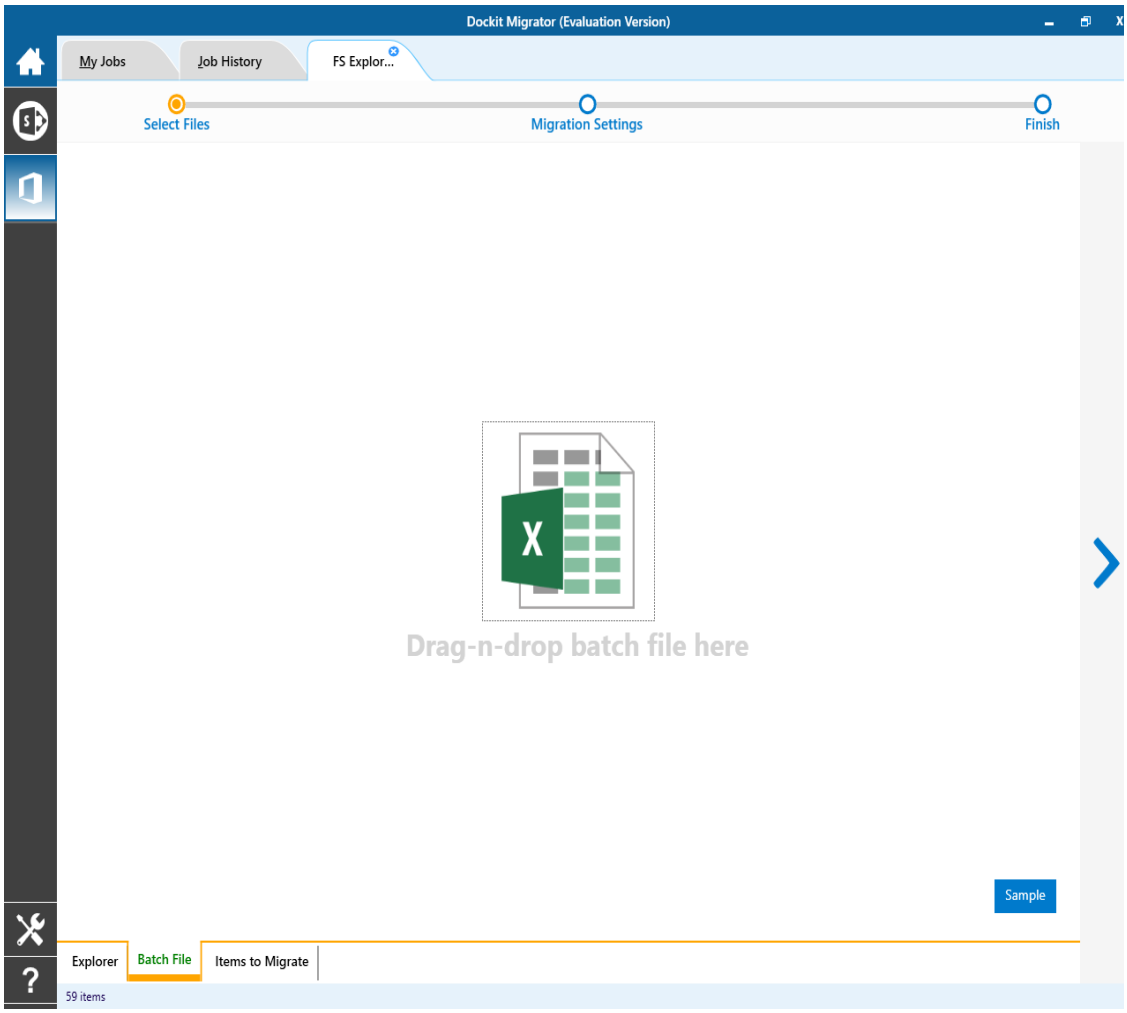
1. **Source Path:** The 'Source Path' column should contain the path of the source document / folder.
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
3. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor file snippet given below:

Source Path	**Destination Path**	**New Folder**
http://sourcesharepoint/files/model1	http://sharepoint/technical documents/folder1	folder2/folder3

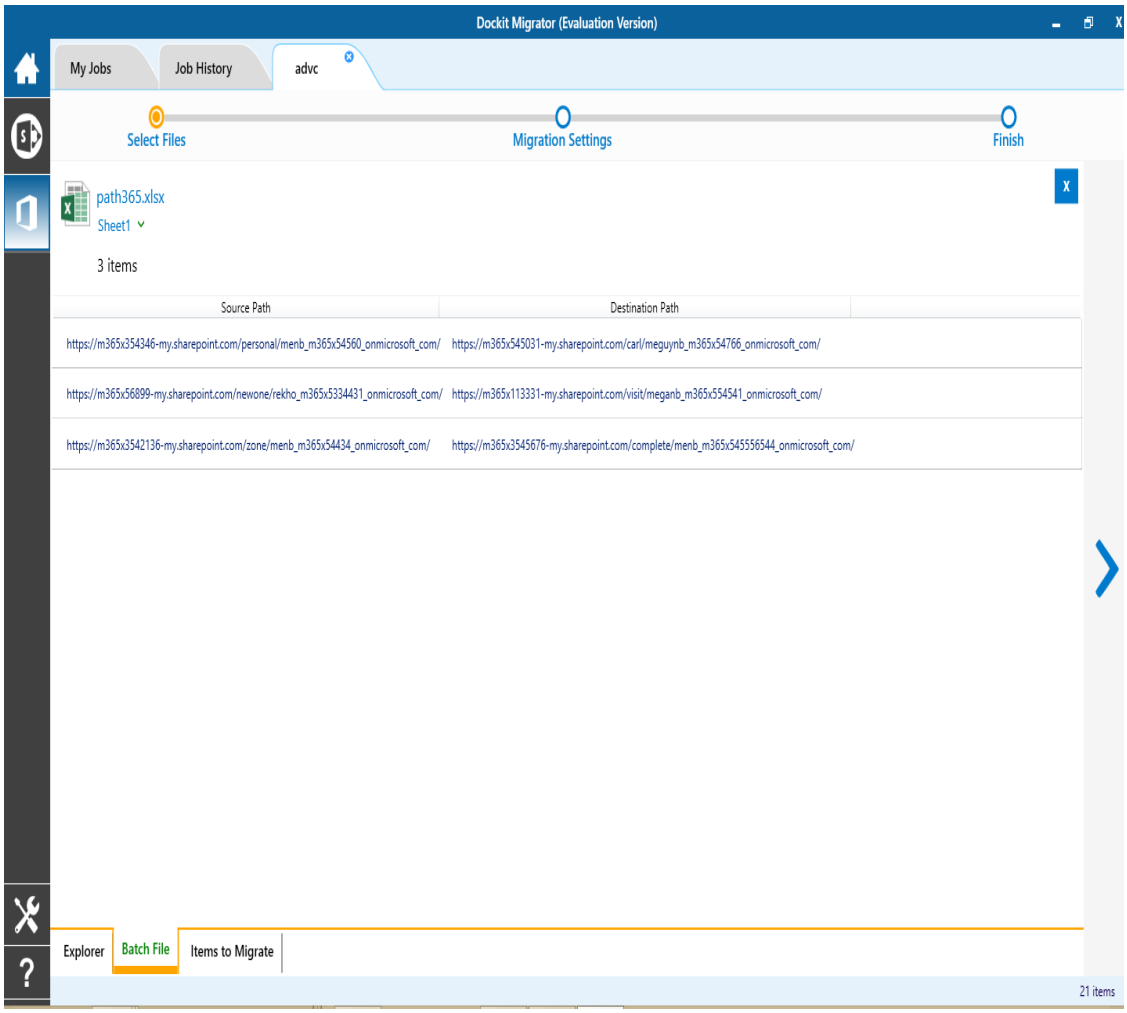
Dockit Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'model1' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

Follow the steps given below to specify the documents to migrate to the target SharePoint Online location in the batch file

1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below



Batch file content will be shown as below.

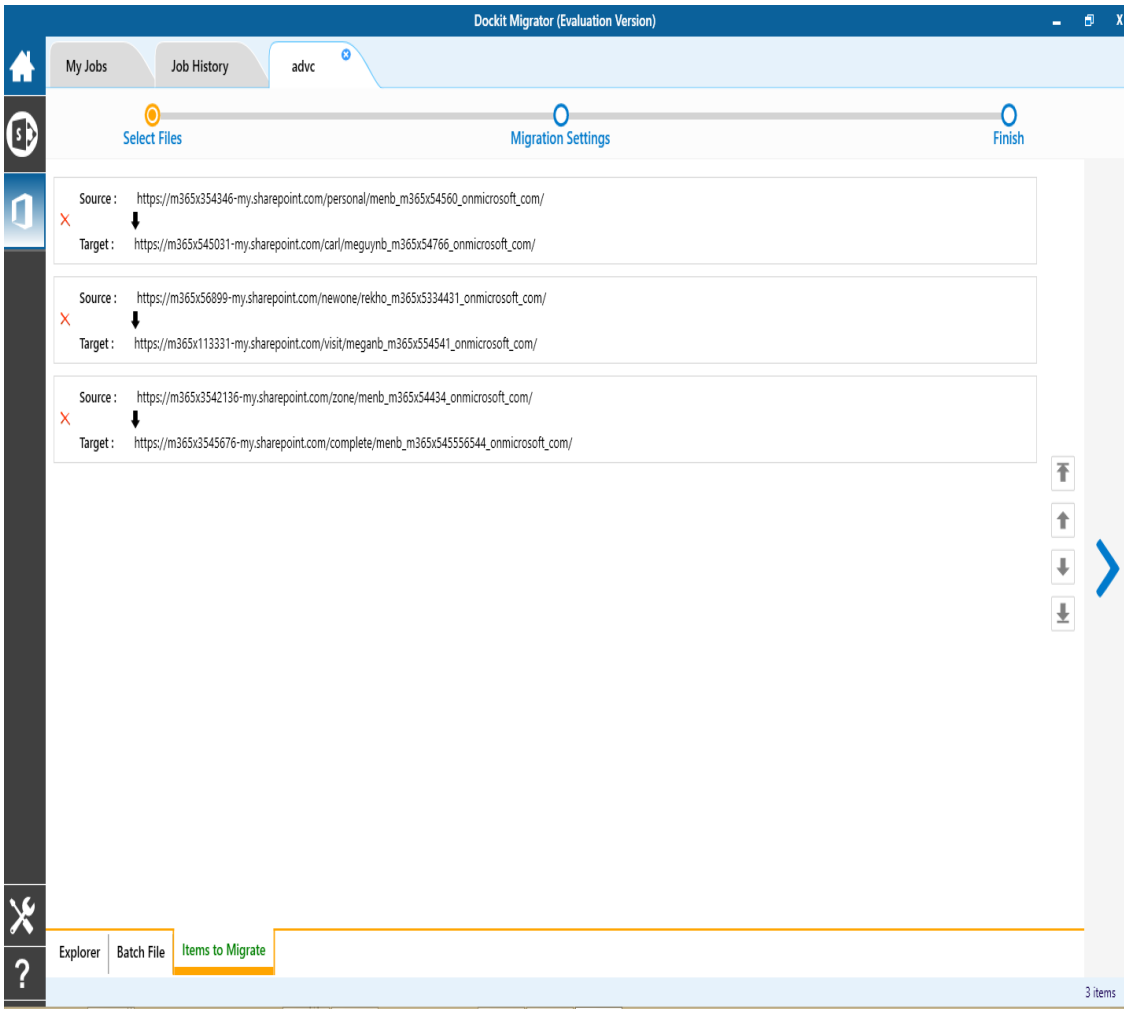


the batch file content will be added to Items to Migrate tab

4.2.2.1.2 Items to migrate

1. From source Sharepoint explorer you can either drag and drop Lists/Libraries to the target SharePoint explorer or simply select content from explorer, Right Click and Select **Add to SharePoint** to add content to Items to migrate.

The **Items to migrate** appears as shown below:



2. The selected Lists and Libraries are added for import will be displayed in the **Items to Migrate** page. The import process order can be changed by the **navigation** buttons available in the right side of the page. You can remove the items added for import by clicking Red **X** .

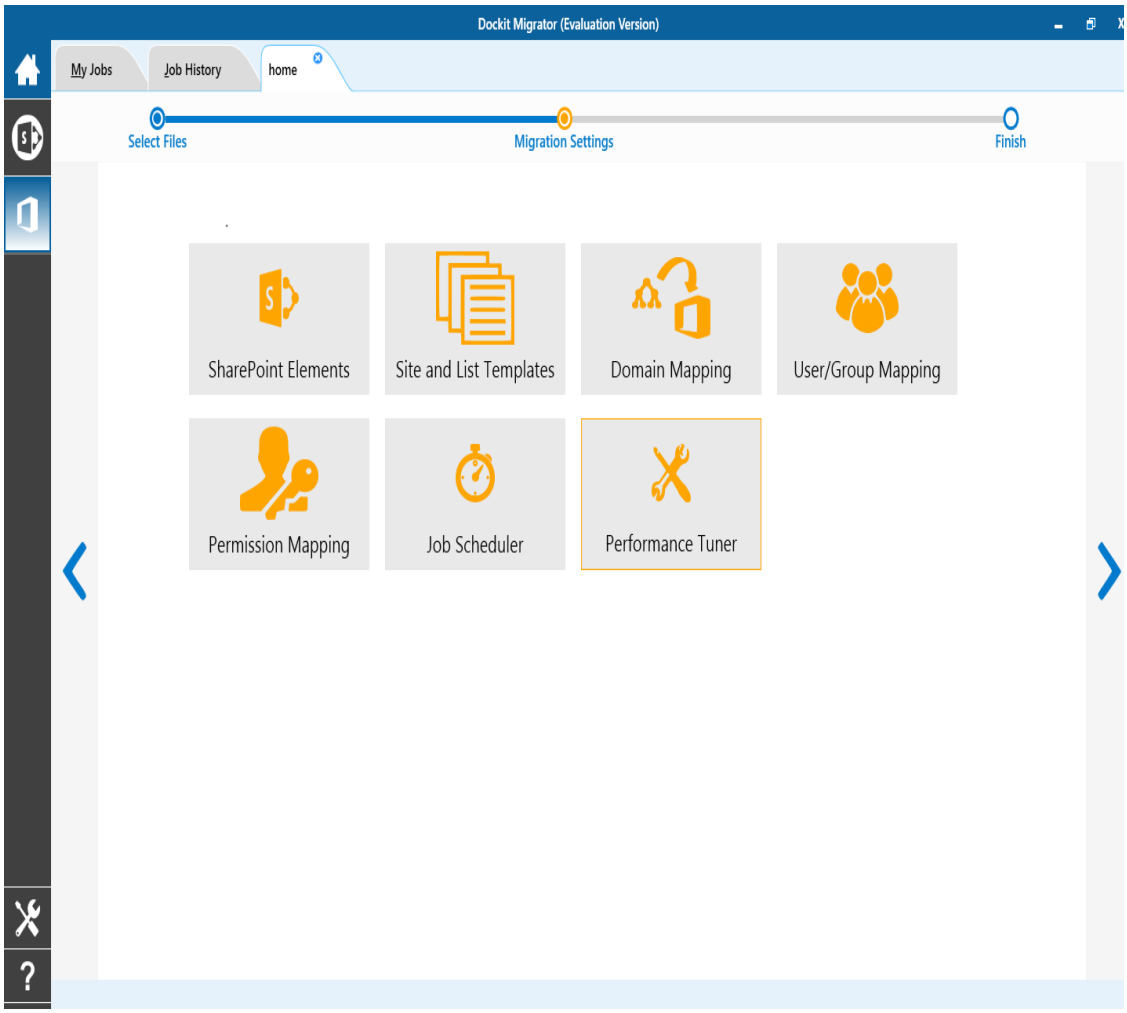
Traversal Options dialog wiil appear depending on the items added for migration

a. To specify migration options for site, click Site Migration Options
b. To specify migration options for List/Library, click List/Library Migration Options

3. Click **>** button to proceed.

4.2.2.1.3 Migration Settings

1. Migration Settings will appear as shown below.



2. From this page, you can :

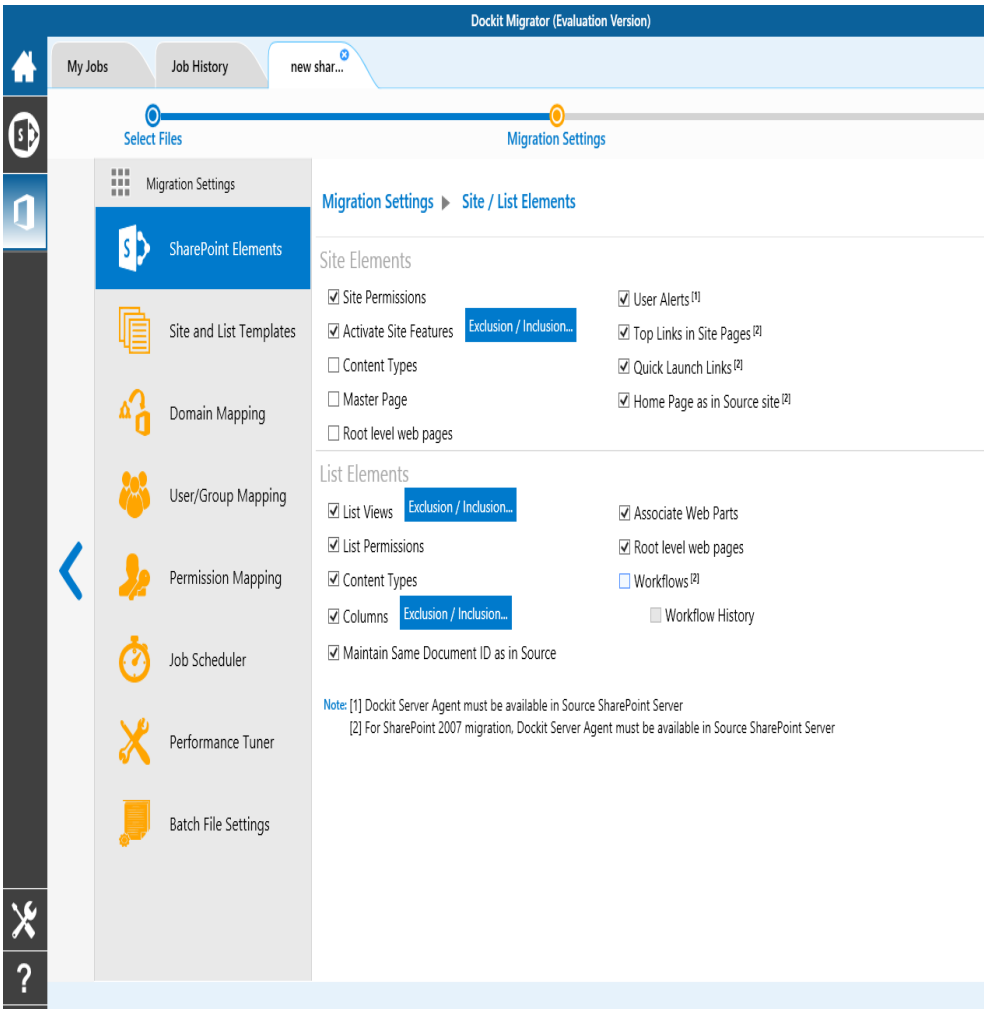
- SharePoint Elements
- Site and List Templates
- Domain Mapping
- User/Group Mapping
- Permission Mapping
- Job Scheduler
- Performance Tuner

4.2.2.1.3.1 SharePoint Elements

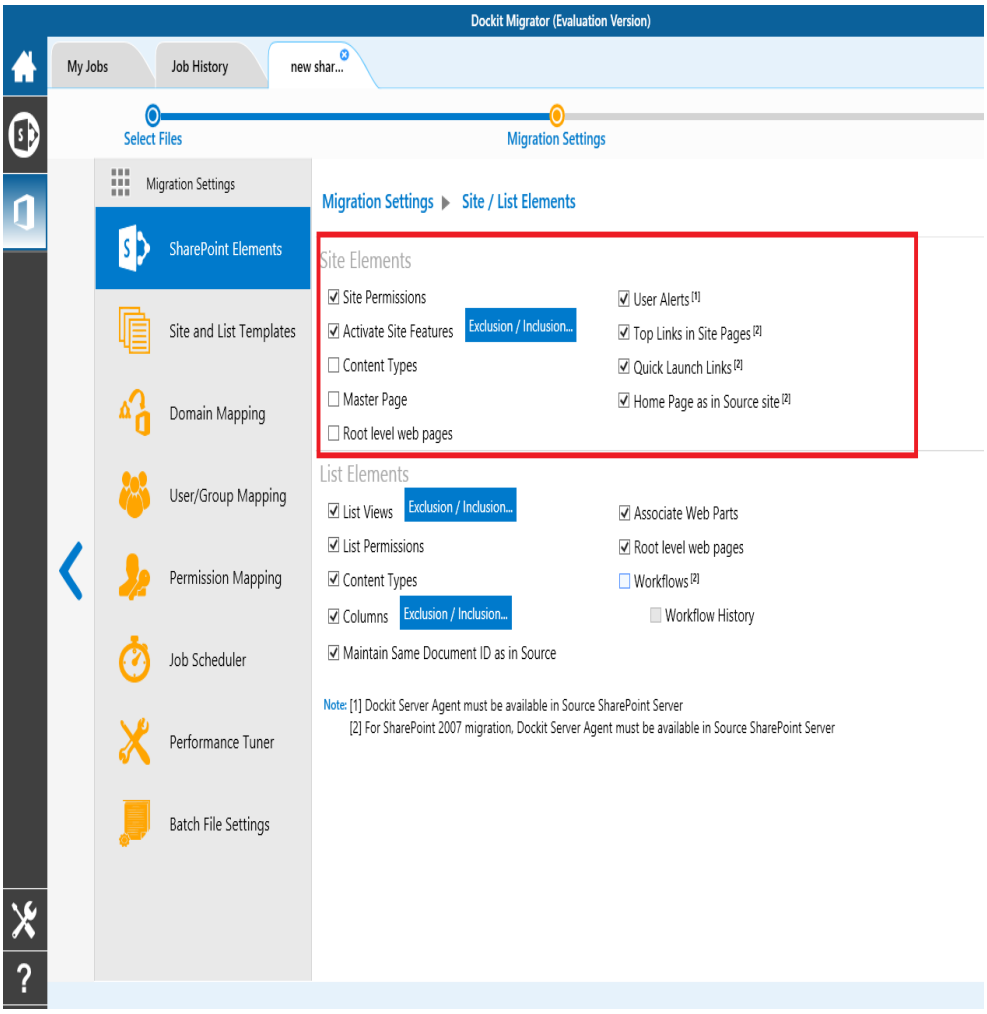
Specify Site elements (say, Master Pages, Site Permissions, Quick Launch Links,

User Alerts and Content Type) and List elements (say, List View, List Permissions Maintain same Document ID and Web Parts) that you want to migrate from source SharePoint environment to target Office 365 in this step.

1. The **Site / List elements** step appears as shown below:



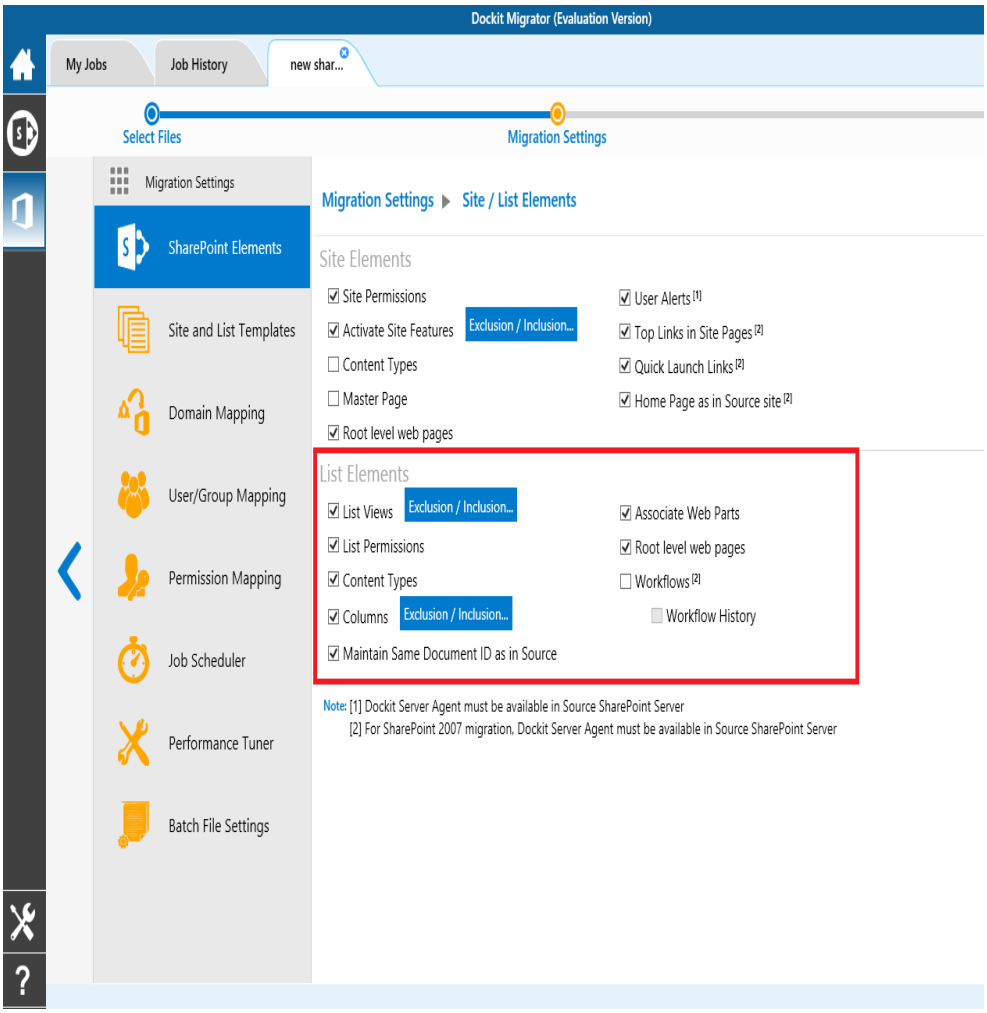
2. Specify the site elements to migrate during a Site / Web level migration to a target Office 365 site.



Master Pages	Migrate master pages. This can be done when migrating content from SharePoint 2007 and above.
Home Page as in source site	Set the home page as in source SharePoint site.
Top Links in site pages:	Set the top links as same as in source SharePoint site.
Quick Launch Links:	Set the quick launch links as same as in source SharePoint site.
User Alerts:	To migrate user alerts to the target SharePoint lists, libraries and their content. **Note: Dockit Server Agent** is required in the source SharePoint server to retrieve the associated user alerts information.
Site Permissions:	To migrate site permissions.

	Note: Dockit Server Agent is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.
Activate Features:	To activate Site collection feature and site feature. **Note**: Click 'Exclusion List button' and specify the feature id's that are excluded during feature activation.

3. Specify the list elements to migrate during a site / list level migration to a target Office 365 site.



List Views:	To migrate list views.
List Permissions:	To migrate list permissions. **Note: Dockit Server Agent** is required in the source SharePoint server to migrate when performing migration from SharePoint 2007.

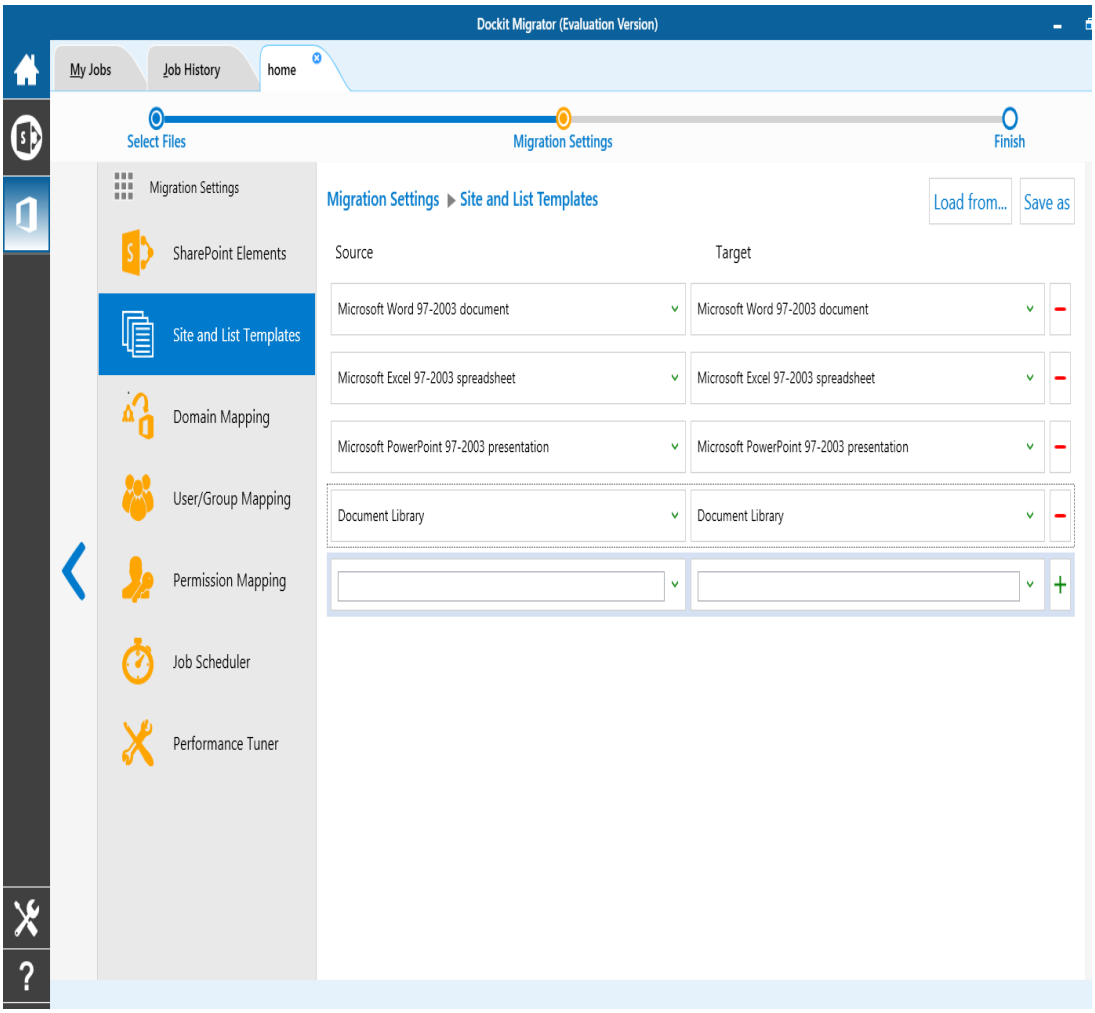
Content Types:	To create content types which are not available in the target SharePoint list.
Columns:	To create list columns which are not available in the target SharePoint list.
Maintain same Document ID as in source:	To retain the document ID for the migrated document as same as source document (when Document ID Services feature is activated in both source and target SharePoint servers).
Web Part:	To migrate the Web Parts (Landing pages, List view and Web Part pages) during a Site / Web level migration. **Note:** • Ordering of Web Parts may not be preserved in Basic Pages (pages without Web Part Zones) • Custom Web Parts will not be migrated and must be available in the target SharePoint prior to migration.
Workflow:	To migrate the list level Workflows during a Site / List level migration. **Note:** • **Dockit Server Agent** is required in the source SharePoint server to retrieve the associated workflows from SharePoint 2007.

4.2.2.1.3.2 Site and List Templates

Dockit Migrator uses Site and List template mapping to map the source List/Library or Site template to its equivalent target Office 365 Site or List/Library template.

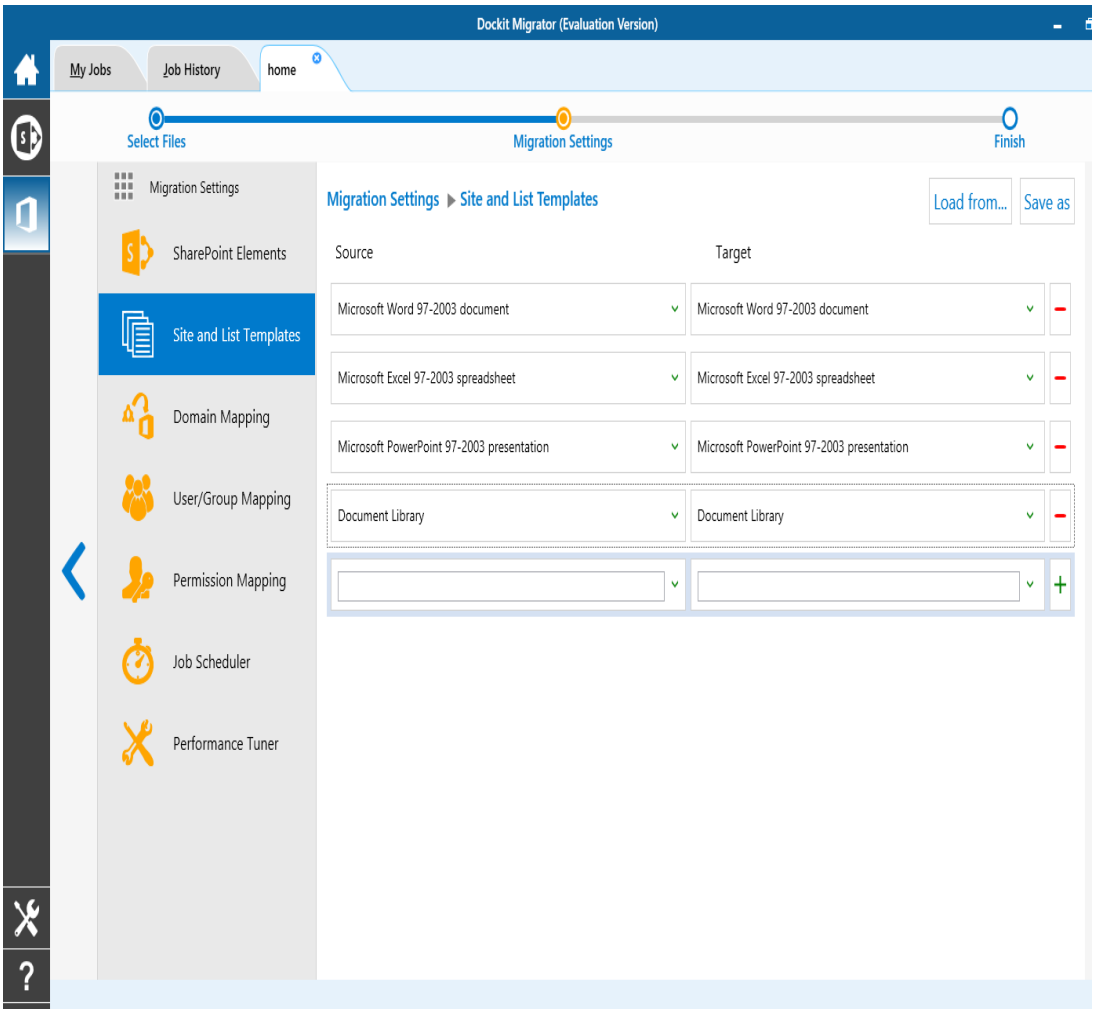
Source Template

1. Dockit Migrator automatically loads the list of source SharePoint templates from connected source site.



Target Template

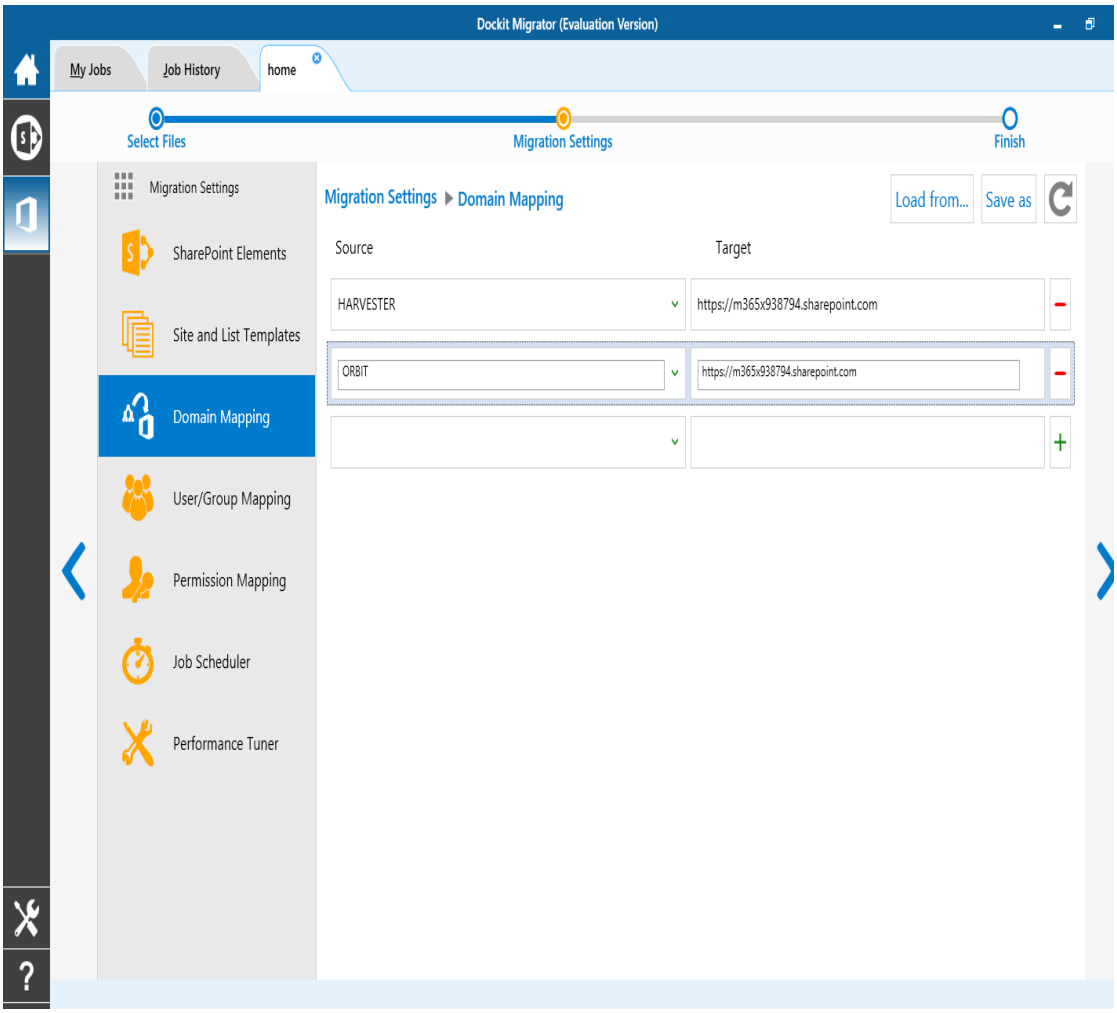
2. Dockit Migrator automatically loads the list of target SharePoint templates from connected target Office 365 site.



4.2.2.1.3.3 Domain Mapping

Dockit Migrator uses domain mapping to replace the unavailable domain with the valid domain while assigning permissions (users / groups) for the folder / file imported to SharePoint.

Dockit Migrator domain mapping enables you to load the list of domains available with the network and it appears in both source and target items as shown below.



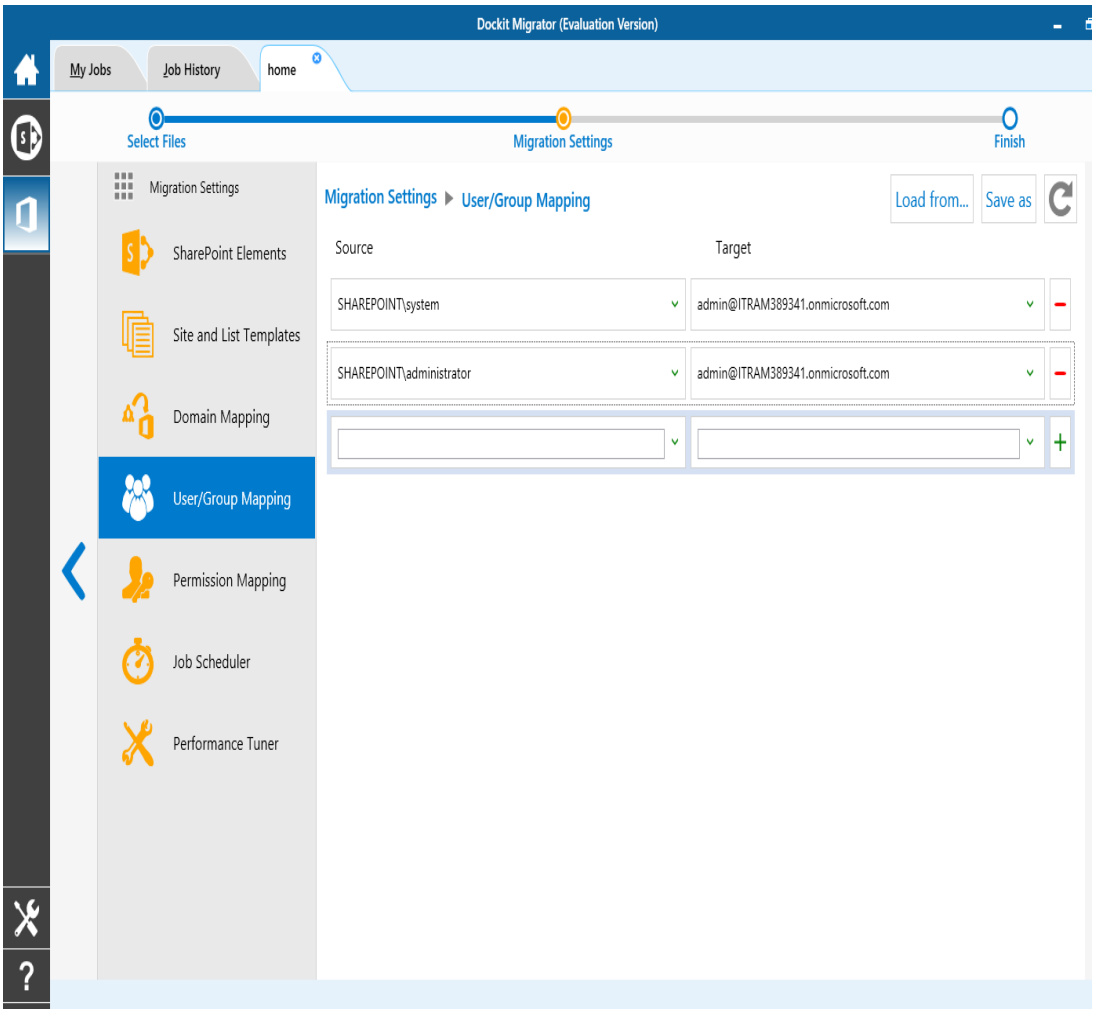
Select appropriate source domain from the domain list and enter the corresponding target domain name to create domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research, vyapin.onmicrosoft.com etc...

4.2.2.1.3.4 User/Group Mapping

Dockit Migrator uses user / group mapping to replace the unavailable users / groups with valid / new SharePoint users / groups when assigning user / groups or permissions for the folder / document during content migration from SharePoint environment to Office 365. You can use this mapping for all Person or Group fields in SharePoint.

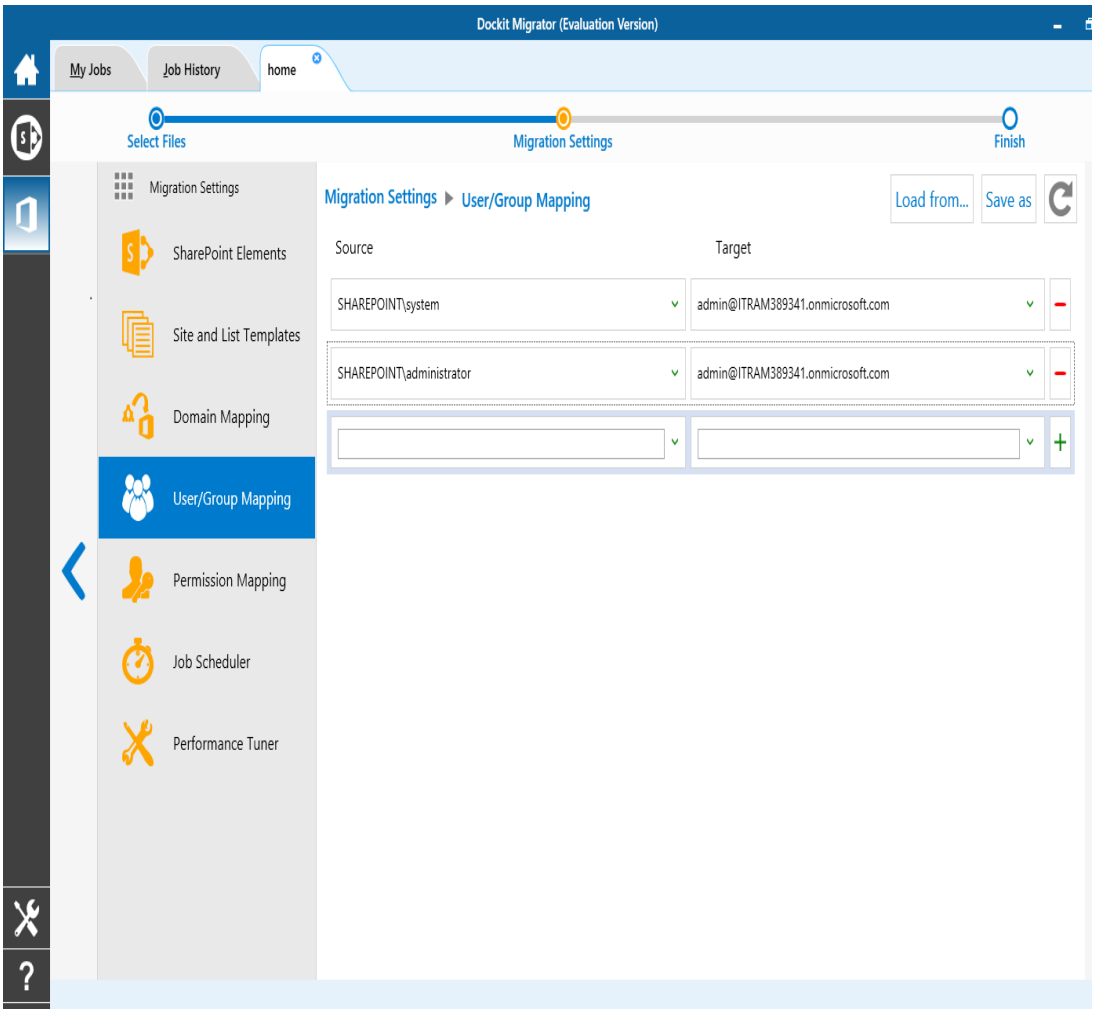
Source User

1. Dockit Migrator automatically loads the list of target users / group from the source SharePoint site.



Target User

2. Dockit Migrator automatically loads the list of target users / group from the target connected site.



You also have the option to enter the user / group of your own in user mapping.

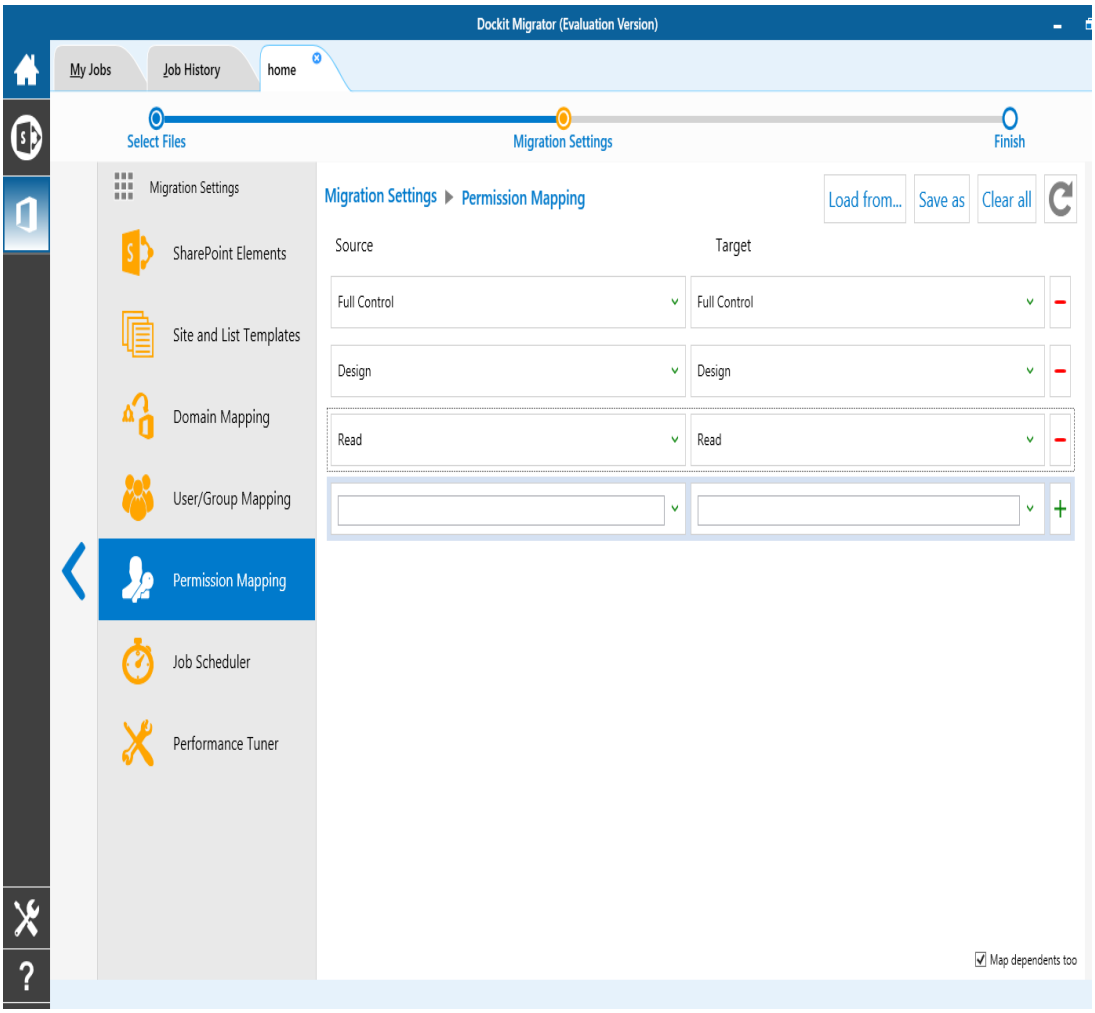
Select Unresolved user from source combobox to map all unresolved / unavailable users from source SharePoint user to a valid user in target Office 365.

4.2.2.1.3.5 Permission Mapping

Dockit Migrator uses permission mapping to map the source SharePoint permissions to its equivalent target SharePoint permission levels and it uses various mapping such as user / group and domain mapping in seperate tab.

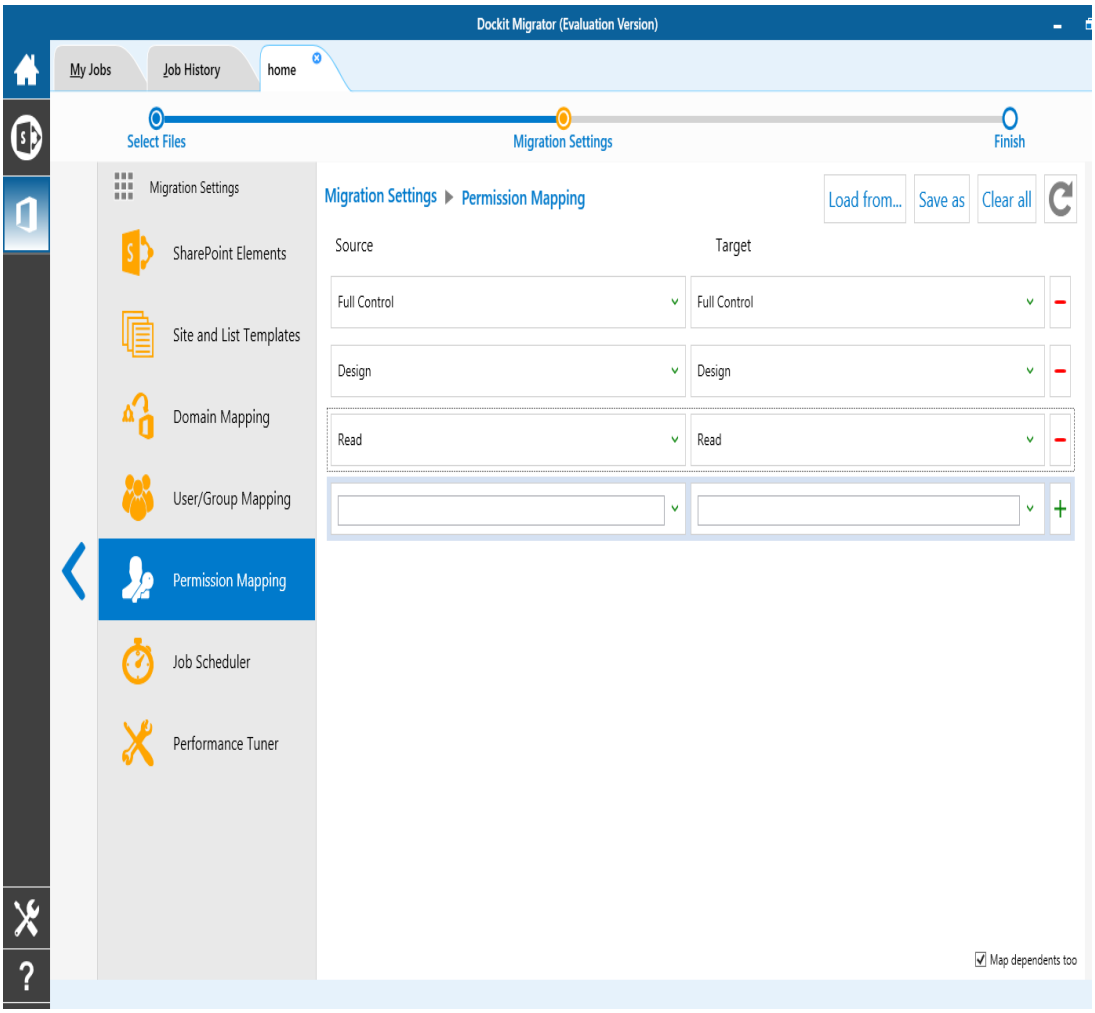
Source Permission

1. Dockit Migrator automatically loads the list of source permissions from items to migrate.



Target Permission

2. Dockit Migrator automatically loads the list of target permissions from the connected site.

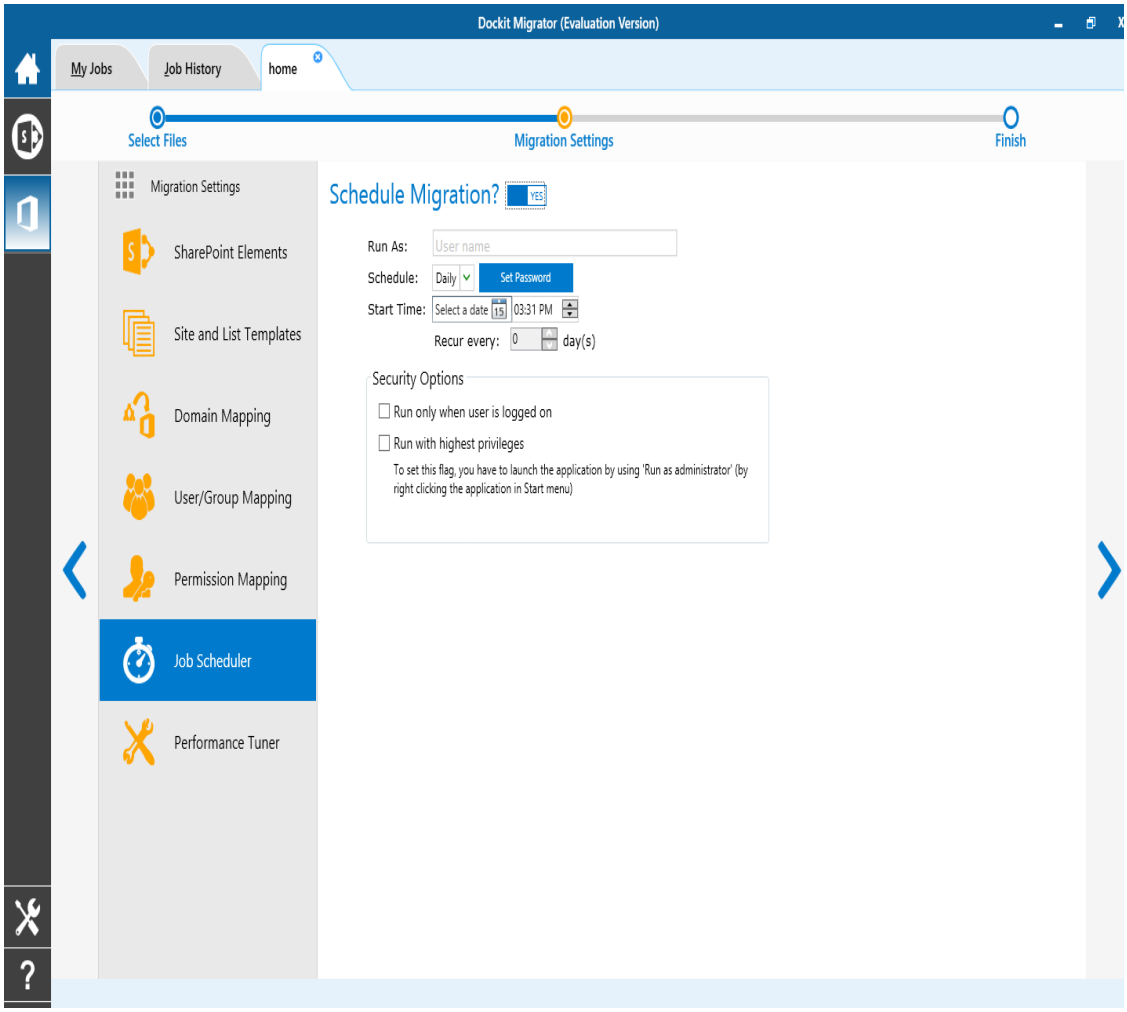


See the following sections for more information

- User Mapping
- Domain Mapping

4.2.2.1.3.6 Job Scheduler

1. The **Job Schedule Settings** step appears as shown below:

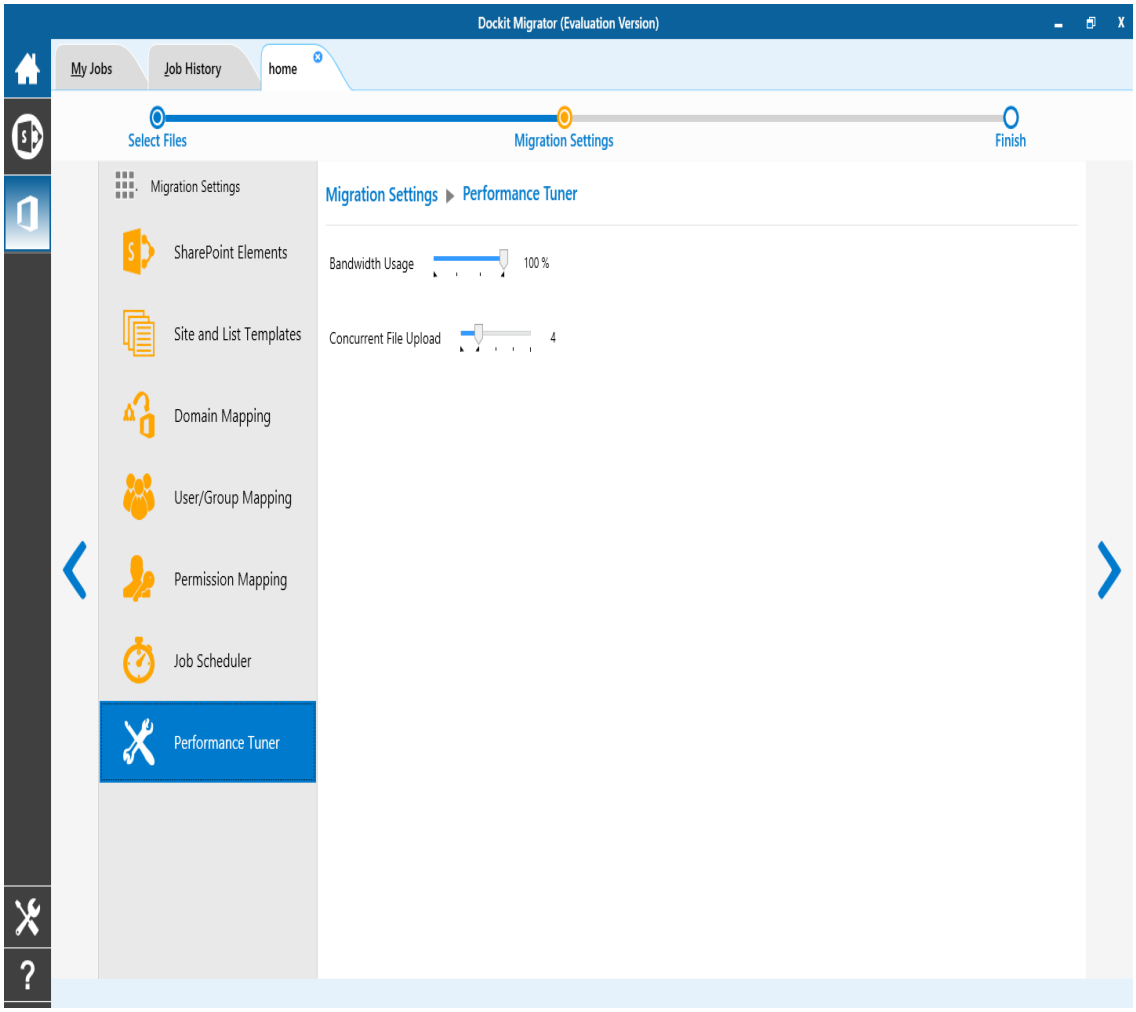


2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

Note: The option **Run with highest privileges** will be available only if you launch the application using **Run as administrator** command.

4.2.2.1.3.7 Performance Tuner

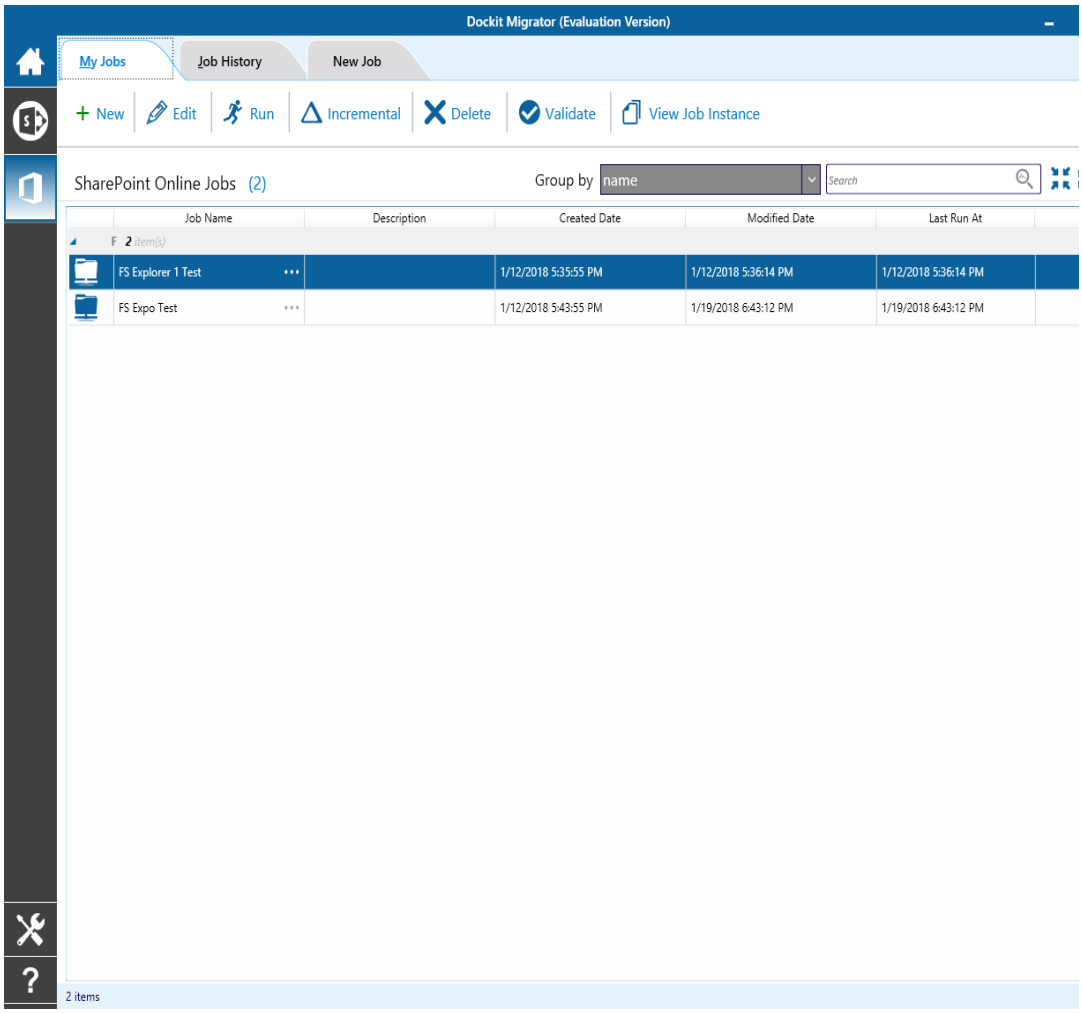
To set percentage of Network bandwidth that Dockit Migrator can use during migration and number of files that can be uploaded concurrently to improve performance.



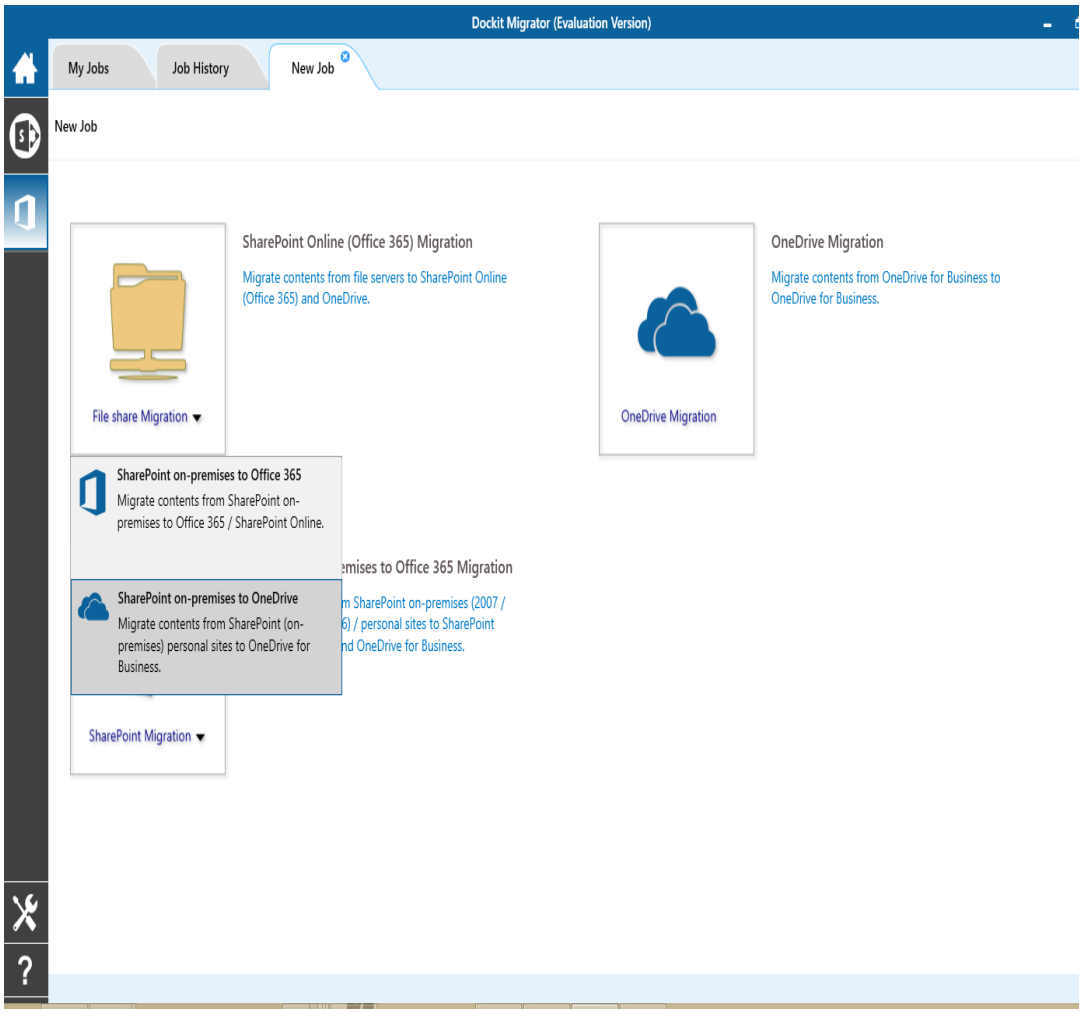
4.2.2.2 SharePoint on-premises To OneDrive

To create a new migration job to migrate sites, lists and libraries along their settings, metadata and permissions from SharePoint to OneDrive:

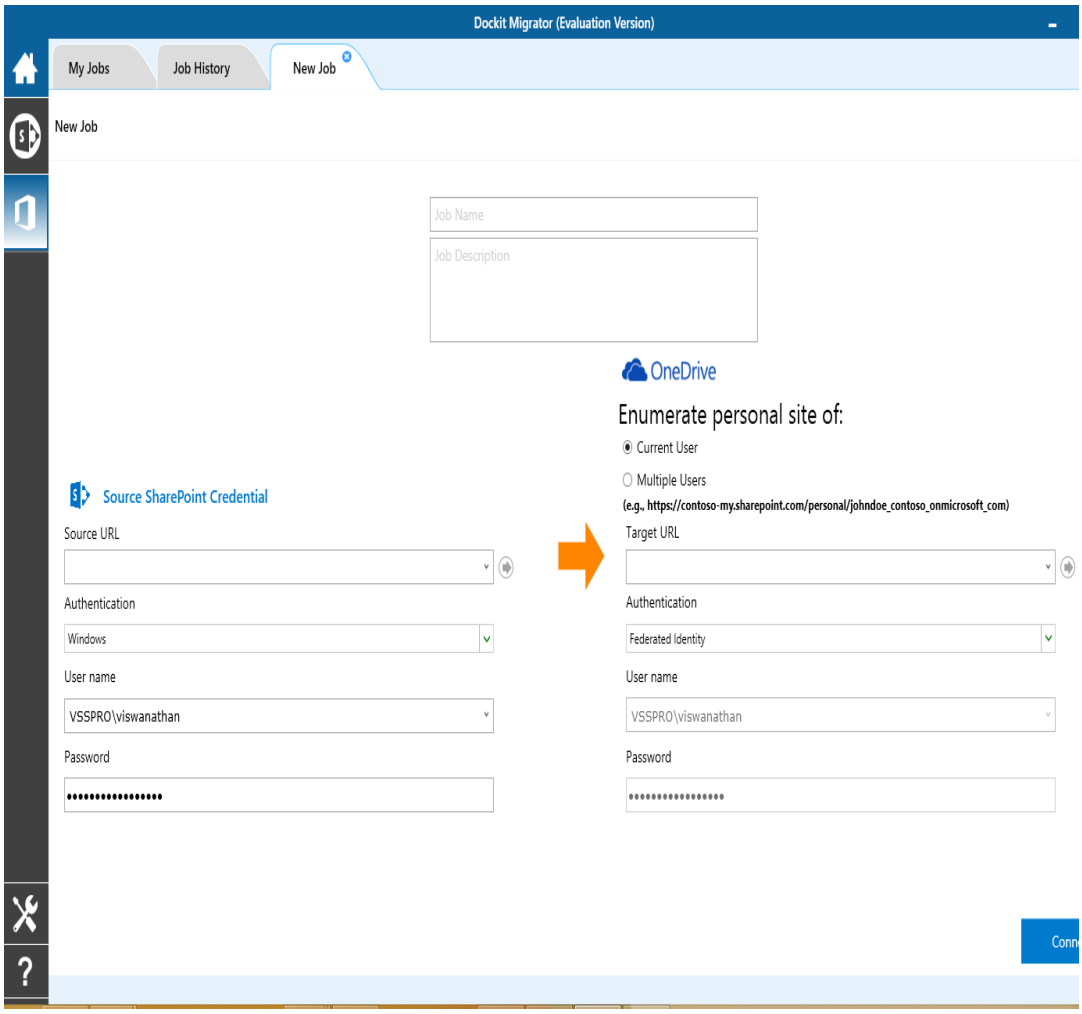
Click **New** option on **My Jobs** tab on Sharepoint Online (Office 365) migration page.



Select **SharePoint on-premises to OneDrive** from **SharePoint Migration** from **job category** page as shown below.



The **New Job** page appears as shown below. Enter **Job Name, Description (Optional)** and specify source sharepoint and target OneDrive Url and its credentials and click **Connect**



a. To specify a SharePoint site URL (both source SharePoint and target OneDrive) of a site from which you wish to migrate Libraries, Lists, folders, files and list items, perform the steps given below.

1. Specify a valid SharePoint site URL in source and specify valid OneDrive URL in target URL textbox.

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

3. Specify the Authentication Type.

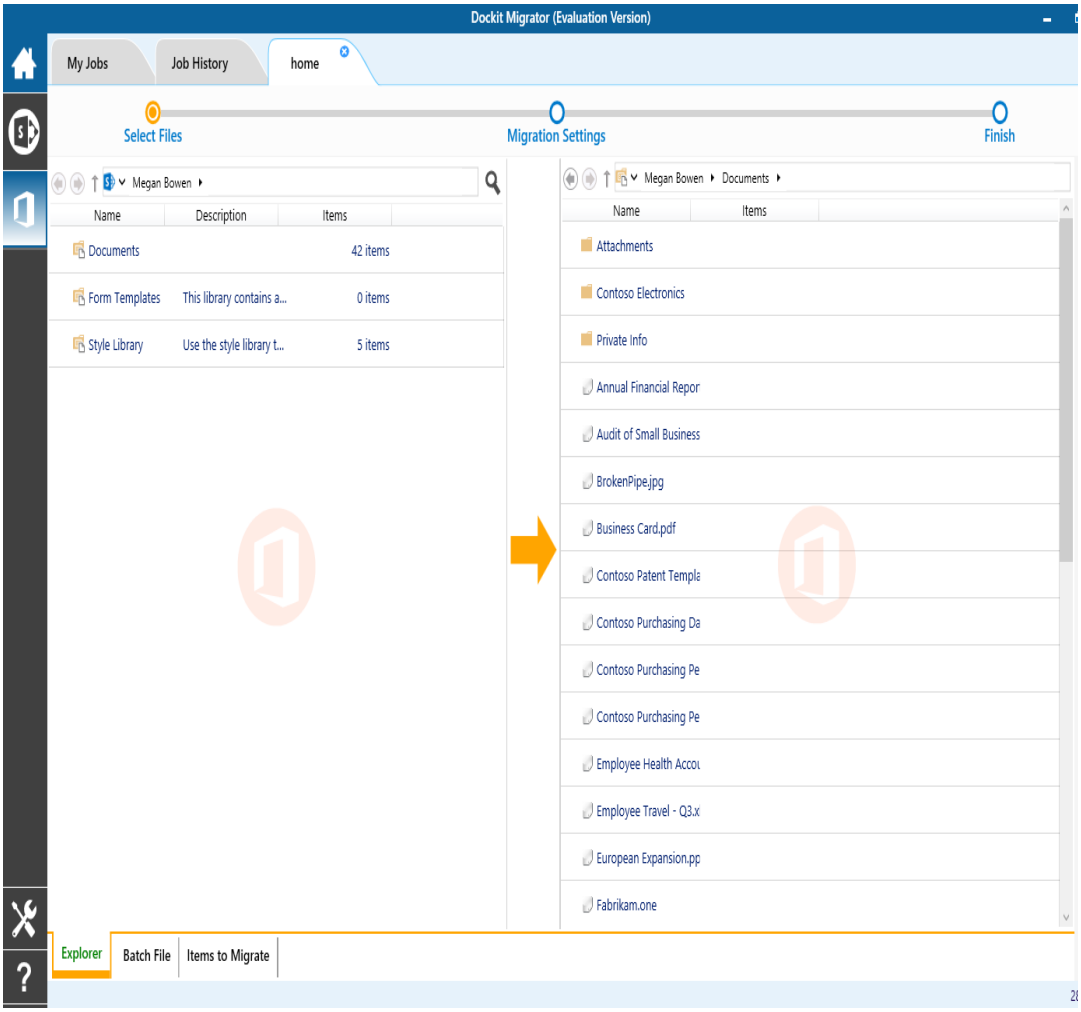
   a. Windows
   b. Forms
   c. Cloud Identity
   d. Federated Identity

4. Specify the **user credentials**

5. Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats:**DOMAIN NAME\USER NAME,UserName@DomainName, UserName** and its corresponding password. Dockit Migrator will initiate Windows authentication or Forms authentication depending on configuration in the SharePoint site.

6. Click **Connect** button to proceed.

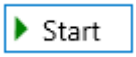
   Drag and Drop files from source SharePoint (Left Pane) to target OneDrive site (Right Pane) or Select content and Right click file share, select **Add to OneDrive**.

7. 

8. Click **Items to Migrate** on Right pane to check the list of items selected for migration, also you can remove files by clicking the Red **X** .

9. Specify Migration Settings

10. Click **Save** button to create the job, or click **<** button to navigate to previous page to change any job settings.

11. After saving the job, it will be listed on the Job Manager page. You can click on 

to initiate the migration process.

4.2.2.2.1 Batch File

The following section gives you the guidelines to create a batch file for migrate folders, files and metadata to target Libraries.

The first row of the batch file should contain the following field names as headers. The reserved headers used by Dockit Migrator in batch file are as follows:

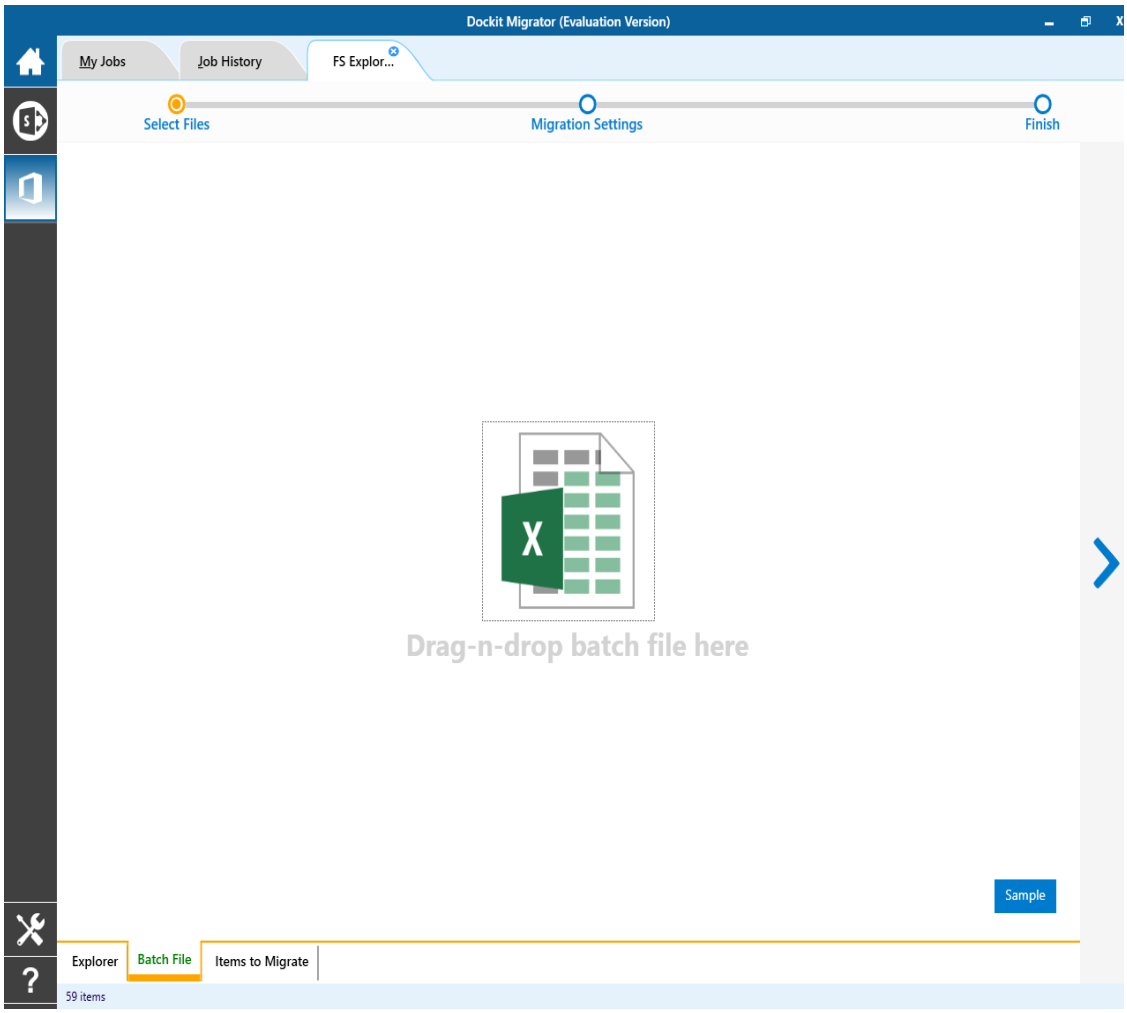
1. **Source Path:** The 'Source Path' column should contain the path of the source document / folder.
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
3. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor file snippet given below:

Source Path	**Destination Path**	**New Folder**
http://sourcesharepoint/files/model1	http://sharepoint/technical documents/folder1	folder2/folder3

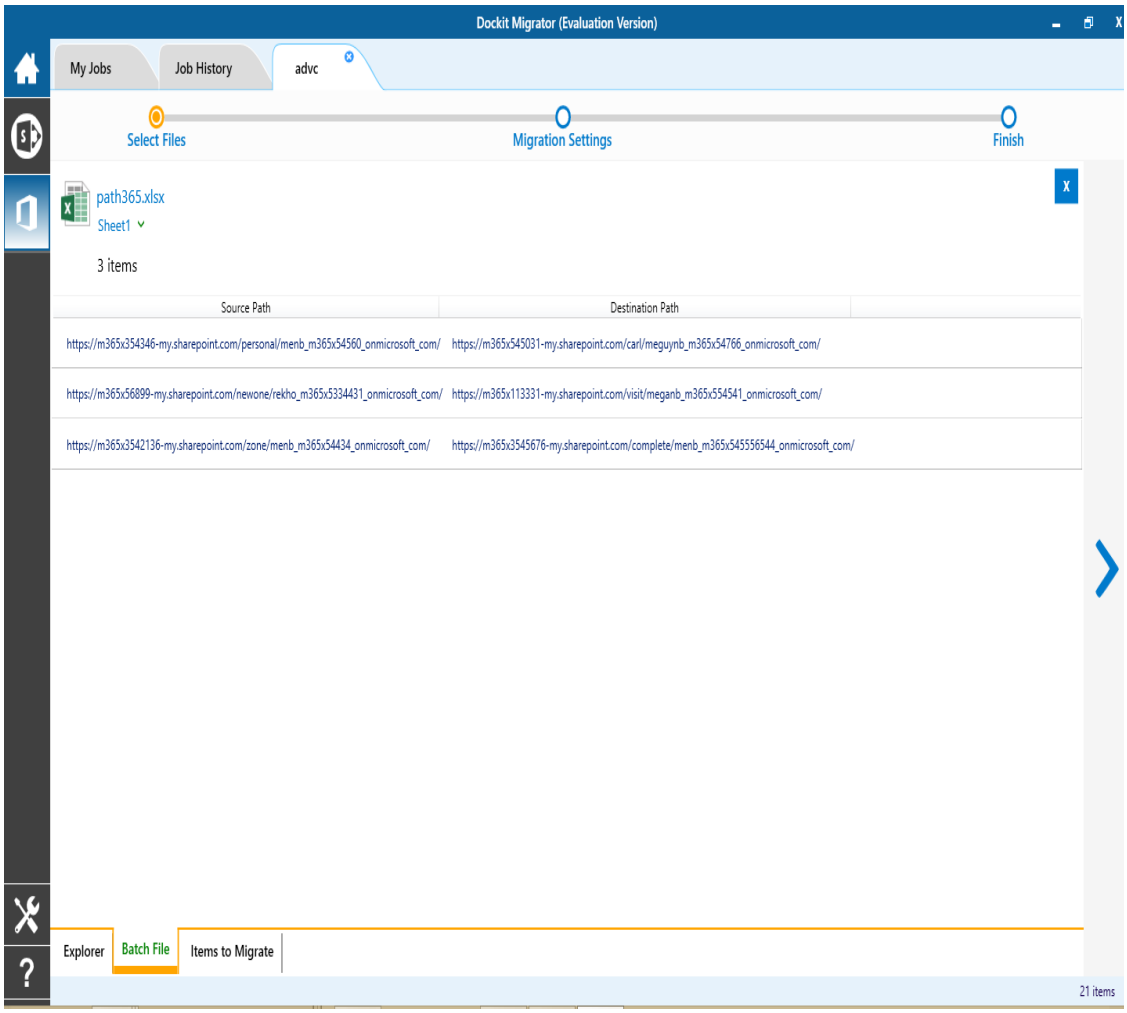
Dockit Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'model1' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

Follow the steps given below to specify the documents to migrate to the target SharePoint Online location in the batch file

1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below



Batch file content will be shown as below.

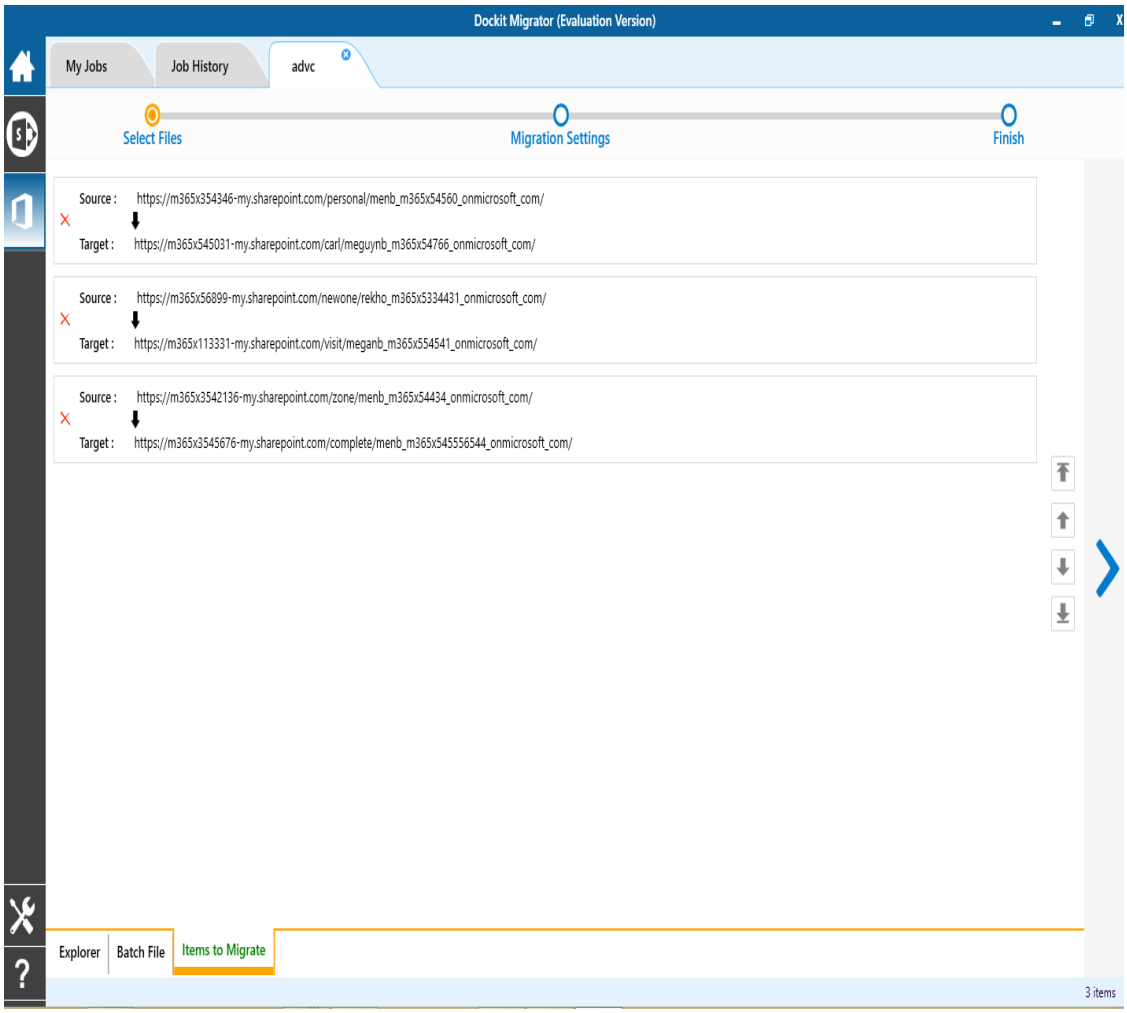


the batch file content will be added to Items to Migrate tab

4.2.2.2.2 Items to migrate

1. From source Sharepoint explorer you can either drag and drop Lists/Libraries to the target SharePoint explorer or simply select content from explorer, Right Click and Select **Add to SharePoint** to add content to Items to migrate.

The **Items to migrate** appears as shown below:



2. The selected Lists and Libraries are added for import will be displayed in the **Items to Migrate** page. The import process order can be changed by the **navigation** buttons available in the right side of the page. You can remove the items added for import by clicking Red **X** .

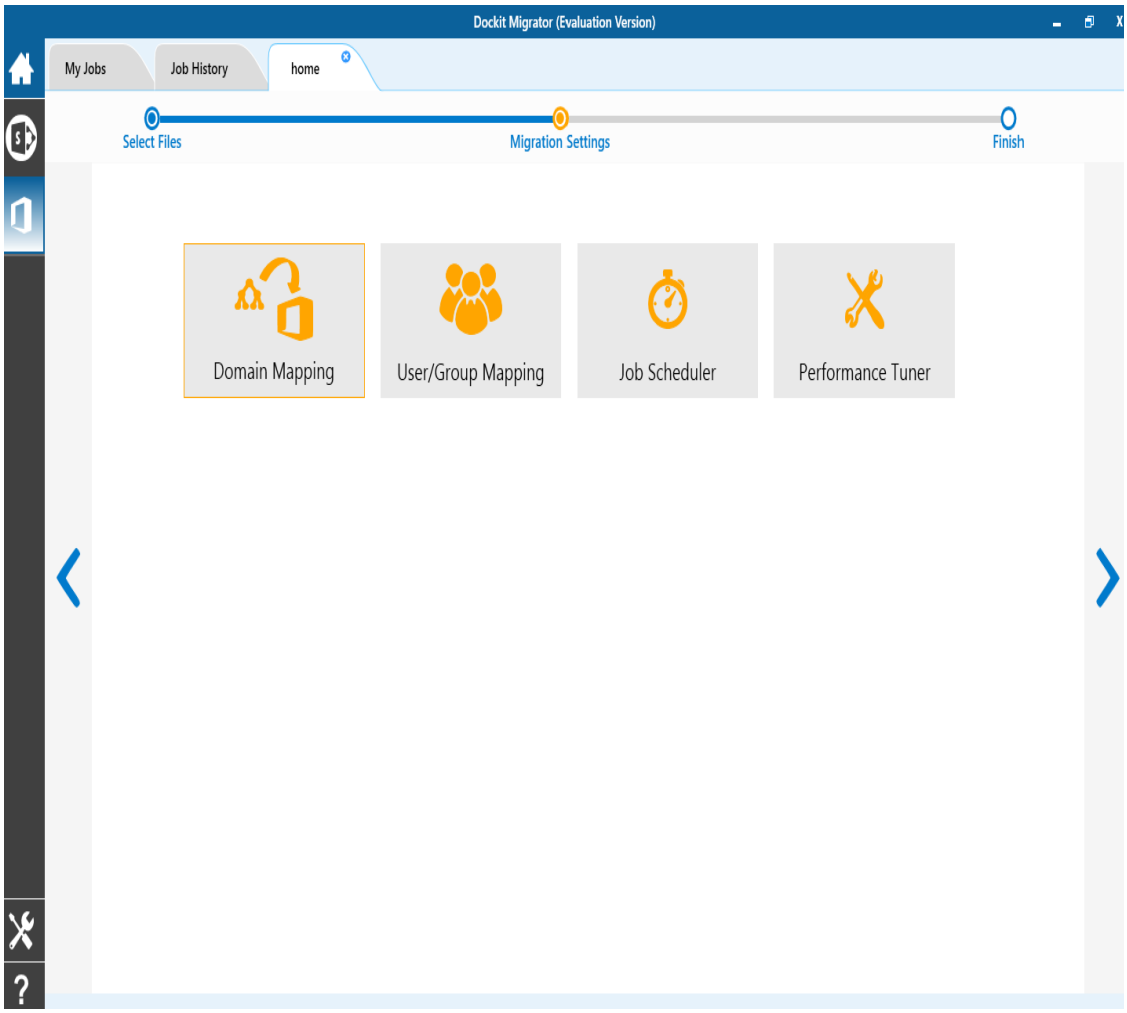
Traversal Options dialog wiil appear depending on the items added for migration

a. To specify migration options for site, click Site Migration Options
b. To specify migration options for List/Library, click List/Library Migration Options

3. Click **>** button to proceed.

4.2.2.2.3 Migration Settings

1. Migration Settings will appear as shown below.



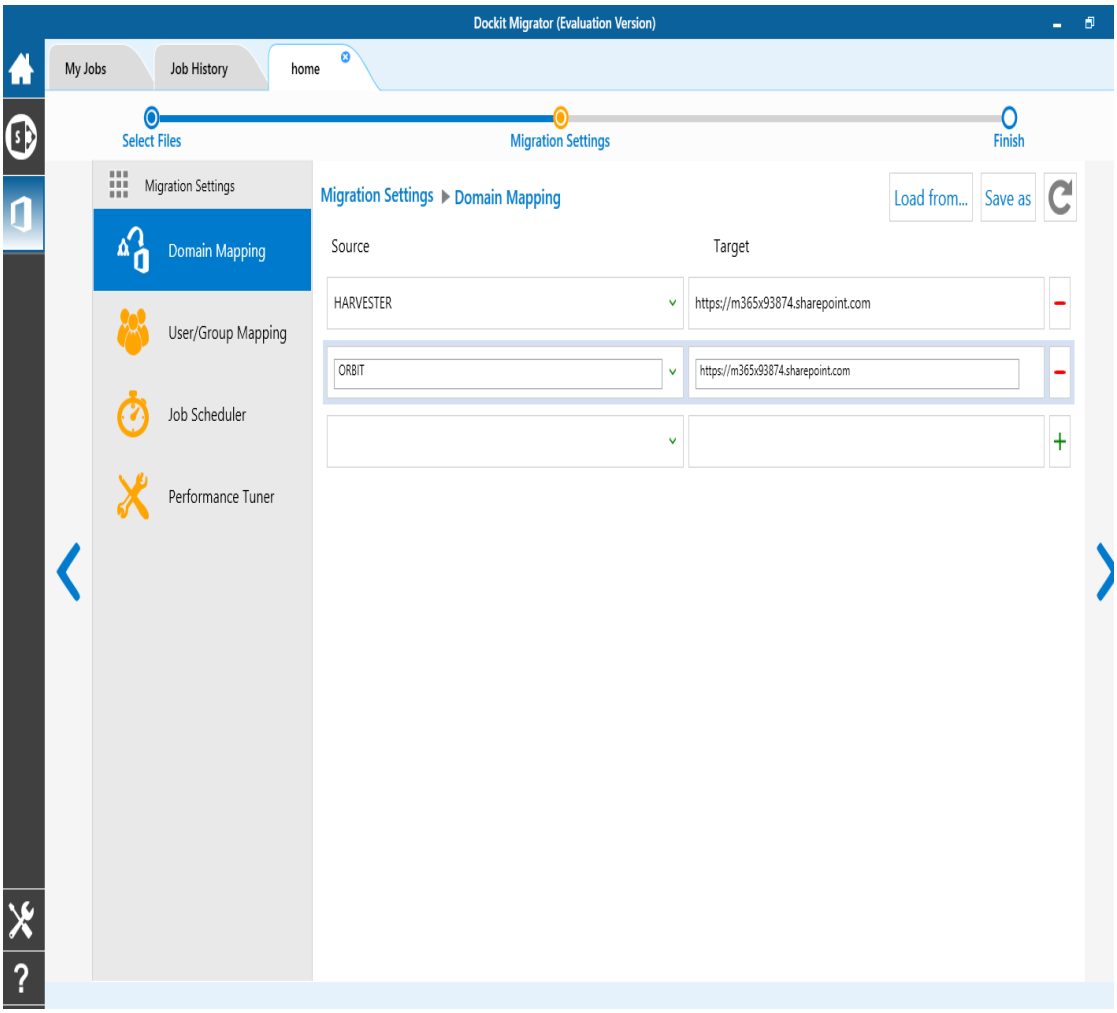
2. From this page, you can :

- Domain Mapping
- User/Group Mapping
- Job Scheduler
- Performance Tuner

4.2.2.2.3.1 Domain Mapping

Dockit Migrator uses domain mapping to replace the unavailable domain with the valid domain while assigning permissions (users / groups) for the folder / file imported to OneDrive.

Dockit Migrator domain mapping enables you to load the list of domains available with the network and it appears in both source and target items as shown below.



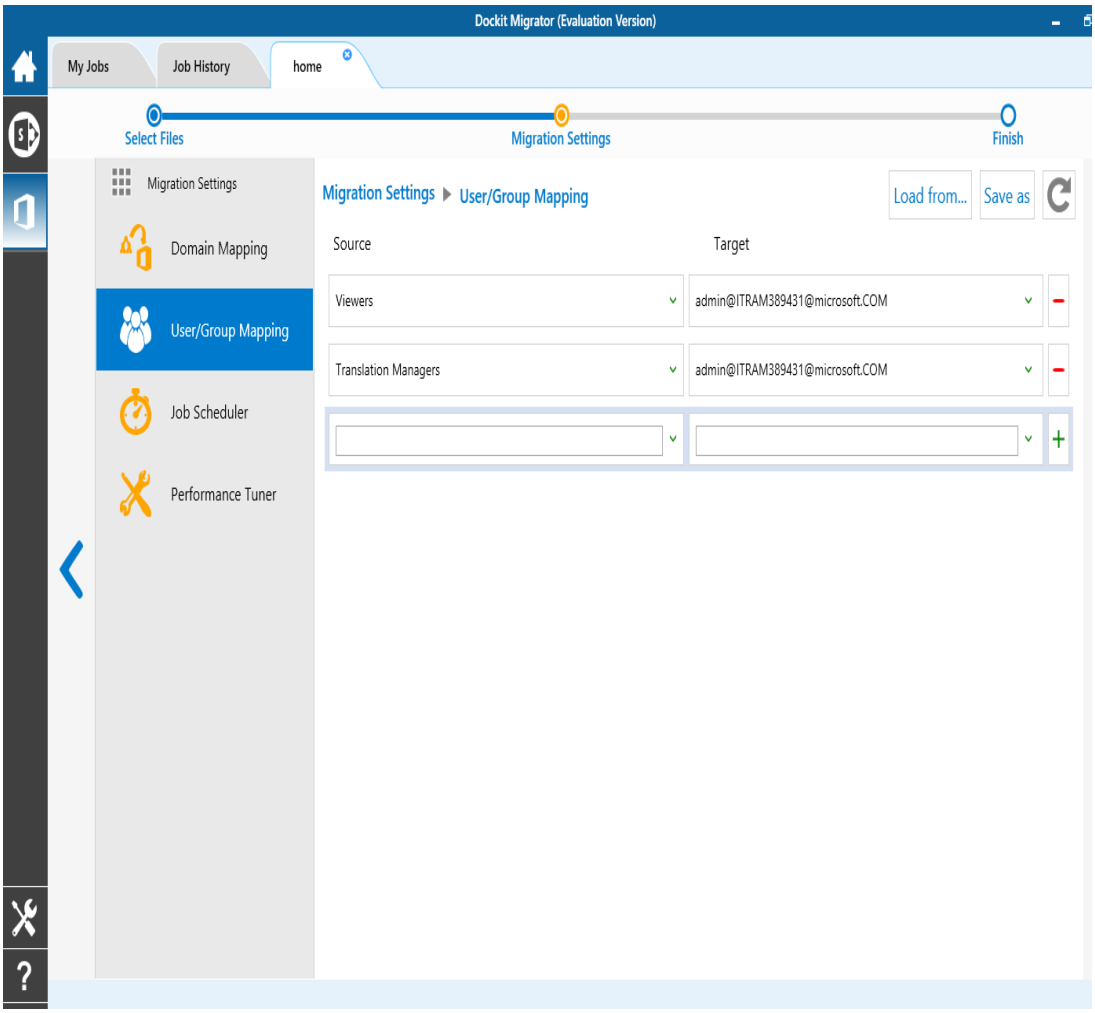
Select appropriate source domain from the domain list and enter the corresponding target domain name to create domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research, vyapin.onmicrosoft.com etc...

4.2.2.2.3.2 User/Group Mapping

Dockit Migrator uses user / group mapping to replace the unavailable users / groups with valid / new OneDrive users / groups when assigning user / groups or permissions for the folder / document during content migration from OneDrive environment to OneDrive. You can use this mapping for all Person or Group fields in OneDrive.

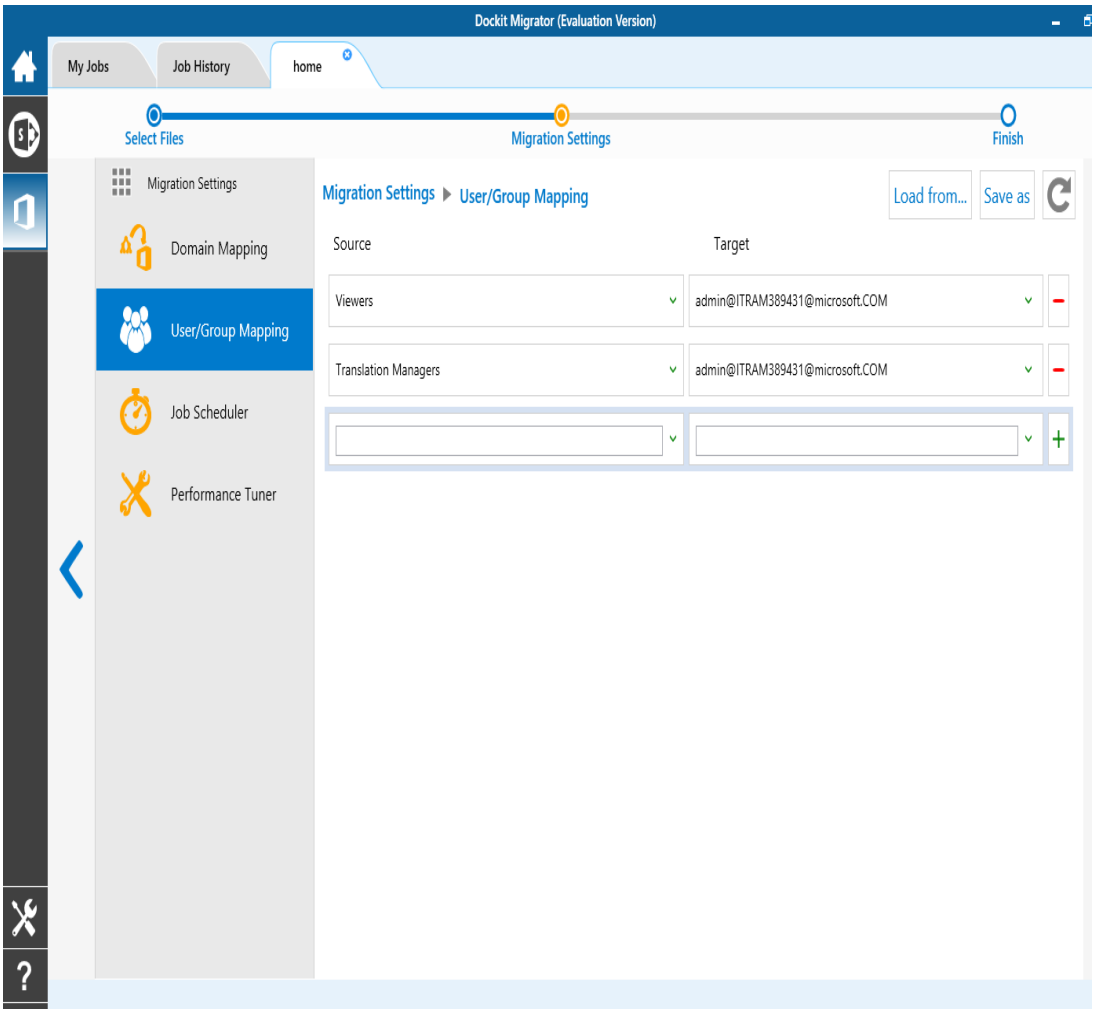
Source User

1. Dockit Migrator automatically loads the list of target users / group from the source OneDrive site.



Target User

2. Dockit Migrator automatically loads the list of target users / group from the target connected site.

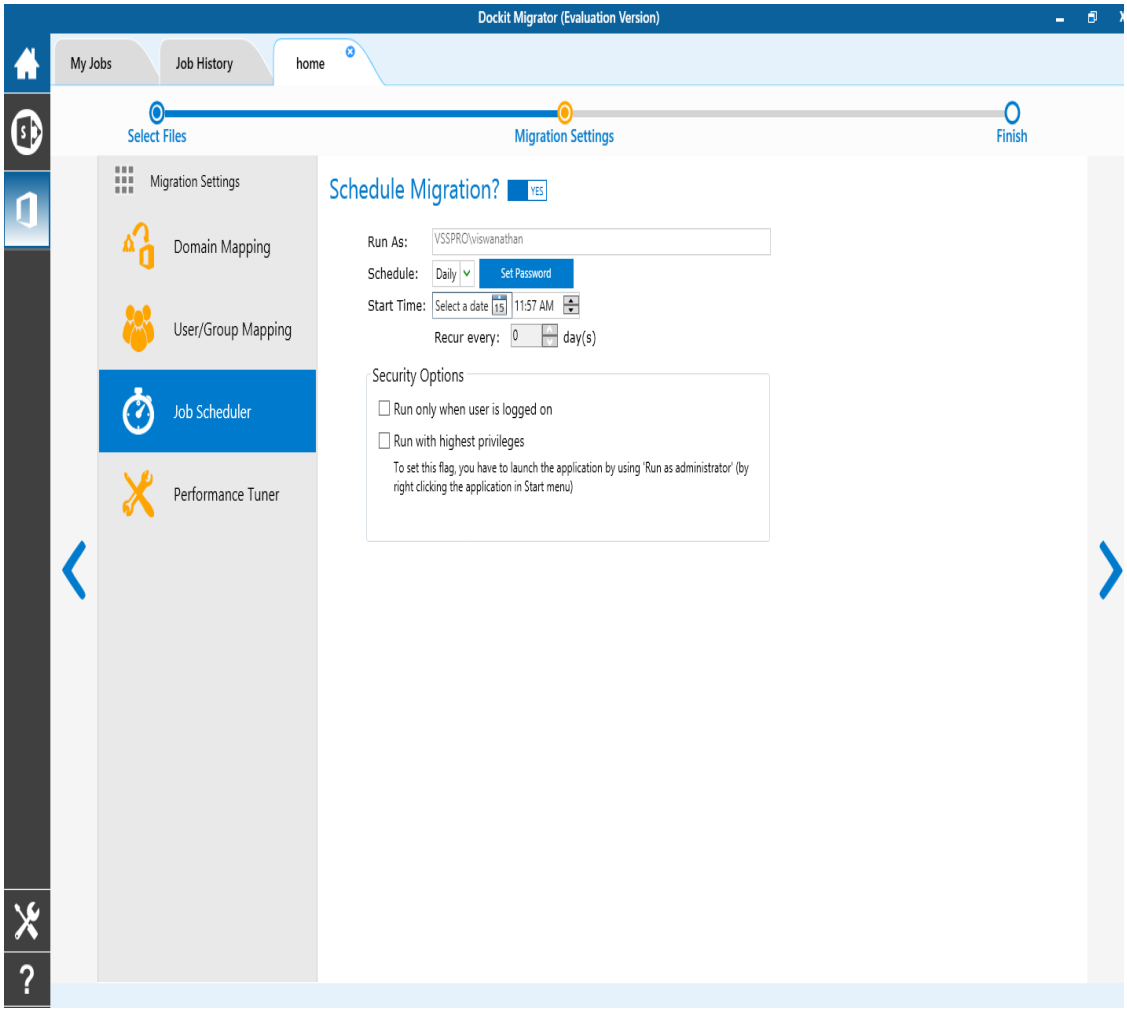


You also have the option to enter the user / group of your own in user mapping.

Select Unresolved user from source combobox to map all unresolved / unavailable users from source OneDrive user to a valid user in target OneDrive.

4.2.2.2.3.3 Job Scheduler

1. The **Job Schedule Settings** step appears as shown below:

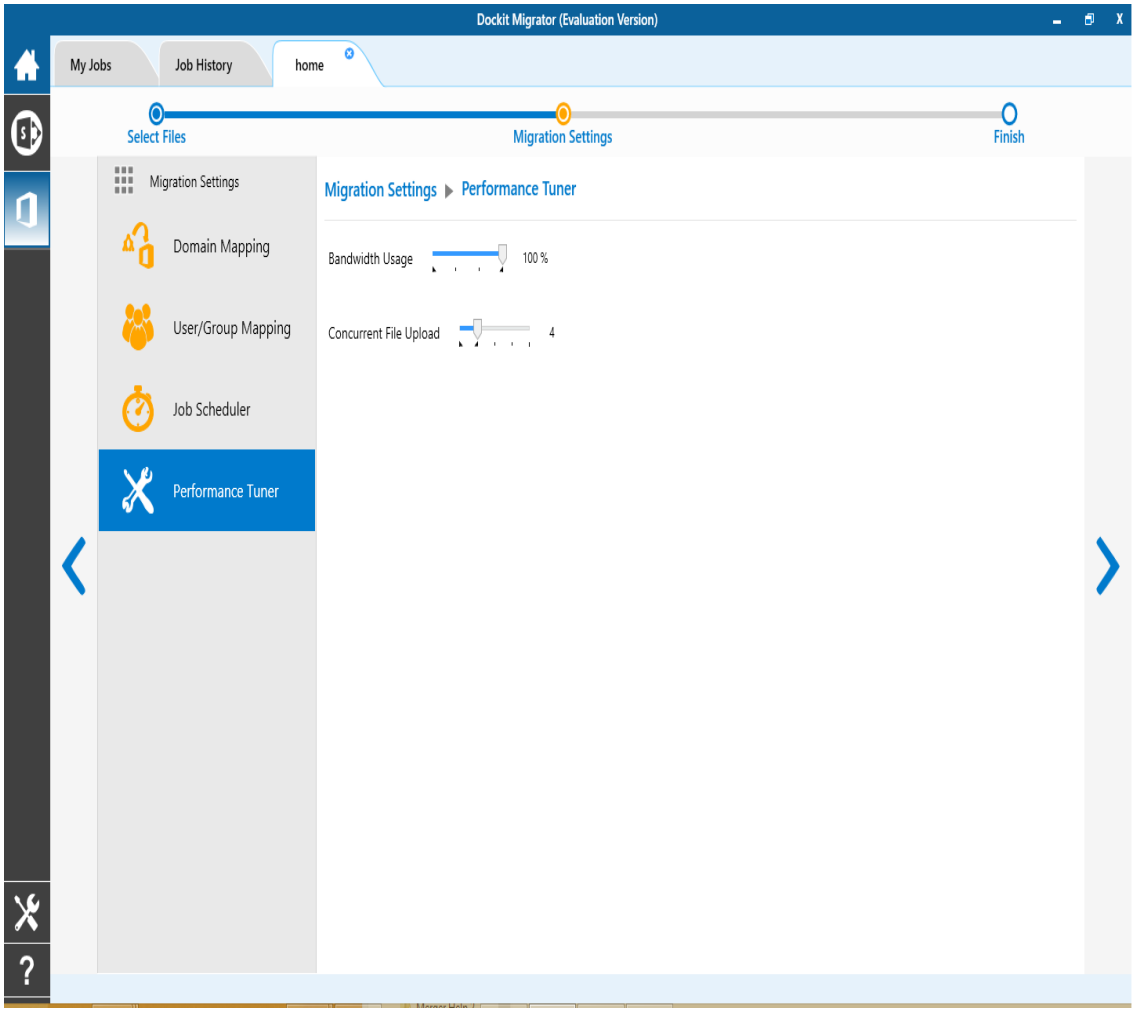


2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

Note: The option **Run with highest privileges** will be available only if you launch the application using **Run as administrator** command.

4.2.2.2.3.4 Performance Tuner

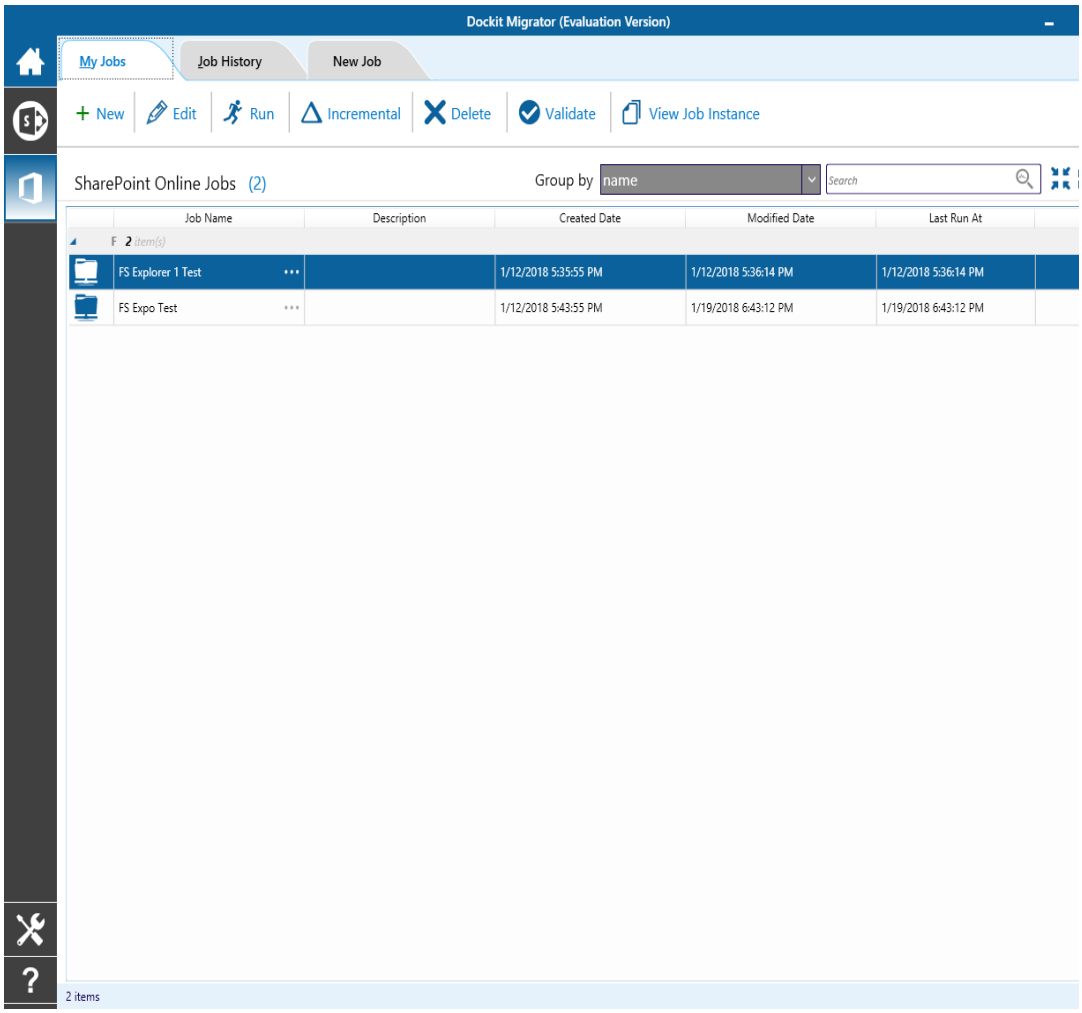
To set percentage of Network bandwidth that Dockit Migrator can use during migration and number of files that can be uploaded concurrently to improve performance.



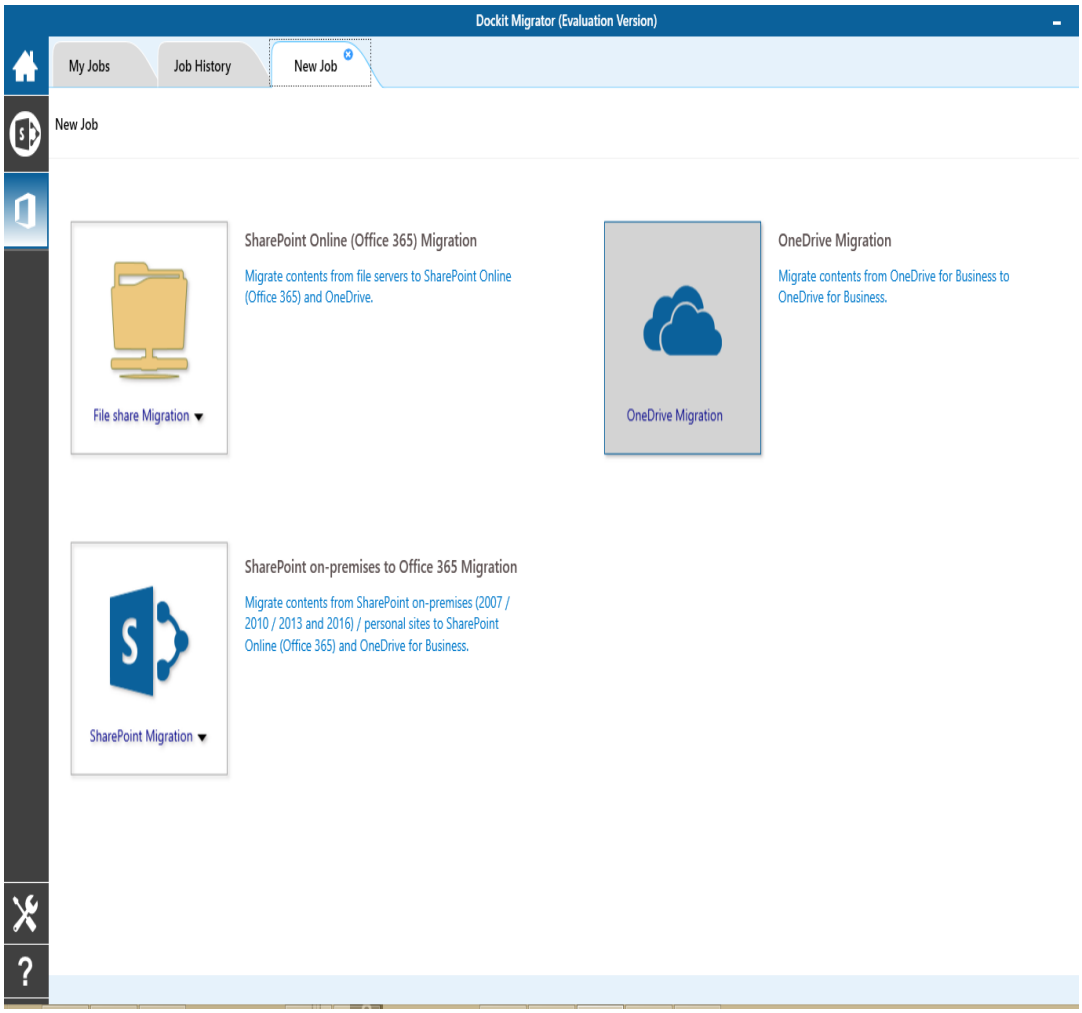
4.2.3 OneDrive Migration

To create a new migration job to migrate sites, lists and libraries along their settings, metadata and permissions from OneDrive for Business to OneDrive for Business:

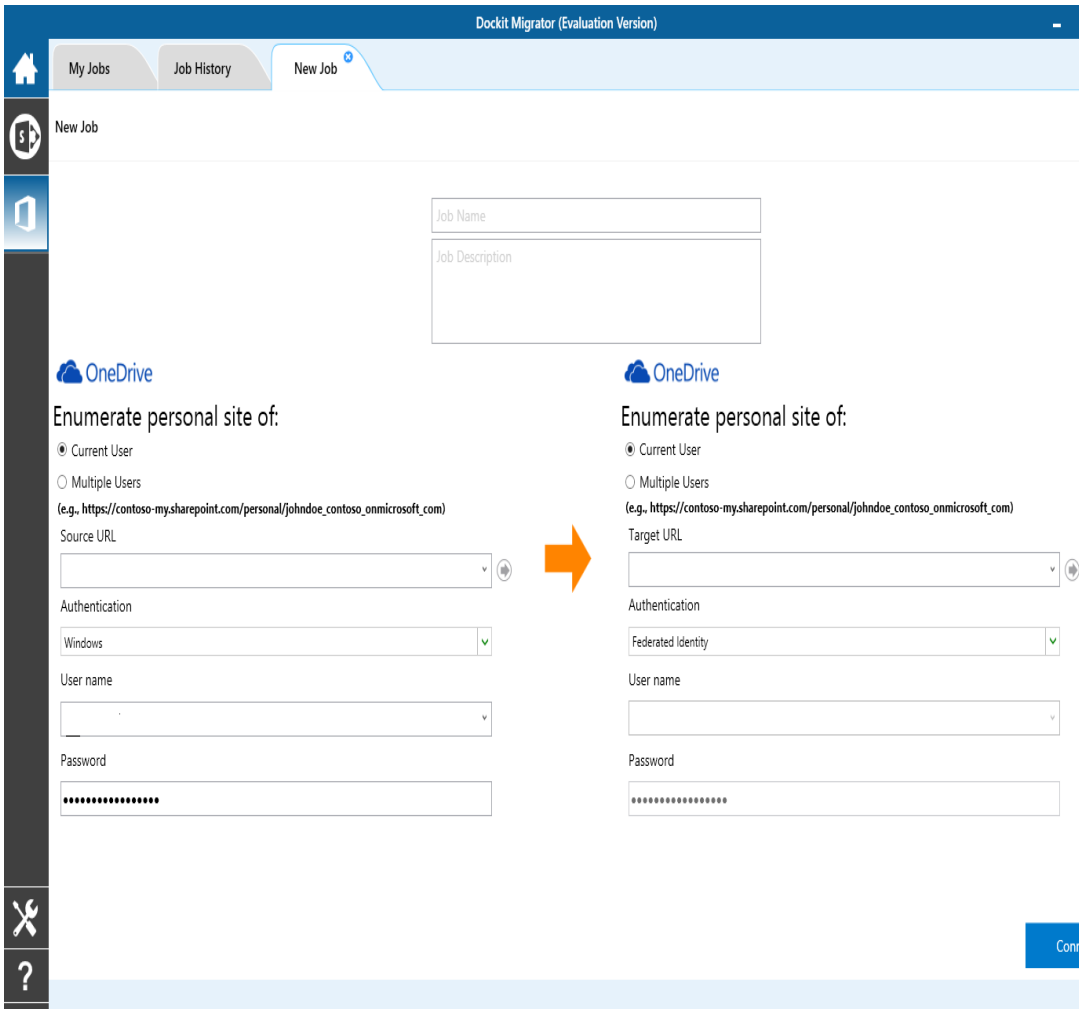
Click **New** option on **My Jobs** tab on Sharepoint Online (Office 365) migration page.



Select **OneDrive Migration** from **job category** page as shown below.



The **New Job** page appears as shown below. Enter **Job Name, Description (Optional)** and specify source OneDrive and target OneDrive Url and its credentials and click **Connect**



a. To specify a OneDrive site URL (both source OneDrive and target OneDrive) of a site from which you wish to migrate Libraries, Lists, folders, files and list items, perform the steps given below.

1. Specify a valid OneDrive site URL in source and specify valid OneDrive URL in target URL textbox.

2. Specify the Authentication type and user credentials to connect to the OneDrive URL using the options given below.

   Specify the Authentication Type.

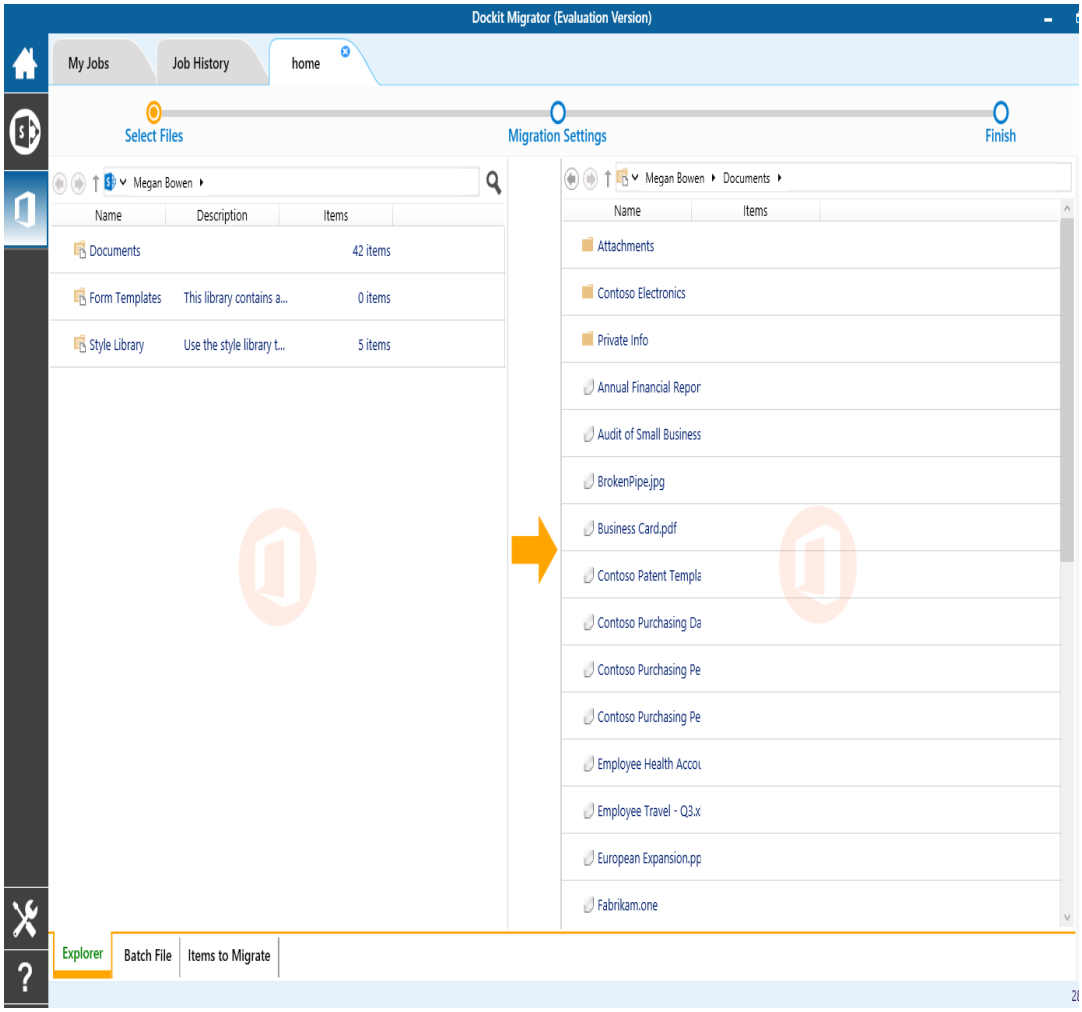
3.
   a. Windows
   b. Forms
   c. Cloud Identity
   d. Federated Identity

4. Specify the **user credentials**

5. Specify the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats:**DOMAIN NAME\USER NAME,UserName@DomainName, UserName** and its corresponding password. Dockit Migrator will initiate Windows authentication or Forms authentication depending on configuration in the OneDrive site.

6. Click **Connect** button to proceed.

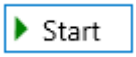
Drag and Drop files from source OneDrive (Left Pane) to target OneDrive site (Right Pane) or Select content and Right click file share, select **Add to OneDrive**.

7. 

8. Click **Items to Migrate** on Right pane to check the list of items selected for migration, also you can remove files by clicking the Red **X** .

9. Specify Migration Settings

10. Click **Save** button to create the job, or click **<** button to navigate to previous page to change any job settings.

11. After saving the job, it will be listed on the Job Manager page. You can click on 

to initiate the migration process.

4.2.3.1 Batch File

The following section gives you the guidelines to create a batch file for migrate folders, files and metadata to target Libraries.

The first row of the batch file should contain the following field names as headers. The reserved headers used by Dockit Migrator in batch file are as follows:

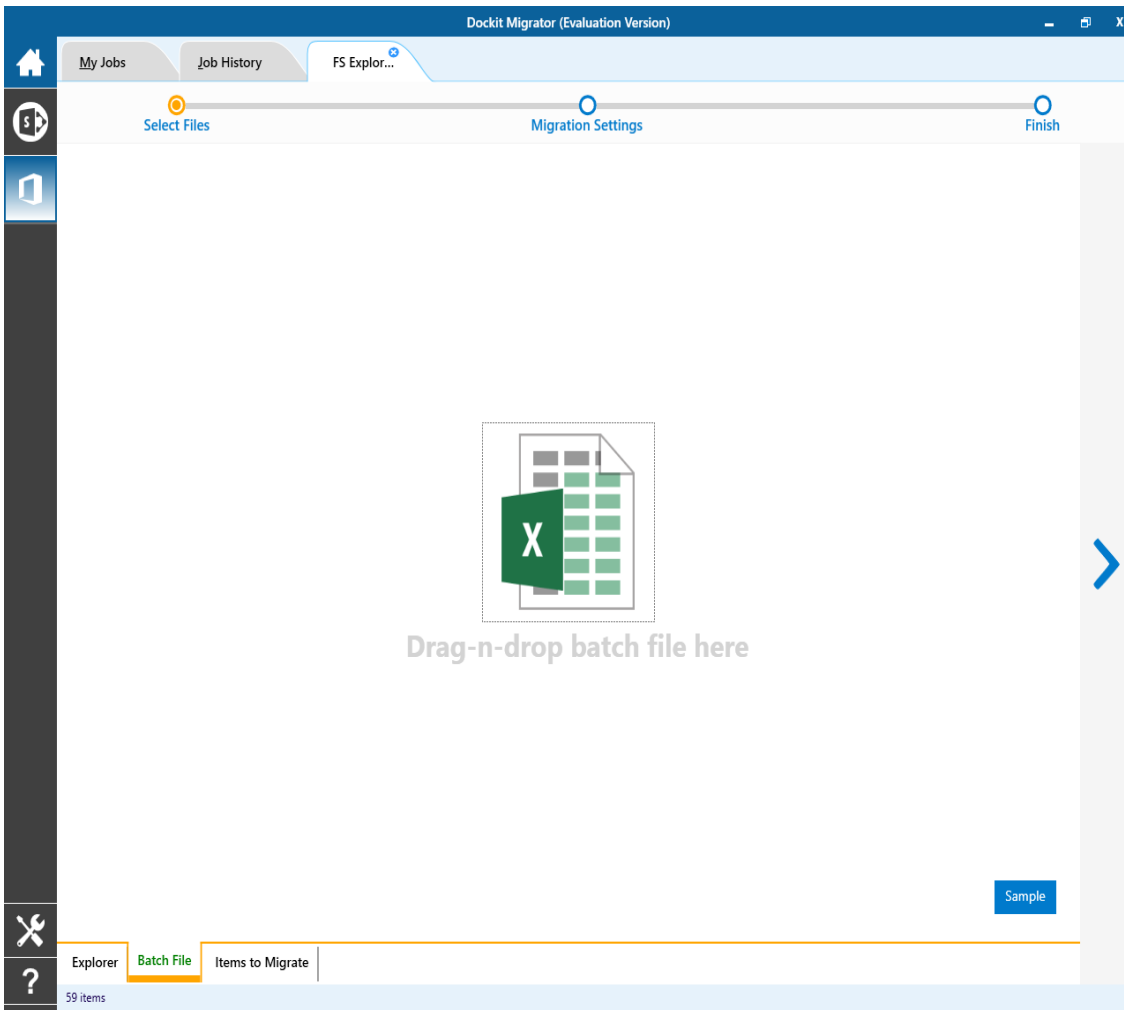
1. **Source Path:** The 'Source Path' column should contain the path of the source document / folder.
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
3. **New Folder:** The column 'New Folder' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to importing the contents. For instance, please see the batch descriptor file snippet given below:

Source Path	Destination Path	New Folder
http://sourcesharepoint/files/model1	http://sharepoint/technical documents/folder1	folder2/folder3

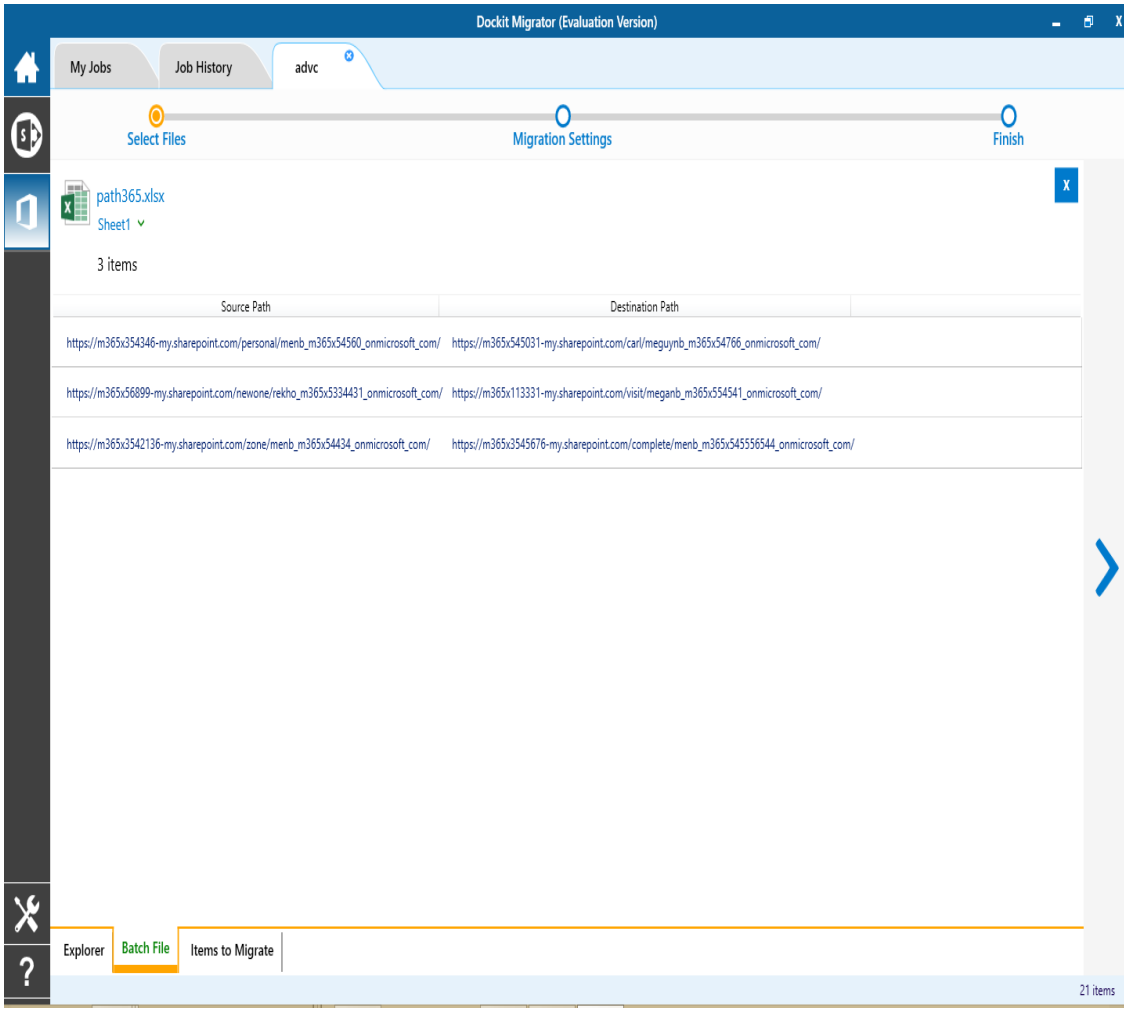
Dockit Migrator automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'model1' will be imported into the new destination location 'http://sharepoint/technical documents/folder1/folder2/folder3'.

Follow the steps given below to specify the documents to migrate to the target SharePoint Online location in the batch file

1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below



Batch file content will be shown as below.

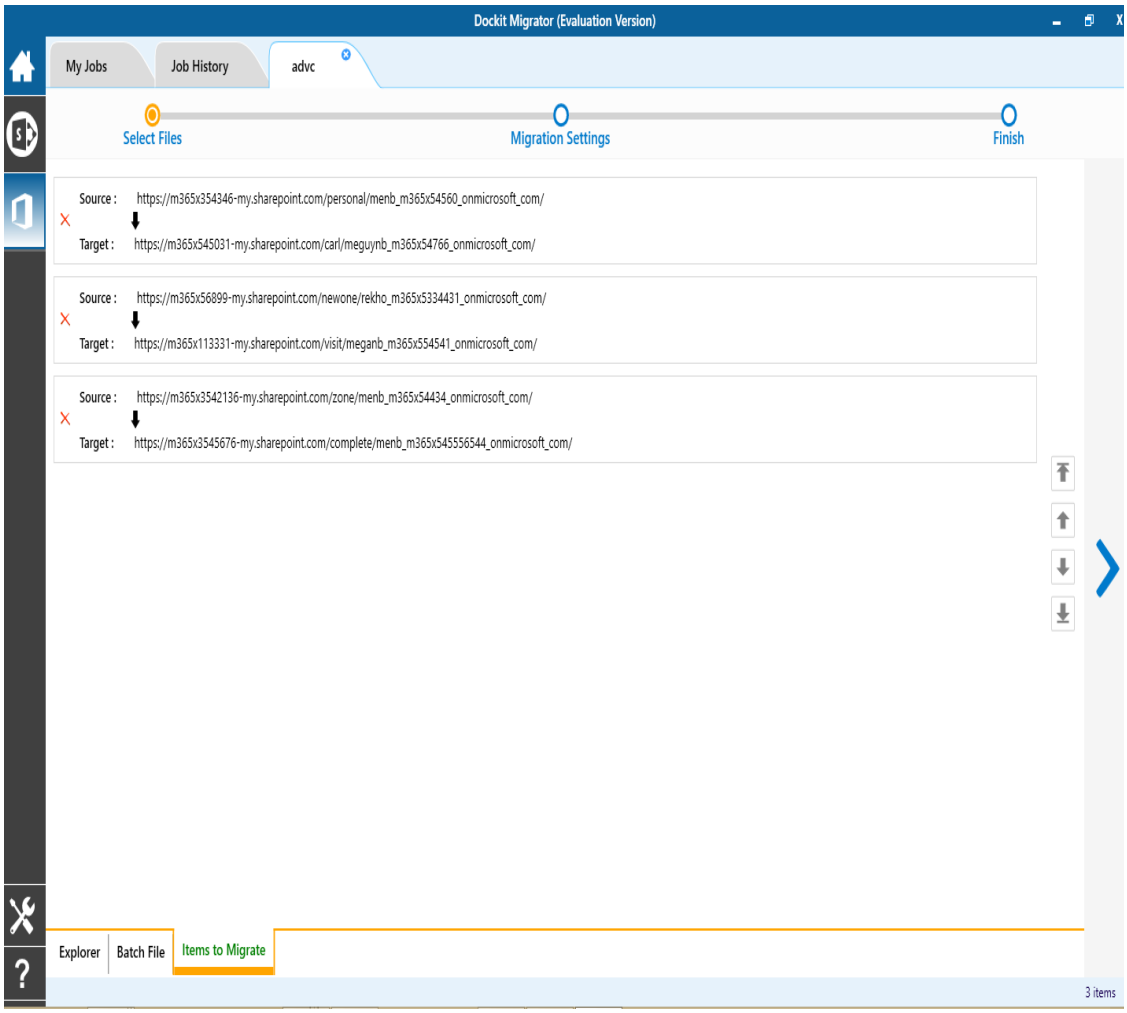


the batch file content will be added to Items to Migrate tab

4.2.3.2 Items to migrate

1. From File explorer you can either drag and drop files to OneDrive explorer or simply select files from file explorer Right Click and Select **Add to OneDrive** to add files to Items to migrate.

The **Items to migrate** appears as shown below:



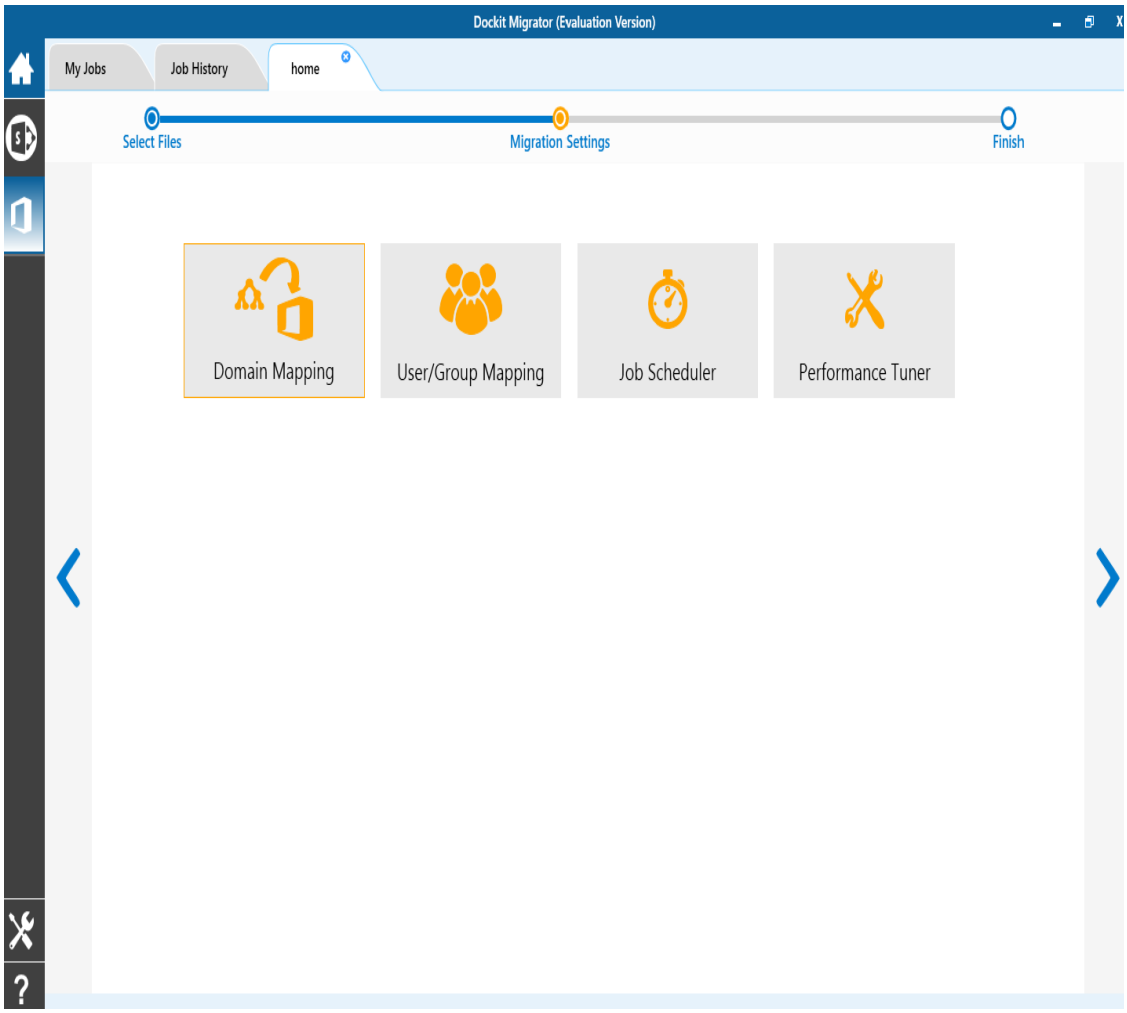
2. The selected folders and files added for import will be displayed in the **Items to Migrate** page. Dockit Migrator processes the top-level folders and files added for import in the order in which it appears in the **Items to Migrate** page. The import process order can be changed by the **navigation** buttons available in the right side of the page. You can remove the files and folders added for import by clicking Red **X** beside the files.

a. To specify migration options for site, click Site Migration Options
b. To specify migration options for List/Library, click List/Library Migration Options

3. Click **>** button to proceed.

4.2.3.3 Migration Settings

1. Migration Settings will appear as shown below.



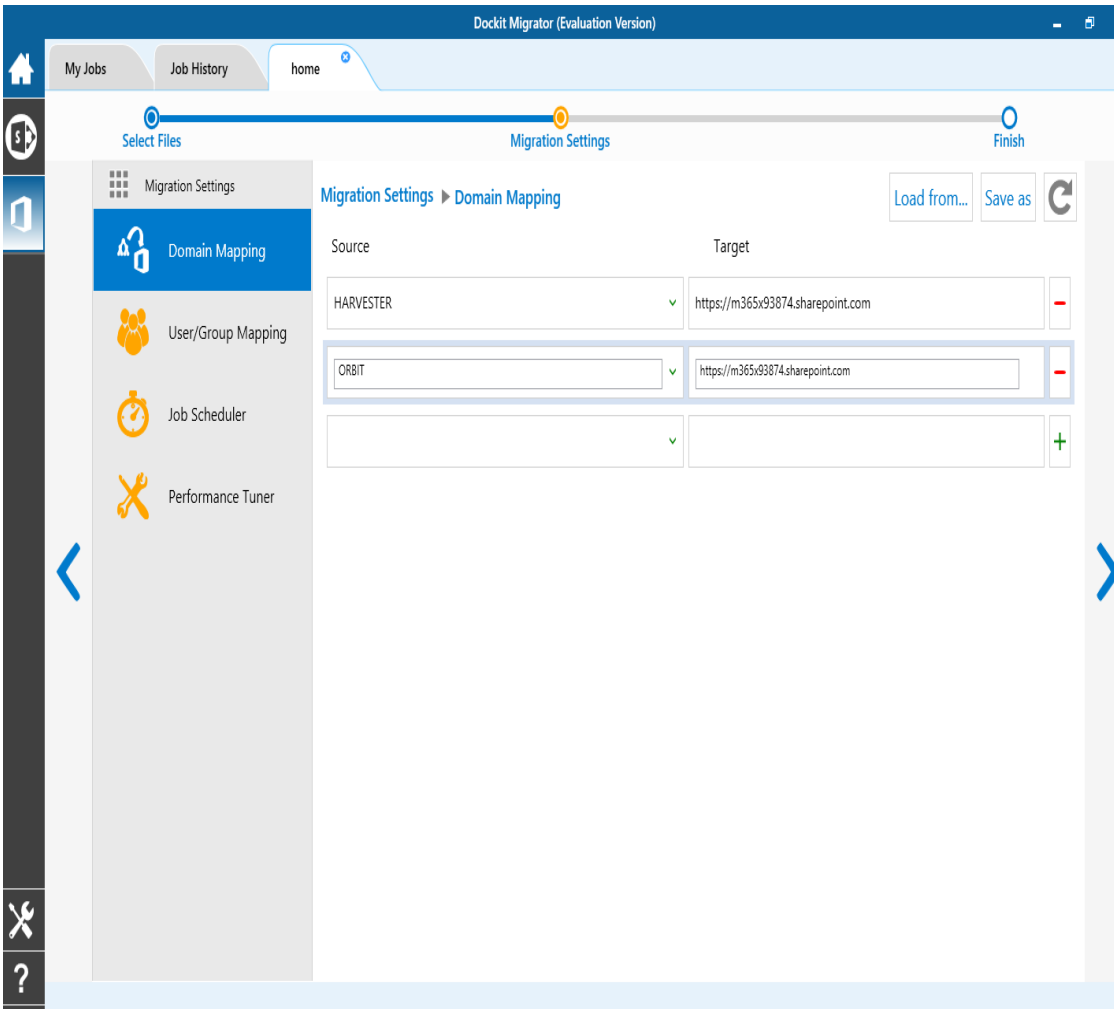
2. From this page, you can :

- Domain Mapping
- User/Group Mapping
- Job Scheduler
- Performance Tuner

4.2.3.3.1 Domain Mapping

Dockit Migrator uses domain mapping to replace the unavailable domain with the valid domain while assigning permissions (users / groups) for the folder / file imported to OneDrive.

Dockit Migrator domain mapping enables you to load the list of domains available with the network and it appears in both source and target items as shown below.



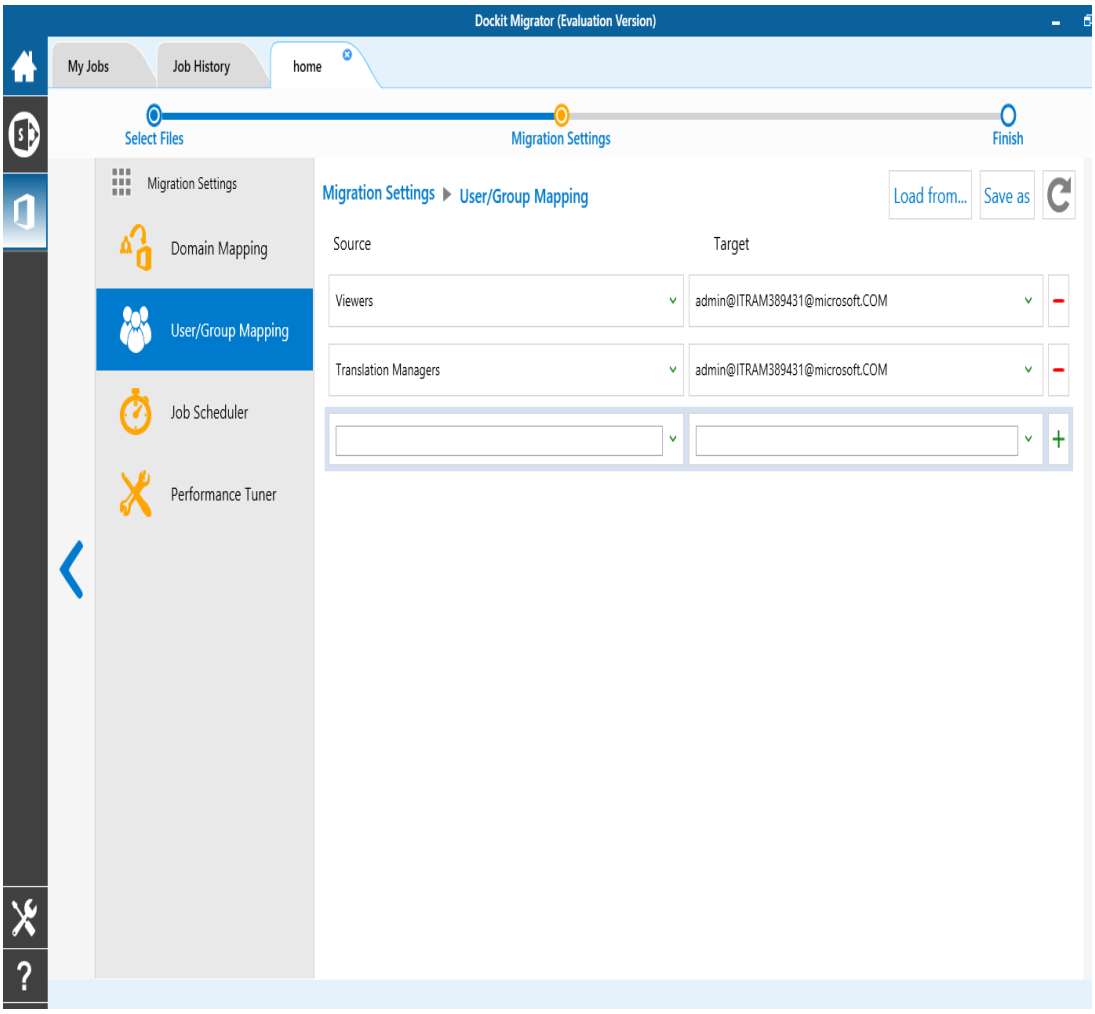
Select appropriate source domain from the domain list and enter the corresponding target domain name to create domain mapping. Dockit Migrator allows you to enter either domain names or UPN suffixes under the text boxes. For example research, vyapin.onmicrosoft.com etc...

4.2.3.3.2 User/Group Mapping

Dockit Migrator uses user / group mapping to replace the unavailable users / groups with valid / new OneDrive users / groups when assigning user / groups or permissions for the folder / document during content migration from OneDrive environment to OneDrive. You can use this mapping for all Person or Group fields in OneDrive.

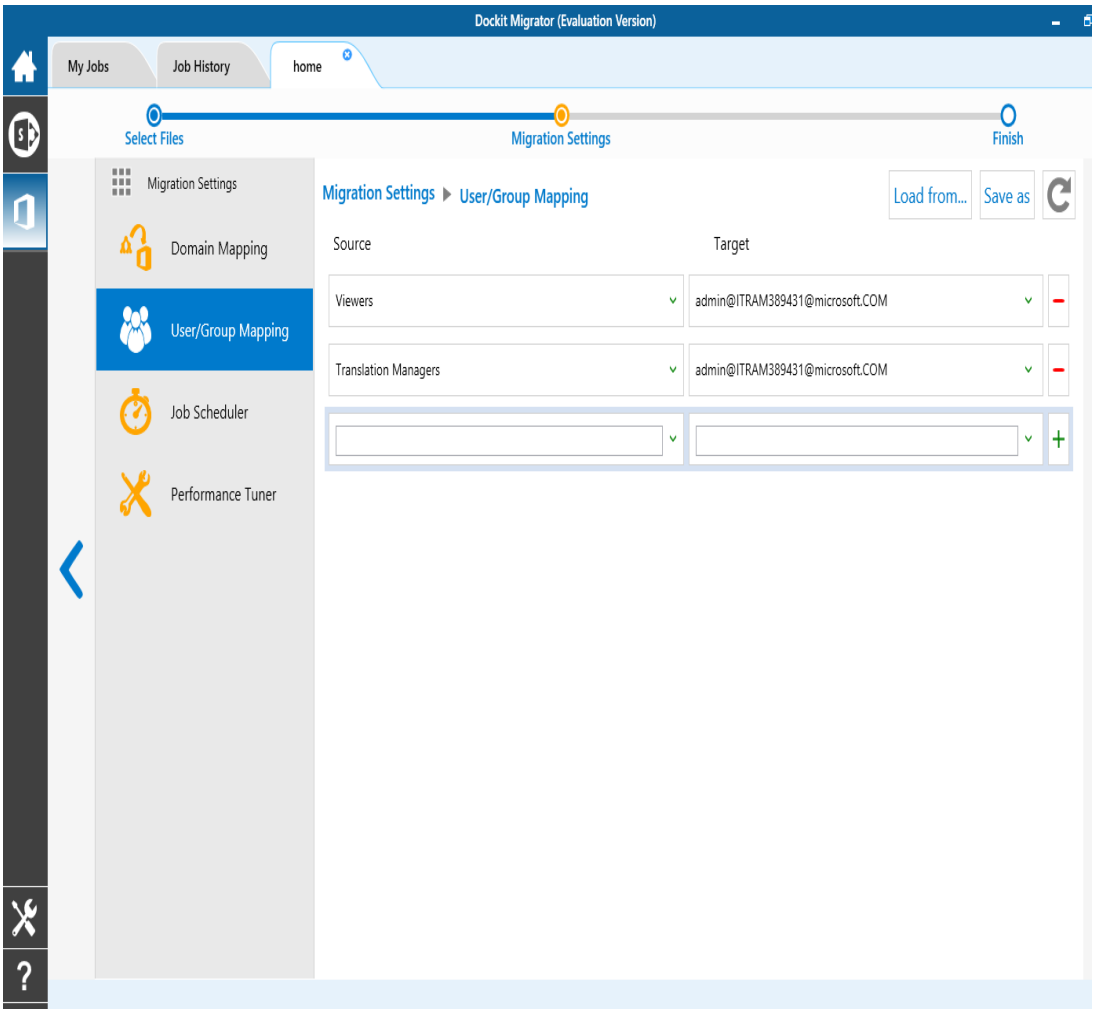
Source User

1. Dockit Migrator automatically loads the list of target users / group from the source OneDrive site.



Target User

2. Dockit Migrator automatically loads the list of target users / group from the target connected site.

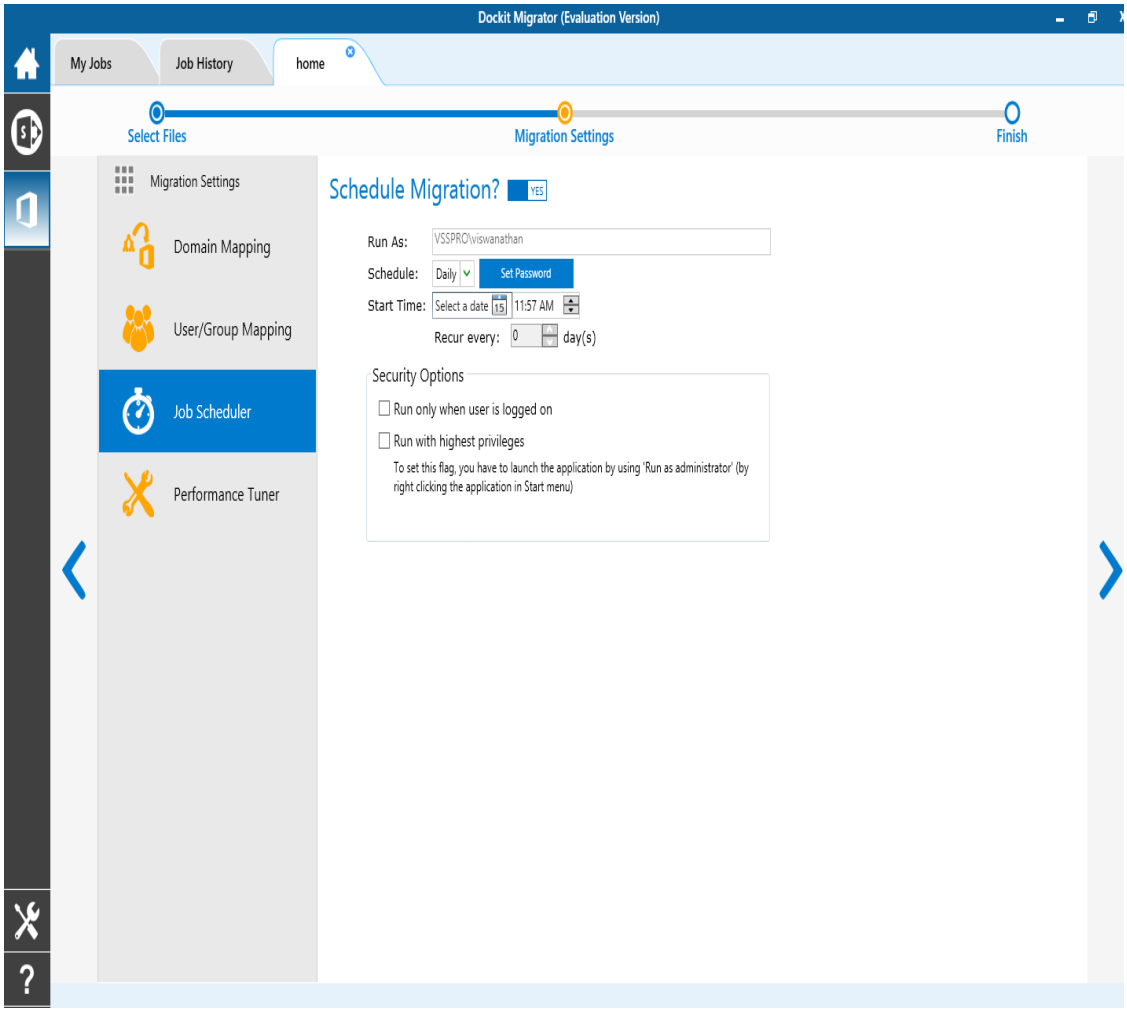


You also have the option to enter the user / group of your own in user mapping.

Select Unresolved user from source combobox to map all unresolved / unavailable users from source OneDrive user to a valid user in target OneDrive.

4.2.3.3.3 Job Scheduler

1. The **Job Schedule Settings** step appears as shown below:

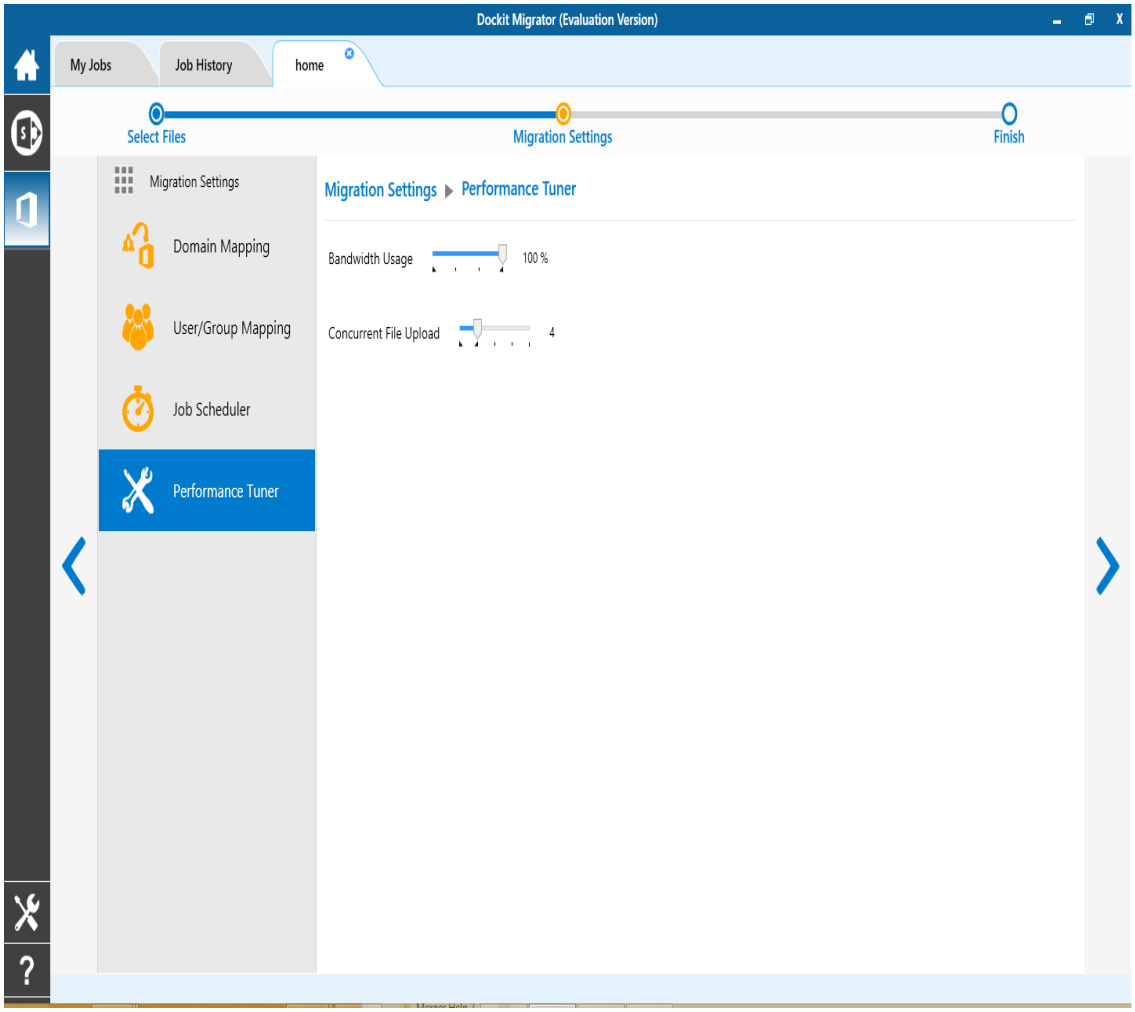


2. Dockit Migrator will create a schedule task in the Windows Scheduled Tasks with the given settings.

Note: The option **Run with highest privileges** will be available only if you launch the application using **Run as administrator** command.

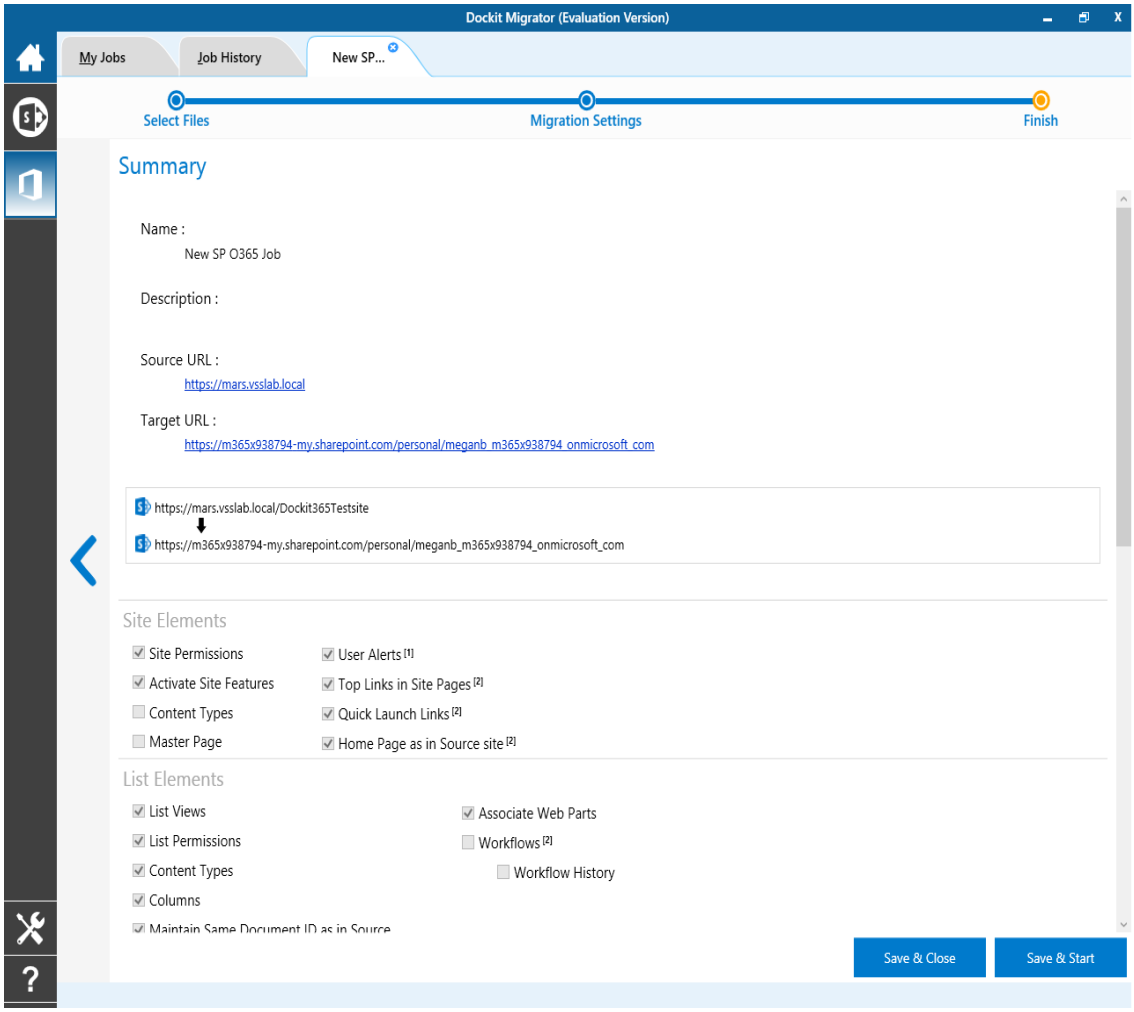
4.2.3.3.4 Performance Tuner

To set percentage of Network bandwidth that Dockit Migrator can use during migration and number of files that can be uploaded concurrently to improve performance.



4.2.4 Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below



5. How-to Guide

- Import Document Versions
- Create Document Sets
- Function Builder
- Rename documents in file system
- Add new terms in managed metadata column

5.1 Import Document Versions

Dockit has been designed to enable users to import multiple file versions of documents available in the source folders. It also has the provision to rename documents and import document versions using **Folder & File Renaming Rules**, thereby eliminating the tedious step of renaming the source folders / files prior to import.

Dockit also allows you to truncate / replace some valid character(s) in folder and/or file names using the **Folder & File Renaming Rules**. This feature helps you in avoiding

certain unwanted string characters (e.g., file suffixes) that are in the source folder / file names to be part of the folder / file name in SharePoint library.

Importing document versions from version folders

a) **Explorer Mode Option:**

Follow the steps in the Explorer Mode (Fileshare to SharePoint Migration) Option task wizard. The relevant section for importing file versions has been described below:

The selected folders and files added for import will be displayed in the **Items added for import** grid. Dockit processes the top-level folders and files added for import in the order in which it appears in the **Items added for import** grid. The import process order can be changed by the **navigation** buttons available in the right side of the grid. You may use this order sequence feature appropriately, when you have to import different file versions (with the same name) in the specified sequence. This feature is extremely powerful when you have different file versions organized in version folder names.

For example, let us say, you have different versions of files organized in the folder structure named as - C:\My Documents\Sales Proposals\version1, C:\My Documents\Sales Proposals\version2, C:\My Documents\Sales Proposals\version3 etc. You can add the folders version1, version2, version3 etc. to the destination location in this intended order or use the navigation buttons to the right of the grid to order them. Dockit will automatically process the added folders / files in the order in which it appears in the grid. Select **Create new version** option in the File Settings wizard step to handle file versions correctly.

b) **Batch File Mode Option:**

Follow the steps in Batch file Mode (Fileshare to SharePoint Migration) option task wizard. The relevant section for importing file versions has been described below:

Dockit processes the entries in the batch descriptor file in the exact same sequence it appears in the file. You can specify the version folders in the batch file in the same sequence it needs to be imported in order to achieve the desired results in SharePoint.

For example, let us say, you have different versions of files organized in the folder structure named as - C:\My Documents\Sales Proposals\version1, C:\My Documents\Sales Proposals\version2, C:\My Documents\Sales Proposals\version3 etc. You can create a batch descriptor file as follows to import the file versions correctly:

"Path","Destination Path"
"C:\My Documents\Sales Proposals\version1","http://sharepoint/DocLib"
"C:\My Documents\Sales Proposals\version2","http://sharepoint/DocLib"
"C:\My Documents\Sales Proposals\version3","http://sharepoint/DocLib"

Select **Create new version** option in the File Settings wizard step to handle file versions correctly.

Importing document versions using the Folders & Files Renaming Rules engine

Dockit enables you to define flexible naming rules, in order to truncate or replace invalid and/or valid characters in folder and/or file names during import. By using wildcard characters ('*', '?') in the Find string in the naming rules, you can also create generic naming rules. By this way, you can rename the folder and/or file name that has the same naming convention throughout the file system.

For instance, all document versions of the same file are stored in a single folder as stated below and you would like to to import them as a single file with version history into the same document library.

D:\Document Store

- \Sample_v1.txt
- \Sample_v2.txt
- \Sample_v3.txt

In this case, you can create generic renaming rule using wildcard characters as shown below, in order to truncate the suffixed version string from the file name.

File Name	Find	Replace	Remarks
Sample_v1.txt Sample_v2.txt Sample_v3.txt	*_v?	*{empty}*	As we left the replace textbox with an empty string / space, the final file name will be 'Sample.txt'

Hence, the resultant file names are same for these files. Thus, Dockit will add as a new version for 'Sample.txt' file into the SharePoint library and we can have a single file with the required version history.

Please follow the instructions given below to use the folder & file renaming rules engine to import multiple documents to a SharePoint library:

You will have to first create a naming rule for importing document versions using Folder & File Renaming rules feature in Dockit. The naming rules are case insensitive. So that, you can use the same Find string for both UPPER and lower case file name. In other words, the Find string '*v?' and '*V?' are same in Renaming rules in Dockit. For more information, click Replace Illegal Characters...

Import folders, files and metadata to SharePoint Libraries (Batch File Mode):

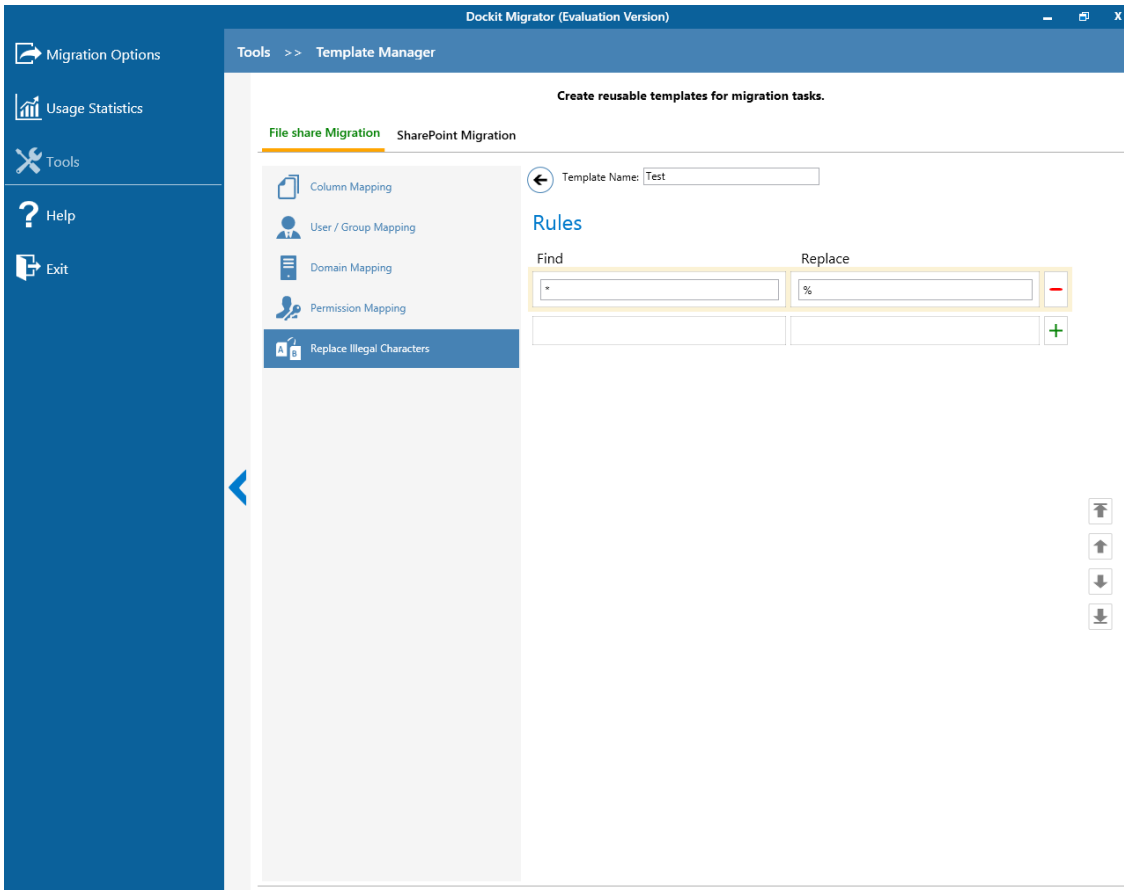
Create a batch descriptor file as given below:

"Path","Destination Path"
"F:\Document Store\Sample_v1.txt","http://sharepoint.vyapin.demo/sites/migration/Shared Documents"
"F:\Document Store\Sample_v2.txt","http://sharepoint.vyapin.demo/sites/migration/Shared Documents"
"F:\Document Store\Sample_v3.txt","http://sharepoint.vyapin.demo/sites/migration/Shared Documents"

Please ensure that files are arranged / ordered with correct version sequence in the batch descriptor file. Dockit processes the files in the order in which they appear in the batch descriptor file.

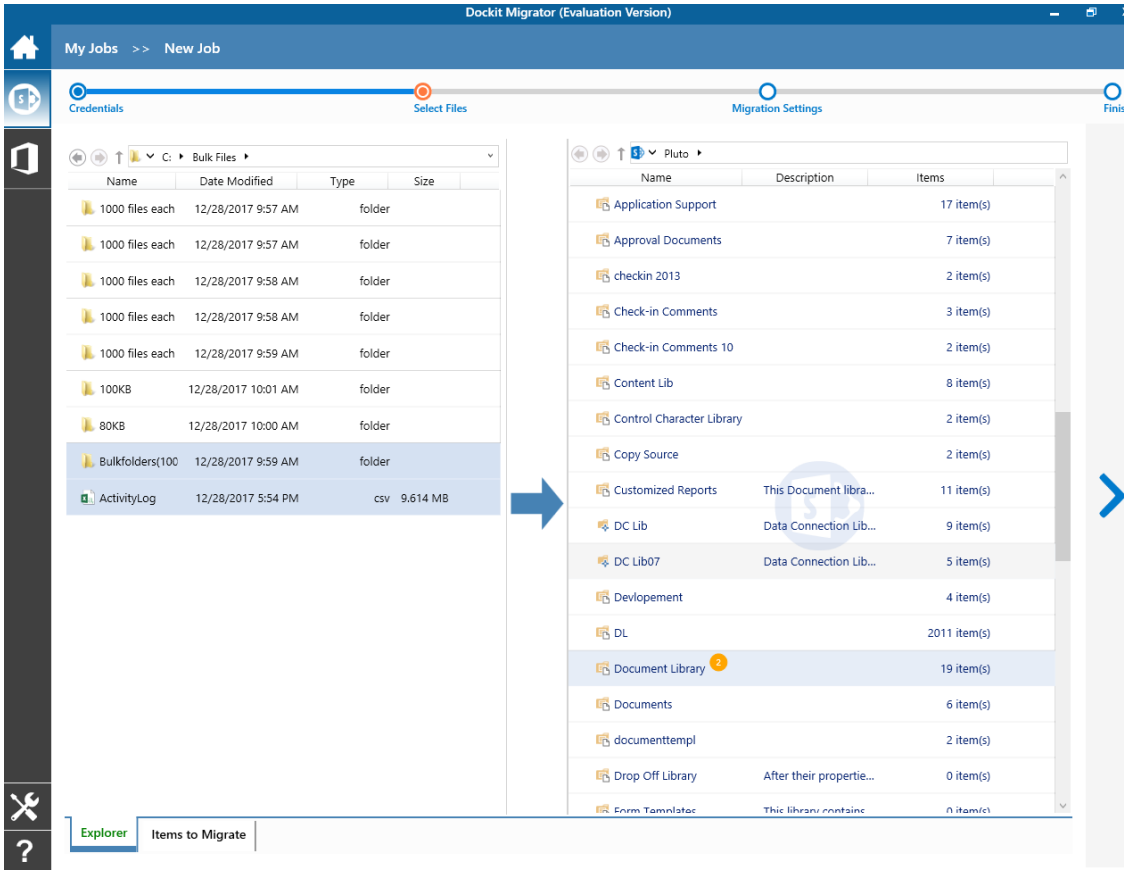
Import folders, files and metadata to SharePoint Libraries (Explorer Mode):

Go to 'Template Manager' under 'Tools' menu and create renaming template as shown below:



Select the items to import into the SharePoint library. In the **Select items to import** dialog, click **Add** button to add the selected files for import as shown below. The import process order can be changed by the **navigation** buttons available in the right side of the grid.

In Items to import step of Dockit import task wizard, Select the template 'Sample rename' (the template one was created to rename the document) from the list of available templates under File Renaming Rule.



Click **Next** to proceed.

Select **Create new version** option in the File Settings wizard step to handle file versions correctly.

You can use **Pre-migration Validation** step in Dockit Task Wizard to validate the task and avoid common errors.

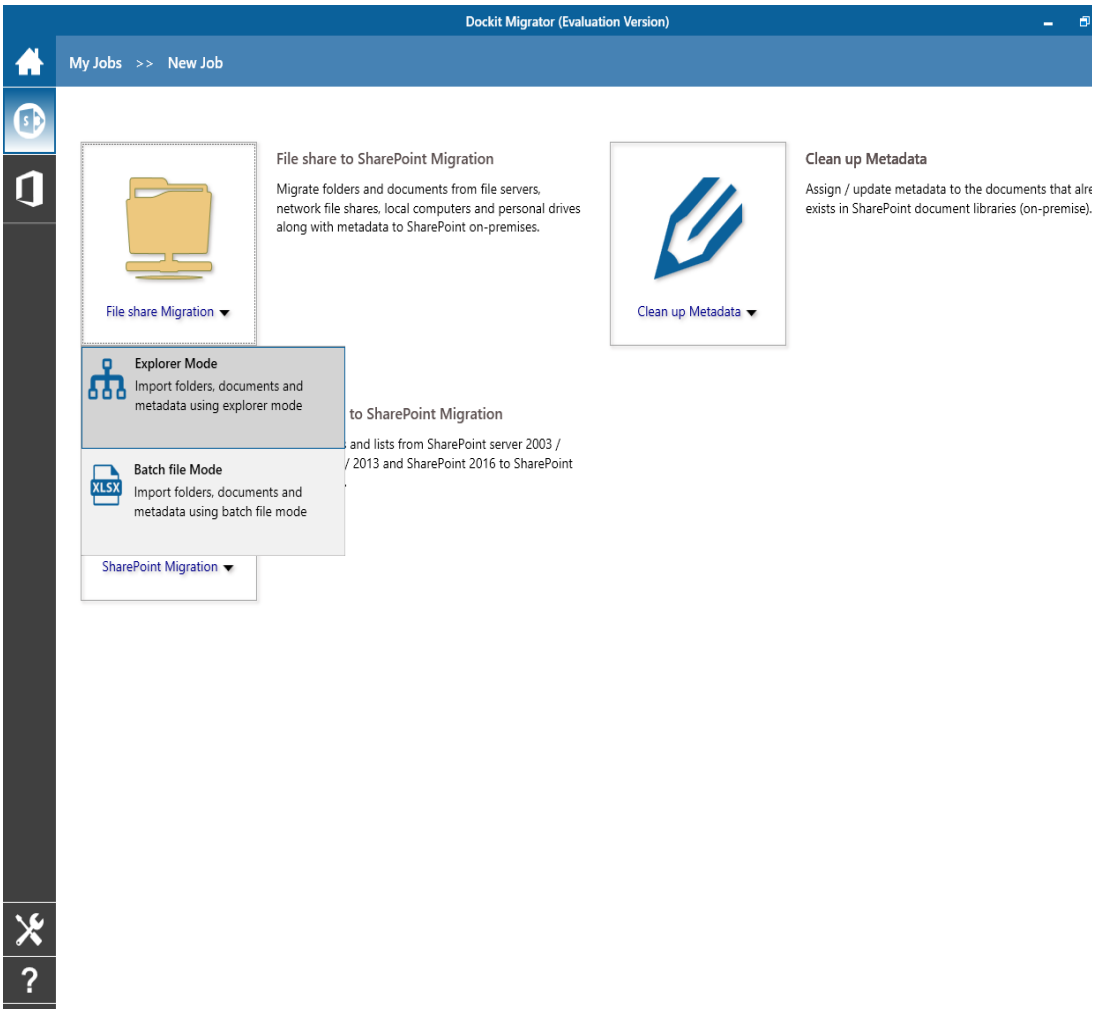
5.2 Create Document Sets

Dockit enables you to create the folders as document set and update the metadata for document sets in SharePoint library. In order to create a new document set, you must specify the folder content type as a 'Document Set'.

Based on the specified content type, Dockit will decide whether to create the source folder as a standard folder or document set in the destination document library. If the specified content type is 'Document Set' derived content type, Dockit will create the new document sets (named with source folder names) and import the files available in the source folders depending upon the folder options specified in Dockit import task wizard.

Please follow the instructions given below to create document sets and import documents into the new document sets created in SharePoint:

1. In Dockit Migrator application, create a task by clicking **Explorer mode** from **File** **Share migration** option in **New Job** page as shown below.



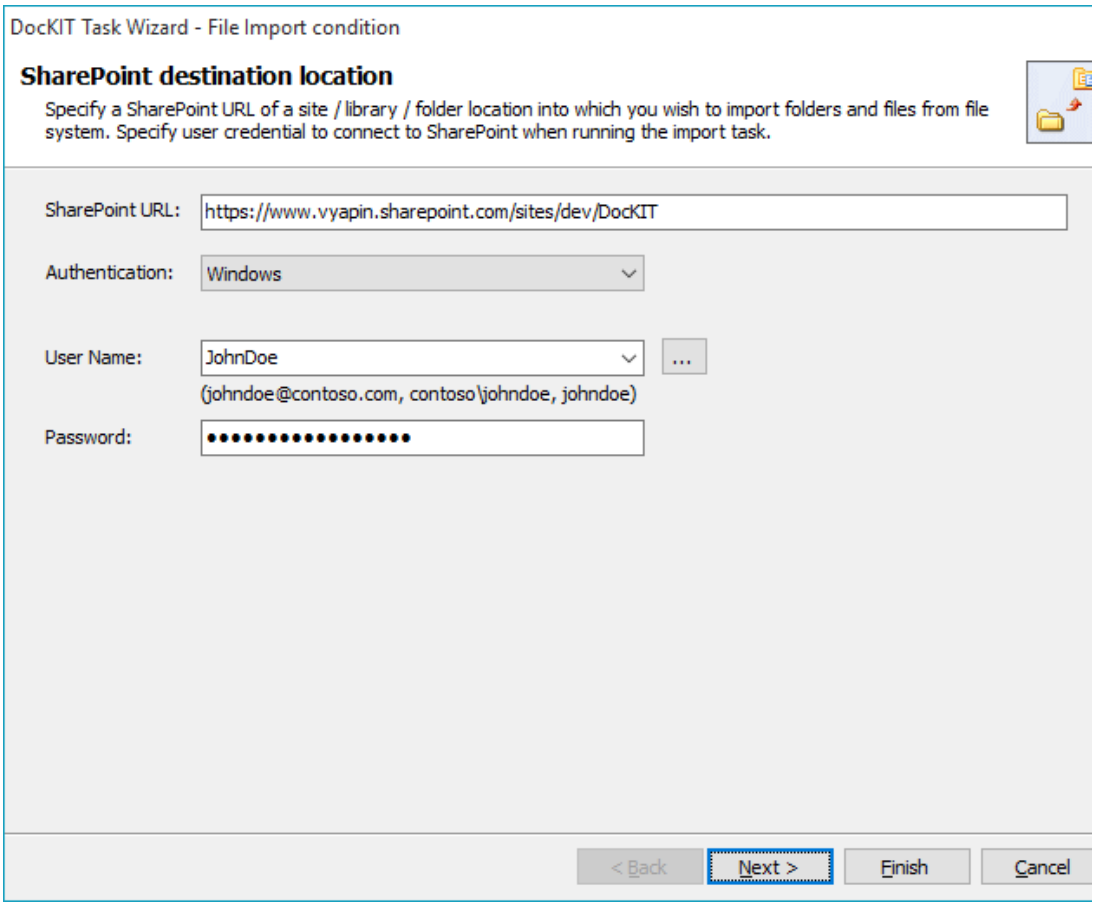
Note: You can also use **Batch File Mode** option from **File share to SharePoint Migration** to create folders as new document sets from remote computer. In this section, we will discuss using the **Explorer Mode** option from **File share to SharePoint Migration** import task option to describe how to use Dockit Task Wizard to create folders as new document sets in SharePoint.

2. Specify a SharePoint URL of a site / library / folder location to which you wish to import folders and files from the file system. Specify the users credentials to connect to the SharePoint URL specified in **Step 1 of 15: SharePoint destination location** step in Dockit Task Wizard.

   Dockit expects the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task to be a:

   - Member of administrators group in the local server and remote SQL Server (or)
   - Application pool user account (or)
   - Owner of the site where the destination library resides

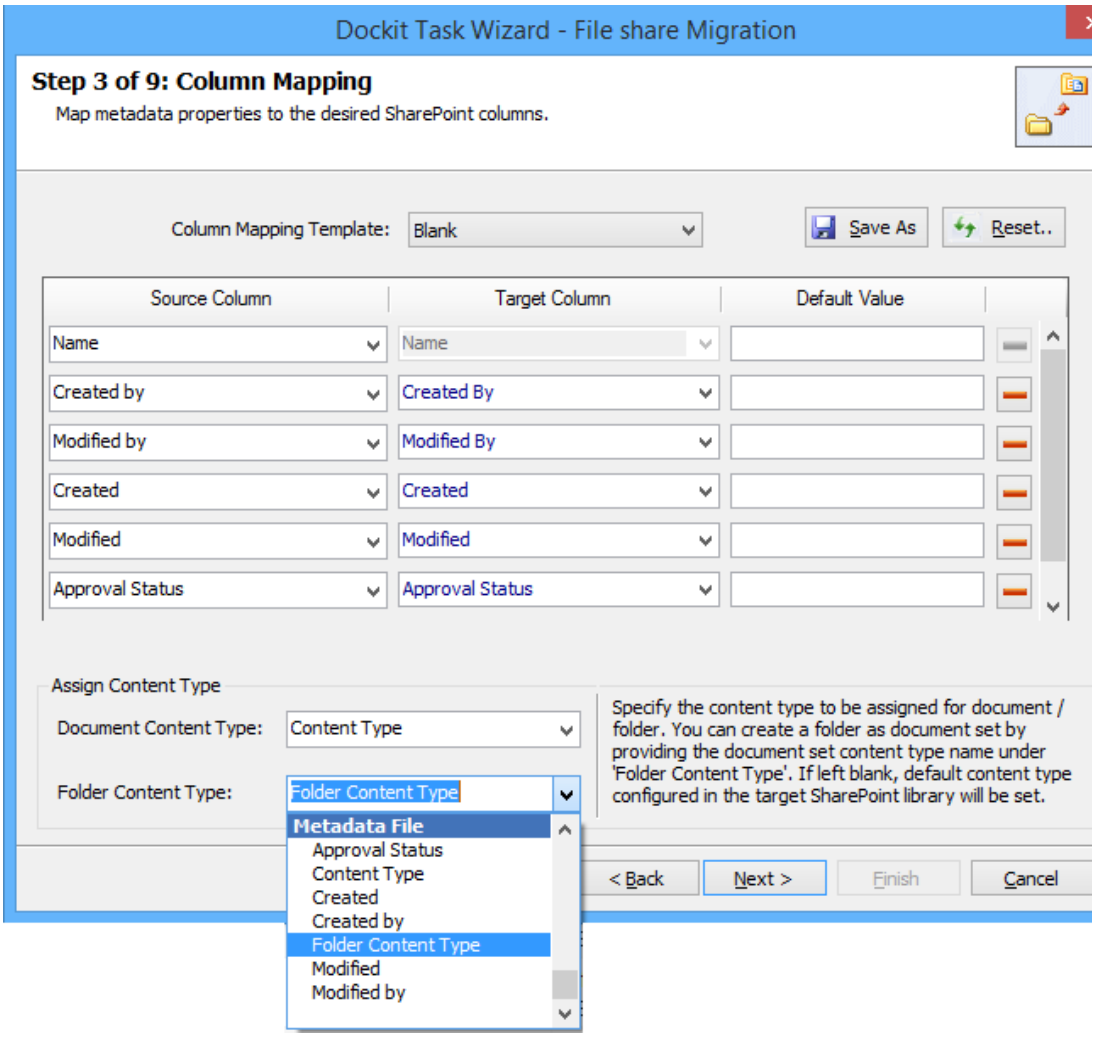
   in order to create the document set.



3. In '**Items to import**' step, select and add the desired folders which you want to create as document set in SharePoint library.

4. Proceed with steps provided in Dockit Task Wizard.

5. In Mapping Templates step, click **Manage Templates...** button to create a template with the content type to create new document sets. Then the templates dialog will appear as shown below:



6. In the dialog, specify the folder content type as any 'Document Set' derived content type to create a document set using one of the options given below:

   a. **Assign from metadata file -** The content type value can also be assigned from the external metadata file by including the content type column name in the metadata file. This option allows each document set to have its own 'Document Set' associated content type, so long as the stated content type already exists in the SharePoint library. If the content type specified in the metadata file does not exist, Dockit will create the folders and will assigned the default content type of the library for folders.
   b. **Use Function** - the calculated value can be assigned as a folder content type to create a document set. If the resultant content type does not exist, Dockit will create the folder and will assign the default content type of the library for the newly created folders.

7. Click **Next** and proceed the subsequent steps.

5.3 Function Builder

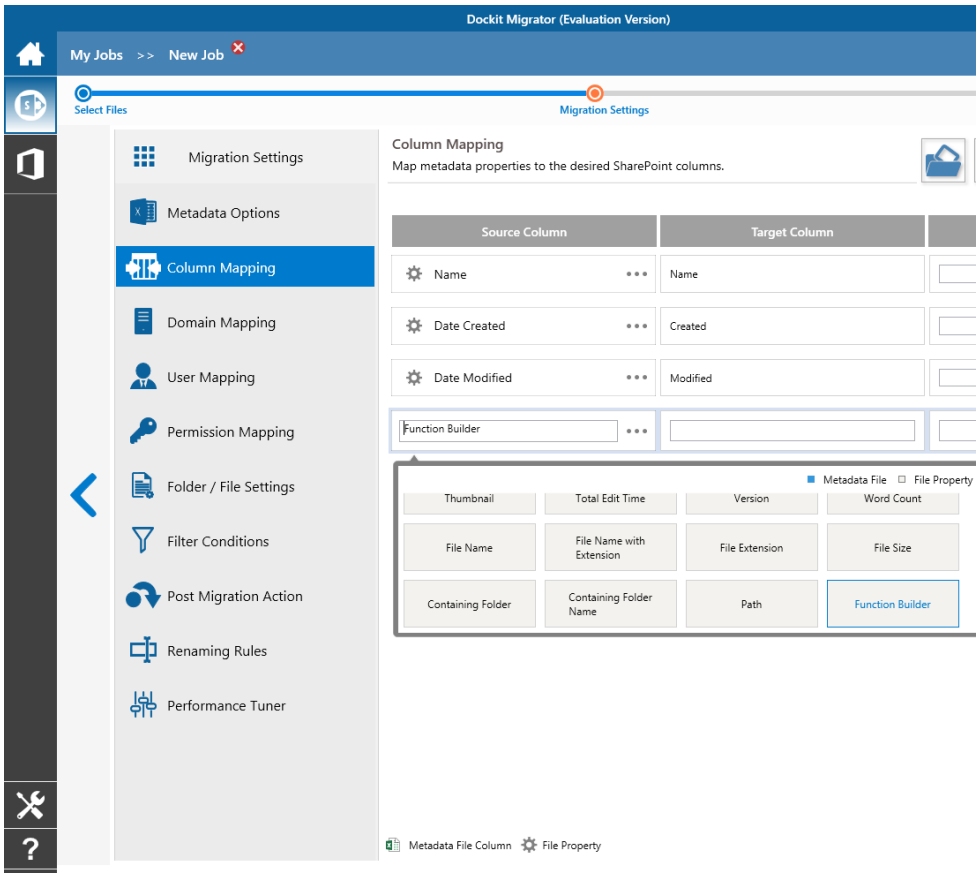
Dockit provides an ability to assign a calculated value for a SharePoint column based on user-defined functions. The custom function generates column values based on metadata file column, file properties or free text entered by the user.

Dockit will prepare the metadata value based on the custom function and assign it to respective SharePoint column.

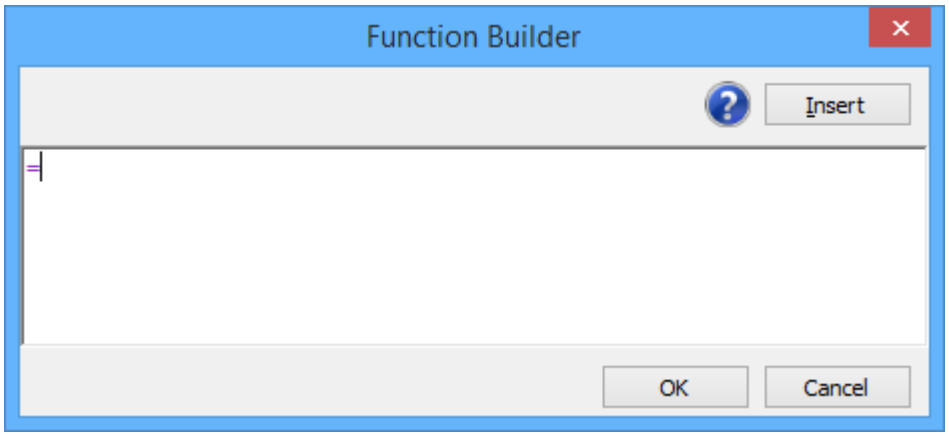
The metadata file column or file property (like Title.[metadatafile], Author.[fileproperty]) can be input as a parameter in a specific syntax. Note that the Function Builder tool recognizes the given parameter as metadata file column only if it ends with *.[metadatafile]* and similarly it recognizes the parameter as file property only if it ends with *.[fileproperty]*.

To create a custom function and assign it to the SharePoint column, perform the following steps:

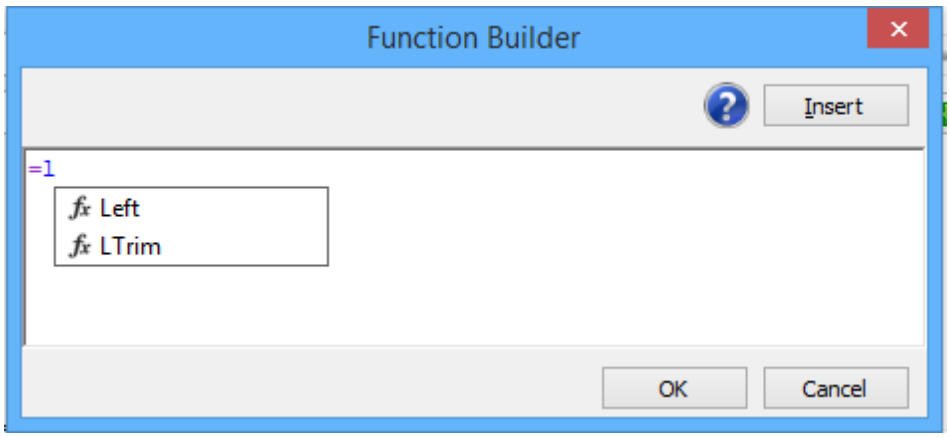
1. Select 'Function Builder' under 'Column Mapping' as Source from the list as shown below:



2. The Function Builder Dialog will appear as shown below:

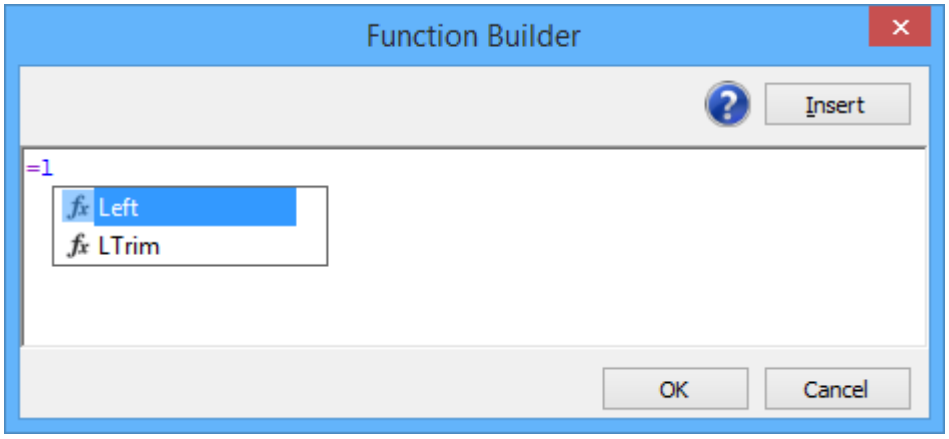


3. Enter a character in a textbox. If a character or substring starts with the built-in function name, suggestion list will appear as shown below:



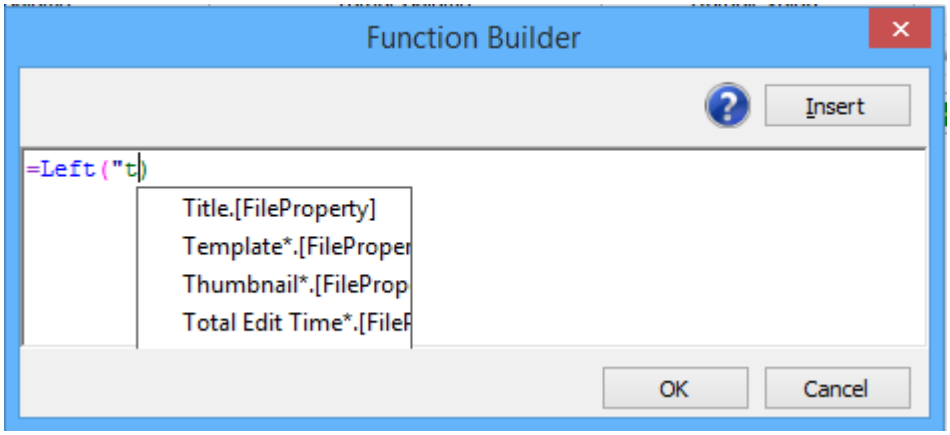
4. Select a function name from the list and press Enter key or Double Click to add the selected function to the function builder.

NOTE: You can also add the built-in function to the function builder by click 'Insert button' and select a function in the function list.

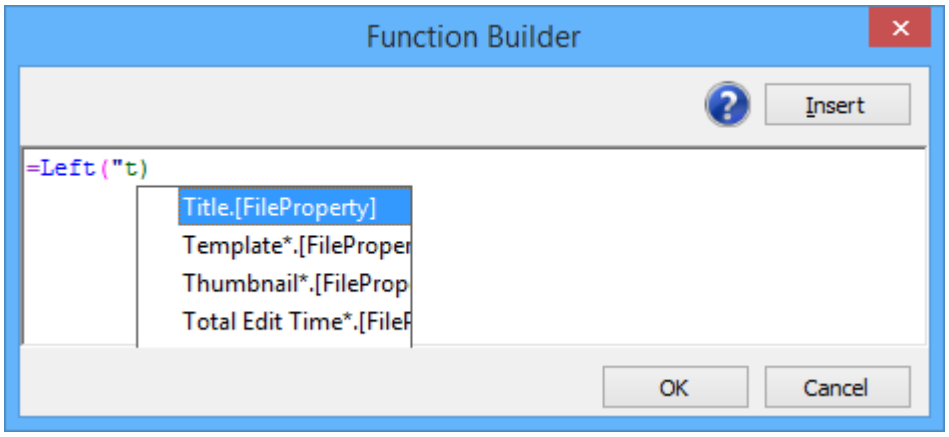


5. To add a file property or column in the metadata file as a parameter to the function, Enter a double quotes followed by character or sub string of a

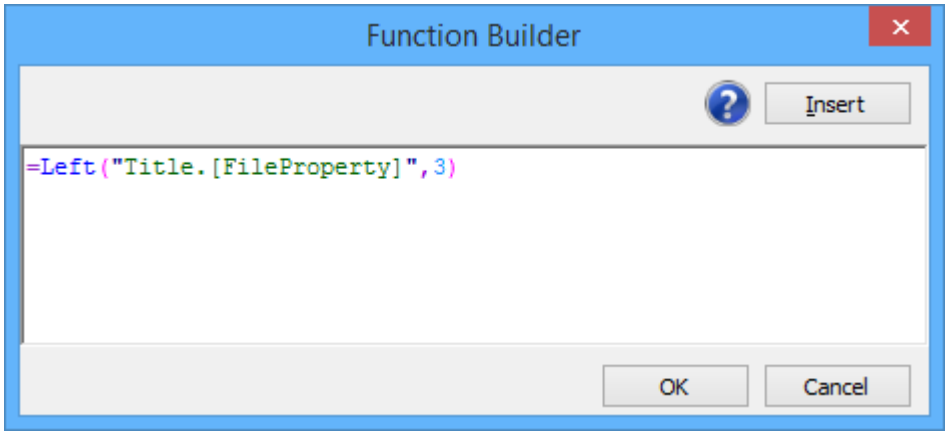
property. If the character starts with file property name or metadata file column name, then suggestion list will appear as shown below:



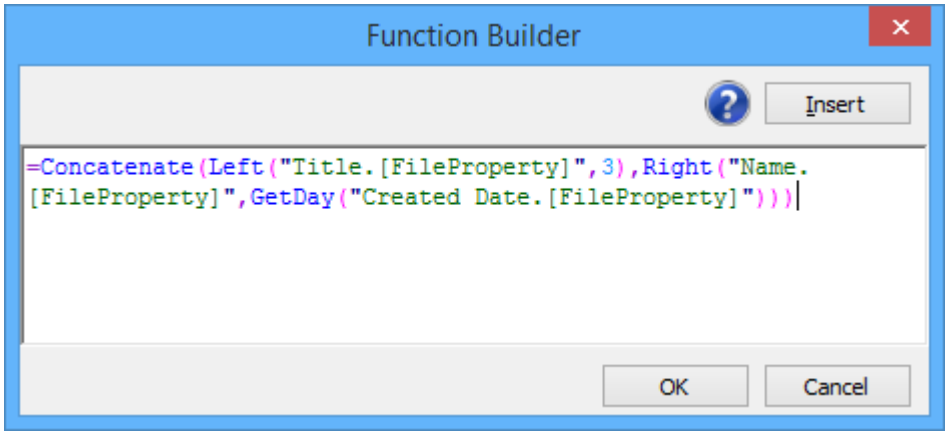
6. Select a property name and press Enter key or Double Click to add as a parameter for the function.



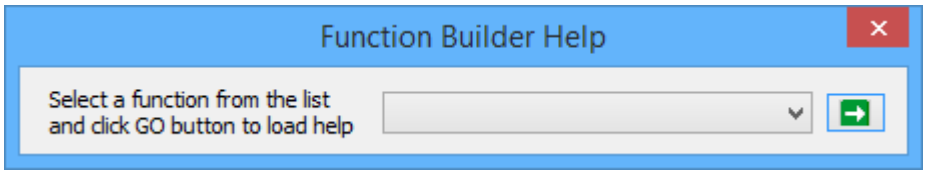
7. You can also provide a free text or integer as parameters for the function, if desired.



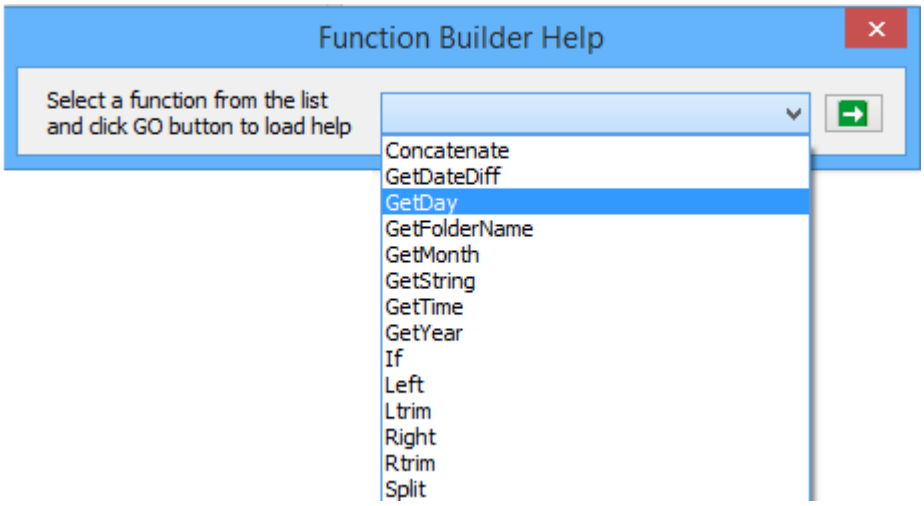
8. You can also use nested functions too as shown below:



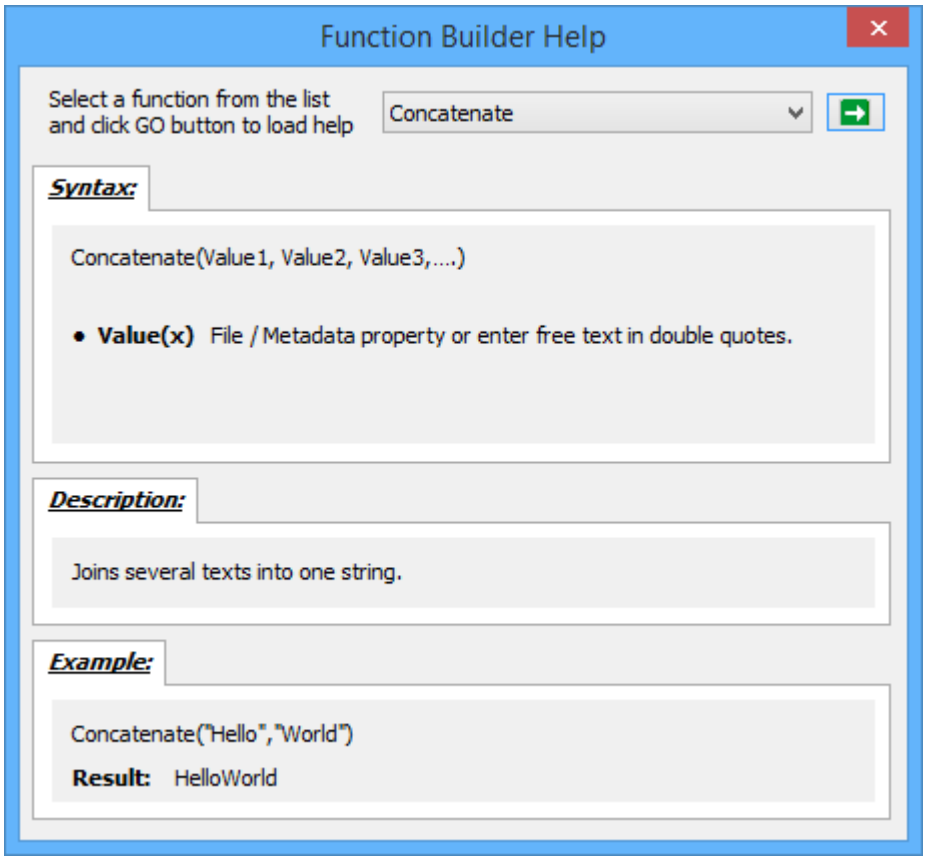
9. Click the question mark image in the function builder to show the information about built-in function in Dockit.



10. Select the option to show the information about the function in Dockit.



11. Information about the function in Function Builder Help dialog as shown below:



12. Click OK to insert the custom function in Function Builder dialog and proceed.

Dockit Built-in Functions

Concatenate

Joins several texts into one string.

Syntax

Concatenate(Value1, Value2, Value3,….)

where **Value(x)**: File / Metadata property or enter free text in double quotes.

Right

Returns the string value from the end of the string up to the specified number of characters.

Syntax

Right(Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

Left

Returns the string value from the start of the string up to the specified number of characters.

Syntax

Left(Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

RTrim

Removes the specified number of characters from the end of the string.

Syntax

RTrim(Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

LTrim

Removes the specified number of characters from the start of the string.

Syntax

LTrim (Property / Value, Count)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Count:** Number of characters.

GetFolderName

Returns the folder name at a specified hierarchical level from the complete folder path.

Syntax

GetFolderName(Property / Value, Level)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Level:** Hierarchical level of the folder name to return.

GetDay

Returns the day value of the given date.

Syntax

GetDay(Date value)

- **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

GetMonth

Returns the month value of the given date.

Syntax

GetMonth(Date value, Format)

- **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

- **Format:** Month format to extract.("MM","MMM","MMMM")

GetYear

Returns the year value of the given date.

Syntax

GetYear(Date value, Format)

- **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

- **Format:** Year format to extract.("YY","YYYY")

GetTime

Returns the time value of the given date.

Syntax

GetTime(Date value)

- **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

GetDateDiff

Returns the difference between two date values.

Syntax

GetDateDiff(Date value, Date value)

- **Date Value:** File / Metadata property or enter free text in double quotes. Note: "Now" free text is used to set a current date and time.

If

Checks the condition, and returns one value if TRUE, and another value if FALSE.

Syntax

If(Property / Value, Condition, True part, False part)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Condition:** Specified formula condition.(StartsWith,EndsWith,EqualsTo)
- **True Part:** Characters or String.
- **False Part:** Characters or String.

GetString

Returns the string value that matches with the regular expression pattern.

Syntax

GetString(Property / Value, Pattern)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Pattern:** Any regular expression pattern to search.

Split

Split the given string with a specified character and returns the value from the specified occurrence.

Syntax

Split(Property / Value, Split Character, Occurrence)

- **Property/Value:** File / Metadata property or enter free text in double quotes.
- **Split Character:** Character separator to split the given string.
- **Occurrence:** Integer value to return the string at specified occurrence.

Example of custom functions and their resultant values:

Function	Sample Metadata file column Value	Sample File Property Value	Result	Remarks

Right("Title.[metadatafile]",5)	test value		value	Right function returns last two characters from the value in the metadata file column 'Title'
Left("Title.[fileproperty]",2)		test property value	te	Left function returns the first two characters from the value in the file property 'Title'
RTrim ("Sample Value",5)			Sample	Rtrim truncates *Value* from the given value *Sample Value* and returns *Sample*
LTrim ("Demo Version",5)			Version	LTrim function truncates *Demo* from

				the given value and returns *Version*
GetFolderName("path.[fileproperty]" ,2)		*C:\Sample Folder\Test\Demo.txt*	Sample Folder	Returns the name of the folder at level two in the full path
GetDay("Created Date.[fileproperty] ")		11/21/1986	21	Returns the date value 21 from the date.
GetMonth("Modified Date.[fileproperty]", "MMM")		11/21/1986	Nov	Returns the month value in MMM format from the date.
GetYear("Date Field.[metadatafile]", "YY")	09/21/1990		90	Returns the year value in YY format from the given date.

GetTime("Time field.[metadatafile]")	09/21/1990 15:05:05		15:05:05	Returns the time value from the given date.
GetDateDiff("Created Date.[fileproperty]","Date Field.[metadatafile]")	09/21/1990	09/ 21/1989	366	Returns the difference between two date values.
Concatenate("Title.[FileProperty]","-","Name.[MetadataFile]")	Content	Type	Type-Content	Joins several texts into one string.
If("Title.[fileproperty]","StartsWith[FileShare]","File","Folder")		FileShare Document	File	If the condition is TRUE, it returns the True part string value.
Split("Name.[fileproperty]","_",2)		Dockit_User Manual_2012	User Manual	Splits the given string based on the split character (_) and returns the value

				from the second part / occurrence.
GetString("Title.[metadatafile]", "\w{4}")	test case		test	Returns the string value that matches with the regular expression pattern.

5.4 Rename Documents in file system

SharePoint does not permit certain characters in folder and file names. Dockit provides the ability to rename invalid character(s) to valid character(s) using **Folder & File Renaming Rules**, thereby eliminating the tedious step of renaming the source folders / files. Dockit also allows you to truncate / replace some valid character(s) in folder and/or file names using the **Folder & File Renaming Rules**. This feature helps you in avoiding certain unwanted string characters (e.g., file suffixes) that are in the source folder / file names to be part of the folder / file name in SharePoint library.

For instance, if a file is named as 'Product Specification_en.doc' and you need to truncate the suffix '_en' from the file name during import, you can create a file naming rule as stated in the example below:

File Name	Find	Replace	Remarks
Product Specification_en.doc	*_en	*{empty}*	As the Replace textbox with an empty string, the final file name will be 'Product Specification.doc'
Product # Table.doc	#	*Number*	As the Replace textbox has the text 'Number' instead of the # symbol, the file name will be 'Product Number Table.doc'

Note: Dockit replaces '_en' with empty string in (or truncates '_en' from) the file name, if the primary part of the file name ends with '_en'. Also, the renaming rule does not replace any characters in extension part (secondary part) of the file name.

Dockit enables you to define flexible naming rules, in order to truncate or replace invalid and/or valid characters in folder and/or file names during import. By using wildcard characters ('*', '?') in the Find string in the naming rules, you can also create generic naming rules.

The naming rules are case insensitive. You can use the same Find string for both UPPER and lower case file names. For more information, please read Folder & File Renaming rules... section in the help document.

5.5 Adding new terms in managed metadata columns

Dockit enables you to assign term labels to the **Managed Metadata (Taxonomy)** column during document import. You can specify the required term by using its default term label or synonyms of the term label or full term path of the required term (in case of duplicates) in the metadata file. The term path should be separated with the vertical separator '|' (e.g., "Continent|North America|Country|United States|States|Alaska").

Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, if the column value exists.

Please read the table below to see how to specify Managed Metadata values in the external metadata file for Dockit import.

Path	**Country**	**State**	**Description**
E:\Documents\Sample Presentation.pptx	United States	Washington**;**California**;**Alaska	Dockit will search the specified term label under the associated term set. Dockit will assign the correspondin g ID to the column. *Note: This syntax will be useful when there is no duplicate in the same term set. Otherwise, Dockit will search the term sets and assign the first occurrence*

			of the matching term value.
E:\Documents\Sample Report.pdf	Continent|North America|Country|United States	Continent|North America|Country|United States|States|Washington; Continent|North America|Country|United States|States|California; Continent|North America|Country|United States|States|Alaska	If there are duplicates in the same term sets, it is recommended to use Absolute Term Path as stated in this example. Dockit will assign the specified term to the associated column.

You can also specify options to create unavailable terms as part of document import. Dockit checks if the term set is open to creating new terms and then adds the unavailable terms to the exact term hierarchy.

6. References

- Batch file structure
- Metadata file structure
- File structure for metadata update
- Error Messages and Resolution
- Troubleshooting

6.1 Batch file structure

The following section describes the guidelines to create a batch descriptor file for **Migrate SharePoint site, list & library content using batch file mode** task option.

1. The first row of the batch descriptor file should contain the Field Names as headers. In a migration task, data type of the columns must be the same across all lists. SharePoint Columns that are read-only will not be updated by Dockit.

2. The first field should be named as '**Source Path**' and second field should be named as '**Destination Path**'. Other field names should be followed separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the

batch descriptor file should be same as 'List Separator' defined in 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

3. The 'Source Path' and 'Destination Path' fields will not be carried forward as a metadata column in SharePoint.

4. The 'Source Path' column of all the rows should contain the URL of the source SharePoint site / list / folder / file / list item. e.g., "http://sharepoint/site1", "http://sharepoint/site1/Lists/Contacts".

5. If a site URL is given in the batch file, then you can use the following wildcards to exclude / include the sub-sites.

Wildcard characters	Example	Description
*	http://sharepoint/site1/.	Migrate all lists, items and folders at the given source SharePoint site level only (excluding sub-sites).
.	http://sharepoint/site1/*.*	Migrate the given source site and its sub-sites with content.

In a list URL is given in the batch file, you can use the following wildcards to migrate the list items from the source SharePoint list based on your requirement.

Wildcard characters	Example	Description
.*	http://sharepoint/lists/Cities/.*	Migrate all items from the source SharePoint list.
. (default)	http://sharepoint/shared documents/*.*	Migrate all items and folders from the source SharePoint list.
.	http://sharepoint/lists/tasks/.	Migrate list items available in the top level folders only.

*	http://sharepoint/lists/custom list/*	Migrate folder structure only.

6. The 'Destination Path' column of all the rows should contain the URL of the target SharePoint site / list / folder e.g., http://RD65/technical documents/folder1

7. The column '**New Folder**' is an optional column in the batch descriptor file. Using this column, you can provide the relative path to be created in the respective destination location given under 'Destination Path' column prior to migrating the content. For instance, please see the batch descriptor file snippet given below:

Source Path	**Destination Path**	**New Folder**
http://sharepoint.vyapin.com/Documents/Sample File.xls	http://sharepoint/technical documents/folder1	folder2/folder3
http://sharepoint.vyapin.com/Lists/Contacts/1_.000	http://sharepoint/Employee Details	Sales/Executives

Dockit automatically creates the folders (folder2/folder3) specified in the column 'New Folder' underneath the specified destination location (folder1). The 'Sample File.xls' will be migrated into the new destination location 'http://RD65/technical documents/folder1/folder2/folder3'.

8. The column '**Site Template**' is an optional column in the batch descriptor file. Using this column, you can provide the site template for the sites being migrated to target SharePoint. For instance, please see the batch descriptor file snippet given below:

Source Path	**Destination Path**	**Site Template**
http://sharepoint.vyapin.com/sites/Mission/Wild	http://sharepoint/sites/Mission	Team Site
http://sharepoint.vyapin.com/sites/Adventure/Estuary	http://sharepoint/sites/Mission/Adventure	Blank Site

Dockit creates the site (wild) underneath the specified destination location (Mission) with the template specified in Site Template column (Team Site). The 'Wild' site content will be migrated into the new destination location 'http://sharepoint/sites/Mission/Wild'.

9. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT batch descriptor file must be in UNICODE encoded format.

10. For Microsoft Excel file formats (XLS / XLSX), do not enclose the field names and their corresponding metadata values within double quotes.

11. Ensure date values are in 'Date Only' or 'Date And Time' format.

12. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.

1 People or Group data type value should be user name, Active Directory (AD) group
3. name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

Sample format of a CSV / TEXT batch descriptor file:

Note: Refer Point #2 for the separator to be used in the batch descriptor file

"Source Path","Destination Path","Issue Date","Author Name","Position","Department"
"http://sharepoint.vyapin.com/Documents/Sample Brochure.doc","http://sharepoint/libone1","11/06/2006","John Doe","Director","Senior Management"
"http://sharepoint.vyapin.com/Documents/Sales/Sample Sales Template.xls","http://sharepoint/libone2","11/24/2006","Jane Doe","VP Sales","Corporate Sales"
"http://sharepoint.vyapin.com/Documents/Sample Product Demo.ppt","http://sharepoint/libone3/folder","09/09/1999","David Blake","Sales Manager","Consumer Sales"
"http://sharepoint.vyapin.com/Lists/Contacts/1_.000","http://sharepoint/Exmployee Details","10/21/2003","Schew","VP Accounts","Accounts"
"http://sharepoint.vyapin.com/Lists/Tasks/10_.000","http://sharepoint/Lists/Tasks/Folder", "09/12/2009","Crouch","Sales Executive","Consumer Sales"

6.2 Metadata file structure

The following section describes the guidelines to create an external reference file for **Migrate SharePoint List content using the browse option** task option.

The first row of the metadata file should contain the Field Names as headers. In a migration task, data type of the columns must be the same across all lists. SharePoint
1. Columns that are read-only will not be updated by Dockit.

The first field should be named as '**Source Path**'. 'Source Path' field should be followed by other field names separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external reference file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

2.

3. The 'Source Path' field will not be carried forward as a metadata column in SharePoint.

The first column of all the rows should contain the path of the file or folder or list item e.g., "http://sharepoint.vyapin.com/shared documents/sample.doc",
4. "http://sharepoint.vyapin.com/Lists/contacts/1_.000".

The column 'Version Number' is an **optional** column in the reference file. By using this column, you can also provide metadata for document versions being migrated to destination SharePoint lists. Dockit looks up the metadata of the respective version history from external reference file and assigns them to the respective document / list item versions during migration.

The following table shows the usage of the Version Number column in the external reference file.

Source Path	**Version Number**
http://sharepoint.vyapin.com/Documents/Sample Brochure.doc	0.1
http://sharepoint.vyapin.com/Documents/Sample Brochure.doc	1.0
http://sharepoint.vyapin.com/Documents/Sample Brochure.doc	2
http://sharepoint.vyapin.com/Documents/Sample Brochure.doc	2.1

Note: If the 'Version Number' column is not present in the external reference file, Dockit updates the metadata only for the latest version of the document during
5. migration.

The **Site Template** column is also an optional column in the reference file. By using this column you can provide the site template for the sites being migrated to destination SharePoint.

Source Path	**Destination Path**	**Site Template**
http://sharepoint.vyapin.com/sites/Mission/Mission1	http://sharepoint/sites/Mission	Team Site
http://sharepoint.vyapin.com/sites/Adventure/Forest	http://sharepoint/sites/Adventure/estuary	Blank site
http://sharepoint.vyapin.com/sites/Adventure/wild	http://sharepoint/sites/Mission	Team Site

6.

For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be
7. in UNICODE encoded format.

For Microsoft Excel file formats (XLS / XLSX), do not enclose the field names and their
8. corresponding metadata values within double quotes.

9. Ensure date values are in 'Date Only' or 'Date And Time' format.

10. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.

11. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

The following section describes the data types supported by SharePoint and an example of how to state the value in the reference file for migration.

SharePoint Data Type	**Remarks**	**Example**
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple	"Windows 2000;Windows XP;Windows 2003;Windows Vista"

	values should be separated with ';'.	
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the migrated file or list item, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows XP"
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the migrated file or list item, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. The user value format (login name or display name or e-mail address) used to identify the user account must be specified in the migration wizard for the values to	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"

	be interpreted correctly. All the user entries in the external metadata file must be in the same format. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the migrated file, only if the user or group name exists.	
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. The user value format (login name or display name or e-mail address) used to identify the user account must be specified in the migration wizard for the values to be interpreted correctly. All the user entries in the external metadata file must be in the same format. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the migrated file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://rd65:5010/Shared Documents/My Sample File.doc" "http://rd60/Pictures/chart.bmp"

Business Data (BDC) / External Data (BCS) *(Applicable only for SharePoint Enterprise Edition)*	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in filter name: value format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:filter name, **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import. In order to assign the values to the BDC / BCS column, Dockit Server Agent must be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010).	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator" If the filter name contains colon (:) in its name, use the following syntax: "FILTER:Product:Product ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file.	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	"Continent|North America|Country|United States|States|Washington;Continent|North America|Country|United States| States|California;Continent|North America|Country|United States| States|Alaska" "Washington;California;Alaska"

Sample format of a CSV / TEXT metadata file:

Note: Refer Point #2 for the separator to be used in the reference file

"Source Path","Modified Date”,”Author Name”,”Position”,"Department"
"http://sharepoint.vyapin.com/Documents/Sample Brochure.doc”,”11/06/2006”,”John Doe”,”Director”,”Senior Management"
"http://sharepoint.vyapin.com/Documents/Sales/Sample Sales Template.xls”,”11/24/2006”,”Jane Doe”,”VP Sales”,”Corporate Sales"
"http://sharepoint.vyapin.com/Documents/Sales/Sample Product Demo.ppt”,”09/09/1999”,”David Blake”,”Sales Manager”,”Consumer Sales”
"http://sharepoint.vyapin.com/Lists/Contacts/1_.000","12/03/1995","Schew","Executive","Markerting"
"http://sharepoint.vyapin.com/Lists/Announcements/4_.000","03/02/2001","Michael","Accounts Assistant","Accounts"

6.3 File structure for metadata update

The following section gives you the guidelines to create an external metadata file for **Assign Metadata to the documents in SharePoint Libraries** task option.

1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by Dockit.

2. The first field should be named as '**Destination Path**'. 'Destination Path' field should be followed by other field names separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'Format' string value available in the registry key (HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

   The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;)
* (asterisk)	Delimited(*)

3. The first column of all the rows should contain the full destination path of the file e.g., http://sharepointserver/sample sales documents/sample folder/sample file.xlsx.

   Use vertical pipeline character (|) as a separator between SharePoint site and Document ID in order to locate documents using their unique Document ID.

   Syntax: Site URL|Document ID

   where,
   Site URL - indicates the site from which Dockit can lookup the document using the specified Document ID.
   Document ID - indicates unique Document ID of the document to be updated.

4. For exampe:

Destination Path	Document Author
http://sharepoint:9000|62WZ4WH5D27C-1-1	John Doe
http://sharepoint:9000|62WZ4WH5D27C-1-2	Peter

The column '**New Name**' is an optional column in the metadata file. By using this column, you can provide the new name for your existing folder and/or file to be renamed in the destination SharePoint library. Please see the sample snippet below:

Destination Path	New Name
http://sharepoint/technical documents/Sample File.txt	New Document.txt

Dockit will rename the file 'Sample File.txt' as 'New Document.txt'. While this renaming operation does not create any new versions, it will change the values of 'Modified Date' and 'Modified By' to the current import time and user respectively. Please note that the file name (to be renamed) should contain its extension, since Dockit uses the value under **New Name** column as the alternate name of the respective file regardless of its

5. type / extension.

Use wildcard representations (* and *.*) in order to update the same metadata for the existing items underneath the destination folder or library. Please see wildcard characters usage for this purpose:

Wildcard characters	Example	Description
*	http://sharepoint/library1/folder1/*	Update all folders and sub-folders only, but skip files
.	http://sharepoint/library1/folder1/*.*	Update all files and sub-folders

Please see the sample snippet below:

Destination Path	Team Name
http://sharepoint/technical documents/project1/*.*	voyager
http://sharepoint/technical documents/project2/*	conqueror

6.

For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be

7. in UNICODE encoded format.

8. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.

9. Ensure date values are in 'Date Only' or 'Date And Time' format.

10. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by Dockit.

11. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by Dockit. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account.

12. The **New Name** field will not be carried forward as a metadata field into SharePoint.

13. Business Data (BDC) / External Data (BCS) column values must be provided with the appropriate filter name to use in order to query the LOB records. Dockit will be unable to update the BDC column values if the filter name is incorrect or does not exist. You must provide the BDC column value in the format: *<filter name>:<value>*. For example: *"Company Name:NorthWind"*

    The Managed Metadata column values can be term labels or synonyms of term labels or full path of the term value (full term path). Dockit will search the specified term value under the specified parent term of the corresponding term set and assign the ID of the matching term value for the managed metadata column. You must provide the path of the term label in the format: *ParentTerm|TermLabel1|TermLabel2|TermLabel3.*

    For example: *"Continent|North America|Country|United States|States|Alaska"*.

    In the example above, if the specified term value 'Alaska' does not exist in the selected term set of the managed metadata column, Dockit checks if the term set is open to creating new terms / values. If yes, Dockit will create the new term / value 'Alaska' under the specified term path "Continent|North America|Country|United States|States" automatically. If the term set does not have the provision to create new terms / values, the specified managed metadata column value 'Alaska' will not be added in the specified term path.

    The full term path is required only if the selected term set (for managed metadata column) contains any duplicate values. As a best practice, we recommend you to provide the full term path to update the desired term value.

    Please note that the new term value creation depends upon the 'Allow Fill-in settings' option selected in Dockit task wizard, which has the option to override the library settings.

14. Note: The term path should be separated by '|' and multiple term values should be separated by ';'

The following section describes the data types supported by SharePoint and an example of how to state the value in the metadata file for import.

SharePoint Data Type	Remarks	Example

Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text.\nThis is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol ($) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.	"Windows 2000;Windows XP;Windows 2003;Windows Vista"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in	"Windows XP"

	SharePoint to accept multiple values. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the column value in the metadata file. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: if the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"

	) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	
People or Group (Multiple value)	User name, AD Group name or SharePoint Group name can be given to this field. The user *Login Name (domain\username), Display Name (John Doe) or E-mail address* (someone@example.com) can be used to denote a user account. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	"VOYAGER\User1; BUILTIN\Administrators;Guest Members;Temps"
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://sharepointserver:5000/Shared Documents/My sample file.doc" "http://sharepointserver/Pictures/sample chart.bmp"
Target Audiences (Multiple value) *(Applicable only for a*	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security / Distribution	"All site users; Admins; Viewers; Administrators; RD60SPUsers; Contributors; Designers

MOSS / Microsoft SharePoint Server 2010 library)	Group should be crawled and stored in User Profile Store of SSP. The values can be of single or multiple. Multiple values should be separated with ';'. Dockit will search for the value in the respective group list and assign the ID of the matching group name to the Target Audiences column of the imported file, only if the group name exists. Moreover, in order to assign the values that belong either to Global Audience or Security / Distribution Group require ***Dockit Server Agent*** to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010).	
Publishing Schedule Start Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Publishing Schedule End Date *(Applicable only for Collaboration Portal / Publishing Portal Site)*	Date or Date & Time can be given in this field. Dockit provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Publishing Image *(Applicable only for Collaboration Portal*	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	"http://sharepoint/Pictures/chart.bmp" "Pictures/chart.bmp" <img src='/sites/collaboration

/ Publishing Portal Site)		portal/PublishingImages/NewsArticleImage.jpg' />
Publishing Hyperlink *(Applicable only for Collaboration Portal / Publishing Portal Site)*	The http URL of any resource can be given to this field. Relative URL also can be given to this field.	"http://sharepoint:5010/Documents/Sample File.doc" "/Documents/Sample File.doc" " NewsArticleImage.jpg"
Publishing HTML *(Applicable only for Collaboration Portal / Publishing Portal Site)*	HTML content can be given in this field. You can use HTML tags in order to create rich content in the field.	It is sample text
Business Data (BDC) / External Data (BCS) *(Applicable only for SharePoint Enterprise Edition)*	The BDC / BCS column value along with the filter name can be specified in this field. Dockit will search for the specified column value in the LOB entity using the given filter and assign the corresponding ID (when the BDC / BCS column value match is found) of the LOB record to the BDC / BCS column in SharePoint. Specify this value in *filter name: value* format. If the filter name contains colon (:) in its name, specify this value in **FILTER**:*filter name*, **QUERY**:value, where **FILTER** and **QUERY** are reserved words. Dockit also automatically fills-up the column values associated with the BDC / BCS column during import.	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator" If the filter name contains colon (:) in its name, use the following syntax: "FILTER:Product:Product ID,QUERY:Dockit" "FILTER:ID:Name,QUERY:1000AX"
Managed Metadata (Single Value)	Text or Number value can be given to this field. Do not use multiple values unless defined in	"Continent|North America|Country|United States|States|Alaska" "Alaska"

	SharePoint to accept multiple values. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Managed Metadata (Multiple Values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'. In this case, you must specify the term label or synonyms of the term label or column value with full term path in the metadata file. Dockit will	"Continent|North America|Country|United States|States|Washington;Continent|North America|Country|United States|States|California;Continent|North America|Country|United States|States|Alaska" "Washington;California;Alaska"

	search the specified value from the term set selected for the corresponding managed metadata column and assign the ID of the matching term value to the managed metadata column of the imported file, only if the column value exists. The term path should be separated with '|'. Note: If the specified column value is unavailable in the term store, Dockit checks if the term set is open to creating new terms. If yes, Dockit creates the new terms under the term path specified in the metadata file. Otherwise, the specified term will not be assigned for the specific file / folder. If you specify the term label in the metadata file, Dockit will search the specified term value and assign the first matching term value for the corresponding managed metadata column.	
Geolocation	Location co-ordinates or name can be given to this field. The co-ordinates value must have latitude and longitude values seperated by ';'.	"30: -60" "New York, United States"
Task Outcome	Text or Number value can be given to this field. Do not use multiple values for these column type.	"Success" "1"
Related Items	The http absolute URL of any list item (including file) within the site collection can be given to this field. The values can be of single or multiple.	"http://sharepoint/Documents/Sample File.doc; http://sharepoint/Documents/Sample File1.doc " "http://sharepoint/Lists/Custom List/1_.000"

	Multiple values should be separated with ';'.	

The following tables below describe the syntax to be used in the external metadata file for single values / multi values for the following data types in SharePoint:

- Choice*
- Lookup
- Person or Group

Single Value	**Example**	**Final Result**
In case single value contains ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. *Note: The delimiter ';#' is a reserved character pattern in the Choice field column. The single value should not contain ';#' as part of its value to be assigned to the Choice field column in SharePoint.*	";#Windows Live;;#Mail;#"	Windows Live;#Mail

Multi-Value	**Example**	**Final Result**
In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Windows Live Spaces; Mesh; Windows Azure; Windows HPC
In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'. *Note: The delimiter ';#' is a reserved character pattern in the Choice field column. The multi-value should not contain ';#' as part of its value to be*	";#Windows Live;;#Mail;#Windows Photo Gallery;#"	Windows Live;#Mail; Windows Photo Gallery

assigned to the Choice field column in SharePoint.		

Sample format of a CSV / TEXT metadata file:

Note: Refer Point #2 for the separator to be used in the metadata file

"Destination Path","New Name","Issue Date","Author Name","Position","Department"
"http://sharepoint/libone1/Sample Brochure.doc","Sample File.doc","11/06/2006","John Doe","Director","Senior Management"
"http://sharepoint/libone1/Sample Sales Template.xlsx","Sales Target.xlsx","11/24/2006","Jane Doe","VP Sales","Corporate Sales"
"http://sharepoint/libone1/Sample Product Demo.ppt","Product Demonstration.ppt","10/4/2006","David Blake","Sales Manager","Consumer Sales"

6.4 Error Messages and Resolution

You may notice one or more of the error messages given below when using Dockit to connect to SharePoint and perform an import . 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 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 server could not sign you in. Make sure your user name and password are correct and then try again. Check if you have a persistent session if you use federated identity.	If you use federated identity to connect to the SharePoint site, Dockit expects a persistent connection (already established connection) to be available for the SharePoint site to commence the import task in unattended mode or scheduled mode.
Unable to establish existence of the account specified.	The user account specified in the scheduled task should be a trusted domain user account.
The file or folder name contains invalid characters.	Map the invalid characters (~#%&{}) into valid character using **Replace Illegal Characters** tool available in **Tools** menu. Assign the naming rule name in your import task.

String was not recognized as a valid Date Time	Ensure that the date value given in metadata file is in correct format. If the given date value format is different from the current system date time format, then specify the appropriate Date Time format mask to use in your import task.
Lookup ID not found	Ensure that the given column value is available in the Lookup field reference list and column. Dockit will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists. Note: if the specified column value is of folder type, the ID of the folder will not be assigned.
User or Group ID not found	Ensure that the given user or group name exists in the respective site. Unavailability of user or group name causes this error.
User ID not found	Ensure that the given user name exists in the corresponding SharePoint Site. This error may occur if the specified user name does not exist.
Multiple User IDs found	The user value specified to assign in SharePoint People / Group column must be unique in the SharePoint repository and Active Directory Services. This error may occur if the specified user value has multiple user entries with the same name in SharePoint.
The column values could not be assigned for this file since there was no corresponding entry in the external metadata file.	Ensure that the given Path or Destination Path in metadata file exists in Source and Destination library respectively. Differences in metadata file and original source location will also result in this error. Also, ensure that the metadata values are provided for all documents that are imported.
The '<value>' could not be assigned for the choice field '<field name>' since there is no matching value defined in the choice field definition.	Ensure that the given choice value is available in the corresponding Choice field definition in SharePoint library. If the given value is unavailable, Dockit reports this message and the value will not be updated in SharePoint.

	Note: if you wish to add newer values (that is not available in the field definition) during import process, specify 'Yes' value for 'Allow Fill-in' option available in Choice field column settings in SharePoint library. The 'Allow Fill-in' option in Choice field column is used as a flag in Dockit to specify whether to add newer value to the choice field definition during import process.
The '<value>' could not be assigned for the taxonomy field '<field name>' since there are no matching value defined in the taxonomy field definition.	Ensure that the specified term value is available in the corresponding managed metadata field termset definition in SharePoint library. If the given value is unavailable and the selected termset is not opened for new term creation, Dockit reports this message and the term value will not be updated in SharePoint.
'<value>' - Not a valid list item URL in the site collection.	Ensure that the given list item URL is a valid list item's URL. Unavailablity of the list item causes the error.
'<value>' - Related item must be a valid list item within the site collection.	Ensure that the given list item URL is a valid list item's URL within the site collection.
Latitude value must be between -90 and +90 for a Geolocation field.	Ensure that the given latitude value is in between -90 and +90.
Longitude value must be between -180 and + 180 for a Geolocation field.	Ensure that the given longitude value is in between -180 and +180.
There is no entry for this file in the external metadata file.	Ensure that the metadata values are provided for all documents that are imported.
Source folder or file not found	Ensure that the given source Path is valid and available. Invalid or unavailable source paths will result in this error.
Unable to locate library with the specified URL (or) Unable to locate destination folder / file with the specified URL.	Ensure that the given Destination Path is valid and exists.
Dockit will not apply metadata for standard folders.	Ensure that you can assign a folder content type to the given destination

	folder. Dockit will not assign metadata for a standard folder.
The following file(s) have been blocked by the administrator: <filename>	Ensure that the file type being imported is not blocked. For example, asp, chm, mdb, etc files are generally blocked in SharePoint by administrators.
The file is checked out or locked for editing by user	If the given file is checked out by another user and you are trying to check-in the file, then this error may occur.
Could not import document as mandatory columns do not have values	The values are required for mandatory columns in a SharePoint library. The file will be skipped as mandatory columns do not have values. The column value for a mandatory column may not available in either the external metadata file or file system properties. Ensure all mandatory columns have values in the respective files added for import.
Could not update metadata values as mandatory columns do not have values	The values are required for mandatory columns in a SharePoint library. The file will be skipped as mandatory columns do not have values. The column value for a mandatory column may not available in the external metadata file.
<fieldname> must contain a metadata value or its corresponding library column must have a default value defined.	This field is defined to be a required field in SharePoint, meaning column value cannot be empty. Moreover, the default value of the column may also be empty. Ensure that a default value is specified for the required field in SharePoint or enter a value for this field in the corresponding file.
Dockit Server Agent version mismatch	Ensure Dockit application version matches with Dockit Server Agent version installed in the destination SharePoint Server. Ensure the same version of Dockit desktop application and Dockit Server Agent is used when importing the Created Date and Last Modified Date fields to SharePoint.
[Created Date], [Modified Date] could not be updated	Ensure Dockit Server Agent is installed and running in the destination SharePoint Server. Dockit will carry forward the two date fields to a SharePoint library residing

	in the SharePoint server in which *Dockit Server Agent* is installed.
Required column(s) may be empty.	Some of the required fields in a SharePoint library may be empty. Ensure all mandatory columns have values in the respective files added for import.
Checkin operation failed	Checkin operation will fail, in case mandatory fields of SharePoint library do not have values (empty) provided to them at the time of check-in.
Checkout operation failed	Checkout operation will fail in case access is denied (or) file is already locked by some other user.
Content Type <name> could not be found in the library	Ensure that the specified content type is available in the destination SharePoint library.
Content Type <name> found in the library, but it is not a valid file content type	Ensure that the list content type is derived from a 'Document' parent content type in the SharePoint site.
Content Type <name> found in the library, but it is not a valid folder content type	Ensure that the list content type is derived from a 'Folder' parent content type in the SharePoint site.
Import condition not satisfied	The file does not satisfy the import condition specified in the task settings. Dockit will log this message in the Activity log and the file will be skipped for import.
Import condition has failed <error message>	Ensure that the constructed import condition is correct. The column name used in import condition may not be available in the external metadata file.
Renaming rule has failed <error message>	Ensure that the constructed Replace Illegal Characters is correct. The find string used in Replace Illegal Characters may have reserved characters which cause to misinterpret the rule.

Unable to read 'Owner' value from the file - Some or all identity references could not be translated.	The Owner value of the file or folder must be a trusted domain user account.
No matching LOB record	Ensure that the specified BDC / BCS value is available in the LOB system instance.
Multiple LOB records found	This message will occur if the given BDC / BCS value matches with more than one LOB record in the LOB system instance. Refine your BDC / BCS query value in order to retrieve a single LOB record only.
The specified filter is not available	Ensure that the specified filter name is available in the LOB System instance. If the specified filter is unavailable, Dockit reports this message and the BDC / BCS value will not be updated in SharePoint.
List data validation failed	Ensure that the given column value satisfies the validation condition defined in the SharePoint library validation settings. Dockit reports this error message when the validation condition (given in Validation Settings) is not satisfied and the respective columns will not be updated in SharePoint.

6.4.1 Troubleshooting

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

1. *Error log file* - e.g., <*Application Data Folder*>\Log\DockitErrorLog.txt

2. For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name under 'TaskHistory' folder.

   a. *Activity log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\ActivityLog.txt

   b. *Error log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\ActivityErrors.txt

   c. *Metadata log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\MetadataErrors.txt

   d. *Dockit error log file* - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\DocKITErrorLog.txt

Move Activity log file - e.g., <*Application Data Folder*>\TaskHistory\Dockit
e. Task\20121222-183919\logs\MoveActivityLog.txt

Task settings file - e.g., <*Application Data Folder*>\TaskHistory\Dockit
f. Task\20121222-183919\settings\Details.xml

Library settings file - e.g., <*Application Data Folder*>\TaskHistory\Dockit
g. Task\20121222-183919\settings\LibrarySettings.xml

Process details file - e.g., <*Application Data Folder*>\TaskHistory\Dockit
h. Task\20121222-183919\settings\ListItemProcessCount.xml

The <*Application Data Folder*> is the common location where Dockit tasks and task history will be stored in the computer running Dockit application. The <*Application Data Folder*> can be found from **Help** screen. The default path of <*Application Data Folder*> is as follows:

a. Windows 2003 - C:\Documents and Settings\All Users\Documents
b. Windows 10, Windows 8, Windows 7, Windows 2012, Windows 2008 - C:\Users\Public\Documents

Troubleshooting for Online tasks

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

1. *Error log file* - e.g., <*Application Data Folder*> \Log\DockitErrorLog.txt

For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name
2. under 'JobHistory' folder.

Activity log file - e.g., <*Application Data Folder*>\JobHistory\Dockit Task\20121222-
a. 183919\logs\ActivityLog.txt

Error log file - e.g., <*Application Data Folder*>\JobHistory\Dockit Task\20121222-
b. 183919\logs\ActivityErrors.txt

Metadata log file - e.g., <*Application Data Folder*>\JobHistory\Dockit
c. Task\20121222-183919\logs\MetadataErrors.txt

Dockit error log file - e.g., <*Application Data Folder*>\JobHistory\Dockit
d. Task\20121222-183919\logs\DocKITErrorLog.txt

Move Activity log file - e.g., <*Application Data Folder*>\JobHistory\Dockit
e. Task\20121222-183919\logs\MoveActivityLog.txt

Task settings file - e.g., <*Application Data Folder*>\JobHistory\Dockit
f. Task\20121222-183919\settings\Details.xml

Library settings file - e.g., <*Application Data Folder*>\JobHistory\Dockit
g. Task\20121222-183919\settings\LibrarySettings.xml

Process details file - e.g., <*Application Data Folder*>\JobHistory\Dockit
h. Task\20121222-183919\settings\ListItemProcessCount.xml

The <*Application Data Folder*> is the common location where Dockit tasks and task history will be stored in the computer running Dockit application. The <*Application Data Folder*> can be found from **Help** screen. The default path of <*Application Data Folder*> is as follows:

a. Windows 2003 - C:\Documents and Settings\All Users\Documents
b. Windows 10, Windows 8, Windows 7, Windows 2012, Windows 2008 - C:\Users\Public\Documents