User Manual

Dockit Migrator

Last Updated: June 2018

Copyright © 2002-2018 Vyapin Software Systems Private Ltd. All rights reserved.

This document is being furnished by Vyapin Software Systems Private Ltd for information purposes only to licensed users of the Dockit Migrator software product and is furnished on an "AS IS" basis, that is, without any warranties, whatsoever, express or implied. *Dockit Migrator* is a trademark of Vyapin Software Systems Private Ltd. Information in this document is subject to change without notice and does not represent any commitment on the part of Vyapin Software Systems Private Ltd. The software described in this document is furnished under a license agreement. The software may be used only in accordance with the terms of that license agreement. It is against the law to copy or use the software except as specifically allowed in that license. No part of this document may be reproduced or retransmitted in any form or by any means, whether electronically or mechanically, including, but not limited to the way of: photocopying, recording, or information recording and retrieval systems, without the express written permission of Vyapin Software Systems Private Ltd.



Vyapin Software Systems Private Limited

Website: <u>http://www.vyapin.com/</u> Sales Contact: <u>sales@vyapin.com</u> Technical Support: support@vyapin.com

Dockit Introduction	8
Install Dockit Server Agent	9
Change Application Data folder location	10
How to uninstall Dockit?	12
How to purchase?	15
How to Activate the Software?	15
Technical Support	16
Dockit Task Manager	18
Task Manager	19
Create New Task on SharePoint On-Premise Migration	22
Create New Task on SharePoint Online (Office 365) Migration	25
Edit Task for SharePoint On-Premise Migration	28
Edit Task for SharePoint Online (Office 365) Migration	29
Run a Task on SharePoint On-Premise Migration	30
Run a Task on SharePoint Online (Office 365) Migration	33
Re-do Migration	36
Incremental Migration (On Premise)	37
Incremental Migration (Online)	39
Delete an existing task	41
Copy an existing task	43
Reschedule Task	45
Validate Task	47
Manage Categories	53
Cleanup history	56
View Job Instance	58
Dockit Tools	60
Dockit Template Manager	61
Column Mapping Template	63
Domain Mapping Template	65
User / Group Mapping Template	68
Permission Mapping Template	71
Folder and File Renaming rules	75
SharePoint Migration – Column Mapping Template	79
SharePoint Migration – User / Group Mapping Template	81
SharePoint Migration – Domain Mapping Template	84
SharePoint Migration – Site and List Mapping Template	87
SharePoint Migration – Permission Mapping Template	89
SharePoint Migration – Reference Mapping Template	92

Table of Contents

Server Agent Test Tool
Metadata Extractor
Metadata Collator
Dockit Features
On Premise
File Share to SharePoint Migration 111
Explorer mode (Create Task) 112
Metadata file structure 113
SharePoint Destination Location
Items to Import
Metadata Options130
Column Mapping 132
Import Conditions
Mapping Templates 141
Folder / File Settings 144
Post Migration Settings 147
Task Schedule Settings 149
Batch file mode (Create Task) 152
Batch File Structure
Metadata File Structure 156
Batch File Options
Metadata Options
Column Mapping 169
Import Conditions
Mapping Templates 177
Folder / File Settings 180
Post Migration Settings 183
Task Schedule Settings 185
SharePoint Migration
Explorer Mode (Create Task) 189
Source SharePoint Location 190
Items to migrate 193
Site / List elements to migrate 199
Mapping Template 203
Task Settings 207
Batch File Mode (Create Task) 210
Batch Descriptor File 211

Site / List e	elements to migrat	e		214
External Re	eference File			218
Mapping Te	emplates			220
Migration F	ilters			223
Task Settin	gs			229
Clean Up Metada	ta			232
Document Lib	raries (Create Task	()		233
Create Met	adata File			234
Metadata C	ptions			243
Column Ma	pping			245
Import Con	dition			247
Mapping Te	emplates			250
Document	Status			252
Task Sched	ule Settings			254
Other List Typ	es (Explorer Mode)		257
SharePoint	List Location			258
Items to up	odate			261
Task Sched	ule Settings			266
Other List Typ	es (Batch File Mod	e)		269
Batch File S	Structure			270
Batch Impo	ort Settings			281
Column Ma	pping			283
Mapping Te	emplates			285
Handling d	uplicate records			287
Import Con	ditions			290
Task Sched	ule Settings			294
Online				297
SharePoint	Online	(Office	365)	Migration
				298
File Share t	o Office 365			
Batch File S	structure			303
Items to Mi	grate			307
Migration S	ettings			
Pre-Migra	ation Validation			334
File Share to C	OneDrive			336
OneDrive U	sers			340
Batch File S	Structure			342

346			ligrate	Items to M
347			Settings	Migration S
348			ings	File Setti
349			ng Rules	Renamin
353			Mapping	Domain I
355			pping	User Map
357			ion Mapping	Permissio
359			nditions	Filter Cor
361			ance Tuner	Performa
362			eduler	Job Sche
363			ion Validation	Pre-Migrati
Migration	365	Office	to	SharePoint
366		fice 365 Migration.	n-premises to Of	SharePoint Or
370			nigrate	Items to m
371			tion Option	Site Migrat
374			ion Option	List Migrati
375			Settings	Migration S
395			ary	Job Summa
396		neDrive Migration	n-Premises to Or	SharePoint Or
400				Batch File.
403			nigrate	Items to m
404			tion Option	Site Migrat
407			ion Option	List Migrati
409			Settings	Migration S
415			ary	Job Summa
Migration				OneDrive
416				
420				Batch File
423			rate	Items to migra
424			n Option	Site Migration
427			Option	List Migration
428			tings	Migration Sett
429			- Mappina	- Domain I
			pping	User Mar

Performance Tuner 43	33
Job Summary 43	34
How to Guide	35
Import Document Versions 43	36
Create Document Sets 44	11
Function Builder	15
Rename Documents in File System 45	58
Adding new terms in Managed Metadata column in SharePoint	59
Profile Manager	51
Site Traversal Options 46	54
List Traversal Options	55
Library Traversal Options 46	56
Folder Traversal Options 46	57
Site Migration Options 46	58
List Migration Options	70
Library Migration Options 47	71
Folder Migration Options 47	72
Migration Filters	73
Folders & File Renaming Rules 47	79
Reference	32
Batch file structure	33
File Structure for Metadata Update 48	36
Metadata file structure 49	94
Error Messages and Resolution 50)2
Troubleshooting)9

Dockit Introduction

- How to install Dockit Server Agent?
- <u>Change Application Data folder location?</u>
- How to uninstall Dockit?
- How to purchase?
- How to activate the software?
- <u>Technical support</u>

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 /no force for the changes to take place in SharePoint server.

You can check the existence of Dockit Server Agent component in target SharePoint server using <u>Server Agent Test Tool</u> available under 'Tools' menu of Dockit Migrator main screen.

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:

		Dockit Migrator (Evaluation	on Version)	_ 🗗 X
Migration Options	Support			
Usage Statistics	Dockit Migrator		Check for Updates	
X Tools	Product Activation	ikit Migrator.	Get the latest updates available for Dockit Migrator.	
? Help	Use this to activate sales@vyapin.com	Dockit Migrator. Contact our sales team at for further assistance.	valuation Version) _ Clock for Updates Get the latest updates available for Dockit Migrator. i at Image: Check for Updates Get the latest updates available for Dockit Migrator. i at Image: Check for Updates Get the latest updates available for Dockit Migrator. i at Image: Check for Updates Get the latest updates available for Dockit Migrator. i at Image: Check for Updates Deter. uation purposes only. You can migrate up to a maximum of 5 G8 data during the 15-day irst). Remaining Data: 5 G8 11x Change Its Change ights reserved. Activate	
Exit	Product Version:	11x		
	Licensed To:			
	License Type:	15-day Evaluation Copy		
	License Description:	This software is meant solely for evaluation p trial period (whichever limit comes first).	urposes only. You can migrate up to a maximum of 5 GB data during the 15-day	G
	Remaining Days:	14	Remaining Data: 5 GB	
	Program Folder:	C:\Program Files\Dockit Migrator		
	Application Data:	C:\Users\Public\Documents\Dockit11x	Change	
	Product Key:			
			Activate	
	Copyright © 2018 Vyapi	n Software Systems Private Limited. All rights res	erved.	

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

Browse For Folder	\times
Select a folder from which files are to be extracted.	
📃 Desktop	^
> 🐔 OneDrive	
> 🤱 adminuser1	
> 💻 This PC	
> 🐂 Libraries	
> 鹶 Network	
> 🖭 Control Panel	~
Make New Folder OK Cancel	

- 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:

Copy or N	Move data		×
?	The application data folder has been chang application settings and data from the old for below.	ed to the new folder location older location to the new fol	n successfully. Do you want to Copy or Move all der location? Click the appropriate button
	<u>С</u> ору	<u>M</u> ove Clo	se

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

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 clean up 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.

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

Dockit Migrator Uninstall Wizard ×
Welcome to Dockit Migrator Uninstall Wizard Signature This wizard helps you to cleanup and uninstall Dockit Migrator completely. Signature
This wizard will guide you through the steps to cleanup the files that are created by Dockit Migrator v11x
Using this wizard you can: * Cleanup import tasks and task history
 Cleanup scheduled tasks that are associated with migration tasks Cleanup log files Uninstall Dockit Migrator application
Note: Use 'Add / Remove Programs' to uninstall Dockit Server Agents from your SharePoint server.
< <u>B</u> ack <u>N</u> ext > Einish <u>C</u> ancel

Click **Next** to proceed.

2. Select required cleanup options as shown below:

Dockit Migrator Uninstall Wizard	×
Step 1 of 2: Cleanup Options Cleaning up the information based on your selection	¶√9
Cleanup import <u>t</u> asks and their history instances Cleanup all import tasks and task history information maintained by Dockit, including folders such as Config, Temp and Log.	
Cleanup scheduled tasks that are associated with the import tasks Remove all associated scheduled tasks available in Windows Control Panel that are configured to run the import tasks in scheduled manner.	
Cleanup stored user profile(s) Remove all stored user profiles created using Dockit Profile Manager in the current user context.	
✓ Uninstall <u>Dockit Migrator application</u> Remove all application files and uninstall Dockit application from the machine.	
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ance	

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 Migrator application** in the wizard.

How to purchase?

You can purchase Dockit Migrator from our website <u>http://www.vyapin.com/</u>. Please contact our Sales department at <u>sales@vyapin.com</u> for sales and price related queries.

How to Activate 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.

- 1. Select Product Activation from Help menu
- 2. The **Product Activation** page appears as shown below:

		Dockit Migrator (Evaluatio	n Version)			-	🗗 X
Migration Options	Support						
Usage Statistics	Dockit Migrator	it Minester	ð	Check for Updates			
🔆 Tools ? Help	Product Activation Use this to activate [sales@vyapin.com for	Dockit Migrator. Contact our sales team at or further assistance.		Report a problem Let us know if you need help or how we can make Docki better.	t Migrator		
Felp Exit	SaleS@vyapin.com to Product Version: Licensed To: License Type: License Description: Remaining Days: Program Folder: Application Data: Product Key: Copyright © 2018 Vyapin	Turner assistance.	urposes only. Re	You can migrate up to a maximum of 5 GB data during the maining Data: 5 GB	hange		

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

Technical Support

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

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

- 1) Version of Dockit 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 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 (e.g., <*Application Data Folder*>\Dockit11x\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>\Dockit11x\TaskHistory\<taskname>\<timestamp>..

NOTE: < Application Data Folder> is the common location where Dockit tasks and task history is stored in the computer running Dockit application. The **< Application Data Folder>** can be found from the **Help -> About** 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 1. Select Report a problem option from Help menu as shown below.

	Dockit Migrator (Evaluatio	on Version)	- 6
Migration Options	Support		
ííí Usage Statistics ★ Tools ? Help	Dockit Migrator Get help using Dockit Migrator. Product Activation Use this to activate Dockit Migrator. Contact our sales team at sales@yapin.com for further assistance.	Check for Updates Get the latest updates available for Dockit Migrator.	
Exit	Use the form below to submit a technical question or problem to the tec (Fields marked with * are required) Salutation" First Name" V E-Mail*	hnical support team.	
	Company"	User Status" Evaluation Copy	
	Product* Dockit Migrator	Version" 11.0.0	
	Operating System* Microsoft Windows 8.1 Pro	Service Pack*	
	File Attachment(s)	0 mm	
	Send	Browse	

Dockit Task Manager

- Task Manager
- Create a new task (On-premise migration)
- Create a new task (Online migration)
- Edit an existing task (On-premise migration)
- Edit an existing task (Online migration)
- Run a task (On-premise migration)
- Run a task (Online migration)
- <u>Re-do Task</u>
- Incremental Task
- Delete an existing task
- <u>Copy task</u>
- <u>Reschedule a task</u>
- <u>Manage categories</u>
- <u>Cleanup history</u>
- <u>View task status</u>

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.

	Dockit Migrator (Evaluation Version) _ 🗗 X										
	My J	obs Job	History								
5	(+) N	ew 🖉 Edit	📌 Run Now	🕪 Re-do	Δ Incremental	X Delete	С Сору	腔 Reschedu	le 🗸 Validate	O View Job Instance	
n	Shar	ePoint On-Prer	mise Jobs (2)			Group by	name		✓ Search	Q)	
	4	Job Nar 1 1 item(s)	me	Description	Cre	ated Date	Mod	lified Date	Last Run At	Total Data Migrated	
	\$>	16 to federated sm	aple •••		1/12/2018 3:0	04:11 PM	1/12/2018 3:0	4:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB	
	4 	E 1 item(s) Explorer Test			1/11/2018 11	:40:15 AM	1/12/2018 1:0	11:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB	
\$											
~											
~											

- Δ referes the task is in Incremental Mode.
- If a schedule in Windows task Scheduler.

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

- a. Task List pane
- b. 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**.

1	Didlik J ucri(s)						
	TESTING		1/9/2018 6:54:28 PM	1/9/2018 6:54:28 PM	1/9/2018 6:54:28 PM	0 Files, 0 Folders, 0 KB	
	name		1/8/2018 7:05:35 PM	1/8/2018 7:05:35 PM	1/8/2018 7:05:35 PM	0 Files, 0 Folders, 0 KB	
	newjobtest	* * *	1/8/2018 4:36:12 PM	1/8/2018 4:36:12 PM	1/8/2018 4:36:12 PM	0 Files, 0 Folders, 0 KB	

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.

4	Blank 3 item(s)				
	TESTING	 1/9/2018 6:54:28 PM	1/9/2018 6:54:28 PM	1/9/2018 6:54:28 PM	0 Files, 0 Folders, 0 KB
	name	1/8/2018 7:05:35 PM	1/8/2018 7:05:35 PM	1/8/2018 7:05:35 PM	0 Files, 0 Folders, 0 KB
	newjobtest	 1/8/2018 4:36:12 PM	1/8/2018 4:36:12 PM	1/8/2018 4:36:12 PM	0 Files, 0 Folders, 0 KB

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.

	Job Name	Start Time	End Time	Elapsed	Items in Source	Completed	lgnored	Errors	Status	
4 01	lder 1 item(s)									
s>	16 to federated smaple	9/25/2017 11:07:04 AM	9/25/2017 11:08:14 AM	00:01:10	0 webs, 1 lists, 0 it	0 webs, 1 lists, 0 it	0 webs, 0 lists, 0 it	0 webs, 0 lists, 0 it	Completed	

Create New Task on SharePoint On-Premise 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 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 N	/ligrator (Evalua	tion Version)			_ ⊟ X
	My Jo	os Job	History							
5	+ Ne	w 🔗 Edit	🏂 Run Now	🕪 Re-do	▲ Incremental	X Delete	С Сору	Reschedule	Validate	View Job Instance
1	Cr Share	eate a new job (Alt+ Point On-Prer	N) mise Jobs (2)			Group by	name		✓ Search	0
	1	Job Nar 1 item(s)	ne	Description	Cre	ated Date	Mod	ified Date	Last Run At	Total Data Migrated
	5>	16 to federated sma	aple •••		1/12/2018 3:0	04:11 PM	1/12/2018 3:0	4:11 PM 1/	/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
	4 I	1 item(s) Explorer Test			1/11/2018 11	:40:15 AM	1/12/2018 1:0	1:40 PM 1/	/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB
										· · ·
×										
?										

	Dockit Migrator (Evaluation Version) _ 🗗 X							
				My Jobs >> New Job	*			
ıt already nise).	Clean up Metadata Assign / update metadata to the documents that alrea exists in SharePoint document libraries (On-Premise).	Clean up Metadata 🗸	File share to SharePoint Migration Migrate folders and documents from file servers, network file shares. Iocal computers and personal drives along with metadata to SharePoint On-Premise.	File share Migration 🗸				
			SharePoint to SharePoint Migration Migrate sites and lists from SharePoint server 2003 / 2007 / 2010 / 2013 and SharePoint 2016 to SharePoint On-Premise.	SharePoint Migration -				
					*			
					* ?			

Click the links below for more information:

- a. Create a task to <u>File share To SharePoint Migration</u>
 b. Create a task to <u>SharePoint To SharePoint Migration</u>
 c. Create a task to <u>Clean Up Metadata</u>

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).

			Do	ckit Migrator (Evaluation Version)			_ # X
	My Jo	bbs Job History					
€	+ Nev	w 🖉 Edit 🕺 Run	X Delete Validate	View Job Instance			
1	Share	Point Online Jobs (2)		Group by name	✓ Search	(2 💥 🖬 🎅
		Job Name	Description	Created Date	Modified Date	Last Run At	
		F 2 item(s)		1/12/2018 5:35:55 PM	1/12/2018 5:36:14 PM	1/12/2018 5:36:14 PM	
	Ē	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

Edit Task for SharePoint On-Premise Migration

To edit an existing task:

- 1. Select a desired task from the **Task List**.
- 2. Click **Edit Task** from the 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 for SharePoint Online (Office 365) Migration

To edit an existing task:

- 1. Select a desired task from the **Task List**.
- 2. Click **Edit Task** from the Home menu of Dockit main screen.

		Docl	kit Migrator (Evaluation Version)			🗕 🖻 X
	My Jobs Job History					
()	+ New 🖉 Edit 🕺 Run	🗙 Delete 🛛 🛇 Validate	O View Job Instance			
1	Edit selected job (Alt+E) SharePoint Online Jobs (2)		Group by name	✓ Search	୍	
	Job Name	Description	Created Date	Modified Date	Last Run At	
	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					

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.

Run a Task on SharePoint On-Premise 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. The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.

1	Sample - SharePoint Login	x
Provide user cre	dentials to connect to SharePoint.	
Authentication:	Windows	
<u>U</u> ser Name:	vsslab\farmadmin_sp16-1 v	
Password:	(johndoe@contoso.com, contoso\johndoe, johndoe)	
	<u>O</u> K <u>C</u> ance	

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

https://vyapin.sharepoint.com		3	×
	Office 365		^
	Sign in with your work or school account		
	someone@example.com		
	Password		
	□ Keep me signed in		
	Sign in Cancel		
	Can't access your account?		
	Your work or school account can be used anywhere you see this symbol. © 2016 Microsoft Legal Privacy		~
<		>	\sim

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

Sample M	igration - Dockit Task Status	×
Preparing contents	Validating data	
Start 100%	0%	End
Status	Connecting to SharePoint	
Items to process	9 files, 12 folders, 6.03 KB	
Items Ignored	0 files, 0 folders, 0 KB	
Errors	0 files, 0 folders, 0 KB	
Items Processed	0 files, 0 folders, 0 KB	
Remaining	9 files, 12 folders, 6.03 KB	
Start Time	Tuesday, February 7, 2017 9:30:11 PM	
		<u>E</u> nd Task

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 any time after an import task has been created using Dockit's task wizard.

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:

https://vyapin.sharepoint.com		2	×
	Office 365		^
	Sign in with your work or school account		
	someone@example.com		
	Password		
	Keep me signed in		
	Sign in Cancel		
	Can't access your account?		
	Your work or school account can be used anywhere you see this symbol.		~
<	S 2016 Microsoft Legal Privacy	>	~

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

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



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

The **Re-do** task 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.

	Dockit Migrator (Evaluation Version) Z												
	My J	obs Job	History										
	(+) N	ew 🔗 Edit	🏂 Run Now	🕪 Re-do	▲ Incremental	X Delete	С Сору	🔗 Resched	lule 🗸 Validate	O View Job Instance			
n	Shar	SharePoint On-Premise Jobs (2)		Re-do job (Alt+O)		Group by name			✓ Search	۵. 🕅 🕄			
		Job Name		Description	Cre	Created Date		lified Date	Last Run At	Total Data Migrated			
	∡ ₹\	1 fitem(s)			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			
		E litem(s)		1712/2010 3.4	1/12/2018 3:04:11 PW			1/12/2010 3:04:11 PM	o files, o folders, o ko				
		Explorer Test ····		1/11/2018 11	1/11/2018 11:40:15 AM		1:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB				
×													
?													

Incremental Migration (On Premise)

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

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

	Dockit Migrator (Evaluation Version) X												
	My Jobs Lob History												
5	(+) N	ew 🖉 Edit	🏂 Run Now	🕕 Re-do	▲ Incremental	X Delete	С Сору	Reschedul	e 🗸 Validate	View Job Instance			
	SharePoint On-Premise Jobs (2)		Incremental Job (Alt	Group by	name		✓ Search	◎ 💥 🖬 🕃					
.		Job Name Description		Created Date		Modified Date		Last Run At	Total Data Migrated				
	s>	S 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				
	4	E 1 item(s)											
		Explorer Test	•••		1/11/2018 11	:40:15 AM	1/12/2018 1:0	1:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB			
<u> </u>													
×													
?													
2. 'Incremental Migration / One-way Sync' dialog will appear as shown below; you can select your desired option to perform incremental migration.

Incremental Migration / One-way Sync	×
Incremental Migration :	
 Sites and Lists modified or newly created in source location, since last migration using Dockit Sites and Lists modified or <u>n</u>ewly created in source location This Week 	
Reference Template (to avoid list item duplicates) : Dockit Default	v
<u>o</u> k <u>c</u>	ancel

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

ii) Documents Modified or newly created in source location, since last update in SharePoint

iii) 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.

			Doc	kit Migrator (Evaluation Version)			_ = *
	My J	obs Job History	New Job				
()	+ Ne	ew 🖉 Edit 🦻 Run	▲ Incremental	Validate 🗍 View J	lob Instance		
n	Shar	ePoint Online Jobs (2)		Group by name	✓ Search	Ć	
		Job Name	Description	Created Date	Modified Date	Last Run At	
		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	
×							
?	2.00						
	2 items						

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

Incremental Migration / One	e-way Sync	x
Specify the option to perform the incremental migration	on / one-way sync	
 Sites and Lists modified or newly created in source location, s Sites and Lists modified or newly created in source location 	since last migration using Dockit This Week 1 days	
	OK Cancel	

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

ii) Documents Modified or newly created in source location, since last update in SharePoint

iii) 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.

Delete an existing task

To delete a Dockit import task:

- 1. Select a desired task from **Task List**.
- 2. Click **Delete Task** from Home menu of Dockit main screen.



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



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

Copy an existing task

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

- 1. Select a desired task from the Task List.
- 2. Click **Copy Task** from Home menu of Dockit main screen.

					Dockit N	ligrator (Evaluat	tion Version)			_ <i>⊟</i> X
	My Jobs	Ţop	History							
5	+ New	Dedit Edit	🏂 Run Now	🕪 Re-do	Δ Incremental	X Delete	Copy	Reschedul	e 🗸 Validate	View Job Instance
n	SharePo	oint On-Prer	mise Jobs (2)			Group by	name	(+C)	✓ Search	◎ 💥 🖬 🕃
-	4 1	Job Nar	me	Description	Cre	ated Date	Mod	ified Date	Last Run At	Total Data Migrated
	5> 1	6 to federated sm	aple •••		1/12/2018 3:0	04:11 PM	1/12/2018 3:0	4:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
	▲ E	1 item(s)								
	E	kplorer Test	***		1/11/2018 11	:40:15 AM	1/12/2018 1:0	1:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB
<u>\</u>										
×										
?										

3. 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.

Copy Task		\times
Copy a task a the task.	and its import settings. Enter a unique name for	
Copy:	Building Documents	
Save As:	Furniture Document	
Run As:		
Password;		
	OK Cancel	

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

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

					Dockit N	ligrator (Evaluat	tion Version)			_ = ×
	My Jobs	do <u>L</u>	History							
5	+ New	De Edit	🏂 Run Now	🕪 Re-do	Δ Incremental	X Delete	Copy	Resche	edule 🗸 Validate	View Job Instance
n	SharePo	int On-Prer	nise Jobs (2)			Group by	name	ReSchedule	job (Alt+H) <i>Search</i>	۹ 💥 🖬 🕄
		Job Nar	ne	Description	Cre	ated Date	Mod	ified Date	Last Run At	Total Data Migrated
	5 16	to federated sma	aple •••		1/12/2018 3:0	14:11 PM	1/12/2018 3:0	4:11 PM	1/12/2018 3:04:11 PM	0 Files, 0 Folders, 0 KB
	▲ E 1	item(s)								
	Exp	lorer Test	•••		1/11/2018 11	40:15 AM	1/12/2018 1:0	1:40 PM	1/12/2018 1:01:40 PM	0 Files, 0 Folders, 0 KB
×										
?										

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.

	Reschedule Task	×
Schedule the	e task in Windows Task Scheduler using the settings below.	
<u>T</u> ask Name:	Reference Document	
Run <u>A</u> s:	DevLab\JohnDeo	
<u>S</u> chedule:	Once ✓ Start time: 10:13:11 AM ▲ Advanced	
Schedule Ta	ask Once	
<u>R</u> un on:	Wednesday, February 1, 2017 V	
At 10:13 AM	on 2/1/2017	
	<u>O</u> K <u>C</u> ance	

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

Validate Task for SharePoint 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.

Pre Migration Validation Tool
his tool will help you to identify the most common errors that are likely to occur and minimize such errors during a live migration.
and a second
Connecting
<u>C</u> ancel

 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.

	Pre Migration Validation Tool x
Scan I Site(s) 1 Site(s) 18 List(s) 14 Folder(s) 37 File(s), 2 version(s) 10 Item(s) Total Size	Pre Migration Validation Tool x Validation Report Features - Checks site / site collection features in target SharePoint • • •
611.000 KB	Choi(s): 13 Site / list content types - Checks availability of site / list content types in target SharePoint

	Pre Migration Validation Tool X
Scan I Site(s) I Site(s) I Site(s) I Site(s) I Site(s), 2 I Site(s), 2 I O Item(s) I Size 611.000 KB	Validation Report Features - Checks site / site collection features in target SharePoint Error(s): 102 Site / list template(s) - Checks site / list templates availability in target SharePoint Site Quota - Verifies site quota limit Successful Site Quota - Verifies site quota limit Successful User and groups - Checks availability of users and groups in target SharePoint Error(s): 15 Site / list content types - Checks availability of site / list content types in target SharePoint Error(s): 39 Site / list workflows - Checks availability of site / list workflows in target SharePoint Error(s): 1 List view(s) - Verifies list view schema in target SharePoint Error(s): 1 Columns - Verifies schema for each column in target SharePoint
	<u>V</u> iew Results

4. Validates the following items:

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).

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. **Detailed View:** shows the list of errors.

Validation Repo	ort >> Detailed V	/iew				Total Row(s) : 103	R
Features (103)	Source Url	Target Url	Category	Object	Status	Remarks	1
Templates (0) Site Quota (0) Users (15)	https:// mars.vsslab.local/ sites/pluto	https:// m365x456987.sha repoint.com/sites/ mars	Feature	3a4ce811-6fe0-4e9 7- a6ae-675470282cf2	Failed	Dependent feature [DocumentSet] is not available in target. Please deploy [DocumentSet] feature in target SharePoint.	
Content Type (Workflow (1) View (1)	https:// mars.vsslab.local/ sites/pluto	https:// m365x456987.sha repoint.com/sites/ mars	Feature	3a4ce811-6fe0-4e9 7- a6ae-675470282cf2	Failed	Dependent feature [Docld] is not available in target. Please deploy [Docld] feature in target SharePoint.	
Column (1)	https:// mars.vsslab.local/ sites/pluto	https:// m365x456987.sha repoint.com/sites/ mars	Feature	3a4ce811-6fe0-4e9 7- a6ae-675470282cf2	Failed	Dependent feature [DocumentSet] is not available in target. Please deploy [DocumentSet] feature in target SharePoint.	
	https:// mars.vsslab.local/ sites/pluto	https:// m365x456987.sha repoint.com/sites/ mars	Feature	PublishingSite	Failed	[PublishingSite] is not available in target. Please install [PublishingSite] feature in target SharePoint.	

6. Click **Close** to close pre migration validation tool.

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.

 Pre Migration Validation Tool
 ×

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

 Checking existence of source and target locations

 Checking site quotas (SharePoint 2013 and above)

 Checking for folder / file name

 Checking for folder / file URL length

 Checking columns availability in target SharePoint (if applicable)

 Checking metadata value availability in target SharePoint (if applicable)

 Checking the functions (if any)

 Checking the existence of permission levels / users in target SharePoint

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

~	Checking existence of source and target locations	
~	Checking site quotas (SharePoint 2013 and above)	
×	Checking for folder / file name	A
~	Checking for folder / file URL length	
~	Checking columns availability in target SharePoint	
~	Checking metadata value availability in target SharePoint (if applicable)	
~	Checking mandatory columns	
~	Validating the functions (if any)	
~	Checking the existence of permission levels / users in target SharePoint	

4. Validates the following items:

Cancel

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).

Mandatory Column: Checks the mandatory column values are valid.

Function: Verifies the functions (if any).

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

5. **Report:** shows the list of errors.

	[Dockit Migrator - Validation Result	x								
Checking	Checking for folder / file name errors										
Source Index	Source	Destination	Remarks								
0	D:\Sample Files\{}&~	https://catalyst.vsslab.local/Dockit/Dockit1/GroupLib	Folder name contains inv								
<			>								
			Close								

6. Click **Close** to close pre migration validation tool.

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.

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



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

Task Categories		×
Categories		New
Categories		
		Delete
		Color:
		Black ~
L	OK	Cancel
	UK	Cancer

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

Click OK.

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

Task Categories	×
Categories	New
Conference Information	Delete
	Color:
	Green 🗸
ОК	Cancel

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.

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 Cleanup History from Home menu of Dockit main screen



2. The Cleanup History dialog appears as shown below:

Cleanup History						
This cleanup utility will clear t your computer.	task history and related files from					
<u>R</u> etain task history for last	 7 instances only 7 days only 					
	<u>C</u> leanup Close					

- 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.

View Job Instance

To view and manage task status of a selected task:

- 1. Select a task from the Task List.
- 2. Select View Job Instance of Dockit main screen.



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

_	Dockit Migrator (Evaluation Version)									🗗 X	
	My Jo	obs >> Job In <u>stan</u> d	ces [16 to federa <u>ted s</u>	maple]							
S) K 🕲
		Job Name	Start Time	End Time	Elapsed	Items in Source	Completed	lgnored	Errors	Status	
1	4 0	lder 1 item(s)									
-	s>	16 to federated smaple	9/25/2017 11:07:04 AM	9/25/2017 11:08:14 AM	00:01:10	0 webs, 1 lists, 0 it	0 webs, 1 lists, 0 it	0 webs, 0 lists, 0 it	0 webs, 0 lists, 0 it	Completed	
*											
?											

- 4. 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.
- 5. **Refresh**: Reloads the task history entries and updates the newly run tasks (if any).
- 6. **Open Log Folder**: Opens the folder that contains the activity log of the currently selected task history item.
- 7. **View activity log**: Displays activity log of the currently selected task history item.
- 8. **Remove**: Removes the currently selected task history entry and its associated log folders and files.
- 9. **Remove all**: Removes all task history entries and their associated log folders and files that are currently displayed.
- 10. Click **Close** button to close this window.

Dockit Tools

- <u>Manage Templates</u>
 <u>Server Agent Test Tool</u>
 <u>Metadata Extractor</u>
 <u>Metadata Collator</u>

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 Template** 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 Folder and File Renaming rules

Column Mapping Template

Dockit allows you to map metadata properties to the SharePoint column-using column mapping templates. Dockit column mapping template is available as one of the items under **Manage Templates** available under **Tools** Menu.

To create a new column mapping template, Select New from the Column mapping Template Tools pane. The new template will appear and enter a unique name for the template as shown below:



Column Mapping Template view

Template list pane in Dockit template manager tool transformed into Column Mapping template view upon selecting a node (column mapping template) under the group Column Mapping Template in template tree pane.

Column Mapping template view consists of following panes to configure column mapping:

Column Mapping Pane

Column Mapping pane displays the column mapping structure for the selected template. It provides the mapping information (metadata value or source assigned) for SharePoint destination column(s) configured in the template. Column Mapping related operations can be performed by using the Column Mapping Actions toolbar.

Source Column	Target Column	Default Value	
🔅 Name	• • • Name		
🔅 Data Created	••• Data Created		_
🔅 Date Modified	••• Date Modified		_
	• • •		+

Domain Mapping Template

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

To create a new domain mapping template

Select New from the Templates Tools pane. The new template pane will appear and enter a unique template name for the template as shown below:

			Dockit Migrator (Evaluation Version) –	∎ X
Migration Options	Тос	ols >> Template Manager		
M Usage Statistics			Create reusable templates for migration tasks.	
X Tools		File share Migration SharePoint Migration		
? Help		Column Mapping	Source Target	
Exit		Domain Mapping	· · · · · · · · · · · · · · · · · · ·	+
	<	Permission Mapping Replace Illegal Characters		

Domain Mapping Template consists of following panes to configure domain mapping:

- 1. Source domain list pane
- 2. Destination domain list pane
- 3. Domain Mapping Pane

Dockit domain mapping template enables you to load the list of domains available with the

network either by clicking \checkmark . Once you click, both source domain list pane and destination domain list pane displays the list of available domains in the network as shown below.



Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click Map button to map the domains.

You can also have the option to enter the domain names of your own in the respective textboxes and finally click + button to map. Dockit 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 enter separated by comma.

Once you click + button, selected domains are mapped and the mapped data is displayed in the domain mapping pane as shown below:

			Dock	it Migrator (Evaluation Version)			-	ø	x
Migration Options	Тос	ols >> Template Manager							
1 Usage Statistics				Create reusable templates for migr	ation tasks.				
X Tools		File share Migration SharePoint Migration	\sim						
? негр		Column Mapping	Sour	rce	1	arget			
■ Fvit		User / Group Mapping		VOYAGER		VSSLAB	`	-	-
		Permission Mapping	L	~			~	+	+
		Replace Illegal Characters							

User / Group Mapping Template

Dockit uses user / group mapping template to replace the unavailable user / group with valid SharePoint user / group while migration. You can use user / group mapping template to replace unavailable user / group with valid SharePoint user / group for all the person or group fields in target Share Point.

To create a new user / group mapping template, Select New from the Templates Tools pane. The new template will appear and enter a unique template name and continue to map the User / group in template manager as shown below:

			Dockit Migrator (Evaluation Version) –	ø	x
Migration Options	Тос	ols >> Template Manager			
📶 Usage Statistics			Create reusable templates for migration tasks.		
X Tools		File share Migration SharePoint Migration			
? Help		Column Mapping	Source Target		
Exit		Domain Mapping	· · · · · · · · · · · · · · · · · · ·	-	+
		Permission Mapping			
		Replace Illegal Characters			
	<				

User / group Mapping Template consists of following panes to configure user / group mapping:

- 1. Source user list / load options pane
- 2. Target user list / load options pane
- 3. Mapped Users / Groups Pane

Dockit user / group mapping template enables you to load the list of source users / groups from various options either by clicking the appropriate button in the source load options pane or load source users / groups menu as shown below. For more information, click Source users / groups loading options.

...

Once you select the option and provide the appropriate inputs, the list of source users / groups displayed on the source users / groups list pane as shown below:



Then you have to select the appropriate source user / group from the source users / groups list and select the target user / group to replace from the list of available target users / groups. Then finally click + button to map the users / groups.

You can also have the option to enter the user / group names of your own in the respective textboxes and finally click + button to map. Once you click + button, selected user / group are mapped and the mapped data is displayed in the user / group mapping pane as shown below:

			Dockit Migrator (Evaluation Version)	-	ø	x
Migration Options	Тос	ols >> Template Manager	,			
M Usage Statistics			Create reusable templates for migration tasks.			
X Tools		File share Migration SharePoi	Voint Migration			
? Неlp		Column Mapping	Source Target			
Exit		Domain Mapping	<last name="">, <first name=""></first></last>	~	-	-
		Permission Mapping	· · · · · · · · · · · · · · · · · · ·	~	-	F
		A B Replace Illegal Characters				
	<					

Permission Mapping Template

Dockit uses permission mapping template to map the NTFS permissions to its equivalent SharePoint permission levels.

To create a new permission mapping template, Select New from the Templates Tools pane. The new template page will appear and enter a unique template name and continue to map the permission in template manager as shown below:

			Dockit Migrator (Evaluation Version)	-	e x
Migration Options	Тос	ols >> Template Manager			
1 Usage Statistics			Create reusable templates for migration ta	sks.	
X Tools		File share Migration SharePoint Migration	Template Name: Sample		
? Help		Column Mapping	Source	Target	
Exit		Domain Mapping			- +
		Permission Mapping			
		A B Replace lilegal Characters			
	<				

Permission Mapping Template consists of following panes to configure permissions mapping:

- 1. Source permissions list / load options pane
- 2. Target permissions list / load options pane
- 3. Mapped Permissions Pane

Dockit Permission mapping template enables you to load the list of source permissions from network location either by clicking the appropriate button in the source load options pane or load source permissions menu as shown below.

...

Once you select the option and provide the appropriate inputs, the list of source permissions displayed on the source permissions list pane as shown below:

		Dockit Migrator (Evaluation Version)		- 6	s x
Тос	ols >> Template Manager				
		Create reusable templates for migration ta	asks.		
	File share Migration SharePoint Migration	Template Name: Sample			
	Column Mapping	Source	Target		
	Domain Mapping	Modify	Full Control	~	-
<	Permission Mapping Compared Transformed Provided Provide	Basic Permissions Full control Modify Read & Execute List Folder contents Read Write		`	+
		Tools >> Template Manager File share Migration SharePoint Migration Image: Column Mapping Image: Column Mapping Image: Column Mapping Image: Column Mapping	Tools >> Template Manager Ele share Migration SharePoint Migration Image: Column Mapping Image: Domain Mapping Image: Permission Mapping Image: Replace lilegal Characters Full control Image: Modify Read & Execute List Folder contents Read Write	Total >> Tenplate Managet Cate resuble templates for migration task. Fit share Migration Image: Communication Marging Image: Communicat	Cotik Utgrater (Evaluation Version)

Dockit permission mapping template enables you to load the list of target permissions from site collection either by clicking the appropriate button in the target load options pane or load target permissions menu as shown below.

...

Once you select the option and provide the appropriate inputs, the list of target permissions displayed on the target permissions list pane as shown below:

			Dockit Migrator (Evaluation Version)	-	6	x	
Migration Options	Тос	ols >> Template Manager					
a Usage Statistics		Create reusable templates for migration tasks.					
X Tools		File share Migration SharePoint Migration	Template Name: Sample				
? Help		Column Mapping	Source	Target			
🕞 Exit		Domain Mapping	Modify	Full Control	~	-	
		Permission Mapping	~		~	+	
	<						

Then you have to select the appropriate source permissions from the source permissions list and select equivalent target permission level(s) to replace from the list of available target permission level(s). Then finally click + button to map permissions.
You can also have the option to enter the permission name(s) / levels(s) of your own in the

respective textboxes and finally click + button to map. Once you click + button, selected permissions are mapped and the mapped data is displayed in the permissions mapping pane as shown below:

			Dockit Migrator (Evaluation Version)	-	ø	x
Migration Options	Тос	ols >> Template Manager				
Usage Statistics			Create reusable templates for migration ta	sks.		
Tools		File share Migration SharePoint Migration	Tunglata Nurus (Cample			
? Help		Column Mapping		Tours		
Exit		Domain Mapping	Source	Full Control	1_	
		Permission Mapping				
		Replace Illegal Characters	· · · · · · · · · · · · · · · · · · ·	·	+	
	<					

Assume, Full Control is not explicitly mapped to the SharePoint permission levels in the permission mapping template, but Read is mapped to Read and Write is mapped with Contribute (SharePoint permission levels).

Folder and File Renaming rules

SharePoint does not permit certain characters in folder and file names. Dockit 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. You can create naming rules, save them as **Naming Rules** and re-use them in your import tasks.

Dockit uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Folder & File Renaming rules page. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

To specify a rule for invalid character sequence to valid character sequence:

1. Select New from the Templates Tools pane. The new template will appear and enter an unique template name for the template as shown below:

	Dockit Migrator (Evaluation Version)	– 🗗 X
Migration Options	Tools >> Template Manager	
Usage Statistics	Create reusable templates for migration tasks.	
7 Help	Column Mapping On-Premise Online	
? Help Ъ Бхіт		

- 2. Once the new renaming rule template created.
 - a. Specify the SharePoint invalid character in **Find** textbox and its valid character in **Replace** textbox, then click + button.
 - b. Click button to remove the selected naming rule.

		Dockit Mig	rator (Evaluation Version)		-	Ð	x
Migration Options	Тос	ols >> Template Manager					
1 Usage Statistics			Create reusable templates for migration	n tasks.			
		File share Migration SharePoint Migration					
2 Help		Column Mapping	Template Name: Test				
		User / Group Mapping	Find	Replace			
Exit		Domain Mapping Permission Mapping	•	%	-		
		A B Replace Illegal Characters			+		
	<						
						Ŧ	
						Ŧ	
						Ŧ	

- 3. You can edit the existing renaming rule by selecting the appropriate rule.
- 4. If you have to order the rules in the grid using the **navigation** buttons available on the right side of the grid, click **Save** button to save the rules in that order.
- 5. The following are valid wildcard characters that can be used to create naming rules in Dockit:

* (asterisk)		Denotes any number of characters to be left							
?	(question	Denotes	at	least	one	character	position	to	be
mark)		truncated / replaced							

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	*_World	{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	∨??	{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	
Sample?File	?	Text	SampleTextFile	
Hello*World	*	{empty}	HelloWorld	
Sample\$	\$	Dollar	SampleDollar	
Sample^File	^	{empty}	SampleFile	
Sample+Document	+	Plus	SamplePlusDocument	
Hello <world< td=""><td><</td><td>{empty}</td><td>HelloWorld</td><td></td></world<>	<	{empty}	HelloWorld	

Hello>World	>	{empty}	HelloWorld	
[Document	[Word	WordDocument	
Word]]	Document	WordDocument	
(File	(Sample	SampleFile	
Sample))	Document	SampleDocument	

SharePoint Migration – Column Mapping Template

Dockit allows you to map metadata properties to the SharePoint column-using column mapping templates.

Dockit column mapping template is available as one of the items under **Manage Templates** available under **Tools** Menu.

To create a new column mapping template, Select New from the Column mapping Template Tools pane. The new template will appear and enter a unique name for the template as shown below:

_	Dockit M	igrator (Evaluation Version)	-	8	x
Migration Options	Tools >> Template Manager				
Usage Statistics	file share Minushine - Chara Daint Minushine	Create reusable templates for migration tasks.			
X Tools		Template Name:			
? Help	User / Group Mapping	Target Column Source Column Default Value			^
Exit	Domain Mapping	File Name ••••		-	
	Permission Mapping	File Created Date		-	
	Reference Templates	File Modified Date		-	
		File Created By Created By		-	
		File Modified By ••••		-	
		File Content Type		-	
		File Checkin Comments		-	
		Folder Name ••••		-	
		Folder Created Date		-	I
		Folder Modified Date Modified ••••		-	
		Folder Created By Created By		-	~

Column Mapping Template view

Template list pane in Dockit template manager tool transformed into Column Mapping template view upon selecting a node (column mapping template) under the group Column Mapping Template in template tree pane.

Column Mapping template view consists of following panes to configure column mapping.

Column Mapping Pane

Column Mapping pane displays the column mapping structure for the selected template. It provides the mapping information (metadata value or source assigned) for SharePoint destination column(s) configured in the template. Column Mapping related operations can be performed by using the Column Mapping Actions toolbar.

Template Name: Sample	
File Created By	🌣 Created By 🚥
File Modified By	🌣 Modified By 🚥
File Content Type	🔅 Content Type 🚥
File Checkin Comments	Check-in Comments
Folder Name	🌣 Name ••• 📃 🗕
Folder Created Date	🌣 Created 🚥
Folder Modified Date	🌣 Modified •••
Folder Created By	🔅 Created By 🚥
Folder Modified By	🌣 Modified By 🚥 🗕
Folder Content Type	🌣 Content Type 🚥
DB Last Update	🌣 Last Updated 🚥
	···· +

SharePoint Migration – User / Group Mapping Template

Dockit uses user / group mapping template 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 one SharePoint environment to another. You can use this mapping template for all Person or Group fields in SharePoint.

To create a new user / group mapping template, select New from the Templates Tools pane. The new template will appear and enter unique template name for the template and continue to map the user as shown below:

	Dockit Migrator (Evaluation Version)	_ = = ×
Migration Options	Tools >> Template Manager	
1 Usage Statistics	Create reusable templates for migration tasks.	
Y Taols	File share Migration SharePoint Migration	
	Column Mapping	
🖌 Help	User / Group Mapping	
🕞 Exit	Domain Mapping	· +
	Permission Mapping	
	Site and List templates	
	Reference Templates	

Dockit user / group mapping template enables you to load the list of users / groups from various sources, either by clicking the appropriate button or load users / groups menu as shown below:



Once you select the option and provide the appropriate inputs for source and target user, the list of users / groups are displayed on the respective users / groups list pane as shown below:



Select the appropriate source user / group from the source users / groups list and select the target user / group to replace from the list of available target users / groups. Finally, click

+ button to map the users / groups.

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

You also have the option to enter the user / group names in the respective textboxes and finally, click + button to map. Once you click + button, selected user / group are mapped and the mapped user pair is displayed in the user / group mapping pane as shown below:

				Dockit Mig	rator (Evaluation Version)			-	a x
Migration Options	Тоо	ls >>	Template Manager						
📶 Usage Statistics					Create reusable templates for r	nigration tas	ks.		
X Tools		File sha	are Migration SharePoint	Migration					
? неір		0	Column Mapping	(Source		Target		
Evit			User / Group Mapping		VSSLAB\aaron	~	vsslab\david	~	
		2	Permission Mapping			~		~	+
		Ē	Site and List templates						
		P	Reference Templates						
	-								

SharePoint Migration – Domain Mapping Template

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

To create a new domain mapping template,

Select New from the Templates Tools pane. The new template will appear enter an unique template name for the template as shown below:

	Dockit Migrator (Evaluation Version)	_ 6 X
Migration Options	Tools >> Template Manager	
Usage Statistics	Create reusable templates for migration tasks.	
	File share Migration SharePoint Migration	
	Column Mapping	
? Help	User / Group Mapping Source Target	_
Exit	Domain Mapping]~ +
	Permission Mapping	
	Site and List templates	
	Reference Templates	

Domain Mapping Template consists of following panes to configure domain mapping:

- 1. Source domain list pane
- 2. Destination domain list pane
- 3. Domain Mapping Pane

Dockit domain mapping template enables you to load the list of domains available with the

network by clicking \checkmark to load. Once you click, both source domain list pane and destination domain list pane displays the list of available domains in the network as shown below.



Then you have to select the appropriate source domain (s) from the source domain list and select the target domain to map from the list of available target domains. Then finally click

+ button to map the domains.

You can also have the option to enter the domain names of your own in the respective

textboxes and finally click + button to map. Dockit 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 enter separated by comma.

Once you click + button, selected domains are mapped and the mapped data is displayed in the domain mapping pane as shown below:



SharePoint Migration – Site and List Mapping Template

Dockit uses site and list template mapping to replace the unavailable site and list templates with valid / new SharePoint site and list templates when creating unavailable sites and lists during content migration from one SharePoint environment to another.

To create a new site and list template mapping, select New from the Templates Tools pane. The new template will appear and enter a unique name for the template as shown below:

	Dockit Migrator (Evaluation Version)	-	🗗 X
Migration Options	Tools >> Template Manager		
Usage Statistics	Create reusable templates for migration tasks.		
X Tools	File share Migration SharePoint Migration		
? Неір	Column Mapping Source Target		
	User / Group Mapping	~	+
	Permission Mapping		
	Site and List templates		
	Reference Templates		

You have to select the appropriate source template from the source template list and target

template from the list of available target templates. Finally, click + button to map the templates. You can also specify the site / list URL in the source URL / Template Name textbox along with the new template name in the Target Template Name textbox.

You also have the option to enter the template names in the respective combo boxes and finally, click + button to map. Once you click + button, selected templates are mapped

and the mapped template pair is displayed in the Site and List Template mapping pane as shown below:



SharePoint Migration – Permission Mapping Template

Dockit uses permission mapping template to assign new permission levels or replace unavailable permission levels with valid permission levels when migrating permissions for site / list / folder / item during content migration.

To create a new permission mapping template, Select New from the Templates Tools pane. The new template will appear and enter a unique name for the template as shown below:



Permission Mapping Template consists of following panes to configure permissions mapping:

- 1. Source permissions list / load options pane
- 2. Target permissions list / load options pane
- 3. Mapped Permissions Pane

Dockit Permission mapping template enables you to select source permissions and target permissions from the list of default SharePoint permission levels as shown below:

	Dockit Migrator (Evaluation Version)	_ = = ×
Migration Options	Tools >> Template Manager	
1 Usage Statistics	Create reusable templates for migration tasks.	
	File share Migration SharePoint Migration	
Tools	Column Mapping Column Mapping	
? Help	User / Group Mapping Source Target	
Fxit		
	Administrator	· +
	Contribute	
	Approve	~

Then, you have to select the appropriate source permissions levels from the source permissions list and select equivalent target permission level(s) to replace from the list of

available target permission level(s). Then finally click + button to map permissions.

Select All Permission Levels from source permission level(s) combo box to map all unresolved / unavailable permission levels from source SharePoint to a valid permission level in target SharePoint.

You also have the option to enter the permission levels(s) in the respective textboxes and

finally click + button to map the corresponding values.

Once you click + button, selected permissions are mapped and the mapped data is displayed in the permissions mapping pane as shown below:



SharePoint Migration – Reference Mapping Template

Dockit uses reference column value templates to allow users to define reference columns for lists based on list template types. Reference column is used to determine the existence of list items to specify the action to be taken by Dockit when a list item with the same name already exists in the destination location.

To create a new column definition select New from the Templates Tools pane. The new template will appear and enter an unique template name for the template as shown below:

	Dockit Migrator (Evaluation Version)	_ 🗗 X
Migration Options	Tools >> Template Manager	
Usage Statistics	Create reusable templates for migration tasks.	
X Tools	Column Magnition Column Magn	
? Help	List Type / List URL Reference Column	
Exit	Domain Mapping Created	+
	Permission Mapping	
	Image: Steel and Use Completes	
•	<	

Specify the List Type and Reference Column in the respective text boxes and click + button to add the pair to the columns list as shown below: You can also specify list URL / list Name in the List Name / List URL textbox along with the reference column in the Reference Column textbox.

		Dockit Mig	grator (Evaluation Version)	-	🗗 X
Migration Options	Tools >>	Template Manager			
1 Usage Statistics	File sher	Migration CharaDaint Migration	Create reusable templates for migration task	۲۵.	
X Tools		Column Mapping	Femplate Name: Sample]	
? Help		Jser / Group Mapping	List Type / List URL	Reference Column	
Exit		Domain Mapping	Links	Created	
) , 1	Permission Mapping	Announcement	Created by	-
	l s	ite and List templates			+
	<	leference Templates			

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:

			Dockit Migrator (Evaluation Version)	ø	x
Migration Options	Tools	>> Check Serv	er Agent		
11 Usage Statistics		Dockit Server Acco	t is an ontional server-side component that must be installed in the ShareDoint Server Vou see sheat the e	istenc	•
Tools		of Dockit Server A	gent in the target SharePoint Server using this tool by specifying a SharePoint server. Tou can credential to c	onnect	
? нер		Site URL :]	
Exit		Authentication :	Windows		
		User Name :	(johndoe@contoso.com, contoso\johndoe, johndoe)		
		Password :]	
	<			⊔ erify	

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

		Dockit Migrator (Evaluation Version)	-	∎ x
Migration Options	Tools >> Check Serv	er Agent		
Usage Statistics				
X Tools	Dockit Server Age of Dockit Server A	nt is an optional server-side component that must be installed in the SharePoint Server.You can check th gent in the target SharePoint Server using this tool by specifying a Sharepoint site URL and a credential	e existe to conr	ence ect.
? Help	Site URL :	https://mars.vsslab.local		
Exit	Authentication :	Windows	~	
	User Name :	vsslab\farmadmin_sp16-1 (johndoe@contoso.com, contoso\johndoe, johndoe)	~	
	Password :	·····		
	<	Dockit Server Agent is installed in the SharePoint farm of the specified SharePoint URL.	Verif	

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.

- Dockit Migrator (Evaluation Version) Migration Options Template Manager Metadata Collator 📶 Usage Statistics Create a reusable templates for migration Export metadata for library / list items to a file. Enter a list or folder location URL job along with the user credentials to 🗶 Tools proceed. ? Help Server Agent Test Tool Job Categories Exit You can check the existence of Dockit To create color categories which is Server Agent in the target SharePoint assigned to the migration job. To edit a server using this tool by specifying a category, select the category name and SharePoint site URL and a credential to use the commands to the right. connect. Metadata Extractor Dockit Metadata Extractor tool allows you to capture metadata for all files (summary and custom properties) in the given source folder location.
- 1. Select Metadata Extractor from Tools menu of Dockit main screen.

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

			Dockit Migrator (Evaluation Version)		-	Ð	x
Migration Options	Tools	>> Metadata Extracto	or				
1 Usage Statistics		Dockit Metadata Extractor to location. The source folder l	ool allows you to capture metadata for all files ocations can be mapped drives, network share:	(summary and custom properties) in the given source folder s and local hard drives.			
X Tools		Source Folder Locatio	on:				
? Неір							
🕞 Exit			Folder Path	Folder Options		×	
	<	Export Options:					
		• Files Only	Folders Only	 All Items (Folders and Files) 			
				Next			
				iea:			

3. 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.

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

Browse For Folder	×
🗅 🌉 This PC	^
D and the second sec	
Network	
Description Panel	
🗑 Recycle Bin	
3 15Clientt	
J5ISAPI	
3 16Client	
🕒 Batch	
🐌 Bing	
Debug	
DMS TaskManger Resource Files	
DMS_v10.5 Sample Help	
Dockit Migrator Setup	
Dockit365 Sample Help	
L m .	¥
Make New Folder OK Cance	el

Upon selecting required source folder, click \mathbf{OK} to add it for extraction.

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





		D	ockit Migrator (Evaluation Vers	ion)	-	Ð	x
Migration Options	Tools	>> Metadata Extractor					
111 Usage Statistics		Metadata Location:					
🔀 Tools		C:\Users\Public\Documents\Dockit11x\Me	etadataExtractor				
? Help		Metadata <u>F</u> ile Name:					
Fxit		SPEDiary					
		<u>M</u> etadata File Format:		Sheet Name:			
			*	lest			
	<						
					Run		

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

	Dockit Migrator (Evaluation Version)				- 1	ø	x	
Migration Options	Tools	>> Metadata	a Extractor					
M Usage Statistics		Metadata Loc	ation:					
X Tools		C:\Users\Public\Doc	uments\Dockit11x\MetadataExtractor]		
? неір		Metadata File	Name:			-		
Exit		SPLIDrary						
		Metadata File	Format:	Test				
	<		Metadata Extractor Metadata file created successfully in C:\Users\Public\Documents\Dockit17x\MetadataExtra Do you want to open the Metadata File ?	actor\SPLibrary.XLSX				
				s <u>N</u> o				
					_	Run		

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.

Dockit Migrator (Evaluation Version)							
Migration Options	Fools >> Metadata Collator						
Usage Statistics	Options: Export absolute URL of the items	Export base URL of the items					
X Tools	Traversal options:	Retrieves item and folder URL					
? Help	Version: Latest version v						
Exit	Column Name Approver Comments Name	Column Type Multiple lines of text File	^				
	 ✓ Title ✓ Version ✓ Item Child Count 	Single line of text Single line of text Lookup					
	Source Version (Converted Document) Source Name (Converted Document) Approval Status	Lookup Lookup ModStat					
	Check In Comment Created By Modified By	Lookup Person or Group Person or Group					
	Copy Source Name Name	Single line of text Calculated Calculated					
	Created Modified ID	Date and Time Date and Time Counter					
	 ✓ Type ✓ File Size ✓ Edit 	Calculated Calculated Calculated					
	Document ID Value Document ID	Single line of text Hyperlink or Picture	×				
	Export Location:	File Name: File Extension:					
	✓ Open metadata file once export is complete		Start Export				

- 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:

					-	 <u> </u>
Migration Options	Tools >> I	Metadata Collator				
Usage Statistics						
X Tools						
? Help						
🕞 Exit						
			Number of Items Processed	: 15 of 15		
			Total Items Processed :	15		
			Total :	15		
				15		
	<		Total Items Skipped :	0		
	<		Total Items Skipped :	0 Ок		
	<		Total Items Skipped : Completed Successful	О Ок Ily.		
	<		Total Items Skipped : Completed Successful	ок Ily.		
	<		Total Items Skipped : Completed Successful	0 ок		
	<		Total Items Skipped : Completed Successful	ок ок		
	<		Total Items Skipped : Completed Successful	ок ок		
	<		Total Items Skipped : Completed Successful	ок ок		
	<		Total Items Skipped : Completed Successful	ок ок		
	<		Total Items Skipped : Completed Successful	ок ок		
	<		Total Items Skipped : Completed Successful	ок ок		
	<		Total Items Skipped : Completed Successful	ок ок		

If you want to stop the export process, click **Cancel** button.

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 **Ok** button to go to the first page of Metadata Collator.

Dockit Features

- <u>On Premise</u><u>Online</u>
On Premise

- File Share to SharePoint Migration
 SharePoint to SharePoint Migration
 Clean Up Metadata

File Share to SharePoint Migration

Explorer mode

Metadata file structure Step 1: SharePoint destination location Step 2: Items to import Step 3: Metadata Options Step 4: Column Mapping Step 5: Import Conditions Step 6: Mapping Templates Step 7: File Settings Step 8: Post Migration Settings Step 9: Task Schedule Settings

Batch File mode

Batch file structure Metadata file structure Step 1: Batch File Options Step 2: Metadata Options Step 3: Column Mapping Step 4: Import Conditions Step 5: Mapping Templates Step 6: File Settings Step 7: Post Migration Settings Step 8: Task Schedule Settings

Explorer mode (Create Task)

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.

		Dockit Migrator (Evalua	tion Version)		- 🗗 X
	My Jobs >> New Job				
1	File share to SharePoir Migrate folders and docur network file shares. local o along with metadata to Sh File share Migration	t Migration nents from file servers, omputers and personal drives arePoint on-premises.	Clean up Metadata 👻	Clean up Metadata Assign / update metadata to the docc exists in SharePoint document librarie	uments that already ss (on-premise).
* ?	Explorer Mode Import folders, documents and metadata using explorer mode Import folders, documents and metadata using batch file mode SharePoint Migration	Int Migration a SharePoint server 2003 / arePoint 2016 to SharePoint			
Spec Sele	ify the <u>SharePoint Destination</u> ct <u>Items to Import</u>	Location			

Specify <u>Metadata Options</u>
 Specify <u>Column Mapping</u>

2. 3.

- 6. Specify <u>Import Conditions</u>
- 7. Specify <u>Mapping Templates</u>
- 8. Specify File Settings
- 9. Specify Post Migration Settings
- 10. Specify Task Schedule Settings

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

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 commonly 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"

 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. 	
People Groupor SharePoint Group 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 (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" "Bockup Owners" "Backup Owners" "Backup Owners" "Bomeone@example.com" "John Doe"	
PeopleorUsername, ADGroupname or"VOYAGER\User1;GroupSharePoint Group name can be given toBUILTIN\Administrators;BUILTIN\Administrators;(Multiplethis field. The user Login NameGuest Members;Temps"value)(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."http://sharepoint/SharedHyperlink orThe http URL of any resource or picture ran be given to this field"http://sharepoint/Shared	mplo
Picture can be given to this field. Documents/My Sa File.doc" "http://sharepoint/Picture art.bmp"	mple s/ch
Target Global Audience name, Security / "All site users; Administra Audiences Distribution Group name and SharePoint Viewers; Administra	nins;

(Multiple value) (Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above	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 ';'.	SPUsers; Contributors; Designers
library)	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).	
Publishing Schedule Start Date (Applicable only for Collaboratio n 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 Collaboratio n 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 Collaboratio n 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/ch art.bmp "Pictures/chart.bmp" <img src="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"/>
Publishing Hyperlink (Applicable only for Collaboratio	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"

n Portal / Publishing Portal Site)		" <a href="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"> NewsArticleImage.jpg "
Publishing HTML (Applicable only for Collaboratio n 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:100 0AX"
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	"Continent North America Country United States States Alaska" "Alaska"

	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 specified term value and assign the first matching term value for the corresponding managed metadata a solume	"Continent North America Country United States States Washington;Co ntinent North America Country United States States California;Continent North America Country United States 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/Document s/Sample 1.doc; http://sharepoint/Documents /Sample 2.xlsx" "http://sharepoint/Lists/Custo m List/1000"

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*LookupPerson 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 ';#'.	";#Windows Live;;#Mail;#"	Windows Live;#Mail
* - 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.		

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 Demo.ppt","09/09/1999","David Blake","Sales Sales\Sample Product Manager","Consumer Sales"

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 **SharePoint destination location** step appears as shown below:

Dockit Task Wizard		×
Specify a SharePo	SharePoint destination location int URL of a site / library / folder location into which you wish to import folders and files from file ser credential to connect to SharePoint when running the import task	
system speary a		
SharePoint URL:		
Authentication:	Windows ~	
User Name:	vsslab\JohnDoe ~	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	•••••	
	< <u>B</u> ack <u>Next</u> > Einish	<u>C</u> ancel

- 2. Specify a valid SharePoint URL in the 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.

Items to Import

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

1. The **Items to import** step appears as shown below:

Dockit Task Wizard - Sample1						
Step 2 of 10: Items to import Select folders or files to import by clicking 'Browse' button.						
Delete? Source Path	Destination Location	Contains	Folder Traversal Option			
Total: 0 item(s), 0 KB			Refresh Size	Browse		
Renaming Rules:				, <u>bionscin</u>		
Folder Renaming Rule : Folder Rule	✓ File Rena	ming Rule : File	Rule 🗸			
Truncated folder names, max	length 128	Truncated file	names, max length 128			
Perform Incremental Migration	/ One-way Sync					
Occuments modified or newly created, since last migration using Dockit						
(Last migration date: NONE)						
O Documents modified or newly created, since last update in SharePoint						
Ocuments modified or newly created and the second secon	ated This Week 🗸					
		< <u>B</u> ack <u>N</u> e	ext > <u>F</u> inish	<u>C</u> ancel		

2. Click 'Browse...' button to add and remove the folders and files for import.

3. The **Select items to import** dialog appears as shown below:

Select items to import ×							
Select folders and files to import destination library or a folder location and click Add button to add items. Click Remove button to remove selected items from import. Press F5 to refresh respective tree-view.							
Source: D:\Sample Files							
Dockit Migrator DockIT Multi-Lingual Source DocKIT_SetUp DocKIT_SetUp	Name Backup Bulk File Catalyst CheckDS CheckIt123456789abcdef CLIENTS DocSet	Size	Type Folder Folder Folder Folder Folder Folder	Modified Date 1/12/2017 11:33:38 AM 7/4/2017 5:54:18 PM 4/22/2017 12:10:29 PM 2/9/2017 11:22:53 AM 1/12/2017 12:08:49 PM 2/2/2017 4:24:39 PM 1/30/2017 4:24:57 PM			
Projects 2010 Projects 2010 Projects 2012 Reference Release Details Sample Files	FileCheck FileName FileName Fol Sobjects selected		Folder Folder Folder Folder	2/16/2017 9:59:07 AM 2/20/2017 10:41:56 AM 2/20/2017 10:34:23 AM 3/6/2017 3:51:15 PM	*		
Chaun Librarias ank Librarias and sub site	Theme added for import		Refrec				
Brow: ● Libraries and sub-site	Source	Destination	2 refres Contains	Folder Traversal Option			
	Total: 0 item(s), 0 KB			<u>O</u> K <u>C</u> ano	el j		

4. **Select items to import** dialog contains a textbox (top), tree-view (top-left) and a listview (top-right), which provides explorer like view to select folder / file to import. You will also see a textbox (middle) and a tree-view (bottom-left), which enables selection of destination location to import folders / files.

	Select items t	o import		×		
Select folders and files to import destination library or a folder location and click Add button to add items. Click Remove button to remove selected items from import. Press F5 to refresh respective tree-view.						
Source: D:\Sample Files						
Dockit Migrator DockIT Multi-Lingual Source DocKIT Multi-Lingual Source DocKIT_SetUp Do	Name Backup Bulk File Catalyst CheckDS CheckIt123456789abcdef CLENTS DocSet FileCheck FileName FileName FileName Stelextaset	Size Type Folder Folder Folder Folder Folder Folder Folder Folder Folder	e Mo er 1/: er 7/4 er 2/: er 2/: er 2/: er 2/: er 2/: er 2/: er 2/: er 2/: er 3/: er 3/:	dified Date		
Show: Libraries only Libraries and sub-sites	Items added for import		🔋 Refresh Size	X Remove all		
Image: State of the state o	Source	Destination	Contains Fold	ler Traversal Option		
🖶 📖 Pharma 🗸 🗸	Total: 0 item(s), 0 KB			<u>O</u> K <u>C</u> ancel		

5. Browse the source folders and files of your local machine and network shares and select the required folders and files from list view (top right pane). Select a destination location or enter the destination location URL in the textbox and click Add button to import selected items.

Select items to import							
Select folders and files to import destination library or a folder location and click Add button to add items. Click Remove button to remove selected items from import. Press F5 to refresh respective tree-view.							
Source: D:\Sample Files							
🕀 🚺 Dockit Migrator	^	Name	Size	Type		Modified Date	
		Backup Bulk File Catalyst Check0S Check1123456789abcdef CLIENTS DocSet FileCheck FileName FileNameTest		Folder Folder Folder Folder Folder Folder Folder Folder Folder Folder		1/12/2017 11:33:38 AM 7/4/2017 5:54:18 PM 4/22/2017 12:10:29 PM 2/9/2017 11:22:53 AM 1/12/2017 12:08:49 PM 1/20/2017 4:24:39 PM 1/30/2017 4:49:57 PM 2/16/2017 9:59:07 AM 2/20/2017 10:41:55 AM 2/20/2017 10:41:55 AM 2/20/2017 10:41:55 AM	
😥 🔡 Release Details		<		loidei		3/0/2017 3.31.13 PM	>
	¥ 3	3 objects selected					
Destination: https://catalyst.vsslab.local/Dockit/	Dockit	Test				Ŀ	∖dd
Show: Libraries only Libraries and sub-si	tes	Items added for import			👌 Refresh	n Size 🗙 Remove 🖉 Rem	nove All
	^	Source	Destination		Contains	Folder Traversal Option	
BulkTask Garage CheckedOutLib		D:\Sample Files\Backup	https://catalyst.vs Test	slab.local/Dockit/l	<u>0 Files, 3</u> Folders, 0 KB	Import all files and folders	Ť †
tem Lan Demand		D:\Sample Files\Bulk File	e https://catalyst.vs Test	slab.local/Dockit/l	<u>3 Files, 0</u> Folders, 295 MB	Import all files and folders	•
Cocuments Cocuments		D:\Sample Files\Catalys	t https://catalyst.vs Test	slab.local/Dockit/l	<u>47 Files,</u> 23 Folders, 7.27 MB	Import all files and folders	±
🗄 🛅 Master Page Gallery							
⊞ MyLibrary ⊞ Pharma							
	_	S					
		Total: 3 item(s), 302 MB				<u>O</u> K <u>C</u> an	:

6. 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.

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 <u>File Settings</u> wizard step to handle file versions correctly.

- 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 <u>Import Document Versions</u>... for step by step guide to import them as a single file with versions.
- 8. Click **OK** button to proceed or click **Cancel** to discard the changes.
- 9. Items to import step contains the folders and files added for import as shown below:

	Dockit Task Wizard - Sample1						
Step 2 Select f	Step 2 of 10: Items to import Select folders or files to import by clicking 'Browse' button.						
Delete?	Source Path	Destination Location	Contains	Folder Traversal Option			
×	D:\Sample Files\Account Files	https://alpine.vsslab.local/De	60 Files, 3 Folders, 2.85 MB	Import all files and folders			
×	D:\Sample Files\Audit Files	https://alpine.vsslab.local/De	<u>10 Files, 0</u> Folders, 96.9 KB	Import all files and folders			
×	D:\Sample Files\Image Files	https://alpine.vsslab.local/De	32 Files, 1 Folders, 1.82 MB	Import all files and folders			
Total :	0 item(s), 0 KB			Refresh Size 🛅	Browse		
Folder Der	g Rules:	Eile Depen		Pula vi			
] Truncated folder names, max	length 128	Truncated file	names, max length 128			
Perfo	rm Incremental Migration	/ One-way Sync					
🖲 Do	cuments modified or newly crea	ated, since last migration using	<u>D</u> ockit				
(Last migration date: NONE)						
	O Documents modified or newly created, since last update in <u>SharePoint</u>						
	ocuments modified or newly crea	ated This Week 🗸					
		<	Back Ne	ext > <u>F</u> inish	<u>C</u> ancel		

10. To make the import process easier for users, Dockit provides an ability to specify the contents 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 button to edit the folder traversal option for folders that are added in Items added for import grid view.

A Folder Traversal dialog appears as shown below.

Folder Traversal Options	×
Specify folders settings to use when reading the contents from source folders and folder contents (sub-folders and files) to import to SharePoint library	
Do you want to create the top-level folder(s) included for import? \odot Yes \bigcirc No	
Import files and retain source sub-folder structure	
 Import files only and ignore source sub-folder structure (set appropriate action for duplicate file names) 	
Import files in the top-level folder(s) only	
Import sub-folder structure only and ignore all files	
O Do not import any contents	
<u>O</u> K <u>C</u> ancel	

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 contents to be imported from the source folders in file system:

- a. **Import 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. Import all files including sub-folders, but ignore sub-folder structure This option imports files only and ignore its source folder structure in the file system. Note: Specify the appropriate options in <u>File Settings</u> step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).
- c. Import 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. **Import 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 import any contents** This option does not import any contents (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 contents.

Note: Folder Traversal option is not applicable for file.

11. Folder Renaming Rule:

Select the rule name available in dropdown for folder renaming rule. This helps to rename invalid characters in SharePoint to a valid folder name.

12. File Renaming Rule:

Select the rule name available in dropdown for file renaming rule. This helps to rename invalid characters in SharePoint to a valid file name.

13. Perform Incremental Migration / One-way Sync:

Select any one of the following One-way Sync Operations. This helps to migrate the incremental contents.

- a. Documents Modified or newly created, since last migration using Dockit
- b. Documents Modified or newly created, since last migration in SharePoint
- c. Documents Modified or newly created 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'

14. Click **Next** to proceed.

Metadata Options

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

1. The **Metadata Options** step appears as shown below:

Dockit Task Wi	zard X
Step Numl Specify meta	ber: Metadata Options adata file to update document properties in SharePoint.
Metadata Fi	ile:
File Name:	Sample
	Use batch file as metadata file
Sheet Name:	~ <u>V</u> iew <u>O</u> lear
Date format:	<use default=""> Time format: <no time=""></no></use>
Metadata co	olumns in file:
	Select All
	0 Metadata columns selected
	< <u>B</u> ack <u>N</u> ext > Einish <u>C</u> ancel

2. Note: 'Use batch file as metadata file' option only available in 'Batch File Mode'.

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).

For more information about how to create external metadata file, <u>click here</u>.

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

- 4. **Click (Sample)** drop down button if you want to see a sample external metadata file (such as, Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in an external metadata file.
- 5. Specify **Date and Time format** for the date fields in the metadata file. If the columns selected to import contains date and time values, specify the date mask to parse the date values. The default value is the current system settings.
- 6. In **Metadata Columns in file**, you can select the required columns from metadata file to migrate to SharePoint.

Dockit Task Wiz	ard	Х
Step Numb Specify meta	er: Metadata Options Idata file to update document properties in SharePoint.	
Metadata Fi	le:	
File Name:	C:\Users\Public\Desktop\batch.XLSX	S <u>a</u> mple
Sheet Name:	sheet2	✓ … <u>V</u> iew <u>C</u> lear
Date format:	<use default=""></use>	~
Metadata co	lumns in file:	
	Approver Comments	^
	✓ column1	
	Approval Status	Select All
	Content Type	 18 Metadata columns selected
	< <u>B</u> ack	Next > Einish Cancel

Click Next to proceed.

Column Mapping

To perform column mapping

1. The **Column Mapping** step appears as shown below:

tep 2 of 7: Colum Map metadata propertie	In Mapping es to the desired Si	harePoint columns.			
Column M	lapping Template:	Blank	~	🛃 Save As 🐓	<u>R</u> eset
Source Colu	ımn	Target Col	umn	Default Value	
Name	~	Name	\sim		_
	~		~		4
Assign Content Type —					

- Column Mapping Template: Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('Blank' and 'Core File Properties') are readily available to ease the mapping configuration.
- Source Column: You can specify source column values from 'File properties', 'Metadata File', '<u>Function Builder</u>' and also from 'Other File Properties' by entering the property name.
- 4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
- 5. **Default value:** You can specify the alternate value here that takes effect, in case the original source value could not be assigned to the target SharePoint column during migration.

6. **Save As:** This option enables you to save the configured column mapping as templates for reuse in other migration tasks.

ckit Task Wizard tep Number: Colum Map metadata properties t	n Mapping o the desired Sl	harePoint columns.			
Column Map;	oing Template:	Blank	~	🛃 Save As	4 → <u>R</u> eset
Source Column		Target Co	lumn	Default Value	
Created	~	Created	~		_ ^
Created By	~	Created By	~		
Modified	~	Modified	~		
Modified By	~	Modified By	~		
Approval Status	~	Approval Status	~		
	~		~		- +
Assign Content Type Document Content Type: Folder Content Type:	Content Type Folder Conten	e v	Specify the con folder. You can providing the do 'Folder Content configured in th	tent type to be assigned create a folder as docum ocument set content type Type'. If left blank, defa e target SharePoint librar	for document / ent set by name under ult content type y will be set.
			< <u>B</u> ack	<u>V</u> ext > <u>F</u> inish	<u>C</u> ancel

7. **Reset:** This helps you reset the mapping configuration to default setting.

Map metadata properties t	o the desired S	harePoint columns.		`
Column Mapp	oing Template:	Blank	~	Save As
Source Column		Target Co	olumn	Default Value
Created	~	Created	~	^
Created By	~	Created By	~	-
Modified	~	Modified	~	
Modified By	~	Modified By	~	
Approval Status	~	Approval Status	~	
	~		~	
Assign Content Type				
Document Content Type:	Content Typ	e v	Specify the co folder. You ca	ntent type to be assigned for document / n create a folder as document set by document set content type name under
Folder Content Type:	Folder Conte	ent Type	Folder Conter	nt Type'. If left blank, default content type the target SharePoint library will be set

8. Click **Next** to proceed.

Import Conditions

Dockit can migrate or upload folders and files to SharePoint after they meet certain criteria. Dockit will import folders and files based on these filter conditions. Filters can be created using metadata columns and values (from external metadata file), file properties (include Office document 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. The **Import Conditions** step appears as shown below:

Dockit Task Wizard	×
Step Number: Import Conditions Specify import conditions to be satisfied for folders and files to be migrated to Shar	ePoint.
BASIC O ADVANCED	,
Folder Import Condition	
File Import Condition	∽
< <u>B</u> ack	Next > Finish Cancel

- 2. Select any one of the following options given below:
 - a. **BASIC** -Basic Folder Import conditions will be used to filter folders or files.
 - b. **ADVANCED** The available import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

3. Once you select **BASIC** and click 'Folder Level Condition...' button or 'File Level Condition...' button to specify the respective filter condition. The import condition dialog will appear as shown below:

Folder Import Condition (Basic)								
Specify condition to apply at the folder level. For example, you can Import folders when [Folder Name' = 'Conference Information'].								
Property	Operator	Value	Connector					
Folder Name ~	=	Conference Information	OR -					
Folder Name \lor	= •	Root Folder	AND 🔻 🖶					
Clear			<u>O</u> K <u>C</u> ancel					

4. Once you specify the respective folder & file import conditions, the task wizard step appears as shown below:

Dockit Task Wizi Step Numb Specify impor	ard Der: Import Conditions rt conditions to be satisfied for folders and files to be	e migrated to S	harePoint.		×
● BASIC ○	ADVANCED				
F <u>o</u> lder Import Condition	<where> <or> <eq> <fieldref name="Folder Name"></fieldref> <value>Conference Information</value> </eq> <eq> <fieldref name="Folder Name"></fieldref> <value>Root Folder</value> </eq></or></where>				~
File Import Condition	<where> <and> <eq> <fieldref name="Date Created"></fieldref> <value>2016-10-07T00:00:00</value> </eq> <isnotnull>] <fieldref name="Character Count"></fieldref> </isnotnull> </and></where>				* *
		< Back	Next >	Finish	Cancel
File Import Condition	<and> <eq> <fieldref name="Date Created"></fieldref> <value>2016-10-07T00:00:00</value> </eq> <isnotnull> <fieldref name="Character Count"></fieldref> </isnotnull> </and>	< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	↓ <u>C</u> ancel

5. Once you select **ADVANCED** and click 'File Level Condition...' button or 'Folder Condition...' button to specify the respective filter condition. The import condition dialog will appear as shown below:

Folder Import C	ondition (Advanced)			×
Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when [Folder Name' Starts With 'Team'].				
<u>F</u> ield Name	Folder Name		~	
Operator	= ~			
<u>V</u> alue	Root Folder			
	' <u>A</u> ND' to Filter	' <u>O</u> R' to Fi	ilter	
Conditions:		() 🔕 🌶	× 🗙 🧷
[Folder Name AND [Folder N	(File Property)] = 'Confer lame (File Property)] = 'R	ence Informati oot Folder'	ion'	
Import if the above condition is: satisfied not satisfied				
Apply the abov	ve condition for: O All	Folders 🖲 Th	ne folders at lev	vel 3
			<u>O</u> K	Cancel

- 6. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.
- 7. Additionally, for folders, you can specify the levels at which you can apply folder conditions as given below:
 - a. All Folders
 - b. The Folders at <Level>

Folder Import Condition (Advanced)			
Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when [Folder Name' Starts With 'Team'].			
<u>F</u> ield Name	Folder Name	~	
<u>O</u> perator	= ~		
<u>V</u> alue	Root Folder		
	' <u>A</u> ND' to Filter	' <u>O</u> R' to Filter	
Conditions: [Folder Name (AND [Folder Na	File Property)] = 'Confera ame (File Property)] = 'Ro	() (x) ence Information' oot Folder'	
Import if the ab	ove condition is:) sati	sfied 🔿 not satisfied	
Apply the above	e condition for: 🔿 All F	olders	at level 3
		<u>O</u> K	Cancel

8. Once you specify the respective folder & file import conditions, the task wizard step appears as shown below:

Dockit Task Wiz Step Numl Specify impor	zard ber: Import Conditions ort conditions to be satisfied for folders and files to be migrated to SharePoint.	×
⊖ BASIC) ADVANCED	
F <u>o</u> lder Import Condition	[Folder Name (File Property)] = 'Conference Information' AND [Folder Name (File Property)] = 'Root Folder'	
File Import Condition	[Date Created (File Property)] = #10/7/2016# OR [Date Modified (File Property)] = #10/7/2016#	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u>	ancel

9. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

1. The **Mapping Templates** step appears as shown below:

Dockit Task Wizard - FileLength		
Select the mapping templates to use for the task and specify the appropriate options.		
Domain Mapping:		
Are the users/groups in the sou	rce and target locations in differen	t AD domains? 🔿 Yes 💿 No
Domain Mapping Template:	None 🗸	* This mapping will be used for all person or group fields.
User Mapping:		
Do you want to map users who	are no longer in the organization to	o different set of users in target SharePoint? \bigcirc Yes \odot No
User / group Mapping Template:	None 🗸	* This mapping will be used for all person or group fields.
Permission Mapping:		
Do you want to propagate NTF	S permissions in file shares to Shar	ePoint? 🔾 Yes 💿 No
Permission Mapping Template:	None 🗸	
		Manage Templates
		< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

2. Domain Mapping Template:

Are the users/groups in the source and target locations in different AD domains? (Yes/No)

If you choose 'Yes', select any one of the domain mapping templates to use from the list of available template(s).

None represents the default domain mapping template that helps to assign the domain names as it is.

Note: This mapping works with permission mapping for SharePoint 2010 / SharePoint 2013 / SharePoint 2016 only. Also, this mapping is applicable for all person or group

columns to replace unavailable domain name from the user value with the valid domain name and make the valid user value.

3. User / Group Mapping Template:

Do you want to map users who are no longer in the organization to different set of users in target SharePoint? **(Yes/No)**

if you choose 'Yes', select any one user / group mapping template to use from the list of available template(s).

None represents the default user / group mapping template that helps to assign user / group as it is. This mapping is applicable for all person or group columns to replace unavailable users with the valid users.

4. Permission Mapping Template:

Do you want to propagate NTFS permissions in file shares to SharePoint? (Yes/No)

if you choose 'Yes', select any one permission mapping template to use from the list of available template(s).

None represents the default permission mapping template.

Note: This mapping works only for SharePoint 2010 / SharePoint 2013 / SharePoint 2016.

5. Click **Manage Template...** button to customize the available template(s) or create a new template.

Dockit Task Wizard - FileLength		
Select the mapping templates to use for the task and specify the appropriate options.		
Domain Mapping:		
Are the users/groups in the source and target locations in different AD domains? \odot Yes \bigcirc No		
Domain Mapping Template: Sample 🗸 🛄 * This mapping will be used for all person or group fields.		
User Mapping:		
Do you want to map users who are no longer in the organization to different set of users in target SharePoint? Yes O No		
User / group Mapping Template: User Sample v * This mapping will be used for all person or group fields.		
Permission Mapping:		
Do you want to propagate NTFS permissions in file shares to SharePoint? 💿 Yes 🔘 No		
Permission Mapping Template: Sample Permission V		
Manage Templates		
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel		

6. Click **Next** to proceed.

Folder / File Settings

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

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

Dockit Task	Wizard		
Specify action to be taken when a folder / file with the same name already exists in the destination location.			
Folder Settings: If a folder with the same name already exists in the destination locat	ion:		
Do not overwrite folders			
O Overwrite folders			
O Create new folder in the name - Prepend	<folder name=""> Append</folder>		
	* denotes incremental index		
File Settings: If a file with the same name already exists in the destination location			
Do not overwrite			
Overwrite			
O Create new file in the name - Prepend	<file name=""> Append</file>		
Create new version	* denotes incremental index		
$_$ If the file is checked-out by either current user or other user			
Leave as is			
 Overwrite current version 			
Check-in and create new version			
	< <u>B</u> ack <u>N</u> ext > Einish <u>C</u> ancel		

- 2. Select any one of the following options given below:
 - a. Do not overwrite Skips the folder without overwriting.
 - b. **Overwrite folder** Deletes the folder from the destination location (along with its version history) and imports the source folder.
 - c. **Create as new folder** Creates a new folder by appending and prepending the user defined characters with the source file name and imports the newly created folder. **Note:** * is the reserved character and denotes incremental index.

Dockit Task Wizard			
Specify action to be taken when a folder / file with the same name already exists in the destination location.			
Folder Settings:			
If a folder with the same name already exists in the destination location	n:		
O Do not overwrite folders			
O Overwrite folders			
Oreate new folder in the name - Prepend	<folder name=""> Appendnew</folder>		
	* denotes incremental index		
File Settings:	· · · · · · · · · · · · · · · · · · ·		
Do not overwrite			
O Overwrite			
Create new file in the name - Prepend	<file name=""> Append</file>		
Create new version	* denotes incremental index		
− If the file is checked-out by either current user or other user -			
Leave as is			
 Overwrite current version 			
Check-in and create new version			
	< Back Next > Einish Cancel		
- 3. Select any one of the following options given below:
 - a. **Do not overwrite** Skips the file without overwriting.
 - b. **Overwrite file** Deletes the file from the destination location (along with its version history) and imports the source file.
 - c. **Create as 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.
 - d. **Create new version** Adds the source file as new version at the destination location. Select any one of the following options to instruct Dockit what to do if the destination file is checked-out by either current user or another user:
 - i. Leave as is Skip the file.
 - ii. **Overwrite current version** Undo Checkout the file and add the source file as new version.
 - iii. **Check-in file & create new version** Check-in the file and add the source file as a new version.

Dockit Task Wizard				
Specify action to be taken when a folder / file with the same name already exists in the destination location.				
Folder Settings:				
If a folder with the same name already exists in the destination location:				
Do not overwrite folders				
Overwrite folders				
O Create new folder in the name - Prepend <folder name=""> Append</folder>				
* denotes incremental index				
File Settings:				
Create new file in the name - Prepend <file name=""> Append * denotes incremental index</file>				
Create new version				
If the file is checked-out by either current user or other user				
Leave as is				
Overwrite current version				
Check-in and create new version				
< <u>Back</u> <u>N</u> ext > <u>Finish</u> <u>Cancel</u>				

4. Click **Next** to proceed.

Post Migration Settings

1. In order to move the source folders and files to the specified location after completing the import process, select **Yes in Move folders & files after migration**.

Dockit Task Wizard - Explorer Test	×
Specify the settings to move files / folders added for import based on the migration results	
Move folders & files after migration:	
Do you want to move folders & files after migration is complet 🔿 Yes 💿 No	
Move Options: Move source folders and files that contain no errors and warnings 💌	
Target location: C:\Users\Public\Documents\Dockit11x\Backup	
Create current timestamp folder under target location	
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ar	ncel

- 2. Select a **Move option** from the list below:
 - a. **Move source folders and files that contain no errors and warnings** This option moves the source folders and files from the current location to the new location, if there no errors and warnings during migration.
 - b. **Move all source folders and files (ignore warnings)** This option moves the source folders and files from the current location to the new location, even if there are warnings reported during migration.

c. **Move all source folders and files (ignore errors and warnings)** - This option moves all source folders and files from the current location to the new location, regardless of any errors and warnings during migration to SharePoint.

Dockit Task Wizard - Explorer Test
Step 8 of 9: Post Migration Settings Specify the settings to move files / folders added for import based on the migration results
Move folders & files after migration:
Do you want to move folders & files after migration is complet I Yes O No
Move Options: Move source folders and files that contain no errors and warnings
Target location: C:\Users\Public\Documents\Dockit11x\Backup
Create current timestamp folder under target location
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

3. Specify a **Target Location** where the source folders and files are to be moved. You can also click browse (...) button to launch folder browser. You must ensure that the user who invokes the move operation has sufficient permissions to delete folders and files in the source location and to re-create them in the target location.

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** step appears as shown below:

Dockit Task Wizard						×
Step Number: T Enter a unique name	ask Schedule Se e for the import task a	e ttings nd specify schedule i	task settings.			
<u>T</u> ask Name:						
Category Name:	Blank			~		
Description:						
Task Option O Run later (a) Run now O Schedule						
			< <u>B</u> ack	<u>N</u> ext >	Einish	<u>C</u> ancel

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from one of the following options given below:
 - a. Run later to run the task later as and when desired
 - b. **Run now** to run the task immediately after clicking Finish button
 - c. **Schedule** To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.

- 4. Select one of the following options to connect to the target SharePoint site:
 - a. This user <user name> This option is available if you choose Run later or Run now or Schedule task option. Dockit will use stored profile context to connect destination SharePoint.
 - b. Prompt me for user context at task run time (Windows and Forms authentication only) This option is available if you choose Run later or Run now task option. Select this option if the target SharePoint site is configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint site when executing Dockit import task.
 - c. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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 / 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.

Task Name:	Test task					
Category Name:	Blank			~		
Description:						
	Connect to Shar	rePoint as:				
Task Option	Authentication:	Windows		~		
O Run later	Lines News					
O Run now	User Name:	vssiab landrew		~		•
Schedule	Password:	•••••	•			
	Schedule Setti	ngs				
	Run <u>A</u> s: vssl	lab \andrew				Set Password
	Schedule: Dail	ly ~	Start time:	7:02 PM	ŧ	Advanced
	Schedule Task [Daily				
	Every 1	dav(s)				
	Every 1	- day(s)				
	Schedule Task [Every 1	Daily day(s)				
	=/	•				
	At 7:02 PM every	day, starting 1/31/2017				

- d. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the target SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit import task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).
- 5. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Batch file mode (Create Task)

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.

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

	Dockit Migrator (Evalua	ation Version)	– <i>a</i> ×
My Jobs >> New Job			
My Jobs >> New Job Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration Image: State of the state digration	File share to SharePoint Migration Migrate folders and documents from file servers, network file shares. local computers and personal drives along with metadata to SharePoint on-premises. ents and er mode to SharePoint Migration : and lists from SharePoint server 2003 / / 2013 and SharePoint 2016 to SharePoint file mode	Clean up Metadata	Clean up Metadata Assign / update metadata to the documents that already exists in SharePoint document libraries (on-premise).
	My Jobs >> New Job	My Jobs >> New Job File share to SharePoint Migration Migrate folders and documents from file servers, network file shares, local computers and personal drives along with metadata to SharePoint on-premises. File share Migration Import folders, documents and metadata using explorer mode Import folders, documents and metadata using batch file mode SharePoint Migration Import folders, documents and metadata using batch file mode SharePoint Migration SharePoint Migration	My Jobs >> New Job File share to SharePoint Migration Migrate folders and documents from file servers, network file shares, local computers and personal drives along with metadata to SharePoint on-premises. File share Migration Explorer Mode Import folders, documents and metadata using explorer mode Migrate folders and metadata using batch file mode SharePoint Migration SharePoint Migration SharePoint Migration



- 1. Specify <u>Batch File Options</u>
- 2. Specify <u>Metadata Options</u>
- 3. Specify <u>Column Mapping</u>
- 4. Specify Import Conditions
- 5. Specify <u>Mapping Templates</u>
- 6. Specify <u>File Settings</u>
- 7. Specify Post Migration Settings
- 8. Specify <u>Task Schedule Settings</u>
- 9. Click **Finish** button to create the task, or click **Back** button to change any task settings.

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 contents. For instance, please see the batch descriptor file snippet given below:

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

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	Conte nt	Manag er
				Туре	
M:\file1.a	http://vyapin/proj	Sample	http://www.google.	Link to	John
spx	ect	Test.doc	com	а	Doe
	documents/folder			docum	
	1			ent	
M:\file1.a	http://vyapin/proj	Microsof	http://www.microso	Extern	John
spx	ect	t	ft.com	al URL	Doe
	documents/folder	Corporat			
	1/sub1	ion			

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.

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	Equivalent Format String
Separator	
, (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 <u>Create Metadatafile</u>

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 commonly 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. The http URL of any resource or picture can be given to this field.	"VOYAGER\User1; BUILTIN\Administrators; Guest Members;Temps" "http://sharepoint/Shared Documents/MySample
Picture	can be given to this field.	Documents/My Sample File.doc" "http://sharepoint/Pictures/ch art.bmp"
Target Audiences	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers: Administrators;

(Multiple value) (Applicable only for a MOSS /	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.	SPUsers; Contributors; Designers
Microsoft SharePoint Server 2010 and above	The values can be of single or multiple. Multiple values should be separated with ';'.	
library)	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 and above).	
Publishing Schedule Start Date (Applicable only for Collaboratio n 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 Collaboratio n 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 Collaboratio n Portal / Publishing	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/ch art.bmp "Pictures/chart.bmp" <img src="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"/>
Portal Site) Publishing Hyperlink (Applicable only for Collaboratio n Portal /	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"

Publishing Portal Site)		" <a href="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"> NewsArticleImage.jpg "
Publishing HTML (Applicable only for Collaboratio n 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)		"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:100 0AX"
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	"Continent North America Country United States States Alaska" "Alaska"

	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 ';'.	"Continent North America Country United States States Washington;Co ntinent INorth
	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.	America Country United States States California;Continent North America Country United States States Alaska" "Washington;California; Alaska"
	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 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	"Complete" "4"
	column type.	•
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/Document s/Sample 1.doc; http://sharepoint/Documents /Sample 2.xlsx" "http://sharepoint/Lists/Custo m 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*
- LookupPerson 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 ';#'.	";#Windows Live;;#Mail;#"	Windows Live;#Mail
* - 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.		

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 Demo.ppt","09/09/1999","David Blake","Sales Sales\Sample Product Manager","Consumer Sales"

Batch File Options

Follow the steps given below to specify the documents to import to the SharePoint Library in the batch file mode.

1. The **Batch File Options** step appears as shown below:

Dockit Task Wizard			
Specify batch file to use to import items in SharePoint. Specify user credential to connect to SharePoint when running the import task.			
Batch File:			
File Name: Sample			
Sheet Name: View Clear			
Renaming Rules:			
Folder Renaming Rule : Folder Rule V File Renaming Rule : File Rule V			
Truncated folder names, max length 128 Truncated file names, max length 128			
Incremental Migration:			
<u>Perform Incremental Migration / One-way Sync</u>			
Occuments modified or newly created, since last migration using <u>D</u> ockit			
(Last migration date: NONE)			
Ocuments modified or newly created, since last update in SharePoint			
◯ Documents modified or newly created This Week ∨			
Folder Option:			
Do you want to create the top-level folder(s) included for import? Yes No 			
< <u>B</u> ack <u>N</u> ext > Einish <u>C</u> ancel			

2. **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, <u>click here</u>.

3. **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.

4. Folder Renaming Rule:

Select the rule name available in dropdown for folder renaming rule. This helps to rename invalid characters in SharePoint to a valid folder name.

5. File Renaming Rule:

Select the rule name available in dropdown for file renaming rule. This helps to rename invalid characters in SharePoint to a valid file name.

6. **Perform Incremental Migration / One-way Sync:**

Select any one of the following One-way Sync Operations. This helps to migrate the incremental contents.

- a. Documents Modified or newly created, since last migration using Dockit
- b. Documents Modified or newly created, since last migration in SharePoint
- c. Documents Modified or newly created with specified Time duration as follows 'This Week', 'Last 7 days', 'This Month', 'Last Week', 'Last 14 days', 'Last Month', 'Today', 'Yesterday', 'Last N days'

	Dockit Task Wizard				×
Step 1 of Specify bat running the	Step 1 of 9: Batch File Options Specify batch file to use to import items in SharePoint. Specify user credential to connect to SharePoint when running the import task.				
Batch File:					
File Name:	D:\Sample	e Files\prevalidation - Copy.xlsx		Sample	
Sheet Name:	Sheet1		×	<u>V</u> iew <u>C</u> lear	
Renaming F	Rules: —				
Folder Renam	ing Rule :	Folder Rule 🗸	File Renaming Rule : File Rule	~	
🗌 Tr	uncated fo	older names, max length 128	Truncated file name	es, max length 128	
Incrementa	al Migratio	on:			
Perform	Increme	ental Migration / One-way Syn	c		
Docum	nents modi	fied or newly created, since last mig	gration using <u>D</u> ockit		
(Las	t migration	date: NONE)			
	nents modi	fied or newly created, since last up	date in <u>S</u> harePoint		
O Docum	◯ Documents modified or newly created This Week ∨				
Folder Option: Do you want to create the top-level folder(s) included for import? • Yes			· · · · · · · · · · · · · · · · · · ·		
			< Back Next >	Einish	<u>C</u> ancel

- 7. 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).
- 8. Click **Next** to proceed.

Metadata Options

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

1. The **Metadata Options** step appears as shown below:

Dockit Task Wiz	zard		
Step Numl Specify meta	Specify metadata file to update document properties in SharePoint.		
Metadata Fi	le:		
File Name:	Sample		
	Use batch file as metadata file		
Sheet Name:	→ <u>V</u> iew <u>O</u> lear		
Date format:	<use default=""> Time format: <no time=""></no></use>		
Metadata co	olumns in file:		
	Select All		
	0 Metadata columns selected		
	< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>C</u> ancel		

2. Note: 'Use batch file as metadata file' option only available in 'Batch File Mode'.

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).

For more information about how to create external metadata file, <u>click here</u>.

- 3. The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
- 4. **Click (Sample)** drop down button if you want to see a sample external metadata file (such as, Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in an external metadata file.
- 5. Specify **Date and Time format** for the date fields in the metadata file. If the columns selected to import contains date and time values, specify the date mask to parse the date values. The default value is the current system settings.
- 6. In **Metadata Columns in file,** you can select the required columns from metadata file to migrate to SharePoint.

Dockit Task Wi	zard	×	
Step Numb	Specify metadata file to update document properties in SharePoint.		
Metadata Fi	ie:		
File Name:	C:\Users\Public\Desktop\batch.XLSX	S <u>a</u> mple	
Sheet Name:	sheet2	✓ … <u>V</u> iew <u>C</u> lear	
Date format:	 <use default=""></use> <th>~</th>	~	
Metadata o	olumns in file:		
	 Approver Comments column 1 Title single Multi Column Choice CustomerNo Look up Taxonomy Multi Taxonomu Keywords Approval Status Content Type 	 ▲ ✓ Select All ✓ 18 Metadata columns selected 	
	< <u>B</u> ack	Next > Einish Cancel	

7. Click **Next** to proceed.

Column Mapping

To perform column mapping

1. The **Column Mapping** step appears as shown below:

Dockit Task Wizard		×	
Step 2 of 7: Column Mapping Map metadata properties to the desired SharePoint columns.			
Column Mapping Template:	Blank ~	🛃 Save As 😽 Reset	
Source Column	Target Column	Default Value	
Name ~	Name ~		
~ I	~		
Assign Content Type Document Content Type: Folder Content Type:	 Specify the confolder. You caproviding the 'Folder Conter configured in 'Solder'. 	ontent type to be assigned for document / in create a folder as document set by document set content type name under int Type'. If left blank, default content type the target SharePoint library will be set.	
	< <u>B</u> ack	Next > Einish Cancel	

- Column Mapping Template: Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('Blank' and 'Core File Properties') are readily available to ease the mapping configuration.
- 3. **Source Column:** You can specify source column values from **'File properties'**, **'Metadata File'**, **'**<u>Function Builder</u>' and also from **'Other File Properties'** by entering the property name.
- 4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
- 5. **Default value:** You can specify the alternate value here that takes effect, in case the original source value could not be assigned to the target SharePoint column during migration.

6. **Save As**: This option enables you to save the configured column mapping as templates for reuse in other migration tasks.

SaveAs	×	
Create a template by entering a new template name. Enter a unique name for the template or else Overwrite a existing Template by choosing exists templates		
Template Name :	~	
	<u>S</u> ave <u>C</u> ancel	

7. **Reset**: This helps you reset the mapping configuration to default setting.

ockit Task Wizard					×
tep Number: Column Map metadata properties t	n Mapping o the desired S	harePoint columns.			
Column Map;	ping Template:	Blank	~	Save As	€ Reset
Source Column		Target Co	olumn	Default Value	
Created	~	Created	~		
Created By	~	Created By	~		_
Modified	~	Modified	~		
Modified By	~	Modified By	~		
Approval Status	~	Approval Status	~		
	~		~		₽ .
Assign Content Type Document Content Type: Folder Content Type:	Content Typ Folder Conte	e v	Specify the con folder. You car providing the co 'Folder Conten configured in t	ntent type to be assigned fo n create a folder as documen locument set content type r t Type'. If left blank, defaul he target SharePoint library	or document / nt set by name under t content type will be set.
			< <u>B</u> ack	<u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

8. Click **Next** to proceed

Dockit can migrate or upload folders and files to SharePoint after they meet certain criteria. Dockit will import folders and files based on these filter conditions. Filters can be created using metadata columns and values (from external metadata file), file properties (include Office document 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. The **Import Conditions** step appears as shown below:

- 2. Select any one of the following options given below:
 - c. **BASIC** -Basic Folder Import conditions will be used to filter folders or files.
 - d. **ADVANCED** The available import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

3. Once you select **BASIC** and click 'Folder Level Condition...' button or 'File Level Condition...' button to specify the respective filter condition. The import condition dialog will appear as shown below:

Folder Import Condition (Basic)			×
Specify condition to apply at the folder le Information'].	evel. For example	, you can Import folders when [Folder Name	' = 'Conference
Property	Operator	Value	Connector
Folder Name 🗸		Conference Information	OR -
Folder Name V	= •	Root Folder	AND -
Clear			OK Cancel

4. Once you specify the respective folder & file import conditions, the task wizard step appears as shown below:

Dockit Task Wiz	ard X	
Step Numb Specify impor	Per: Import Conditions rt conditions to be satisfied for folders and files to be migrated to SharePoint.	
● BASIC ○) ADVANCED	
F <u>o</u> lder Import Condition	<pre></pre>	
Eile Import Condition	<pre></pre>	
	< Back Next > Finish Cancel	,

5. Once you select **ADVANCED** and click 'File Level Condition...' button or 'Folder Condition...' button to specify the respective filter condition. The import condition dialog will appear as shown below:

Folder Import Co	ndition (Advanced)			×
Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when [Folder Name' Starts With 'Team'].				
Field Name	Folder Name		~	
<u>Operator</u>	= ~			
<u>V</u> alue	Root Folder			
	' <u>A</u> ND' to Filter	' <u>O</u> R' to Filt	er	
Conditions:		()	6)	< 🗙 🧷
[Folder Name (AND [Folder Na	File Property)] = 'Confer ame (File Property)] = 'Ro	ence Information oot Folder'	n'	
Import if the above condition is: (•) satisfied () not satisfied				
Apply the above	e condition for: O All F	Folders 💿 The	e folders at lev	vel 3
			<u>O</u> K	Cancel

6. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

- 7. Additionally, for folders, you can specify the levels at which you can apply folder conditions as given below:
 - a. All Folders
 - b. The Folders at <Level>

Folder Import Co	ondition (Advanced)		×	(
Specify rule that must be satisfied before creating folders to SharePoint. For example, you can create folders only when [Folder Name' Starts With 'Team'].				
<u>F</u> ield Name	Folder Name		~	
Operator	= ~			
<u>V</u> alue	Root Folder			
	' <u>A</u> ND' to Filter	' <u>O</u> R' to Filter		
Conditions:			× x × 0	
[Folder Name (AND [Folder Na	[File Property)] = 'Confere ame (File Property)] = 'Ro	nce Information' ot Folder'		
Import if the above condition is: satisfied not satisfied				
Apply the above condition for: O All Folders The folders at level 3				
		<u>(</u>	<u>O</u> K Cancel]

8. Once you specify the respective folder & file import conditions, the task wizard step appears as shown below:

Dockit Task Wiz Step Numl Specify impor	tard ber: Import Conditions rt conditions to be satisfied for folders and files to be migrated to SharePoint.	×
⊖ BASIC) ADVANCED	
F <u>ol</u> der Import Condition	[Folder Name (File Property)] = 'Conference Information' AND [Folder Name (File Property)] = 'Root Folder'	
File Import Condition	[Date Created (File Property)] = #10/7/2016# OR [Date Modified (File Property)] = #10/7/2016#	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u>	ancel

9. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

1. The **Mapping Templates** step appears as shown below:

Dockit Task Wizard - FileLength			
Step Number: Mapping Select the mapping templates	g Templates to use for the task and specify th	e appropriate options.	
Domain Mapping:			
Are the users/groups in the sou	rce and target locations in differen	t AD domains? 🔿 Yes 💿 No	
Domain Mapping Template:	None	* This mapping will be used for all person or group fields.	
User Mapping:			
Do you want to map users who	are no longer in the organization t	o different set of users in target SharePoint? 🔿 Yes 💿 No	
User / group Mapping Template:	None	* This mapping will be used for all person or group fields.	
Permission Mapping:			
Do you want to propagate NTF	S permissions in file shares to Shar	rePoint? 🔾 Yes 💿 No	
Permission Mapping Template:	None		
		Manage Templates	
		< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel	

2. Domain Mapping Template:

Are the users/groups in the source and target locations in different AD domains? (Yes/No)

If you choose 'Yes', select any one of the domain mapping templates to use from the list of available template(s).

None represents the default domain mapping template that helps to assign the domain names as it is.

Note: This mapping works with permission mapping for SharePoint 2010 / SharePoint 2013 / SharePoint 2016 only. Also, this mapping is applicable for all person or group columns to replace unavailable domain name from the user value with the valid domain name and make the valid user value.

3. User / Group Mapping Template:

Do you want to map users who are no longer in the organization to different set of users in target SharePoint? **(Yes/No)**

If you choose 'Yes', select any one user / group mapping template to use from the list of available template(s).

None represents the default user / group mapping template that helps to assign user / group as It is. This mapping is applicable for all person or group columns to replace unavailable users with the valid users.

4. Permission Mapping Template:

Do you want to propagate NTFS permissions in file shares to SharePoint? (Yes/No)

If you choose 'Yes', select any one permission mapping template to use from the list of available template(s).

None represents the default permission mapping template.

Note: This mapping works only for SharePoint 2010 / SharePoint 2013 / SharePoint 2016.

5. Click **Manage Template...** button to customize the available template(s) or create a new template.

Dockit Task Wizard - FileLength			
Step Number: Mapping Select the mapping templates t	Templates to use for the task and specify the appropriate options.		
Domain Mapping:			
Are the users/groups in the source	e and target locations in different AD domains? \odot Yes \bigcirc No		
Domain Mapping Template:	Sample		
User Mapping:			
Do you want to map users who a	re no longer in the organization to different set of users in target SharePoint? \odot Yes \bigcirc No		
User / group Mapping Template:	User Sample * This mapping will be used for all person or group fields.		
Permission Mapping:			
Do you want to propagate NTFS	permissions in file shares to SharePoint?		
Permission Mapping Template:	Sample Permission V		
	Manage Templates		
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel		

6. Click **Next** to proceed.

Folder / File Settings

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

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

Dockit Task Wizard ×				
Specify action to be taken when a folder / file with the same name already exists in the destination location.				
Folder Settings: If a folder with the same name already exists in the destination location	:			
O not overwrite folders				
○ Overwrite folders				
Create new folder in the name - Prepend	<folder name=""> Append</folder>			
	* denotes incremental index			
File Settings:				
Po pot every rite				
O Overwrite	(The Names Annual			
	<rile name=""> Append * denotes incremental index</rile>			
Create new version	denotes indentarindex			
If the file is checked-out by either current user or other user				
Leave as is				
 Overwrite current version 				
Check-in and create new version				
<	Back Next > Finish Cancel			

- 2. Select any one of the following options given below:
 - a. Do not overwrite Skips the folder without overwriting.
 - b. **Overwrite folder** Deletes the folder from the destination location (along with its version history) and imports the source folder.
 - c. **Create as new folder** Creates a new folder by appending and prepending the user defined characters with the source folder name and imports the newly created folder. Note: * is the reserved character and denotes incremental index.

Dockit Task Wizard	×			
Specify action to be taken when a folder / file with the same name already exists in the destination location.				
Folder Settings:	_			
Create new folder in the name - Prepend <pre></pre>				
* denotes incremental index				
If a file with the same name already exists in the destination location:				
O not overwrite				
○ Overwrite				
Create new file in the name - Prepend <file name=""> Append</file>				
O Create new version * denotes incremental index				
If the file is checked-out by either current user or other user				
Leave as is				
Overwrite current version				
Check-in and create new version				
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel				

- 3. Select any one of the following options given below:
 - a. **Do not overwrite** Skips the file without overwriting.
 - b. **Overwrite file** Deletes the file from the destination location (along with its version history) and imports the source file.
 - c. **Create as 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.
- d. **Create new version** Add the source file as new version at the destination location. Select any one of the following options to instruct Dockit what to do if the destination file is checked-out by either current user or another user:
 - i. Leave as is Skip the file.
 - ii. **Overwrite current version** Undo Checkout the file and add the source file as new version.
 - iii. **Check-in file & create new version** Check-in the file and add the source file as a new version.

Dockit Task Wizard
Specify action to be taken when a folder / file with the same name already exists in the destination location.
Folder Settings: If a folder with the same name already exists in the destination location:
Do not overwrite folders
Create new folder in the name - Prepend <pre></pre>
File Settings:
If a file with the same name already exists in the destination location:
O Do not overwrite
O Overwrite
Create new file in the name - Prepend <pre>File Name > Append</pre> _V*
O Create new version * denotes incremental index
If the file is checked-out by either current user or other user
Leave as is
Overwrite current version
Check-in and create new version
< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>C</u> ancel

4. Click **Next** to proceed.

Post Migration Settings

1. In order to move the source folders and files to the specified location after completing the import process, select **Yes** in **Move folders & files after migration**.

Dockit Task Wizard - Explorer Test	×
Specify the settings to move files / folders added for import based on the migration results	<u>ت</u> م
Move folders & files after migration:	
Do you want to move folders & files after migration is complet 🔿 Yes 💿 No	
Move Options: Move source folders and files that contain no errors and warnings 💌	
Target location: C:\Users\Public\Documents\Dockit11x\Backup	
Create current timestamp folder under target location	
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> anc	el

- 2. Select a **Move option** from the list below:
 - a. **Move source folders and files that contain no errors and warnings** This option moves the source folders and files from the current location to the new location, if there no errors and warnings during migration.
 - b. **Move all source folders and files (ignore warnings)** This option moves the source folders and files from the current location to the new location, even if there are warnings reported during migration.
 - c. **Move all source folders and files (ignore errors and warnings)** This option moves all source folders and files from the current location to the new location, regardless of any errors and warnings during migration to SharePoint.

Dockit Task Wizard - Explorer Test
Specify the settings to move files / folders added for import based on the migration results
Move folders & files after migration:
Do you want to move folders & files after migration is complet Yes O No
Move Options: Move source folders and files that contain no errors and warnings 💌
Target location: C:\Users\Public\Documents\Dockit11x\Backup
Create current timestamp folder under target location
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

3. Specify a **Target Location** where the source folders and files are to be moved. You can also click browse (...) button to launch folder browser. You must ensure that the user who invokes the move operation has sufficient permissions to delete folders and files in the source location and to re-create them in the target location.

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** step appears as shown below:

Dockit Task Wizard						×
Step Number: T Enter a unique name	ask Schedule Se e for the import task a	e ttings nd specify schedule i	task settings.			
<u>T</u> ask Name:						
Category Name:	Blank			~		
Description:						
Task Option O Run later (a) Run now O Schedule						
			< <u>B</u> ack	<u>N</u> ext >	Einish	<u>C</u> ancel

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from one of the following options given below:
 - a. Run later to run the task later as and when desired
 - b. **Run now** to run the task immediately after clicking Finish button
 - c. **Schedule** To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.
- 4. Select one of the following options to connect to the target SharePoint site:

- a. This user <user name> This option is available if you choose Run later or Run now or Schedule task option. Dockit will use stored profile context to connect destination SharePoint.
- b. Prompt me for user context at task run time (Windows and Forms authentication only) This option is available if you choose Run later or Run now task option. Select this option if the target SharePoint site is configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint site when executing Dockit import task.
- c. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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 / 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.

Task Name:	Test task					
Category Name:	Blank			~		
Description:						
	Connect to S	SharePoint as:				
Task Option	Authenticatio	n: Windows		~]	
O Run later	User Name:	vsslab\andrew		~		
O Run now	Deserved]	
 Schedule 	Password:	•••••	•••••			
	Schedule S	ettings				
	Run <u>A</u> s:	vsslab\andrew			Set	Password
	Schedule:	Daily	Start time:	7:02 PM	<u>▲</u> <u>A</u> c	dvanced
	-Schedule Ta	ask Daily				
	Every	1 🔶 day(s	5)			

- d. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the target SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit import task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).
- 5. Click **Finish** button in the **Dockit Task Wizard** to create the task.

SharePoint Migration

Explorer mode

- SharePoint location
- <u>Items to migrate</u>
- Site / List elements to migrate
- <u>Mapping Templates</u>
- Task Settings

Batch file mode

- Batch File Options
- Site / List elements to migrate
- External Metadata File
- Mapping Templates
- Migration Conditions
- Task Settings

Explorer Mode (Create Task)

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 menu of Dockit Migrator screen.

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

		Dockit Migrator (Evaluat	ion Version)	_ = *
	My Jobs >> New Job			
5				
1	File share Migration	File share to SharePoint Migration Migrate folders and documents from file servers, network file shares, local computers and personal drives along with metadata to SharePoint on-premises.	Class up Metadata -	Clean up Metadata Assign / update metadata to the documents that already exists in SharePoint document libraries (on-premise).
	File share Migration \checkmark SharePoint Migration \checkmark SharePoint Migration \checkmark Explorer Mode Use Dockit explorer mo sites and lists Batch file Mode Use batch file mode to and lists	SharePoint to SharePoint Migration Migrate sites and lists from SharePoint server 2003 / 2007 / 2010 / 2013 and SharePoint 2016 to SharePoint on-premises.	Clean up Metadata 👻	
* ?				

- 2. Specify <u>SharePoint Location</u>
- 3. Add <u>Items to migrate</u>
- 4. Specify <u>Site / List elements to migrate</u>
- 5. Specify <u>Mapping Templates</u>
- 6. Specify <u>Task Settings</u>
- 7. Click **Finish** button to create a task, or click **Back** button to change any task settings.

Source 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 **SharePoint location** step appears as shown below:

	Dockit Task Wizard - [Explorer Mode]
Step 1 of 5: Specify Share	SharePoint location Point URL of source and target locations to migrate contents
Source Locatio	on:
Source Site URL:	
<u>A</u> uthentication:	Windows
User Name:	vsslab\farmadmin_sp10-1
	(johndoe@contoso.com, contoso\johndoe, johndoe)
Password:	••••••
Destination Lo	ocation:
<u>A</u> uthentication:	Windows V
User Name:	voyager\farmadmin_sp13-1 v
	(johndoe@contoso.com, contoso\johndoe, johndoe)
Password:	••••••
	< Back Next > Einish Cancel

2. Specify a valid SharePoint site URL (both source and target SharePoint) in the respective 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.

	Dockit Task Wizard - [Explorer Mode]	? ×
Step 1 of 5: Specify Share	SharePoint location Point URL of source and target locations to migrate contents	i
Source Locatio	on:	
Source Site URL:	https://stone.voyager.local/	
<u>A</u> uthentication:	Windows V	
User Name:	vsslab\farmadmin_sp10-1	
-	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	•••••	
Destination Lo	ocation:	
Target Site URL:	https://mod799074-my.sharepoint.com/	
<u>A</u> uthentication:	Federated Identity	
User Name:	voyager\farmadmin_sp13-1	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	• • • • • • • • • • • • • • • • • • • •	
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel

- 3. Specify the **Authentication type** and **user credentials** to connect to the SharePoint URL using the options given below :
 - a. Specify the Authentication Type Windows
 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. 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. <u>Click here</u> to view the details about Profile Manager dialog.

4. Click **Next** button to proceed.

Items to migrate

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

1. The **Items to migrate** step appears as shown below:

Dockit Task Wizard - [Ex	plorer Mode]	? ×
Step 2 of 5: Items to migrate Select sites, libraries and lists to migrate		•
Click here to select items to migrate		
	< Back Next > Einish	<u>C</u> ancel

2. **Click here** hyperlink to add and remove the folders and files for migration.

3. The **Select content to migrate** dialog appears as shown below:



4. Select content to migrate dialog contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select folder / file / list item to migrate. The source Folder textbox allows you to directly browse the specified folder location in the connected source 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 list items for the keyword specified in search textbox. Advanced Search Link will be enabled for site that has office search service. You will also see a textbox (middle) and a tree-view (bottom-left), which enables selection of destination location into which you wish to migrate them.



5. Browse the source folders, files and list items of source SharePoint list and select the required folders, files and list items from list view (top right pane). Select a destination location in the tree-view (bottom right pane) and click **MIGRATE** button to add selected items for migration.



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

Click OK. The selected items to migrate will appear in the 'Items to migrate' step as shown below:

Dockit Task Wizard - SharePoint Migration [For Help]	? 🗙
Step 2 of 5: Items to migrate Select sites, libraries and lists to migrate	
Click here to select items to migrate	
Sites	^
Source: https://stone.voyager.local/dms/alphabets/	Metadata File: None Filter: Off
Traversal 🏹 Settings 🝸 Filters	Metadata
Lists	
Source: https://stone.voyager.local/dms/Lists/Sample I list, 1 items Target: https://stone.voyager.local/Blank	Metadata File: None Filter: Off
Traversal 🏹 Settings 🝸 Filters	Metadata
Folders	
Source: https://stone.voyager.local/dms/dms/CustomDateField/Set	Metadata File: None Filter: Off
Traversal 🌣 Settings 🝸 Filters	Metadata 🗸
< <u>B</u> ack <u>N</u> ext >	<u>F</u> inish <u>C</u> ancel

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

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

Traversal Options dialog 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

To specify traversal options for folder, click Folder Traversal Options

8. 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 dialog will appear depending on the items added for migration.

To specify migration options for site, click Site Migration Options

To specify migration option for list, click List Migration Options

To specify migration option for list, click Library Migration Options

To specify migration options for folder, click Folder Migration Options

9. 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 dialog will appear and you can specify the filter conditions.

To specify filter condition, click Filter Condition

10. 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.

- 11. Click **OK** button to proceed or click **Cancel**.
- 12. Click **Next** to proceed.

Site / List elements to migrate

Specify Site / List elements to migrate settings in this wizard step 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** step appears as shown below:

Dockit Task Wizard - SharePoint Migration ?					
Select the required elements associated with sites and lists to include during migration			i		
Site Elements			,		
Master Pages (SP 2007 ar	nd above)	Content Types			
Home Page as in source s	ite (SP 2010 and above)	Root level web pages ()			
Themes (SP 2007 and abo	ove)	Top Links in site pages (SP 2010 and above)			
Associate Web Parts		Quick Launch Links (SP 2010 and above)			
User Alerts [1]		Workflows			
Site Permissions [2]		Workflow history			
Site Features	Indusion / Exclusion List				
List Bements			Select All		
Associate Web Parts		🗌 Root level web pages 🌒			
List Views	Indusion / Exclusion List	Maintain same Document ID as in source			
List Permissions [2]		Quick Launch links as in source (SP 2010 and abo	ove)		
Columns	Indusion / Exclusion List	Workflows			
Content Types		Workflow history			
Maintain same List Item IE) as in source		Select All		
Note : [1] Dockit Server A [2] For SharePoint	gent must be available in target Sharef 2007 migration, Dockit Server Agent m	Point server ust be available in source SharePoint server			
		< Back Next > Finish	<u>C</u> ancel		

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.

Site Elements
✓ Master Pages (SP 2007 and above)
✓ Home Page as in source site (SP 2010 and above)
✓ Themes (SP 2007 and above)
✓ Associate Web Parts
User Alerts [1]
Site Permissions [2]
✓ Site Features Inclusion / Exclusion List

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.				
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.				
Web Part:	To migarte 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. 				

Workflows:	To migarte 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. 					
User Alerts:	To migrate user alerts to the target SharePoint lists, libraries and their content.					
	Note: Dockit Server Agent is required in the <u>target</u> <u>SharePoint server</u> to migrate user alerts for on-premise.					
Site Permissions:	To migrate site permissions.					
	Note: Dockit Server Agent is required in the <u>source</u> <u>SharePoint server</u> 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 list level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.

List Elements					
✓ Associate Web Parts					
✓ List Views	Inclusion / Exclusion List				
✓ List Permissions [2]					
Columns	Inclusion / Exclusion List				
Content Types					
☑ Maintain same List Item ID as in source [1]					

List Views:	To migrate list views.
List Permissions:	To migrate list permissions.
	Note: Dockit Server Agent is required in the <u>source SharePoint server</u> 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 <u>target SharePoint server</u> to retain list item ID.
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).

Mapping Template

1. To specify mapping templates to use for the task:

The **Mapping Template** step will appear as shown in the screen below:

Dockit Task Wizard - SharePoint Migration [2]	? ×
Step 4 of 5: Mapping Templates Select the mapping templates to use for the task and specify the appropriate options.	1 0 •
Column Mapping:	
Do you want to map source and target SharePoint columns?	
Column Mapping Template : Dockit Default 🗸 Map columns using: Display name Internal n	iame
User Mapping:	
Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint server	
O Map users who are no longer in the source SharePoint server to this user account in target SharePoint	0
O Map users who are no longer in the source SharePoint server to different set of user accounts in target SharePoint server as p	er the mapping
User Map v	
Domain Mapping:	
Are the users/groups in the source and target locations in different AD domains? O Yes No	
Domain Mapping Template : None ~	
Site and List Mapping:	
Do you want to replace / map unavailable site and list template in source to new template in target? 🔿 Yes 💿 No	
Site and List Mapping Template : None 🗸 📈 * Dockit Server Agent is required in the source server	
Permission Mapping:	
Do you want to replace / map unavailable permission in source to different permission in target? 🔵 Yes 💿 No	
Permission Mapping Template : None \checkmark	
Manage	Templates
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

2. Column Mapping Template:

Do you want to map metadata properties between SharePoint columns? (Yes/No)

If you choose 'Yes', select any one column mapping template from the list of available template(s)

Default template:

Dockit Default - Values for the destination SharePoint columns configured in this template, will be assigned as per the setting defined in Dockit default mapping template.

In the Map columns using section, Specify whether to match columns in mapping template based on their Display name or Internal name. For more information, please visit Column Mapping Template.

3. User Mapping Template:

1. Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint server

This option helps you to assign the user who perform the migration instead of the user(s) who are no longer available in the organization.

2. Map users who are no longer in the source SharePoint server to this user in target SharePoint server

This option helps you to assign the specific user instead of the user(s) who are no longer available in the organization.

3. Map users who are no longer in the source SharePoint server to the different set of user accounts in target SharePoint server as per the mapping

If you choose this option, you have to select any one of the user mapping templates from the list of available template(s)

None represents the default user / group mapping template that helps to assign user / group as it is. This mapping is applicable for all person or group columns to replace unavailable users with the valid users. For more information, please visit <u>User / Group</u> <u>Mapping Template</u>.

4. Domain Mapping Template:

Are the users/groups in the source and target locations in different AD domains? (Yes/No) If you choose 'Yes', select any one of the domain mapping templates to use from the list of available template(s).

None represents the default domain mapping template that helps to assign domain as it is. This mapping is applicable for all person or group columns to replace unavailable domain name from the user value with the valid domain name and make the valid user value. For more information, please visit <u>Domain Mapping Template</u>.

5. Site and List Template Mapping:

Do you want to replace / map unavailable site and list template in source to valid template in target? (Yes/No)

If you choose 'Yes', select any one site and list template mapping from the list of available template(s).

None represents the default site and list template mapping that helps to assign the list template as it is. The site and list template mapping requires the Dockit Server Agent to be installed in the target server. For more information, please visit <u>Site and List Template</u> <u>Mapping</u>.

6. Permission Mapping Template:

Do you want to replace / map unavailable permission in source to valid permission in target? (Yes/No)

If you choose 'Yes', select any one of the permission mapping templates to use from the list of available template(s).

None represents the default permission mapping that helps to assign the permission as it is. For more information, please visit <u>Permission Mapping Template</u>.

7. **Reference Mapping Template:**

Do you want to retain unique value (no duplicates) for the column values? (Yes/No)

If you choose 'Yes', select any one of the Reference mapping templates to use from the list of available template(s).

None represents the default Reference mapping that helps to assign the reference as it is. For more information, please visit <u>Reference Mapping Template</u>.

8. Click **Manage Templates** button to customize the available template(s) or to create new template(s).

Dockit Task Wizard - SharePoint Migration [2]	? ×
Step 4 of 5: Mapping Templates Select the mapping templates to use for the task and specify the appropriate options.	ب وا
Column Mapping:	
Do you want to map source and target SharePoint columns? Yes No 	
Column Mapping Template : Dockit Default 🗸 Map columns using: Display name Intern	al name
User Mapping:	
O Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint server	
O Map users who are no longer in the source SharePoint server to this user account in target SharePoint	0
Map users who are no longer in the source SharePoint server to different set of user accounts in target SharePoint server	as per the mapping
User Map V	
Domain Mapping:	
Are the users/groups in the source and target locations in different AD domains? O Yes No	
Domain Mapping Template : None v	
Site and List Mapping:	
Do you want to replace / map unavailable site and list template in source to new template in target? 🔿 Yes 💿 No	
Site and List Mapping Template : None v * Dockit Server Agent is required in the source server	er
Permission Mapping:	
Do you want to replace / map unavailable permission in source to different permission in target? 🔘 Yes 💿 No	
Permission Mapping Template : None v	
Man	age Templates
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

9. Click **Next** to proceed.

Task Settings

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

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

Dockit Task Wizard - [Explorer Mode]				
Step 5 of 5: 1 Enter a unique r	ask Settings name for the migration task and specify schedule task settings.	•		
Task Name: Category Description: Task Option O Run later O Run now Schedule	Blank Onnect to source SharePoint server as This user: This user: vsslab\farmadmin_sp10-1 Manage Profile Prompt me for user context at task run time Connect to destination SharePoint server Using federated authentication (Web SSO). Check session status in Web SSO Dashboard Schedule Settings Run As: VSSLAB\adminuser1 Schedule: Daily Schedule Task Daily Every Image day(s) At 2:44 PM every day, starting 1/28/2017			
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel		

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from one of the following options:
 - a. Run later to run the task later as and when desired.
 - b. **Run now** to run the task immediately after clicking Finish button.
 - c. **Schedule-** to create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings. Dockit will perform the migration based on the *Run As* user account specified in this wizard step. The *Run As* account should be a valid Windows domain account.

- 4. Select one of the following options to connect to the source and destination SharePoint. The options provided to the user will change depending on the authentication mechanism used by the source and destination SharePoint servers.
 - a. User Profiles <user name> This option is available if you choose Run later or Run now or Schedule task option.
 - b. This user <user name> This option is available if you choose Run later or Run now or Schedule task option. Dockit will use stored profile context to connect corresponding SharePoint.
 - c. Prompt me for user context at task run time- This option is available if you choose Run later or Run now task option. Select this option if the SharePoint sites are configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint sites when executing Dockit migration task.
 - d. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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.
 - e. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the source or destination SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit migration task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).

5. The task settings for a **Schedule** task will appear as shown below:

	Dockit Task Wizard - [Explorer Mode] ? ×				
Step 5 of 5: T Enter a unique r	T ask Settings name for the migration task and specify schedule task settings.	ت ما ت			
Task Name: Category Description: Task Option	Testing Schedule Blank Connect to source SharePoint server as				
 Run later Run now Schedule 	This user: vsslab\farmadmin_sp10-1 Manage Profile Use 'Run As' user context given below Connect to destination SharePoint server Output for former of the former o				
	Schedule Settings Run As: VSSLAB\adminuser 1 Schedule: Daily Schedule: Daily Schedule Task Daily Every 1 Schedule				
	At 2:44 PM every day, starting 1/28/2017				
	< Back Next > Einish	<u>C</u> ancel			

6. Click **Finish** button to create the task.

Batch File Mode (Create Task)

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 menu of Dockit Migrator screen.

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

		Dockit Migrator (Evaluat	ion Version)	_ @ X
	My Jobs >> New Job			
•				
1	File share Migration 👻	File share to SharePoint Migration Migrate folders and documents from file servers, network file shares, local computers and personal drives along with metadata to SharePoint on-premises.	Clean up Metadata 🗸	Clean up Metadata Assign / update metadata to the documents that already exists in SharePoint document libraries (on-premise).
	SharePoint Migration -	SharePoint to SharePoint Migration Migrate sites and lists from SharePoint server 2003 / 2007 / 2010 / 2013 and SharePoint 2016 to SharePoint on-premises.		
	Explorer Mode Use Dockit explorer mo sites and lists Batch file Mode Use batch file mode to and lists	nde to migrate migrate sites		
* ?				

- 2. Specify <u>Batch Descriptor File</u>
- 3. Specify Site / List Elements to migrate
- 4. Specify External Reference File
- 5. Specify <u>Mapping Templates</u>
- 6. Specify <u>Migration Conditions</u>
- 7. Specify Task Settings
- 8. Click **Finish** button to create a task, or click **Back** button to change any task settings.

Batch Descriptor File

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** step appears as shown below:

Dockit Task Wizard - SharePoint Migration	? ×
Step 1 of 6: Batch descriptor file Specify batch descriptor file to use in order to migrate sites, lists, libraries and their contents with its associated metadata to another SharePoint location.	•
File Name:	Sample
Sheet Name: View View Clear	
Site Migration Option	
🔿 Create as sub-site / replace sub-site in target site 🛛 🍈	
🖲 Merge sites 🌐	
If list / library already exists in the target location:	
Overwrite list / library	
Retain list / library and merge content only	
◯ Do not overwrite list / library (leave as-is)	
Replace site in target location	
List Migration Option	
Replace list in target location	
Merge lists	
If list items / documents already exist in the target location:	
◯ Overwrite list item / document	
Add source list item / document as new version(s) to existing item / document	
◯ Do not overwrite list item / document (leave as is)	
Folders for lists / libraries	
Do you want to create the top-level folders in the destination? O Yes No	
< Back Next > Finish	Cancel

2. **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, <u>click here</u>.

3. 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.

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.

4.

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
- 5.

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).

6. 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).

7. 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.

	Dockit Task Wizard - SharePoint Migration ? 🗙						
Step 1 of Specify bat to another	Step 1 of 6: Batch descriptor file Specify batch descriptor file to use in order to migrate sites, lists, libraries and their contents with its associated metadata to another SharePoint location.						•
File Name:	C:\Sample.xlsx						Sample
Sheet Name:	Sheet1		~		<u>V</u> iew	C <u>l</u> ear	1 row(s)
Site Migratio	on Option e as sub-site / replace sub-site in target site e sites itibrary already exists in the target location: Overwrite list / library Retain list / library and merge content only Do not overwrite list / library (leave as-is) ce site in target location if	0					
O Repla	ce list in target location						
Merge	lists						
lf list	If list items / documents already exist in the target location:						
(Overwrite list item / document						
(Add source list item / document as new version(s) to existing item / document						
(Do not overwrite list item / document (leave as-is)						
Folders for I	ists / libraries						
Do you want	to create the top-level folders in the destination?	○ Yes	No				
			< B	ack	<u>N</u> ext >	Finish	<u>C</u> ancel

9. Click **Next** to Proceed.

Site / List elements to migrate

Specify Site / List elements to migrate settings in this wizard step 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** step appears as shown below:

Dockit Task Wizard - SharePoint Migration ? 🗙						
Step 2 of 6: Site / List elements to migrate Select the required elements associated with sites and lists to include during migration						
Site Elements			,			
Master Pages (SP 200	7 and above)	Content Types				
Home Page as in source	ce site (SP 2010 and above)	🗌 Root level web pages 🌒				
Themes (SP 2007 and	above)	Top Links in site pages (SP 2010 and above)				
Associate Web Parts		Quick Launch Links (SP 2010 and above)				
User Alerts [1]		Workflows				
Site Permissions [2]		Workflow history				
Site Features	Indusion / Exclusion List					
List Bements			Select All			
Associate Web Parts		🗌 Root level web pages 🌒				
List Views	Indusion / Exclusion List	Maintain same Document ID as in source				
List Permissions [2]		Quick Launch links as in source (SP 2010 and abov	re)			
Columns	Indusion / Exclusion List	Workflows				
Content Types		Workflow history				
Maintain same List Iter	m ID as in source ^[1]		Select All			
Note : [1] Dockit Server Agent must be available in target SharePoint server [2] For SharePoint 2007 migration, Dockit Server Agent must be available in source SharePoint server						
		< Back Next > Finish	<u>C</u> ancel			

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.

Site Elements		
✓ Master Pages (SP 2007 and above)		
✓ Home Page as in source site (SP 2010 and above)		
✓ Themes (SP 2007 and above)		
✓ Associate Web Parts		
User Alerts [1]		
Site Permissions [2]		
✓ Site Features	Inclusion / Exclusion List	

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.	
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.	
Web Part:	To migarte 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 <u>target</u> 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.
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.
User Alerts:	To migrate user alerts to the target SharePoint lists,
	Note: Dockit Server Agent is required in the <u>target</u> <u>SharePoint server</u> to migrate user alerts for on-premise.
Site Permissions:	To migrate site permissions.
	Note: Dockit Server Agent is required in the <u>source</u> <u>SharePoint server</u> 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 list level migration to a target SharePoint 2007 / 2010 / 2013 / 2016 server and Office 365 site.

List Elements		
✓ Associate Web Parts		
✓ List Views	Inclusion / Exclusion List	
✓ List Permissions [2]		
Columns	Inclusion / Exclusion List	
 Content Types 		
Maintain same List Item ID as in source [1]		

List Views:	To migrate list views.
List Permissions:	To migrate list permissions.
	Note: Dockit Server Agent is required in the <u>source SharePoint server</u> 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 <u>target SharePoint server</u> to retain list item ID.
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).
External Reference File

Dockit provides an additional facility to update metadata from an external reference file for metadata cleansing purposes. When a document / list item metadata is specified in the external reference file, Dockit uses the values in the external reference file instead of the document / list item metadata values as available in the source SharePoint list. To specify the external reference file to use to assign document properties in SharePoint:

1. The **External Reference File** step appears as shown below:

	Dockit Task Wizard - [Ba	atch Mode]			? ×
Step 3 of 6 Specify an ex	of 6: External Metadata File y an external metadata file to use to update list item metadata in the destination SharePoint list / library.			، دا دا	
File Name:					Sample
	Use batch file as external metadata file				
Sheet Name:		¥	<u>V</u> iew	<u>C</u> lear	
Date and Time f	format: <use default=""> << <no time=""> <</no></use>				
		< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	<u>C</u> ancel

 Click (...) button to specify the external reference file. The reference 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 external reference file, <u>click here</u>.

- 3. The external reference file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based external reference file, then select the sheet name to use from the drop-down.
- 4. Specify **Date and Time format** for the date fields and the **User value format** for the user related columns entered in the reference file. The selected formats will be used to parse the external reference file and assign them to the respective columns in SharePoint.

	Dockit Task Wizard - [Ba	atch Mode]			? ×
Step 3 of 6 Specify an e	: External Metadata File xternal metadata file to use to update list item metadata in the dest	ination SharePoi	nt list / library.		6 1 6 1
File Name:	D:\Sample Files\ItemsToMigrate.csv				Sample
	\checkmark Use batch file as external metadata file				
Sheet Name:		×	<u>V</u> iew	<u>C</u> lear	4 row(s)
Date and Time	format: Use default> No Time> 				
		< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	<u>C</u> ancel

5. Click **Next** to proceed.

Mapping Templates

- 1. To specify mapping templates to use for the task:
 - The **Mapping Template** step will appear as shown in the screen below:

Dockit Task Wizard - SharePoint Migration [2]
Step 4 of 5: Mapping Templates Select the mapping templates to use for the task and specify the appropriate options.
Column Mapping:
Do you want to map source and target SharePoint columns?
Column Mapping Template : Dockit Default 🗸 Map columns using: Display name Internal name
User Mapping:
Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint server
O Map users who are no longer in the source SharePoint server to this user account in target SharePoint
O Map users who are no longer in the source SharePoint server to different set of user accounts in target SharePoint server as per the mapping
User Map v
Domain Mapping:
Are the users/groups in the source and target locations in different AD domains? \bigcirc Yes \odot No
Domain Mapping Template : None v
Site and List Mapping:
Do you want to replace / map unavailable site and list template in source to new template in target? 🔘 Yes 💿 No
Site and List Mapping Template : None v * Dockit Server Agent is required in the source server
Permission Mapping:
Do you want to replace / map unavailable permission in source to different permission in target? O Yes No
Permission Mapping Template : None v
Manage Templates
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

2. Column Mapping Template:

Do you want to map metadata properties between SharePoint columns? (Yes/No) If you choose 'Yes', select any one column mapping template from the list of available template(s)

Default template:

Dockit Default - Values for the destination SharePoint columns configured in this template, will be assigned as per the setting defined in Dockit default mapping template.

In the **Map columns using** section, Specify whether to match columns in mapping template based on their **Display name** or **Internal name**

For more information, please visit <u>Column Mapping Template</u>.

3. User Mapping Template:

1. Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint server

This option helps you to assign the user who perform the migration instead of the user(s) who are no longer available in the organization.

2. Map users who are no longer in the source SharePoint server to this user in target SharePoint server

This option helps you to assign the specific user instead of the user(s) who are no longer available in the organization.

3. Map users who are no longer in the source SharePoint server to the different set of user accounts in target SharePoint server as per the mapping

If you choose this option, you have to select any one of the user mapping templates from the list of available template(s)

None represents the default user / group mapping template that helps to assign user / group as it is. This mapping is applicable for all person or group columns to replace unavailable users with the valid users. For more information, please visit <u>User / Group</u> <u>Mapping Template</u>.

4. Domain Mapping Template:

Are the users/groups in the source and target locations in different AD domains? (Yes/No) If you choose 'Yes', select any one of the domain mapping templates to use from the list of available template(s).

None represents the default domain mapping template that helps to assign domain as it is. This mapping is applicable for all person or group columns to replace unavailable domain name from the user value with the valid domain name and make the valid user value. For more information, please visit <u>Domain Mapping Template</u>.

5. Site and List Template Mapping:

Do you want to replace / map unavailable site and list template in source to valid template in target? (Yes/No)

If you choose 'Yes', select any one site and list template mapping from the list of available template(s).

None represents the default site and list template mapping that helps to assign the list template as it is. The site and list template mapping requires the Dockit Server Agent to be installed in the target server. For more information, please visit <u>Site and List Template</u> <u>Mapping</u>.

6. Permission Mapping Template:

Do you want to replace / map unavailable permission in source to valid permission in target? (Yes/No)

If you choose 'Yes', select any one of the permission mapping templates to use from the list of available template(s).

None represents the default permission mapping that helps to assign the permission as it is. For more information, please visit <u>Permission Mapping Template</u>.

7. Click **Manage Templates** button to customize the available template(s) or to create new template(s).

Dockit Task Wizard - SharePoint Migration [2]	? ×
Step 4 of 5: Mapping Templates Select the mapping templates to use for the task and specify the appropriate options.	i
Column Mapping:	
Do you want to map source and target SharePoint columns?	
Column Mapping Template : Dockit Default v Map columns using: Display name In	ternal name
User Mapping:	
O Map users who are no longer in the source SharePoint server to the user performing migration in target SharePoint ser	ver
O Map users who are no longer in the source SharePoint server to this user account in target SharePoint	0
Map users who are no longer in the source SharePoint server to different set of user accounts in target SharePoint ser	ver as per the mapping
User Map v	
Domain Mapping:	
Are the users/groups in the source and target locations in different AD domains? O Yes () No	
Domain Mapping Template : None 🗸	
Site and List Mapping:	
Do you want to replace / map unavailable site and list template in source to new template in target? 🔘 Yes 💿 No	
Site and List Mapping Template : None v * Dockit Server Agent is required in the source e	server
Permission Mapping:	
Do you want to replace / map unavailable permission in source to different permission in target? 🔘 Yes 💿 No	
Permission Mapping Template : None v	
	Manage Templates
	nanage remplates
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

8. Click **Next** to proceed.

Migration Filters

Dockit can migrate webs, lists, folders, files and list items from source SharePoint to destination SharePoint based on certain migration filters.

1. The **Migration filters** step appears as shown below:

	Dockit Task Wizard - [Batch Mode]	? ×
Step 5 of 6: Specify condit	Migration Filters ons for webs, lists, folders, items to migrate from SharePoint	•
BASIC	O ADVANCED	
<u>W</u> eb Level		~
List Level		
<u>F</u> older Level		
<u>I</u> tem Level		<
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel

- 2. Select any one of the following options given below:
 - a. **BASIC** -Basic migration filter will be used to filter webs, lists, folders and list items.
 - b. **ADVANCED** The available migration filters specified will be used to filter webs, lists, folders and list items.
- 3. You can specify migration conditions at four levels:
 - a. **Web Level -** Migrate the source webs that satisfy the given migration filter.
 - b. List Level Migrate the source lists that satisfy the given migration filter.
 - c. **Folder Level -** Migrate the folders that satisfy the given migration filter.
 - d. List Item Level Migrate the files / items that satisfy the given migration filter.
- 4. Option that has discussed below is **Folder Level Filter.**

5. Once you select **BASIC** and click 'Folder Level Filter...' button to specify the respective filter condition. The migration filter dialog will appear as shown below:

	Fo	Ider Migratio	n Filters (Basic)	×	
Specify condition to apply at	Specify condition to apply at the folder level. For example, you can export folders when ['Created By' = 'John Doe'].				
Property	Field Type	Operator	Value	Connector	
Folder Name	▪ Text ▪	= •	Conference Information	Or	
Folder Name	• Text •		Root Folder	- 4	
Clear				<u>O</u> K <u>C</u> ancel	

6. Once you specify the respective folder migration filter, the task wizard step appears as shown below:

	Dockit Task Wizard - [Batch Mode]	? ×
Step 5 of 6: Migr Specify conditions for	ration Filters r webs, lists, folders, items to migrate from SharePoint	1 •
● BASIC ○	ADVANCED	
<u>W</u> eb Level		
List Level		↓
<u>F</u> older Level	<where> <or> <eq> <fieldref name="Folder Name"></fieldref> <value type="Text">Conference Information</value> </eq> <eq></eq></or></where>	*
Item Level		∧
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel

7. Once you select **ADVANCED** and click 'Folder Level Filter...' button to specify the respective filter condition. The migration filter dialog will appear as shown below:

	Folder Migration	Filters (Advanced)				
Specify rule that example, you ca	Specify rule that must be satisfied before migrating item from source SharePoint. For example, you can migrate folder only when [Created By' = 'john doe'].					
<u>F</u> ield Name	Modified Date (SharePo	nt) 🗸 🖓				
<u>O</u> perator	= ~					
<u>V</u> alue	1/28/2017					
	' <u>A</u> ND' to Filter	'O <u>R</u> ' to Filter				
Conditions:						
[Folder Name] Or[Folder Nam	= 'Conference Informatione] = 'Root Folder'	n'				
Migrate List Ite	ms if above condition is	satisfied				
		<u>Q</u> K <u>C</u> ancel				

Click (...) button to add the SharePoint columns in Field Name dropdown.

The Add Fields Dialog appears as shown below:

		Add Fields Dialog	9	×
Name:				
Type:	Text			~
		Ad	ld	<u>R</u> emove
Column Nar	me	Column T	ype	
		<u>0</u>	к	<u>C</u> ancel

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the fieldname dropdown list. Click **Remove** button to remove the columns from the fieldname dropdown list. 8. Once you specify the respective folder migration filter, the task wizard step appears as shown below:

	Dockit Task Wizard - [Batch Mode]	? ×
Step 5 of 6: Migr Specify conditions for	r ation Filters r webs, lists, folders, items to migrate from SharePoint	•
O BASIC	ADVANCED	
<u>W</u> eb Level		
<u>L</u> ist Level		
<u>F</u> older Level	[Modified Date (SharePoint)] = #1/28/2017# AND [Folder Name (SharePoint)] = 'Details'	
Item Level		
	< <u>B</u> ack <u>N</u> ext > Einish	<u>C</u> ancel

9. Click **Next** to proceed.

Task Settings

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

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

	Dockit Task Wizard - [Explorer Mode]	? ×
Step 5 of 5: T Enter a unique n	ask Settings name for the migration task and specify schedule task settings.	i
<u>T</u> ask Name: <u>C</u> ategory Description:	 ☐ Blank ♥	
Task Option	Connect to source SharePoint server as	
O Run later	This user: vsslab\farmadmin_sp10-1 Manage Profile	
Run now	○ Prompt me for user context at task run time	
◯ Schedule	Connect to destination SharePoint server	
	O Using federated authentication (Web SSO). Check session status in <u>Web SSO Dashboard</u>	
	Schedule Settings	
	Run As: VSSLAB\adminuser1 Set Password	
	Schedule: Daily Start time: 2:44:08 PM Advanced	
	Schedule Task Daily	
	Every 1 algorithm day(s)	
	At 2:44 PM every day, starting 1/28/2017	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from one of the following options:
 - a. Run later to run the task later as and when desired.
 - b. **Run now** to run the task immediately after clicking Finish button.
 - c. **Schedule-** to create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings. Dockit will perform the migration based on the *Run As* user account specified in this wizard step. The *Run As* account should be a valid Windows domain account.

- 4. Select one of the following options to connect to the source and destination SharePoint. The options provided to the user will change depending on the authentication mechanism used by the source and destination SharePoint servers.
 - a. User Profiles <user name> This option is available if you choose Run later or Run now or Schedule task option.
 - b. This user <user name> This option is available if you choose Run later or Run now or Schedule task option. Dockit will use stored profile context to connect corresponding SharePoint.
 - c. Prompt me for user context at task run time- This option is available if you choose Run later or Run now task option. Select this option if the SharePoint sites are configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint sites when executing Dockit migration task.
 - d. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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.
 - e. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the source or destination SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit migration task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).

5. The task settings for a **Schedule** task will appear as shown below:

	Dockit Task Wizard - [Explorer Mode]	? ×
Step 5 of 5: T Enter a unique n	ask Settings name for the migration task and specify schedule task settings.	، دا دا
Task Name: Category Description: Task Option Run later Run now Schedule	Testing Schedule Blank Connect to source SharePoint server as This user: vsslab\farmadmin_sp10-1 Use 'Run As' user context given below Connect to destination SharePoint server Using federated authentication (Web SSO). Check session status in Web SSO Dashboard Schedule Settings Run As: VSSLAB\adminuser1 Schedule: Daily Start time: 2:44:08 PM Advanced Schedule Task Daily Every 1 At 2:44 PM every day, starting 1/28/2017	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

6. Click **Finish** button to create the task.

Clean Up Metadata

Document Libraries

Create Metadata File Step 1: Metadata Options Step 2: Column Mapping Step 3: Import Condition Step 4: Mapping Templates Step 5: Document Status Step 6: Task Schedule Settings

Other List Types (Explorer Mode)

Step 1: SharePoint list location Step 2: Items to update Step 3: Task Schedule Settings

Other List Types (Batch File Mode)

Batch file structure Step 1: Batch Import Settings Step 2: Column Mapping Step 3: Mapping Templates Step 4: Handling duplicate records Step 5: Import Conditions Step 6: Task Schedule Settings

Document Libraries (Create Task)

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 the Metadata Options
- 3. Specify the Column Mapping
- 4. Specify the Mapping Templates
- 5. Specify the Document Status
- 6. Specify the Import Conditions
- 7. Specify the Task Schedule Settings
- 8. Click **Finish** button to create the task, or click **Back** button to change the any task settings.

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.
- 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.
- 4. 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 example:

Destination Path	Document Author
http://sharepoint:9000[62WZ4WH5D27C-	John Doe
<u>1-1</u>	
http://sharepoint:9000162WZ4WH5D27C-	Peter
<u>1-2</u>	

5. 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	New Document.txt
File.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 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 ';

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	"100" "10000" "1500.67"

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.

	should not exceed the currency boundary.	
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	"Windows 7"
Leeluur	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) can be used to denote a user account. Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values.	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"

	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://sharepoint/Shared Documents/My Sample File.doc" "http://sharepoint/Pictures/ch art.bmp"
Target Audiences (Multiple value) (Applicable only for a MOSS /	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.	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers
Microsoft SharePoint Server 2010 and above	The values can be of single or multiple. Multiple values should be separated with ';'.	
library)	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 and above).	
Schedule Start Date (Applicable only for	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"

Collaboratio n Portal / Publishing Portal Site)		
Publishing Schedule End Date (Applicable only for Collaboratio n 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 Collaboratio n 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/ch art.bmp "Pictures/chart.bmp" <img src="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"/>
Publishing Hyperlink (Applicable only for Collaboratio n 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" " <a href="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"> NewsArticleImage.jpg "
Publishing HTML (Applicable only for Collaboratio n 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.	"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:100 OAX"

	Dockit also automatically fills-up the column values associated with the BDC / 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 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. 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	"Continent North America Country United States States Washington;Co ntinent North America Country United States States California;Continent North America Country United States States Alaska" "Washington;California; Alaska"

	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 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/Document s/Sample 1.doc; http://sharepoint/Documents /Sample 2.xlsx" "http://sharepoint/Lists/Custo m 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	";#Windows Live Spaces; Mesh;#"	Windows Live Spaces; Mesh
values using ';#'.		
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'.	";#Windows Live;;#Mail;#"	Windows Live;#Mail
 * - 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	
Choice held 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 ';#'. * - 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"

Metadata Options

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

1. The **Metadata Options** step appears as shown below:

Dockit Task Wiz	zard
Step Numl Specify meta	ber: Metadata Options adata file to update document properties in SharePoint.
Metadata Fi	le:
File Name:	Sample
	Use batch file as metadata file
Sheet Name:	→ <u>V</u> iew <u>O</u> lear
Date format:	<use default=""> Time format: <no time=""></no></use>
Metadata co	olumns in file:
	Select All
	0 Metadata columns selected
	< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>C</u> ancel

2. Note: 'Use batch file as metadata file' option only available in 'Batch File Mode'.

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).

For more information about how to create external metadata file, <u>click here</u>.

- 3. The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
- 4. **Click (Sample)** drop down button if you want to see a sample external metadata file (such as, Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in an external metadata file.
- 5. Specify **Date and Time format** for the date fields in the metadata file. If the columns selected to import contains date and time values, specify the date mask to parse the date values. The default value is the current system settings.
- 6. In **Metadata Columns in file,** you can select the required columns from metadata file to migrate to SharePoint.

Dockit Task Wiz	ard	×
Step Numb	er: Metadata Options	
Specify meta	data file to update document properties in SharePoint.	
Metadata Fi	e:	
File Name:	C:\Users\Public\Desktop\batch.XLSX	S <u>a</u> mple
Sheet Name:	sheet2	✓ … <u>V</u> iew <u>Q</u> lear
Date format:	<use default=""></use>	ime> ~
Metadata co	lumns in file:	
	 Approver Comments column 1 Title single Multi Column Choice CustomerNo Look up Taxonomy Multi Taxonomu Keywords Approval Status Content Type 	 ▲ ✓ Select All ✓ 18 Metadata columns selected
		< Back Next > Einish Cancel

7. Click **Next** to proceed.

Column Mapping

To perform column mapping

1. The **Column Mapping** step appears as shown below:

Dockit Task Wizard		×
Step 2 of 7: Column Mapping Map metadata properties to the desired S	harePoint columns.	
Column Mapping Template:	Blank ~	Save As
Source Column	Target Column	Default Value
Name ~	Name 🗸	
~	×	4
Assign Content Type Document Content Type: Folder Content Type:	Specify the co folder. You ca providing the 'Folder Conter configured in t	Intent type to be assigned for document / n create a folder as document set by document set content type name under nt Type'. If left blank, default content type the target SharePoint library will be set.
	< <u>B</u> ack	Next > Einish Cancel

- Column Mapping Template: Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('Blank' and 'Core File Properties') are readily available to ease the mapping configuration.
- 3. **Source Column:** You can specify source column values from **'File properties'**, **'Metadata File'**, <u>'Function Builder</u>' and also from **'Other File Properties'** by entering the property name.
- 4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.
- 5. **Default value:** You can specify the alternate value here that takes effect, in case the original source value could not be assigned to the target SharePoint column during migration.

6. **Save As**: This option enables you to save the configured column mapping as templates for reuse in other migration tasks.



7. **Reset**: This helps you reset the mapping configuration to default setting.

ockit Task Wizard					×
tep Number: Column Map metadata properties to	n Mapping the desired S	harePoint columns.			
Column Mapp	ing Template:	Blank	~	🛃 Save As	€ † <u>R</u> eset
Source Column		Target Colu	imn	Default Value	
Created	~	Created	~		— ^
Created By	~	Created By	~		
Modified	~	Modified	~		
Modified By	~	Modified By	~		
Approval Status	~	Approval Status	~		
	~		~		+ -
Assign Content Type Document Content Type: Folder Content Type:	Content Typ	e v nt Type v	Specify the con folder. You can providing the do 'Folder Content configured in th	tent type to be assigned create a folder as docum ocument set content type Type'. If left blank, defa le target SharePoint libra	for document / ment set by name under ult content type ry will be set.
			< <u>B</u> ack !	Next > Einish	<u>C</u> ancel

8. Click **Next** to proceed

Import Condition

Dockit can migrate or upload folders and files to SharePoint after they meet certain criteria. Dockit will import folders and files based on these filter conditions. Filters can be created using metadata columns and values (from external metadata file), file properties (include Office document 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.

Dockit Task Wizard					×
Step Number: Impor Specify import conditions to	t Conditions be satisfied for folders and files to	o be migrated to Sł	narePoint.		
BASIC O ADVANCED					,
F <u>o</u> lder Import Condition					~
Eile Import Condition					~
		< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	<u>C</u> ancel

1. The **Import Conditions** step appears as shown below:

- 2. Select any one of the following options given below:
 - a. **Do not apply any import conditions** No conditions will be used to filter folders or files.
 - b. **Apply the following import conditions** The import conditions specified will be used to filter folders / files that are uploaded to SharePoint.

3. Once you select **Apply the following import conditions** and click 'File Condition...' button or 'Folder Condition...' button to specify the respective filter condition.

The import condition dialog will appear as shown below:

File Import Condi	tion (Advanced)		×
Specify rule that m example, you can i	ust be satisfied before in import documents only v	nporting documents to Sl vhen ['File Extension' = 'd	narePoint. For Jocx'].
Field Name		~	
Operator	~		
<u>V</u> alue		~	
	' <u>A</u> ND' to Filter	' <u>O</u> R' to Filter	
Conditions:		() 😣	x X 0
Import if the abo	ove condition is:	sfied 🔘 not satisfied	
		<u>O</u> K	Cancel

4. You can specify the import conditions by selecting the Field Name and by specifying a corresponding value with the required operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

5. Once you specify the respective folder & file import conditions, the task wizard step appears as shown below:

Dockit Task Wizard Step Number: Specify import cor	: Import Conditions nditions to be satisfied for folders and files to be migrated to SharePoint.	×
BASIC	VANCED	
F <u>o</u> lder Import Condition	older Name (File Property)] = 'Conference Information' ND [Folder Name (File Property)] = 'Root Folder'	-
File Import Condition	Date Created (File Property)] = #10/7/2016# R [Date Modified (File Property)] = #10/7/2016#	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel]

6. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

1. The **Mapping Templates** step appears as shown below:

	Dockit Task W	/izard - 4Files
Step Number: Mapping Select the mapping templates	g Templates to use for the task and specify th	ne appropriate options.
Domain Mapping:		
Are the users/groups in the sou	rce and target locations in differer	nt AD domains? 🔿 Yes 💿 No
Domain Mapping Template:	None	* This mapping will be used for all person or group fields.
User Mapping:		
Do you want to map users who	are no longer in the organization t	to different set of users in target SharePoint? 🔘 Yes 💿 No
User / group Mapping Template:	None	* This mapping will be used for all person or group fields.
		Manage Templates
		< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

2. Domain Mapping Template:

Are the users/groups in the source and target locations in different AD domains? **(Yes/No)**

If you choose 'Yes', select any one of the domain mapping templates to use from the list of available template(s).

None represents the default domain mapping template that helps to assign the domain names as it is.

Note: This mapping works with permission mapping for SharePoint 2010 / SharePoint

2013 / SharePoint 2016 only. Also, this mapping is applicable for all person or group columns to replace unavailable domain name from the user value with the valid domain name and make the valid user value.

3. User / Group Mapping Template:

Do you want to map users who are no longer in the organization to different set of users in target SharePoint? **(Yes/No)**

If you choose 'Yes', select any one user / group mapping template to use from the list of available template(s).

None represents the default user / group mapping template that helps to assign user / group as It is. This mapping is applicable for all person or group columns to replace unavailable users with the valid users.

4. Click **Manage Template...** button to customize the available template(s) or create a new template.

	Dockit Task Wizard - 4Files	x
Step Number: Mapping Select the mapping templates	g Templates to use for the task and specify the appropriate options.	ت و
Domain Mapping:		
Are the users/groups in the sou	rce and target locations in different AD domains?	
Domain Mapping Template:	Sample	fields.
User Mapping:		
Do you want to map users who	are no longer in the organization to different set of users in target SharePoint? \odot Yes \bigcirc	No
User / group Mapping Template:	User Sample	fields.
	Manage Template	ès
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ance	4

5. Click Next to proceed.

Document Status

When assigning metadata to documents in SharePoint libraries, Dockit can update the metadata in the latest version of the document, with or without creating an additional version. Please note the versioning results may vary depending on whether **Dockit Server Agent** component is installed in the target SharePoint server. Please read the section below for more information.

1. The **Document Status** wizard step appears as shown below:

Dockit Task Wizard - assign metadata	×
Step Number: Document Status	
Specify document status to be set while updating metadata value	*
Update metadata values and create new version	
O Update metadata values in the last version, without creating a new version	
Note: When DocKIT Web Service is unavailable or not installed in the target server, Content Approval status must be set to Approved for perfect results. Refer Help document for more info.	
If the file is checked-out by either current user or other user	
Leave as is	
Overwrite current version	
O Check-in and create new version	
< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel	

2. Select any one of the following versioning options (read note below for more information):

Update metadata values and create new version - Updates the metadata values for the existing documents and create new version(s).

Update metadata values in the last version, without creating a new version - To update the metadata values for the existing documents in SharePoint without creating an additional

- 3. Select any one of the following options:
 - a. Leave as is Skip the file.
 - b. **Overwrite current version** Undo Checkout the file and add the source file as new version.
 - c. **Check-in file & create new version** Check-in the file and add the source file as a new version.
- 4. Click **Next** to proceed.

Note:

The document versioning results may vary depending on the following factors:

- a) *Dockit Server Agent* component is installed in the target SharePoint server (such as Office 365).
- b) *Content Approval* is enabled and the content approval status is set to Approved for the documents that are migrated to SharePoint.
- c) *Major and Minor* versioning is used in the target SharePoint library.
- d) Retention of Created Date, Created By, Modified Date & Modified by fields in SharePoint during migration.
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** step appears as shown below:

Dockit Task Wizard					×
Step Number: Task Sc Enter a unique name for the i	nedule Settings mport task and specify schedule	task settings.			
Task Name:					
Category Name:	ank		~		
Description:					
Task Option O Run later Run now O Schedule					
		< <u>B</u> ack	Next >	Einish	<u>C</u> ancel

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from <u>one</u> of the following options given below:
 - a. Run later to run the task later as and when desired
 - b. **Run now** to run the task immediately after clicking Finish button
 - c. **Schedule** To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.

- 4. Select one of the following options to connect to the target SharePoint site:
 - a. **This user <user name> -** This option is available if you choose **Run later** or **Run now** or **Schedule** task option. Dockit will use stored profile context to connect destination SharePoint.
 - b. Prompt me for user context at task run time (Windows and Forms authentication only) This option is available if you choose Run later or Run now task option. Select this option if the target SharePoint site is configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint site when executing Dockit import task.
 - c. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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 / 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.

Dockit Task Wizard Step Number: 1 Enter a unique name	ask Schedule S e for the import task a	Settings and specify schedule tas	k settings.		×
<u>T</u> ask Name: <u>C</u> ategory Name:	Test task			~	
Description:					
	Connect to Shar	rePoint as:			
Task Option	Authentication:	Windows		~	
O Run later	User Name:	vsslab \andrew		~	
Schedule	Password:	•••••	••		
	– Schedule Setti	ngs			
	Run As: vss	lab \andrew			Set Password
	Scheduler Dai		Start time:	7:02 PM	Advanced
	Schedule: Dal	ly ∼		7:02 PM	 <u>A</u>dvanced
	Every 1	day(s)			
	At 7:02 PM every	day, starting 1/31/2017	7		
		[< <u>B</u> ack	<u>N</u> ext >	Einish <u>C</u> ancel

- d. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the target SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit import task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).
- 5. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Other List Types (Explorer Mode)

To create a task to import list items in SharePoint list using Dockit Explorer Mode option:

1. Select **Other List Types (Explorer Mode)** from **Clean Up Metadata** option in **New Job** page as shown below. Ensure the action to perform is **Update list items** and click **OK** to proceed.



- 2. Specify the SharePoint list location
- 3. Select <u>Items to update</u>
- 4. Specify Task Schedule Settings
- 5. Click **Finish** button to create the task, or click **Back** button to change the task settings.

SharePoint List Location

To specify a SharePoint URL of a site / list location to work with, perform the steps given below:

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

Dockit Task Wizar	d ×
Step Number Specify a Share	SharePoint list location Point list URL to update metadata for list items.
SharePoint URL:	
Authentication:	Windows ~
User Name:	vsslab\aaron v (johndoe@contoso.com, contoso\johndoe, johndoe)
Password:	•••••
	< <u>B</u> ack <u>N</u> ext > <u>Finish</u> <u>C</u> ancel

2. Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site, list location in the URL textbox.

Dockit Task Wizar	d	×
Step Number Specify a Share	r: SharePoint list location Point list URL to update metadata for list items.	Z
SharePoint URL:	https://flame.voyager.local	
Authentication:	Windows	
User Name:	vsslab\andrew ~	
Password:	••••••	
	< <u>B</u> ack <u>Next</u> > Einish	<u>C</u> ancel

- 3. 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 Next button to proceed.
 - b. Use federated authentication (Web Single Sign-on) to connect to SharePoint Connect to SharePoint URL using federated identity configured using ADFS. Use this option to connect to Office 365 SharePoint Online configured using federated identity provider.

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

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

https://vyapin.sharepoint.com		×
	Office 365	~
	Sign in with your work or school account	
	someone@example.com	
	Password	
	□ Keep me signed in	
	Sign in Cancel	
	Can't access your account?	
	Your work or school account can be used	
	anywhere you see this symbol. © 2016 Microsoft Legal Privacy	~
<		> `

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

Items to update

To add / edit items to update or delete, perform the steps given below:

1. Click **Add / Edit...** button in the task wizard to add and/or remove folders and list items.

Dockit Task Wizard	×
Step Number: Items to update Select list items to update metadata.	
Items to update	
Destination Path (Absolute URL)	Title
Metadata Options Conditions	<u>A</u> dd / Edit
< <u>B</u> ack <u>N</u> ext >	<u>F</u> inish <u>C</u> ancel

2.	The	Select	items	dialog	appears	as	shown	below:
----	-----	--------	-------	--------	---------	----	-------	--------

Select iter	ms dialog			>
Select Sha	arePoint list items to update and click Ad	d button to add contents. Click Remove button	to remove selected items fro	rom the list. Press F5 to refresh respective view.
Source:	https://alpine.vsslab.local		Select <u>L</u> ist →	+ <u>R</u> efresh
Folder:				→
		Default		🍺 UP 🖹 Refresh 🏢 Select Views 👻 🖆
		Name		
Thomas barrow	- 4-1-			
Items to u	poate			Add items to undate X Remove /2 Remove All
Destinati	ion Path		~	Title
Desanda				noc
				<u>O</u> K <u>C</u> ancel

3. Click **Select list** drop down button to select the SharePoint list to work with.

Select ite	ms dialog						2
Select Sh	arePoint list items to update and click	Add button to add contents. Clic	k Remove button to remov	ve selected items	from the list. Press F5 to refre	esh respectiv	e view.
Source:	https://alpine.vsslab.local			Select List 👻	✤ Refresh		
Folder:			111	ann			-
			111	Announcem	nents		
		Derault		c		Selec	ct views 👻 🖻
		Name		cal			
				Calendar			
				cl			
				Clist			
				Content and	l Structure Reports		
			<u></u>	custL1			
			<u></u>	Custom List			
			<u></u>	CustomDT			
			<u>.</u>	customlist			
			111	custper			
				dd			
				DisBoard			
Items to	update		<u> </u>	DiscBoard			
			<u>111</u>	ghj		emove _d	Remove A
Destina	tion Path		111	Link list1			
			<u></u>	linklist1			
			111	Links			
			111	llist			
			111	My List			
			111	Projects			
			111	Ragnar			
			111	Requiremen	t Management System		
			<u></u>	Reusable Co	ontent		
			111	sample		ж	Cancel
				spfr tasks			
			<u>181</u>	SPFR-ListIss	ue		
			<u>181</u>	Tasks			
			<u>, 111</u>	Team Discus	ssion		
			<u>m</u>	Term test			
			<u></u>	test1Discuss			
			111	Workflow Ta	asks		

- 4. Select items dialog contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer view to select folder / item to update or delete. The Folder textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must specify the folder's relative path and Click 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.
- 5. Browse items in the explorer view and select required items from the list view (top right pane). You can add the selected items to either update or delete process. Select an

appropriate tab and click '**Add items**' button to add the selected items to the respective process. Please note that you cannot add the same list items to both update and delete process in the same task.

Select ite	ms dialog					×
Select Sha	arePoint list items to update and click Ad	dd button to add contents. Click Remo	ove button to remove selected items	from the list. Press F	5 to refresh respective	e view.
Source:	https://alpine.vsslab.local		🔟 Custom List 👻	↔ <u>R</u> efresh		
Folder:						→
🕀 🚺 Ci	ustom List	Default - (3) items		沙 UP	👌 Refresh 🎛 Selec	t Views 👻 🗹
		Name	ID	Created By	Created	Modified
		Demo	4	System Account	3/18/2016 5:35	3/18/2016 5:35
		Demo	3	System Account	3/18/2016 5:34	3/18/2016 5:34
		Research	2	System Account	3/18/2016 5:34	3/18/2016 5:34
		<				>
Items to u	update					
3 items				<mark>↓ A</mark> dd items to up	date 🗙 Remove 🍐	🖉 Remove All
Destinat	tion Path			Title		
https://a	lpine.vsslab.local/Lists/Custom List/Den	no		Demo		
https://a	lpine.vsslab.local/Lists/Custom List/3	000		Demo		
https://a	lpine.vsslab.local/Lists/Custom List/1	000		Projects		
					<u>о</u> к	<u>C</u> ancel

The items added for update will appear as shown below:

- 6. Click Refresh button to reload list names.
- 7. Click **OK** button to proceed or click **Cancel** to discard the changes.

8. **Items to update or delete** steps contains the folders and list items added for update or delete as shown below:

Dockit Task Wizard	×
Step Number:Items to update Select list items to update metadata.	
Items to update - (3) items	
Destination Path (Absolute URL)	Title
https://alpine.vsslab.local/Lists/Custom List/Demo	Demo
https://alpine.vsslab.local/Lists/Custom List/3000	Demo
https://alpine.vsslab.local/Lists/Custom List/1000	Projects
Metadata Ontions	Add / Edit
< <u>B</u> ack <u>N</u> ex	t > <u>Fi</u> nish <u>C</u> ancel

- 9. Click **Metadata Options...** button to specify the metadata values to update in the SharePoint list.
- 10.Click **Conditions...** button to define the conditions to use when updating list items in a SharePoint list.
- 11.Click **Next** to proceed.

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** step appears as shown below:

Dockit Task Wizard Step Number: 1 Enter a unique nam	ask Schedule Settings In for the import task and specify schedule task settings.	×
<u>T</u> ask Name: <u>C</u> ategory Name: Description:	□ Blank ✓	
Task Option O Run later (a) Run now O Schedule		
	< <u>B</u> ack <u>N</u> ext > ⊟nish	Cancel

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from <u>one</u> of the following options given below:
 - a. Run later to run the task later as and when desired
 - b. Run now to run the task immediately after clicking Finish button
 - c. **Schedule** To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.
- 4. Select one of the following options to connect to the target SharePoint site:
 - a. **This user <user name> -** This option is available if you choose **Run later** or **Run now** or **Schedule** task option. Dockit will use stored profile context to connect destination SharePoint.

- b. Prompt me for user context at task run time (Windows and Forms authentication only) This option is available if you choose Run later or Run now task option. Select this option if the target SharePoint site is configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint site when executing Dockit import task.
- c. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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 / 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

Dockit Task Wizard					×
Step Number: T Enter a unique name	ask Schedule S e for the import task a	Settings and specify schedule ta	sk settings.		
Task Name:	Test task				
Category Name:	Blank			~	
Description:					
	Connect to Shar	ePoint as:			
	Authentication:	Windows		~	
	User Name:	vsslab\andrew		~	
 Schedule 	Password:	•••••	••		
	-Schedule Setti	ngs			
	Run <u>A</u> s: vssl	ab\andrew			Set Password
	Schedule: Dail	у ~	/ <u>S</u> tart time:	7:02 PM	▲ <u>A</u> dvanced
	Schedule Task D	aily			
	Every 1	🚖 day(s)			
	At 7:02 PM every	day, starting 1/31/201	7		
			< <u>B</u> ack	<u>N</u> ext >	Einish <u>C</u> ancel

- d. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the target SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit import task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).
- 5. Click **Finish** button in the **Dockit Task Wizard** to create the task.

Other List Types (Batch File Mode)

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.

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



- 2. Specify the **Batch Import Settings**
- 3. Specify the Column Mapping
- 4. Specify the Mapping Templates
- 5. Specify the Handling duplicate records
- 6. Specify the Import Conditions
- 7. Specify the Task Schedule Settings
- 8. Click **Finish** button to create the task, or click **Back** button to change any task settings.

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 (,), semicolon (;) 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.
- 4. **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].

The following table explains the behavior of wild card characters:

Destination Path	Name	Description
http://sharepoint/engg	*	Traverse all items and sub-folders
documents/Folder1		presented in the Base URL and
		perform the specified action.
http://sharepoint/lists/technical		It will perform the specified action
lists/Folder2		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.

5. 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	1000
http://SharePoint/technical documents/Folder1	Folder2
http://SharePoint/technical documents/Folder2	*
http://SharePoint/technical documents/Folder3	

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.

6. 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:

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 1	Title	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 2	Title	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.

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	1000	C:\My documents\Sample Workbook.xls
http://sharepoint/technical list	2000	C:\My Documents\Sample Folder
http://sharepoint/technical list	3000	Sample Workbook.xls; Sample Text.txt;
http://sharepoint/technical list	4000	C:\My documents\Sample Workbook 1.xls; C:\My documents\Sample Workbook 2.xls

7. 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	New Folder
http://sharepoint/technical	folder2/folder3
documents/folder1	

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'.

- 8. 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.
- 9. For Microsoft Excel file formats (XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
- 10. Ensure date values are in 'Date Only' or 'Date And Time' format.
- 11. 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.
- 12. 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.
- 13. 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 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	"Stock Details; Accounts; Product Details"

	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.	
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/ch art.bmp"
Target Audiences (Multiple value)	Global Audience name, Security / Distribution Group name and SharePoint Group name can be given to this field. Global Audience and Security /	"All site users; Admins; Viewers; Administrators; SPUsers; Contributors; Designers

(Applicable only for a MOSS / Microsoft SharePoint Server 2010 and above library)	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 to be installed in the destination SharePoint server (MOSS / Microsoft SharePoint Server 2010 and above).	
Publishing Schedule Start Date (Applicable only for Collaboratio n 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 Collaboratio n 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 Collaboratio n 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/ch art.bmp "Pictures/chart.bmp" <img src="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"/>
Publishing Hyperlink (Applicable only for Collaboratio n 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" "<a href='/sites/collaboration portal/PublishingImages/New

		sArticleImage.jpg'> NewsArticleImage.jpg"
Publishing HTML (Applicable only for Collaboratio n 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.	"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:100 0AX"
	Column values associated with the BDC / 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	"Continent North America Country United States States Alaska" "Alaska"

	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	"Continent North America Country United States States Washington;Co ntinent North America Country United States States California;Continent North
	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 specifie file / folder	America Country United States States Alaska" "Washington;California; Alaska"
	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 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/Document s/Sample 1.doc; http://sharepoint/Documents /Sample 2.xlsx" "http://sharepoint/Lists/Custo m List/1000"

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	";#Windows Live	Windows Live Spaces; Mesh
part of its value, you can separate	Spaces; Mesh;#"	
the values using ';#'.		
In case single value contains ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'.	";#Windows Live;;#Mail;#"	Windows Live;#Mail
* - 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.		

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

"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"

Batch Import Settings

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

1. The **Batch Import Settings** step appears as shown below:

Dockit Task Wizard	×
Step Number: I Select a batch file	Batch Import Settings e to import list items in SharePoint list. Specify an unique reference to use to identify the list item.
Metadata File: -	
Batch File Name:	Sample
Excel Sheet Name:	✓ <u>V</u> iew <u>Q</u> lear
File Description:	Reference column name: v to retain unique values (no duplicates)
	Attachment column name: 🗸 🗸
	Date and Time format: <use default=""> <no time=""></no></use>
Metadata columi	Select All
	o metadata columns selected
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

- 2. Click (...) button to specify the <u>Batch File</u>. The Batch File can be created in any one of the following file formats Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT). The batch file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based batch file, then select the sheet name to use from the drop-down. Click (Sample) drop-down button if you want to see a sample batch file (Comma delimited (CSV) file, Excel (XLSX) file) to know how the columns should be arranged in the batch file. Refer <u>Batch File Structure</u> for more information about how to create a batch file.
- 3. Reference Column: You can specify which column to refer in a SharePoint list as a unique reference. This unique reference column will be used to identify the list item / folder in a SharePoint list. Please note that the reference column value <u>must</u> be unique. Dockit will search the specified reference column value in SharePoint list or folder. Then Dockit will

retrieve an Absolute URL of the matched item or matched folder from the SharePoint list automatically and then proceed to perform the specified action.

- 4. **Attachments:** Use this option to select the column from the batch file that contains file attachments. The attachment column states the files to be attached to the list items or file attachments to be deleted from the list item.
- 5. 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.

Dockit Task Wizard				×	
Select a batch file to import list items in SharePoint list. Specify an unique reference to use to identify the list item.					
Metadata File: —					
Batch File Name:	C:\Dockit .xlsx			S <u>a</u> mple	
Excel Sheet Name:	Sheet2		✓ <u>V</u> iew	<u>C</u> lear	
File Description:	Reference column name:	<none></none>	✓ to retain unique values (no	duplicates)	
	Attachment column name:	<none></none>	~		
	Date and Time format:	<use default=""> < <no time=""></no></use>	• ~		
Metadata column	s:				
	 Single Gender Build Number Product ID Created By Modified By Department 				
			 Select All 7 Metadata columns se 	lected	
		< <u>B</u> ack	<u>N</u> ext > <u>F</u> inish	<u>C</u> ancel	

6. Click **Next** to proceed.

Column Mapping

To perform column mapping

1. The **Column Mapping** step appears as shown below:

Dockit Task Wizard		×		
Step 2 of 7: Column Mapping Map metadata properties to the desired SharePoint columns.				
Column Mapping Template:	Blank ~	Save As		
Source Column	Target Column	Default Value		
Name ~	Name ~			
~	~	4		
Assign Content Type Document Content Type:	Specify the co √ folder. You ca	ntent type to be assigned for document / n create a folder as document set by		
Folder Content Type:	providing the 'Folder Conter Configured in	document set content type name under nt Type'. If left blank, default content type the target SharePoint library will be set.		

- Column Mapping Template: Select any one of the column mapping templates to use from the list of available template(s). A couple of default templates ('Blank' and 'Core File Properties') are readily available to ease the mapping configuration.
- 3. Source Column: You can specify source column values from 'File properties', 'Metadata File', 'Function Builder' and also from 'Other File Properties' by entering the property name.
- 4. **Target Column:** You can specify the target SharePoint Column which needs to map and assign values.

- 5. **Default value:** You can specify the alternate value here that takes effect, in case the original source value could not be assigned to the target SharePoint column during migration.
- 6. **Save As**: This option enables you to save the configured column mapping as templates for reuse in other migration tasks.

SaveAs	×
Create a template by entering unique name for the template Template by choosing exists te	a new template name. Enter a or else Overwrite a existing emplates
Template Name :	~
	<u>S</u> ave <u>C</u> ancel

7. **Reset**: This helps you reset the mapping configuration to default setting.

Column Mapping Template: Blank Save As Reset. Source Column Target Column Default Value Created Created Image: Created By Image: Created By Created By Created By Image: Created By Image: Created By Modified Modified Image: Created By Image: Created By Modified By Image: Created By Image: Created By Image: Created By Approval Status Image: Created By Image: Created By Image: Created By Approval Status Image: Created By Image: Created By Image: Created By Assign Content Type Image: Content Type Specify the content type to be assigned for document promotion to many moder Document Content Type: Content Type Image: Content Type	tep Number: Columi Map metadata properties to	• Mapping • the desired S	harePoint columns.			
Source Column Target Column Default Value Created Created By Created By Created By Modified Modified Modified By Modified By Approval Status V Assign Content Type Specify the content type to be assigned for document folder. You can create a folder as document set by	Column Mapp	ing Template:	Blank	~	Save As	4→ <u>R</u> eset
Created Created By Created By Image: Created By	Source Column		Target Co	lumn	Default Value	
Created By Created By Image: Created B	Created	~	Created	~		– ^
Modified \vee Modified \vee Modified \vee I \vee I Modified By \vee Modified By \vee I \vee I \vee I Approval Status \vee Approval Status \vee I \vee I \vee I Approval Status \vee I \vee I \vee I \vee I Assign Content Type \vee I \vee I \vee I \vee I Document Content Type: Content Type \vee I Specify the content type to be assigned for document folder. You can create a folder as document set by providing the does ment ext content type to be assigned to upder and the provement of the providing the does ment ext content type to be assigned to upder the providing the does ment ext content type to be assigned for document of the providing the does ment ext content type to be assigned for document of the providing the does ment ext content type to be assigned for document of the providing the does ment ext content type to be assigned for document of the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext content type to be assigned for document as the providing the does ment ext con	Created By	~	Created By	~		_
Modified By Modified By Image: Content Type Approval Status Approval Status Image: Content Type Assign Content Type: Content Type Specify the content type to be assigned for document folder. You can create a folder as document set by providing the document type to be assigned to the provide the document type to be assigned to the provide type to be a	Modified	~	Modified	~		_
Approval Status Approval Status V V Assign Content Type Specify the content type to be assigned for document folder. You can create a folder as document set by providing the document to the compare under the providing the document to the compare under the compare	Modified By	~	Modified By	~		-
Assign Content Type Document Content Type: Content Type C	Approval Status	~	Approval Status	~		_
Assign Content Type Document Content Type: Content Type C		~		~		+ -
Folder Content Type: Folder Content Type V F						

8. Click **Next** to proceed.

Mapping Templates

To specify the mapping templates to use for the task:

1. The **Mapping Templates** step appears as shown below:

Dockit Task Wizard - 4Files				
Select the mapping templates to use for the task and specify the appropriate options.				
Domain Mapping:				
Are the users/groups in the sou	rce and target locations in different AD domains? \bigcirc Yes \odot No			
Domain Mapping Template:	None v *This mapping will be used for all person or group fields.			
User Mapping:				
Do you want to map users who	are no longer in the organization to different set of users in target SharePoint? \bigcirc Yes \odot No			
User / group Mapping Template:	None v * This mapping will be used for all person or group fields.			
	Manage Templates			
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel			

2. Domain Mapping Template:

If you choose 'Yes', select any one domain mapping templates to use from the list of available template(s)

None represents the default domain mapping template that helps to assign user / group as it is. This mapping is applicable for all the person or group columns to replace unavailable domain name in the user value with the valid domain name and make the user value value.

3. User / Group Mapping Template:

If you choose 'Yes', select any one user / group mapping template to use from the list of available template(s)

None represents the default user / group mapping template that helps to assign user / group as it is. This mapping is applicable for all the person or group columns to replace unavailable users with the valid users.

4. Click **Manage Template...** button to customize the available template(s) or create a new template.

	Dockit Task Wizard - 4Files
Step Number: Mapping Select the mapping templates	to use for the task and specify the appropriate options.
Domain Mapping:	
Are the users/groups in the sour	ce and target locations in different AD domains?
Domain Mapping Template:	Sample
User Mapping:	
Do you want to map users who	are no longer in the organization to different set of users in target SharePoint? Yes No
User / group Mapping Template:	User Sample * This mapping will be used for all person or group fields
	Manage Templates
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish <u>C</u> ancel

Click **Next** to proceed.

Handling duplicate records

To specify the action to be taken by Dockit when an item with the same name already exists in the destination location:

Note: If you opt to overwrite the last version of a list item during the update operation, Dockit requires **Dockit Server Agent** component to be installed in the Windows Server 2003 (or) Windows Server 2008 (or) Windows Server 2012 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) or Microsoft SharePoint Server 2010 or Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2013 or Microsoft SharePoint Server 2016 or Microsoft SharePoint Foundation 2013 to activate this feature.

1. The **Handling duplicate records** step appears as shown below:

Dockit Task Wizard		×
Step Number:Handir Specify versioning to be	Ig duplicate records set while updating list item metadata	
Reference Column:	None 🍈	
SharePoint Lists Versio	on Option Settings	
Version Option:	 Import as new list item 	
	○ Import as new version	
	 Import list item by overwriting existing item 	
	\bigcirc Import list item by overwriting last version of the item	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

2. The **Reference Column** indicates the metadata column that you have chosen in <u>'Batch</u> <u>Import Settings</u>' step.

- 3. Select any one of the following Version Option:
 - a. **Import as new list item** to create the new list items in SharePoint regardless of the existence check. This option does not require a Reference Column to be set.
 - b. **Import as new version** To update the existing list items in SharePoint. This option requires a Reference Column to be set.
 - c. **Import list item by overwriting existing item** To delete the existing list items in SharePoint and create it as new. This option requires a Reference Column to be defined.
 - d. **Import list item by overwriting last version of the item -** To update the existing list items in SharePoint, but not to create any additional version. This option requires a Reference Column to be set.
- 4. If the list item is in checked-out state when Dockit runs, you can specify one of the following options given below:
 - a. Leave as is Skip the list item.
 - b. Overwrite current version Undo Checkout the list item and add the updated list item as new version.
 - c. Check-in item & create new version Check-in the list item and add the updated list item as a new version.
- 5. Select Check-In comments from one of the options below:
 - a. Check-in comments not required No comments will be updated.
 - b. **Use specific check-in comments** Specify **Check-in Comments** to be updated during list item update in SharePoint. You can also specify the generic comment string using the following identifiers in **Check-in comments** textbox:
 - i. <user name> Replaces this identifier with the current user who performs Dockit update. For example, List item was updated by <user name>.
 - ii. **<task name>** Replaces this identifier with the current Dockit import task name. For example, List item was updated using **<task name>** in Dockit.
 - c. **Assign from batch file** You can also assign the check-in comments by selecting a field from the batch file.

Dockit Task Wizard		×
Step Number: Handir Specify versioning to be	ng duplicate records set while updating list item metadata	
Reference Column:	None 🍈	
SharePoint Lists Versio	on Option Settings	
Version Option:	 Import as new list item Import as new version Import list item by overwriting existing item Import list item by overwriting last version of the item 	
	< <u>B</u> ack <u>N</u> ext > <u>F</u> inish	<u>C</u> ancel

6. Warning: Updating last version of the list item with Created Date, Modified Date, Created By and Modified By fields

As you wish to update the Created Date, Modified Date, Created By and Modified By fields for an existing version of a SharePoint list item, **Import list item by overwriting last version of the item** option will not work as expected in SharePoint 2010 / SharePoint 2013 / SharePoint 2016 lists, unless Content Approval is enabled in the destination SharePoint list.

Enabling this option will update the Created Date, Modified Date, Created By and Modified By and retain the last version number of the existing list item in the following conditions:

- All SharePoint 2007 list types with Content Approval enabled or disabled
- SharePoint 2010 / SharePoint 2013 / SharePoint 2016 lists that have Content Approval enabled in Versioning Settings

In SharePoint 2010 / SharePoint 2013 / SharePoint 2016 lists that have Content Approval disabled, SharePoint will create a new version when the Created Date, Modified Date, Created By and Modified By fields are updated in an existing SharePoint list item. Therefore, the list item version numbers may not be retained as expected when using this import option.

7. Click **Next** to proceed.
Import Conditions

Dockit can update folder and list item metadata / properties in SharePoint based on certain conditions. The conditions can be created using SharePoint columns or metadata columns and values from the batch file.

1. The **Import Conditions** step appears as shown below:

		ne following cond	ditions		
ld Name	<u>O</u> p	erator	<u>V</u> alue		
Add to Filter		Add Fields	~	'OR' to Filter	
					XZ

- 2. Select any one of the following options given below:
 - a. **Do not apply any conditions** No conditions will be used to filter folders / items.
 - b. **Apply the following conditions** The conditions specified will be used to filter folders / list items taken for update or delete in SharePoint

3. The wizard step appears as shown below:

Dockit Task Wizard		×
Step Number: Import Condition Specify conditions to be satisfied for fold	ns ders / items to perform the	specified action in SharePoint.
O Do not apply any conditions	Apply the following condition	ons
<u>F</u> ield Name	Operator	Value
Product ID	~ = ~	1
' <u>A</u> ND' to Filter	Add Fields	' <u>O</u> R' to Filter
Conditions:		() & 🔭 🗙 🖉
AND [Product ID (Metadata File)] = '1'		
Perform action against folder / list items if	f the above conditions are:	● satisfied ○ not satisfied
		< Back Next > Einish Cancel

You can specify the conditions by selecting the field name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

4. Click **Add Fields** button to add the SharePoint Columns in Field Name drop-down box. Using this dialog, you can also filter the list items using existing columns in SharePoint list. The **Add Fields Dialog** appears as shown below:

Add Fields Dia	alog		×
Name:			
Type:	Text		~
		<u>A</u> dd	<u>R</u> emove
Column Name		Column Type	
		<u>о</u> к	<u>C</u> ancel

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down field.

Click **Add** button to add the columns to the Field Name drop-down.

Click **Remove** button to remove the columns from the Field Name drop-down.

- 5. Dockit can update the folders / list items that **satisfy** the conditions or update the folders / list items that **do not satisfy** the conditions specified in the step above. Use the appropriate action to follow using the options given below:
 - a. Perform action against folder / list items if the above conditions are satisfied - Folders / List items that satisfy the condition will be marked for metadata update.
 - b. Perform action against folder / file if the above conditions are not satisfied
 Folders / List items that do not satisfy the condition will be marked for metadata update.

Dockit Task Wizard			×
Step Number: Import Conditions Specify conditions to be satisfied for folders	items to perform the s	pecified action in SharePoint.	
O Do not apply any conditions Appl	y the following conditio	ns	
<u>F</u> ield Name	Operator	Value	
Product ID \sim	= ~	1	
' <u>A</u> ND' to Filter	Add Fields	' <u>O</u> R' to Filter	
Conditions:		() 候	x X 🧷
[Build Number (Metadata File)] <> '1024' AND [Product ID (Metadata File)] = '1' Perform action against folder / list items if the a	above conditions are:	 ○ satisfied ● not satisfied 	
		< Back Next > Finish	<u>C</u> ancel

6. Click **Next** to proceed.

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** step appears as shown below:

Dockit Task Wizard					×
Step Number: Ta Enter a unique name	ask Schedule Settings e for the import task and specify schedule	task settings.		¢	1
Task Name:]		
Category Name:	🔲 Blank	~			
Description:					
Task Option Run later Run now Schedule					
		< <u>B</u> ack N	ext >	Einish C ar	ncel

- 2. Enter a unique task name in **Task Name** textbox.
- 3. Select a **Task Option** from <u>one</u> of the following options given below:
 - a. Run later to run the task later as and when desired
 - b. **Run now** to run the task immediately after clicking Finish button
 - c. **Schedule** To create a Windows scheduled task. Dockit will create a schedule task in the Windows Scheduled Tasks with the given settings.

- 4. Select one of the following options to connect to the target SharePoint site:
 - a. **This user <user name> -** This option is available if you choose **Run later** or **Run now** or **Schedule** task option. Dockit will use stored profile context to connect destination SharePoint.
 - b. Prompt me for user context at task run time (Windows and Forms authentication only) This option is available if you choose Run later or Run now task option. Select this option if the target SharePoint site is configured to use Windows and/or Forms Authentication only. Dockit will prompt for the user context to use to connect to SharePoint site when executing Dockit import task.
 - c. Use 'Run As' user context given below This option will be available if you choose Schedule task option. 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 / 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.

Dockit Task Wizard					×
Step Number: T Enter a unique name	ask Schedule S	Settings and specify schedule task	settings.		
<u>T</u> ask Name: <u>C</u> ategory Name:	Test task Blank			~	
Task Option ORun later Run now Schedule	Connect to Shar Authentication: User Name: Password:	ePoint as: Windows vsslab\andrew	•	~ ~	
	Schedule Settin Run <u>A</u> s: vssl Schedule: Dail Schedule Task D Every 1 At 7:02 PM every	ngs ab \andrew y ~ Daily aly day(s) day, starting 1/31/2017	<u>S</u> tart time:	7:02 PM	<u>S</u> et Password ♠ Advanced
			< <u>B</u> ack	<u>N</u> ext >	Einish <u>C</u> ancel

- d. Use federated authentication (Web SSO) for the SharePoint site This option is available if you choose Run later or Run now or Schedule task option. Select this option if the target SharePoint site uses federated identity (Web SSO or Active Directory users configured via ADFS). Dockit will prompt for the user context to use to connect to SharePoint when executing Dockit import task. To connect to Office 365's SharePoint Online environment, you can use Web Single Sign-on option (Web SSO) 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.com).
- 5. Click **Finish** button in the **Dockit Task Wizard** to create the task.

- <u>SharePoint Online (Office 365) Migration</u>
 <u>SharePoint to Office 365 Migration</u>
 <u>OneDrive Migration</u>

SharePoint Online (Office 365) Migration

File Share to Office 365

- <u>Batch File structure</u>
- <u>Items to Migrate</u>
- <u>Migration Settings</u>
 - File Settings
 - <u>Renaming Rules</u>
 - Metadata File Structure
 - <u>Column Mapping</u>
 - Domain Mappings
 - User Mapping
 - Permission Mappings
 - Filter Conditions
 - Performance Tuner
 - Job Scheduler
- Pre-Migration Validation

File Share to One Drive

- OneDrive Users
- Batch File structure
- <u>Items to Migrate</u>
- Migration Settings
 - File Settings
 - <u>Renaming Rules</u>
 - Domain Mappings
 - User Mapping
 - Permission Mappings
 - Filter Conditions
 - <u>Performance Tuner</u>
 - Job Scheduler
- Pre-Migration Validation

File Share to Office 365

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 **Share Point** Online migration page.

					Doc	kit Migrator (Evaluat	tion Version)				- 🗗 X
	My J	obs <u>J</u>	ob History	New Job							
•	+ Ne	w Ø Edit	🍂 Run	Δ Incremental	X Delete	Validate	🚺 View J	ob Instance			
n	Shar	ePoint Online	Jobs (2)			Group by	name	~	Search	Ø,	X III 🕄
		Job	Name	Descr	iption	Created [Date	Modified Date	Last Run At		
		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	I	1/19/2018 6:43:12 PM	1/19/2018 6:43:12 PM		
×											
?	2 items										

2. The New Job page appears as shown below

Docki	Migrator (Evaluation Version)	-
My Jobs Job History list Migration		
New Job > File share to Office 365 > list Migration		
list Migration		
lob Description	Target URL	
		· (*)
	Authentication	
	Cloud Identity	~
	User name	
		v
	Password	

- 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**.

					Docki	it Migrator (Evaluation Version)			-	∎ x
	My Jobs	Job History	recent new								
6		0								0	
U	Sele	ct Files				Migration	Settings			Finish	
	🍥 🛞 🕇 🎩 🛩 C:	 Users Viswanathan 	 Desktop 		v		(e) (i) ↑ (S) ∨ Test →				
U.	Name	Date Modified	Туре	Size	^		Name	Description	Items		
	💻 Network						FirstValidation		2 web(s), 21 list(s), 43		
	🌲 This PC						🖻 anbu		2 items		
	🕌 Favorites	1/13/2017 9:51 AM					🖻 Anbuv		2 items		
	🥦 Viswanathan	/15/2017 9:37 AM					R Ankurresolved		1 items		
	30.5	:/27/2017 7:59 PM					🖻 Bulk		0 items		
	尾 25-128.png	2/27/2017 7:17 PM	.png	3.000 KR	id to ShaveDoint		🖻 crash		0 items		
	尾 7z-128.png	2/1/2017 3:15 PM	.png	879 Bytes	du to shareFoint		🔂 D365		2 items		
	尾 arrow_sans_rig	2/13/2017 4:34 PM	.png	322 Bytes			🖻 DemoLib		12 items		
	尾 Capture.PNG	2/29/2017 6:43 PM	.PNG	2.000 KB			documents		3 items		
	尾 CreateNewMig	1/4/2018 2:30 PM	.png	46.000 KB			🖻 don		2 items		
	🕌 CSV	2/15/2017 6:48 PM					🖻 Meyer		3 items		
	🎉 DMS_v10.5 Sar	/15/2017 4:38 PM					🗟 Meyer Lib		3 items		
	ያ Dockit.chm	/4/2018 11:45 AM	.chm	13.780 MB			🖻 MeyerTest		3 items		
	🛃 Dockit.msi	1/3/2018 6:59 PM	.msi	31.791 MB			new 🖻		2 items		
×	💽 Edit_black-128	2/16/2017 5:15 PM	.png	2.000 KB	~		🖻 newlast		2 items		~
2	Explorer Batcl	h File Items to Mig	rate								
	30 items 3 items sele	cted Size: 4.000 KB									20 items

7. **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**.

		Dockit Migrator (Evaluation Version)	_ = * ×
	My Jobs Job History recent new		
~	0	0	— O
B	Select Files	Migration Settings	Finish
	(●) ↑ → C: → Users → Viswanathan → Desktop → CSV	✓ () ↑ 5 ✓ Test →	
	Name Date Modified Type Size	Name Description Items	^
	EsvFileWriter 12/2017 12:13 PM cs 7.0	100 KB SirstValidation 2 web(s), 21 list(s), 4	3
	☐ CsvMetadataE: 12/2017 11:40 AM cs 2.0	NOD KB Cite anbu 2 ite	ms
	hyhj 1/15/2017 6:48 PM TXT 4.0	NOO KB C Anbuv 2 ite	ms
	SPLibrary 2/15/2017 6:45 DM XLSX 2.0	NOD KB	ms
	SPLibraryn Add to Metadata XLSX 4.0	NOD KB Bulk 0 ite	ms
	i SPLibraryq 1/5/2017 6:46 PM XLSX 2.0	100 KB 🖻 crash 0 ite	ms
		🔂 D365 2 ite	ms
		DemoLib 12 ite	ms
		Documents 3 ite	ms
		nd don 2 ite	ms
		🔂 Meyer 3 ite	ms
		🔂 Meyer Lib 3 ite	ms
		🔂 MeyerTest 3 ite	ms
		new 2 ite	ms
×		newlast 2 ite	ms
	Explorer Batch File Items to Migrate		
?	6 items 1 item selected Size: 2.000 KB		20 items

- 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 <u>Migration Settings</u>
- 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.

Start

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.

		Dockit Migrator (Evaluation Version)	-	∎ X
	My Jobs Job History	FS Explor		
()	Select Files	O Migration Settings	O Finish	
1	Batch FS O365.xlsx Sheet1 ~ 3 items		x	
	Dath	Dectination Dath		
	D:\rd60\libone1\Sample Brochure.doc	https://contoso.sharepoint.com/sites/BulkSite/Documents/		
	D:\rd60\libone1\Sample Sales Template.xls	https://contoso.sharepoint.com/sites/BulkSite/Documents/		
	D:\rd60\libone1\Sample Product Demo.ppt	https://contoso.sharepoint.com/sites/BulkSite/Documents/		
* 2	Explorer Batch File Items to M	igrate	Validate	>
•	59 items			

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.

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:

	Dockit Migrator (Evaluation Version)	-	∎ x
	My Jobs Lob History new job		
\$	Select Files Migration Settings	O Finish	
↓	Source : Cu/Users/Public/Documents/sampleExcel.stax Source : Cu/Users/Public/Documents/sampleExcel.stax Target : Ch/Users/Public/Documents/sampleExcel.stax Target : Ch/Users/Public/Documents/sa		>

- 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.

Migration Settings

1. Migration Settings will appear as shown below.



- 2. From this page, you can :
 - File Settings
 - <u>Renaming Rules</u>
 - <u>Metadata Settings</u>
 - <u>Column Mapping</u>
 - Permission Mapping
 - User/Group Mapping
 - Domain Mapping
 - Filter Conditions
 - Job Scheduler
 - Performance Tuner

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

- Dockit Migrator (Evaluation Versi <u>M</u>y Jobs Job History doc Migration Select Files O Finish s þ Migration Setting Migration Settings Migration Settings
 File Settings File Settings Skip O Replace <File Name> Append * denotes incremental O Create new file in the name - Prepend Renaming Rules Metadata Settings Column Mapping < Domain Mapping User/Group Mapping Permission Mapping Filter Condition × Job Scheduler ?
- 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.

Renaming Rules

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

	Dockit Migrator (Evaluation Version)									-	∎ X	
\blacksquare	<u>M</u> y Jok	os	Job History doc Migr	ation ²⁰								
(1)	Select Files				Migration Settings Finish				O Finish			
	Migration Settings			Migration Settings	Migration Settings Renaming Rules							
			File Settings	File				Folder				
				Find	Replace			Find	Replace			
		B	Renaming Rules	#	-	-		#	-	-		
		XE	Metadata Settings	%	-	-		%	-	-		
			·····			+		*_Files	_Files_	-		
		- 4119-	Column Mapping				₹			+	-	
	<	∆	Domain Mapping				↑ ↓				Т †	>
		8	User/Group Mapping				Ŧ				↓	
		22	Permission Mapping									
		\mathbf{Y}	Filter Condition									
*		Ö	Job Scheduler	Truncate file name, max	length (including file extensio	n)		Truncate folder name, ma 250	ax length			
?		× Ø	v									

The renaming rules page will appear as shown below:

1. 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.

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.

2. 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.

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:

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.

				Truncate one character preceding the letter p
Sample	?p	{empty}	Sale	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	۱^	{empty}	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello <world< td=""><td>\<</td><td>{empty}</td><td>HelloWorld</td><td>Example of escape sequence for <</td></world<>	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	١	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	١.	Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape sequence for)

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	"Windows 7;Windows Vista;Windows 2003;Windows XP"

	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 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 be used to denote a user account. Do not use multiple values unless the equivalent column defined in	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" " <u>someone@example.com</u> " "John Doe"

	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 <i>Login</i> <i>Name (domain\username),</i> <i>Display Name (John Doe) or E-</i> <i>mail address</i> (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.	" <u>http://sharepoint/Shared</u> <u>Documents/My Sample File.doc</u> " "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"
	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	"Company Name:Vyapin" "ID:1000" "Product Name:Dockit Migrator"

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.	ID,QUERY:Dockit Migrator" "FILTER:ID:Name,QUERY:1000AX"
Text or Number value can be	"Continent North
given to this field. Do not use	America Country United
multiple values unless defined	States States Alaska"
in SharePoint to accept	
multiple values.	"Alaska"
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 a construction of the second secon	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. 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 file. Otherwise, the specified term will not be assigned for the specified 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	Text or Number values can be	"Continent North
Metadata	given to this field. The values	America Country United
(Multiple	can be of single or multiple.	States States Washington;Continent
Values)	Multiple values should be	North America Country United States
	separated with ';'.	States California;Continent
		North America Country United States
	In this case, you must specify the term label or synonyms of the term label or solumn value with	States Alaska"
	full 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 ' '.	"Washington;California;Alaska"
	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.	
Task Outcome	Text or Numeric value can be	"Complete"
	given to this field. Do not use	"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 Livo #Mail. #"	Windows Live: #Mail
SharePoint.	;#WINDOWS LIVE;;#Mail;#	WINDOWS LIVE;#Mail
Multi-Value	Example	Final Result
Multi-Value In case multi-value contain ';' as part of its value, you can separate the values using ';#'.	Example ";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Final Result Windows Live Spaces; Mesh ;Windows Azure;Windows HPC
Multi-Value In case multi-value contain ';' as part of its value, you can separate the values using ';#'. In case multi-value contain ';#' as part of its value, escape these characters by preceding them with a semicolon and separate the values using ';#'.	Example ";#Windows Live Spaces; Mesh;#Windows Azure;#Windows HPC;#"	Final Result <u>Windows Live Spaces; Mesh</u> ; <u>Windows Azure;Windows</u> <u>HPC</u>

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

1. Click to

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)								
	<u>M</u> y Jobs	Job History doc Mig	ration ³						
()	Se	lect Files	Migration Settings O						
		Migration Settings	Migration Settings 🕨 Metadata File		8				
		File Settings	SPLibrary.XLSX						
	A	Renaming Rules	7 Rows. 6 columns Open						
	X	Metadata Settings		Date format <use default=""> Y</use>					
		Column Mapping	Select all Destination Path	Time format <no time=""> Y</no>					
	<	Domain Mapping	Title Author			>			
	- 2	User/Group Mapping	Created						
	,	Permission Mapping	Li comments						
	7	Filter Condition							
*	d	Job Scheduler		Sam	ple				
?	×.	e .							

Column Mapping

				Doc	kit Migrator (E	valuation Version)			-	∎ x
\blacksquare	<u>M</u> y Jol	25	Job History doc Migr	ation [©]						
()		Select	Files		Migration	Settings		O Finish		
1		Mi	gration Settings	Migration Settings Colum	nn Mapping		Load	d from Save as	C	
		E.	File Settings	Source Column		Target Column	Default Value			
		AB	Renaming Rules	🔅 Name		Name] –	
		×∃	Metadata Settings	🔅 Created Date		Created Date] –	
			Column Mapping	🌣 Modified Date		Modified Date				
	<	4	Domain Mapping] +	>
		~	User/Group Mapping							
		》	Permission Mapping							
		\mathbf{V}	Filter Condition							
⊁		Ø	Job Scheduler							
?		× Ø	v							

Column mapping screen will appear as shown below.

1. You can click on C 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.

	Dockit Migrator (Evaluation Version)									-	∎ x
	<u>M</u> y Jol	My Jobs Job History doc Migration									
6		0		O							
	Select Files Migration Settings			Migration Settings Column Mapping Load from Sav						C	
	<		File Settings	Source Column		Target Column	De	fault Value		^	
		AB	Renaming Rules	Name	•••	Name				-	
		XI	Metadata Settings					📕 Metadata File 🛛 F	ile Property 🙁		
		_		Title	Name	Subject	Author	Owner	Â		
			Column Mapping	Category	Keywords	Comments	Application Name	Byte Count			
		A D A	Domain Mapping	Character Count	Character Count With Spaces	Company	Date Created	Date Modified			>
		202	User/Group Mapping	Date Last Printed	Date Last Saved	Hidden Slide Count	Last Saved By	Line Count			
				Manager	Multimedia Clip Count	Note Count	Page Count	Paragraph Count			
		- 22	Permission Mapping	Presentation Forma	at Revision Number	Shared Document	Slide Count	Template			
		\mathbf{Y}	Filter Condition	Thumbnail	Total Edit Time	Version	Word Count	File Name	~		
*	Job Scheduler		Job Scheduler	🔅 Created Date		Created Date				-	
?		10	~	, 🌣 Modified Date	•••	Modified Date					

File Properties- gives a list of available file system columns.

Metadata Properties- gives a list of columns available in metadata file.

3. Click > to proceed.

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)		-	∎ x
	<u>M</u> y Jobs		Job History doc Migra	tion			
(s)	Select Files		Files	Migration Settings	O	h	
		M	ligration Settings	Migration Settings > Domain Mapping	Load from Save	as C	
			File Settings	Source	Target		
	1	A B	Renaming Rules	HARVESTER 📃		+	
		X	Metadata Settings				
			Column Mapping	U VOYAGER			
		A	Domain Mapping				>
		8	User/Group Mapping				
		》	Permission Mapping				
		\mathbf{V}	Filter Condition				
⊁		Ø	Job Scheduler				
?		× Ø	~				

				Doc	kit Migrator (Evaluation Version)			-	∎ x
	<u>M</u> y Jobs	;	Job History doc Mig	ration ³					
()		Select	Files		Migration Settings		O Finish		
1		M	igration Settings	Migration Settings Domai	n Mapping		Load from Save as	C	
			File Settings	Source		Target			
		A	Renaming Rules	HARVESTER	~	https://m365x938794.sharepoint.com		-	
		В	3	ORBIT	~	https://m365x938794.sharepoint.com		+	
		×∃	Metadata Settings						
			Column Mapping						
	<	۵ <u>۵</u>	Domain Mapping						>
		8	User/Group Mapping						
		》	Permission Mapping						
		\mathbf{Y}	Filter Condition						
*		Ø	Job Scheduler						
?		× Ø							

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.
User Mapping

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

1. Source User

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



2. Target User

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

	Dockit Migrator (Evaluation Version) —									🗗 X
	My Job	s	Job History hon	ie Ø						
•		Select	Files	Migration Setting	js			O Finish		
1		Mi	gration Settings	Migration Settings User/Group Mapping			Load from	Save as	C	
		S	SharePoint Elements	Source		Target				
		r	Site and List Templates	Wilber, Alex	~	admin@M365x938794.onmicrosoft.com	1	~	-	
				training group	~			~	+	a
		٥,	Domain Mapping							
		8	User/Group Mapping			MOD Administrator admin@M365x938794.onmicrosoft. i:0#.f]membership admin@m365x93	com 8794.onmicrosoft.cor	n		
	<	2/2	Permission Mapping			Alex Wilber AlexW@M365x938794.onmicrosoft. i:0#.flmembershipJalexw@m365x938	.com 1794.onmicrosoft.com	1	~	>
		Ø	Job Scheduler							
		×	Performance Tuner							
×										
?										24 items

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

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

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 separate tab.

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

1. Source Permission

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

				Dock	it Migrator (Evaluation Version)					-	a x
	My Job	55	Job History doc Mig	ration ³							
•		Select	t Files		Migration Settings				O Finish		
n		M	ligration Settings	Migration Settings Permis	sion Mapping		Load from	Save as	Clear all	C	
			File Settings	NTFS		SharePoint					
		A	Renaming Rules	FullControl	~	Full Control			v	-	
				Change	~	Contribute			~	-	
		×	Metadata Settings	Read		Reader			~	+	
			Column Mapping	Change							
	<	6	Domain Mapping	Change Read							>
		*	User/Group Mapping	Read	~						
		} 2	Permission Mapping								
		\mathbf{Y}	Filter Condition								
*		Ö	Job Scheduler								
?		× 10	~						✔ Map depende	nts too	

2. Target Permission

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

				Dockit Migrator (Evaluation Version)	-	∎ X
	<u>M</u> y Jo	bs	Job History doc Mig	ation		
•		Select	Files	Migration Settings) ish	
n		M	igration Settings	Migration Settings Permission Mapping Load from Save as Clean	all C	
-			File Settings	NTFS SharePoint		
		AB	Renaming Rules	· ·]* +	
		×	Metadata Settings			
			Column Mapping			
	<	₽	Domain Mapping			>
		*	User/Group Mapping			
		} 2	Permission Mapping			
		Y	Filter Condition			
⊁		Ö	Job Scheduler			
?		× 10	~	I Map	Jependents too	>

See the following sections for more information

- <u>User Mapping</u>
 <u>Domain Mapping</u>

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 conditions for File/Folder filter as shown as below.

						Dockit Mi	grator (Evalu	ation Version)						-	∎ x
	<u>M</u> y Jo	bs	Job History doc Migr	ation											
()		Select	Files			Mi	oration Set	tings							
n		M	igration Settings	Migra	ition Settings 🕨	Filter Cond	ition	5			 Metadata File Column File Property 			C	
7			File Settings	File	^{File} Folder										
		AB	Renaming Rules	Prop	perty		Operator	Val	Je			Connec	tor.		
		x	Metadata Settings			• • •		~				OR	~	+	
									_		 Metadat 	a File 🗆	File Property		
			Column Mapping		Title	Na	me	Subject		Author	Owner				
		42	Domain Mapping		Category	Keyw	vords	Comments		Application Name	Byte Cour	ıt			
					Character Count	Character (Spaces	Count With	Company		Date Created	Date Modif	ied			
		()	User/Group Mapping		Date Last Printed	Date La	st Saved	Hidden Slide Co	unt	Last Saved By	Line Cour	nt			
		2/2	Permission Mapping		Manager	Multime Count	edia Clip	Note Count		Page Count	Paragraph Co	ount			
		$\mathbf{\nabla}$	Filter Condition		Presentation Format	Revision	Number	Shared Docum	ent	Slide Count	Template	2			
		*			Thumbnail	Total Ec	dit Time	Version		Word Count	File Name	e	~	J	
×		\odot	Job Scheduler							Mineste : 644	a about condition		atisfied O N-+	entiefic d	-
?		N D	v							iviigrate if th	e above condition	ins ⊚ 5a	susied UNOt	satistied	

File Filter

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

Folder Filter

					Dockit Migrator (Evalu	ation Version)				-	∎ x
	<u>M</u> y Jo	obs	Job History doc Mig	ration ²							
•		Select	Files		O Migration Set	ings			O Finish		
n		M	igration Settings	Migration Settings	Filter Condition			🛍 Me	tadata File Column Property	C	
		E.	File Settings	File Folder							
		AB	Renaming Rules	Property	Operator	Value		Con	nector		
		XI	Metadata Settings	Folder Name				OF	t 🗸	+	
			Column Manning					 Metadata File 	File Property		
			Column Mapping	Date Created	Date Modified	Folder Name	Containing Folder	Containing Folder Name			
		۵ [°]	Domain Mapping	Path							1
		8	User/Group Mapping								
		22	Permission Mapping								
		\mathbf{V}	Filter Condition					•			
*		Ö	Job Scheduler								
?		× 10		,			Migrate if the	above condition is	Satisfied O Not s	utisfied	

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.



Job Scheduler

- Dockit Migrator (Evaluation Version) <u>M</u>y Jobs Job History doc Migration O Finish Select Files • Migration Settings Migration Settings Schedule Migration? Run As: Renaming Rules Schedule: Daily 🗸 Set Password Start Time: Select a date 15 03:31 PM 🜩 Metadata Settings Recur every: 0 🔶 day(s) Security Options Run only when user is logged on Column Mapping Run with highest privileges To set this flag, you have to launch the application by using 'Run as administrator' (by right clicking the application in Start menu) ۵, Domain Mapping < User/Group Mapping Permission Mapping Filter Condition Ò ⊁ Performance Tuner ?
- 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.

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.

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 Share point Online migration page.

	Do	ckit Migrator (Evaluation Version)			– 🗗 X
	My Jobs Job History New Job				
€	+ New 🖉 Edit 🧳 Run 🛆 Incremental 🗙 Delete	e 🗸 Validate 🗍 View	Job Instance		
n	SharePoint Online Jobs (2)	Group by name	✓ Search	(2 💥 🖬 🎅
	Job Name Description	Created Date	Modified Date	Last Run At	
	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 in				
	2 items				

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** button.

	Dockit Migrator (Evaluation Version)
My Jobs Job History new job	
aw Job > File share to OneDrive > new job	
new job	Enumerate personal site of
Job Description	© Current User
	O Multiple Users
	(e.g., https://contoso-my.sharepoint.com/personal/johndoe_contoso_onmicrosoft_com) OneDrive URL
	~ ®
	Authentication
	Cloud Identity 👻
	User name
	۲. Contraction of the second
	Password
	••••••

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.

				Dockit Migra	ator (Evaluation Version)			-	⊜ x
My Jobs	Job History	new job							
Sel	ect Files			Migr	O ration Settings			O Finish	
(e) (e) ↑ ↓ ∨ (c)	: • Users • Viswanatha	an 🕨 Desktop 🕨		~	🍥 🍥 🕇 💁 🛩 Megan Bo	wen 🕨			
Name	Date Modified	Туре	Size	^	Name	Description	Items		
🔲 Network					Cocuments		24 items		
🍂 This PC					🖻 Form Templates	This library contains adm	0 items		
📡 Favorites	1/13/2017 9:51 AM				🖷 Style Library	Use the style library to st	5 items		
🥦 Viswanathan	1/15/2017 9:37 AM								
) 10.5	:/27/2017 7:59 PM								
尾 25-128.png	2/27/2017 7:17 PM	.png	3.000 KB						
尾 7z-128.png	2/1/2017 3:15 PM	.png	879 Byte	Add to SharePoint					
🔒 arrow_sans_rig	g :/13/2017 4:34 PM	.png	322 Bytes						~
属 Capture.PNG	!/29/2017 6:43 PM	.PNG	2.000 KB						
🕌 csv	!/15/2017 6:48 PM								
) DMS_v10.5 Sa	er 1/15/2017 4:38 PM								
👔 Dockit.chm	/4/2018 11:45 AM	.chm	13.780 MB						
🔂 Dockit.msi	1/3/2018 6:59 PM	.msi	31.791 MB						
鬼 Edit_black-128	8 :/16/2017 5:15 PM	.png	2.000 KB						
Emerger_Char	n 1/16/2017 7:07 PM	.txt	684 Bytes	~					
Explorer Bat	ch File Items to Mi	grate							
31 items 4 items se	lected Size: 6.000 KB								3 items

- 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 <u>Migration Settings</u>
- 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

Start

to initiate the migration process.

OneDrive Users

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

Dockit Migrator (Evaluation Version)	-	a x
My Jobs Job History new job Image: Comparison of the second s		
Select Files Migration Settings	O Finish	
Ocdit 16: V C + Users + Public + Documents + Name Date Modified Type Size Dockit 365 2018 10:25 AM folder Dockit 365 2018 10:25 AM folder Dockit 365 2018 10:12 AM folder Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 web(s), 8 list(s), 1 Dockit 365 7est site Created for testing p 0 items Site Collection Doc This system library w 0 items Site Collection ma This system library w 0 items Site Collection ma This system library w 0 items Site Style Library Use the style library U		
Image: Section of Migrate 17 items 1 item selected Size: 8.000 KB		8 items

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.

Dockit	Migrator (Evaluation Version)	-	a x
My Jobs Job History new job			
Select Files	O Migration Settings	O Finish	
(●) ● ↑ 🕨 < C: ► Users ► Public ► Documents ► <	(♠) (♠) ↑ (\$> ∨ Megan Bowen + DMSub +		
Name Date Modified Type Size	Name Items		
📙 Dockit 365 / 0/2017 4:54 PM folder	Cocuments 0 items		
📕 Dockit 365 I 0/2017 7:40 PM folder	🖻 Site Assets 1 items		
Dockit Shan /2017 11:49 AM folder	Site Pages 2 items		
Lockit10x /2018 10:12 AM folder			
📕 Dockit11x 9/2018 6:42 PM folder			
Dockit9x 3/2016 3:18 PM folder			
Governance 5/2017 3:38 PM folder			
Hyper-V /2014 12:06 PM folder			
List Metada: 8/2017 3:44 PM folder			>
📙 NLib /2014 12:54 PM folder			
🗼 NTFS Securi /2015 11:55 AM folder			
ReporterX V 2/2016 6:21 PM folder			
🗼 SPInsight /2015 11:01 AM folder			
🗼 SPListX 0/2017 3:54 PM folder			
🗼 XPlica6x 1/2017 6:51 PM folder			
DocKITSche /2015 10:52 AM dll 131.000 KB			
iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii			
Explorer Batch File Items to Migrate			

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

Batch File Structure

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:

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

Destination Path: The 'Destination Path' column should contain the target location where the source gets moved.

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:

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

OneDrive Users: The 'OneDrive Users' column should contain the target user email where the source gets moved.

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	ishada soo ahaa aa aa iyoo ahaa ahaa	faldar:2 (faldar:2
FIIe.xISX	jonnaoe@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://contosomy.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.

		Dockit Migrator (Evaluation Version)	∎ x
	My Jobs Job History	FS Explor	
€	Select Files	O Migration Settings Finish	
1	Batch FS O365.xlsx Sheet1 ~ 3 items	×	•
	Dath	Destination Data	
	D:\rd60\libone1\Sample Brochure.doc	https://contoso.sharepoint.com/sites/BulkSite/Documents/	
	D:\rd60\libone1\Sample Sales Template.xls	https://contoso.sharepoint.com/sites/BulkSite/Documents/	
	D:\rd60\libone1\Sample Product Demo.pp	<pre>c https://contososharepoint.com/sites/BullkSite/Documents/</pre>	
*		Validate	>
2	Explorer Batch File Items to M	igrate	
•	59 items		

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.

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:

	Dockit Migrator (Evaluation Version)	-	∎ X
	My Jobs Lob History new job		
\$	Select Files Migration Settings	O Finish	
■	Source : C(USERS/Public)Documents/sampleExcel.xlsx Target : C(USERS/Public)Documents/sampleExcel.xlsx Source : C(USERS/Public)Documents/sampleExcel.xlsx Target : C(USERS/Public)Documents/sampleExcel.xlsx Target : C(USERS/Public)Documents/sampleExcel.xlsx Target : C(USERS/Public)Documents/sampleExcel.xlsx December 1000000000000000000000000000000000000		>
	29 items		2 items

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.

Migration Settings

- Dockit Migrator (Evaluation Version) <u>M</u>y Jobs Job History doc Migration O Select Files Migration Settings • E. **₩** хI File Settings Renaming Rules Metadata Settings Column Mapping Ω Domain Mapping User/Group Mapping Permission Mapping Filter Condition < (?) ส์ Job Scheduler Performance Tuner **⊁** ?
- 1. Migration Settings will appear as shown below.

- 2. From this page, you can :
 - o File Settings
 - Renaming Rules
 - Permission Mapping
 - User/Group Mapping
 - o Domain Mapping
 - Filter Conditions
 - o Job Scheduler
 - <u>Performance Tuner</u>

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:

Skip - Skips the file without overwriting.

Replace - Deletes the file from the destination location (along with its version history) and imports the source file.

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.

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

					Dockit Migrator (Evalu	auon version)					-	· ^
	<u>M</u> y Jol	bs	Job History doc Mig	ration ³								
폐		Select) Files		Migration Set	lings				O Finish		
n		Mi	igration Settings	Migration Setting	JS 🕨 Renaming Rules							
			File Settings	File				Folder				
				Find	Replace			Find	Replace			
		A B	Renaming Rules	#	-	-		#	-	-		
		X	Metadata Settings	%	-			%	-	_		
						+		*_Files	_Files_	-	•	
			Column Mapping				Ŧ			+	×	
	<	∆ 0	Domain Mapping				↑ ↓				•	>
		8	User/Group Mapping				Ŧ				* ±	
		22	Permission Mapping									
		\mathbf{Y}	Filter Condition									
*		Ö	Job Scheduler	Truncate file name, m 256	nax length (including file extensio	n)		Truncate folder name, max l	ength			
?		× 10		1								

The renaming rules page will appear as shown below :

1. 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.

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.

2. 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.

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.

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),

Sample renaming rules:

				if the file names contains V and followed by any one character.
Sample	?р	{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	١.	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	۱^	{empty}	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello <world< td=""><td>\<</td><td>{empty}</td><td>HelloWorld</td><td>Example of escape sequence for <</td></world<>	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	١	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	١(Sample	SampleFile	Example of escape sequence for (

Sample)	\)	Document	SampleDocument	Example of escape sequence for)

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)		-	∎ x
	<u>M</u> y Jobs		Job History doc Migra	tion			
(s)		Select	Files	Migration Settings	O	h	
		M	ligration Settings	Migration Settings > Domain Mapping	Load from Save	as C	
			File Settings	Source	Target		
	1	A B	Renaming Rules	HARVESTER 📃		+	
		X	Metadata Settings				
			Column Mapping	U VOYAGER			
		A	Domain Mapping				>
		8	User/Group Mapping				
		》	Permission Mapping				
		\mathbf{V}	Filter Condition				
⊁		Ø	Job Scheduler				
?		× Ø	~				

				Doc	kit Migrator (Evaluation Version)			-	∎ x
	<u>M</u> y Jobs	;	Job History doc Mig	ration ³					
()		Select	Files		Migration Settings		O Finish		
1		M	igration Settings	Migration Settings Domai	n Mapping		Load from Save as	C	
			File Settings	Source		Target			
		A	Renaming Rules	HARVESTER	~	https://m365x938794.sharepoint.com		-	
		В	3	ORBIT	~	https://m365x938794.sharepoint.com		+	
		×∃	Metadata Settings						
			Column Mapping						
	<	۵ <u>۵</u>	Domain Mapping						>
		8	User/Group Mapping						
		》	Permission Mapping						
		\mathbf{Y}	Filter Condition						
*		Ø	Job Scheduler						
?		× Ø							

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.

User Mapping

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

1. Source User

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



2. Target User

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

				Dockit Migrator	(Evaluation Version)			-		D X
	My Jok	os	Job History hon	1e 🛛						
•		Select	Files	O Migration Settings Finish						
n		M	igration Settings	Migration Settings User/Group Map	oping		Load from Save	as 🕻	ž	
		S 🗲	SharePoint Elements	Source		Target				
		ſ	Site and List Templates	Wilber,Alex	~	admin@M365x938794.onmicrosoft.com	n	· -	-	
				training group	~			~ -	F	
		٥	Domain Mapping			spocrw19240 i:0#.wlylo001_spocrwl_19240				
	User/Group Mapping		User/Group Mapping			MOD Administrator admin@M365x938794.onmicrosoft i:0#.f membership admin@m365x9	.com 38794.onmicrosoft.com			
	<	22	Permission Mapping			Alex Wilber AlexW@M365x938794.onmicrosoft i:0#.f membership alexw@m365x93	.com 8794.onmicrosoft.com		~	>
		Ø	Job Scheduler							
		×	Performance Tuner							
¥										
~										
•									24	4 items

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

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

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 separate tab.

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

1. Source Permission

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

				Dock	it Migrator (Evaluation Version)					-	∎ x	
\blacksquare	My Jobs Job History doc Migration											
•		Select	Files	O Migration Settings O Finish								
1		M	ligration Settings	Migration Settings Permis	sion Mapping		Load from	Save as	Clear all	C		
-			File Settings	NTFS		SharePoint						
		2	Renaming Rules	FullControl	~	Full Control			~	-		
		АВ	Kenaming Kules	Change	~	Contribute			~	-		
		×	Metadata Settings	Read		Reader			~	+		
		-	Column Mapping	Change	^							
	1			Change							1	
		۵à	Domain Mapping	Read								
		- 🝪	User/Group Mapping	Read	×							
) ;;	Permission Mapping									
		\mathbf{Y}	Filter Condition									
⊁		Ø	Job Scheduler									
?		× @							✓ Map depend	ants too		

2. Target Permission

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

				Dockit Migrator (Evaluation Version)		- 6	∎ x
	<u>M</u> y Jo	lbs	Job History doc Mig	ation			
•	Select Files			Migration Settings	O Finish		
n		Mi	gration Settings	Migration Settings Permission Mapping Load from Save as	Clear all	C	
			File Settings	NTFS SharePoint			
		AB	Renaming Rules	· · ·	~	+	
		×	Metadata Settings				
			Column Mapping				
	<	A	Domain Mapping				>
		~	User/Group Mapping				
		2/2	Permission Mapping				
		\mathbf{Y}	Filter Condition				
⊁		Ø	Job Scheduler				
?		× 10	V		☑ Map dependen	ts too	

See the following sections for more information

- User Mapping
- Domain Mapping

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 conditions for File/Folder filter as shown as below.

					Dockit Migrator (Evalu	ation Version)				-	∎ x
	<u>M</u> y Jo	bs	Job History doc Migr	ation ²⁰							
•		Select	Files		Migration Set	tings			O Finish		
n		M	igration Settings	Migration Settings	Migration Settings ► Filter Condition						
			File Settings								
		AB	Renaming Rules	Property	Operator	Value		Conn	ector		
		X	Metadata Settings		•••	~		OR	~	+	
			Column Mapping	Title	Name	Subject	Author	 Metadata File Owner 	File Property		
	1	2	Domain Manning	Category	Keywords	Comments	Application Name	Byte Count			5
			Domain wapping	Character Count	Character Count With Spaces	Company	Date Created	Date Modified			
		~	User/Group Mapping	Date Last Printed	Date Last Saved	Hidden Slide Count	Last Saved By	Line Count			
		_	Permission Mapping	Manager	Multimedia Clip Count	Note Count	Page Count	Paragraph Count			
		∇	Filter Condition	Presentation Format	Revision Number	Shared Document	Slide Count	Template			
		Ċ	Job Scheduler	Thumbnail	Total Edit Time	Version	Word Count	File Name	~		
×		0	Job Scheduler				Migrate if the	e above condition is	Satisfied O Not sa	tisfied	
?		× 10	~				inigrate if the				

File Filter

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

Folder Filter

	Dockit Migrator (Evaluation Version)									- •	a x
	<u>M</u> y Jo	bs	Job History doc Migr	ration [©]							
•		Select	Files	Migration Settings							
n		Migration Settings		Migration Settings Filter Condition				Metadata File Column C			
		E,	File Settings	File Folder							
		AB	Renaming Rules	Property	Operator	Value		Connec	tor		
		×∃	Metadata Settings	Folder Name				OR		+	
			Column Mapping	Date Created	Date Modified	Folder Name	Containing Folder	 Metadata File Containing Folder Name 	File Property 🙁		
	<	1	Domain Mapping	Path							>
		*	User/Group Mapping								
		》	Permission Mapping								
		\mathbf{n}	Filter Condition								
⊁		Ø	Job Scheduler								
?		× Ø	v				Migrate if the	above condition is S 	ətisfied 🔿 Not satis	sfied	

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.


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.

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:

			Dockit Migrator (Evaluation Version)		_ = x
	<u>M</u> y Jobs	Job History	FS Expo		
5		Select Files	Migration Settings		Finish
	V	/alidate Migration?	TES		
<u>u</u>		TES Check exister	nce of source and target locations		
		🔤 📧 Check site qu	iotas		
		Check invalid	l characters for folder / file name		✓
		Check for fol	der / file URL length		Validate
		Check for file	es that exceed 2 GB size limit		
		Check colum	ns availability in target SharePoint		
		TES Check manda	atory columns		
		Check metad	lata value availability in target SharePoint (if applicable)		
		Check the ex	istence of permission levels / users in target SharePoint		
16					
~				Save & Close	Save & Start

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, view the Pre-migration validation test results.

icon will be enabled. Click to

SharePoint to Office 365 Migration

SharePoint On-premises to Office 365 Migration

SharePoint On-premises to OneDrive

SharePoint On-premises to Office 365 Migration

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

Dockit Migrator (Evaluation Version) **_** My Jobs Job History New Job A + New 🏂 Run △ Incremental X Delete Validate View Job Instance Ø ß Edit 0 💥 🖿 🕄 Group by nam SharePoint Online Jobs (2) 1 Created Date Modified Date Last Run At Job Name Description F 2 iter 1/12/2018 5:35:55 PM 1/12/2018 5:36:14 PM 1/12/2018 5:36:14 PM FS Explorer 1 Test FS Expo Test 1/12/2018 5:43:55 PM 1/19/2018 6:43:12 PM 1/19/2018 6:43:12 PM × ?

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**

		Dockit Migrator (Evalu	ation Version)		-	8	x
	My Jobs Job History Site migrate						
()	New Job > SharePoint to Online > Site migrate						
1		Site migrate					
	Source SharePoint Credential		Target S	SharePoint Credential			
	Source URL		Target URL				
		* (i)				Ý	۲
	Authentication		Authentication				
	Windows	~	Cloud Identity			~	
	User name		User name				
		~				~	
	Password		Password				
	•••••		••••••	•••			
×							
2					Conr	nect	
-							

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**, **User Name** 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.

7. **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**.

	Docki	it Migrator (Evaluation Version)			_ = ×
My Jobs Job History Site	migrate				
Select Files		O Migration Settings		Fini) ish
	items ^	● ● ↑ ● ✓ Test Name Test	Description	Items	
🗊 a1	2 web(s), 72 list(s),	FirstValidation	n 1 2 w	eb(s), 21 list(s), 43	
🚯 Act	0 web(s), 12 list(s),	🖷 anbu		2 items	
S ≫ B1	13 web(s), 196 list(🖻 Anbuv		2 items	
Built-in Workflows	0 web(s), 13 list(s),	R Ankurresolve	d	1 items	
communitys	0 web(s), 11 list(s),	🖻 Bulk		0 items	
5 Dchin	0 web(s), 7 list(s), 1	rash		0 items	
Design Manager Te	0 web(s), 7 list(s), 1	🖻 D365		2 items	
Ø designmanager	0 web(s), 4 list(s), 4	🖻 DemoLib		12 items	
🚯 dms103	2 web(s), 38 list(s),	R Documents		3 items	
Dockit	13 web(s), 418 list(🖻 don		2 items	
Dust	1 web(s), 29 list(s),	🖻 Meyer		3 items	
🚯 Flash	1 web(s), 22 list(s),	🖻 Meyer Lib		3 items	
🚯 gh	0 web(s), 13 list(s),	🖷 MeyerTest		3 items	
Mealthcare	4 web(s), 113 list(s)	MicroFeed	MySite MicroFeed Persis	2 items	~
Explorer Items to Migrate					
					22 items

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.

12. After saving the job, it will be listed on the Job Manager page. You can click on to initiate the migration process.

Start

a. 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:

My Jobs Job History ssa Select Files Migration Settings Finish Source : {} http://planet.vsilab.local/a1 settings Settings Settings settings Settings Settings Settings Settings Settings Settings	
Select Files Migration Settings Image: Select Files Settings Image: Select Files Settings Image: Settings Settings	
Source: 1) http://planet.vsiab.local/a1 Setting: X xeb(s), 72 list(s), 210 item(s) Setting: Target: 1) http://planet.vsiab.local/communitys Setting: X Queb(s), 111 list(s), 16 item(s) Setting: Source: 1) http://planet.vsiab.local/onmunitys Setting: X Queb(s), 111 list(s), 16 item(s) Setting: Source: 1) http://planet.vsiab.local/ommunitys Setting: X Queb(s), 111 list(s), 16 item(s) Setting: X Queb(s), 21 list(s), 113 item(s) Setting: X Queb(s), 28 list(s)	
Source : D http://planet.vsslab.local/communitys D web/s0.111 list(s).16 item(s) Target : D http://m355x938794.sharepoint.com/test/fs/sv Settings Source : D http://planet.vsslab.local/dms103 Settings X 2 web/s0.38 list(s).113 item(s) Target : D http://m355x938794.sharepoint.com/test/fs/sv Settings	
Source : D http://planet.vsslab.local/dms103 × 2.web/0.38/list(s).113/liem(s) Target : D https://m365x938794.sharepoint.com/test/fs/sv	
Source : 5) http://planet.vsslab.local/flash X I 1.web/3, 22 list(s), 18 item(s) Target : 5) https://m365x938794.sharepoint.com/test/fs/sv	
*	
2 Explorer Items to Migrate	l items

b. 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 page will appear depending on the items added for migration

To specify migration options for site, click Site Migration Options

To specify migration options for List/Library, click List/Library Migration Options

c. Click > button to proceed.

Site Migration Option



The **Site Migration Option** page will appear as shown below:

1. Select the site template to apply to the site from the list of available templates.

Note: Selecting **As in source** Option requires Dockit Migrator Server Agent to be installed in the source server as well.

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

1. **Create as sub site / replace sub site in target site** - The selected site in source location 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 source site content will be migrated to the sub-site in target location while retaining all sub-site content in the target site location.

- 2. **Merge sites** The source site content will be migrated to the target site while retaining all site content in the target site location.
 - a. Overwrite list / library this option overwrites list / library in the target location.
 - b. Retain list / library and merge contents only this option retain list / library and merge contents only in target location.
 - c. Do not overwrite list / library (leave as-is) this option will not overwrite list / library and its contents in target location.
- 3. **Replace site in 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 target site will be deleted and completely replaced by the selected source site. Otherwise, the selected site in source location will be created as a sub-site afresh in the target location.

3. Site Traversal

Dockit Migrator (Evaluation Vers	sion) 🗕 🗗 X
My Jobs Job History New SP ³	
Select Files Migration Settings	Specify site settings to use when migrating a site and its conter \mathbf{x}
	Source Web Template : STS#0
Source : Source : https://mars.vsslab.local/Dockit365Testsite	Target Web Template : STS#0
Target : 5 https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com	Site Migration Option
	O Merge site content 1
	Overwrite list/library
	Retain list/library and merge contents
	Do not overwrite list/library (leave as-is)
	Site Traversal
	 Migrate content in selected site and its subsites Migrate content in selected site only.
	• Migrate content in selected site only
	Target Site Template
	As in Source V Load Web Templates
16	
T L Hama to Migrate	
? Explorer Trents to Wigrate	
	1 item

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

- 1. **Migrate contents in selected site and its subsites** This option migrates content in selected site and its sub-sites.
- Migrate contents in selected site only This option migrates content available in the selected site only. Dockit Migrator will not traverse the sub-sites within the selected site.

4. Target Site Template



By Default, **Dockit Migrator** uses the same web template as in source SharePoint to create SharePoint site in target Office 365. However, the application allows you to change the web template of your choice. For this, you need to pick one from the dropdown box.

Note: You may need to load all target web templates by clicking **Load Web Templates** button.

List Migration Option



1. The List Migration Option page will appears as shown below:

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

- 1. **Merge list contents** This option merge the list contents only with the following options
- 2. **Replace list, if it already exists** This option replaces the list in the target location, if the list already exists in the target location.

Migration Settings



1. Migration Settings will appear as shown below.

- 2. From this page, you can :
 - o SharePoint Elements
 - Site and List Templates
 - o Domain Mapping
 - User/Group Mapping
 - o Permission Mapping
 - o Job Scheduler
 - o <u>Performance Tuner</u>

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.

Dockit Migrator (Evaluation Version)

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.



	Migrate master pages. This can be done when migrating content from SharePoint 2007 and above.
Master Pages	
	Set the home page as in source SharePoint site.
Home Page as in source site	
	Set the top links as same as in source SharePoint site.
Top Links in site pages:	
	Set the quick launch links as same as in source SharePoint site.
Quick Launch Links:	
	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.
User Alerts:	

	To migrate site permissions.
	Note: Dockit Server Agent is required in the <u>source SharePoint</u> <u>server</u> to migrate when performing migration from SharePoint 2007.
Site Permissions:	
	To activate Site collection feature and site feature.
Activate Features:	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 Viewe	To migrate list views.					
	To migrate list permissions					
	Note: Dockit Server Agent is required in the <u>source</u> <u>SharePoint server</u> to migrate when performing migration from SharePoint 2007.					
List Permissions:						
Content Types:	To create content types which are not available in the target SharePoint list.					
	To create list columns which are not available in the target					
Columns:	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).					
	To migrate the Web Parts (Landing pages, List view and Web Part pages) during a Site / Web level migration.					
	Note:					
Web Bosti	 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. 					
	To migrate the list level Workflows during a Cite / List					
	level migration.					
	Note:					
Maria filowa	• Dockit Server Agent is required in the <u>source</u> <u>SharePoint server</u> to retrieve the associated workflows from SharePoint 2007.					
WORKTIOW:						

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.

1. Source Template

Dockit Migrator automatically loads the list of source SharePoint templates from

connected source site.

				Dockit Migrator (Evaluation Version)			-	8
	<u>M</u> y Jo	bs	Job History home	8				
•	Select Files							
n		M	igration Settings	Migration Settings Site and List Templates		Load from	Save a	s
		s >	SharePoint Elements	Source	Target			
		Ē	Site and List Templates	Microsoft Word 97-2003 document v	Microsoft Word 97-2003 document		~ -	•
		2	Domain Mapping	Microsoft Excel 97-2003 spreadsheet 🗸	Microsoft Excel 97-2003 spreadsheet		~ -	·
				Microsoft PowerPoint 97-2003 presentation v	Microsoft PowerPoint 97-2003 presentation		~ -	
		~	User/Group Mapping	Document Library 🗸	Document Library		• -]
	<	22	Permission Mapping	·			~ +] >
		Ø	Job Scheduler					
		×	Performance Tuner					
×								
?								

2. Target Template

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

				Dockit Migrator (Evaluation Version)			-	a x				
	<u>M</u> y Job	os	Job History home	3								
•		Select	Files	Migration Settings	O Finish							
1		M	ligration Settings	Migration Settings Site and List Templates		Load from S	ave as					
		s >	SharePoint Elements	Source	Target							
		ſ	Site and List Templates	Microsoft Word 97-2003 document 🗸	Microsoft Word 97-2003 document		· _					
		42	42	42	42	42	Domain Mapping	Microsoft Excel 97-2003 spreadsheet 🗸 🗸	Microsoft Excel 97-2003 spreadsheet		· _	
		•••		Microsoft PowerPoint 97-2003 presentation	Microsoft PowerPoint 97-2003 presentation		· _					
		()	User/Group Mapping	Document Library 🗸	Document Library		· _					
		22	Permission Mapping	~			· +	>				
		Ö	Job Scheduler									
		×	Performance Tuner									
×												
?												

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

					DOCKIL MIGRATOR (Evaluati	on version)					_	· ^
	<u>M</u> y Jo	bs	Job History doc Mig	ration ³								
•	Select Files				Migration Settings				O Finish			
n		Mi	gration Settings	Migration Settings	Renaming Rules							
		E,	File Settings	File				Folder				
				Find	Replace			Find	Replace			
		A B	Renaming Rules	#	-	-		#	-	-		
		X	Metadata Settings	%	-	-		%	-	_		
						+		*_Files	_Files_			
			Column Mapping				Ŧ			+	•	
	<	6	Domain Mapping				+				• •	>
		8	User/Group Mapping				Ŧ				Ŧ	
		22	Permission Mapping									
		\mathbf{Y}	Filter Condition									
		-		Truncate file name, max	length (including file extension)			Truncate folder name, max le	ngth			
×		\odot	Job Scheduler	256				250				
?		× Ø										

The renaming rules page will appear as shown below:

1. 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.

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.

2. 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.

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.

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 renaming rules:

				Truncate one character preceding the letter p
Sample	?p	{empty}	Sale	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	۱^	{empty}	SampleFile	Example of escape sequence for ^
Sample+Document	\+	Plus	SamplePlusDocument	Example of escape sequence for +
Hello <world< td=""><td>\<</td><td>{empty}</td><td>HelloWorld</td><td>Example of escape sequence for <</td></world<>	\<	{empty}	HelloWorld	Example of escape sequence for <
Hello>World	\>	{empty}	HelloWorld	Example of escape sequence for >
[Document	١	Word	WordDocument	Example of escape sequence for [
Word]	\]	Document	WordDocument	Example of escape sequence for]
(File	١(Sample	SampleFile	Example of escape sequence for (
Sample)	\)	Document	SampleDocument	Example of escape sequence for)

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)		-	∎ x
	<u>My</u> Jobs <u>J</u> ob History doc Migr	ation [©]			
()	Select Files	O Migration Settings	O Finish		
	Migration Settings	Migration Settings Domain Mapping	Load from Save as	C	
2	File Settings	Source	Target		
		HARVESTER		+	
	Metadata Settings				
	Column Mapping	U VOYAGER			
	C Domain Mapping				>
	User/Group Mapping				
	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>				
	Filter Condition				
*	🧑 Job Scheduler				
?	× Ø				

				Doc	kit Migrator (Evaluation Version)			-	∎ x
	<u>M</u> y Jobs	;	Job History doc Mig	ration ³					
()		Select	Files		Migration Settings		O Finish		
1		M	igration Settings	Migration Settings Domai	n Mapping		Load from Save as	C	
			File Settings	Source		Target			
		A	Renaming Rules	HARVESTER	~	https://m365x938794.sharepoint.com		-	
		В	3	ORBIT	~	https://m365x938794.sharepoint.com		+	
		×∃	Metadata Settings						
			Column Mapping						
	<	۵ <u>۵</u>	Domain Mapping						>
		8	User/Group Mapping						
		》	Permission Mapping						
		\mathbf{Y}	Filter Condition						
*		Ø	Job Scheduler						
?		× Ø							

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.

User Mapping

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

1. Source User

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



2. Target User

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

				Dockit Migr	ator (Evaluation Version)				🗗 X
	My Job	is	Job History hon	1e ³					
•		Select	Files	Mig	oration Settings		O Finish		
n		M	ligration Settings	Migration Settings User/Group	Mapping		Load from Save as	C	
		S	SharePoint Elements	Source		Target			
		ē	Site and List Templates	Wilber,Alex	~	admin@M365x938794.onmicrosoft.con	ı ~	-	
		4_		training group	~		~	+	_
		A C	Domain Mapping			spocrwl_19240 i:0#.wlylo001_spocrwl_19240		1	
		8	User/Group Mapping			MOD Administrator admin@M365x938794.onmicrosoft. i:0#.f membership admin@m365x93	com 8794.onmicrosoft.com		
	<	2	Permission Mapping			Alex Wilber AlexW@M365x938794.onmicrosoft. i:0#.f membership alexw@m365x93i	com 8794.onmicrosoft.com		>
		Ø	Job Scheduler						
		×	Performance Tuner						
*									
?									24 items

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

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

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 separate tab.

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

1. Source Permission

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

				Dockit Migrator	(Evaluation Version)				-	∎ x
	My Jo	lbs	Job History doc Migr	ation [©]						
()		Select	Files	Migratio	Optimized in the second sec			O Finish		
1		M	ligration Settings	Migration Settings Permission Map	ping		Load from Sav	e as Clear all	C	
U			File Settings	NTFS	NTFS SharePoint					
			Papaming Pulse	FullControl	~	Full Control		~	-	
		АВ	Renaming Rules	Change	~	Contribute		~	-	
		×	Metadata Settings	Read		Reader		~	+	
		-	Column Mapping	Change	^					
	1			Change						5
		"0	Domain Mapping	Read						
		- 😽	User/Group Mapping	Read	v					
		Je	Permission Mapping							
		\mathbf{Y}	Filter Condition							
*		Ø	Job Scheduler							
?		× Ø	V					✓ Map depend	ents too	

2. Target Permission

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

				Dockit Migrator (Evaluation Version)	-	∎ X
	<u>M</u> y Jol	bs	Job History doc Migra	tion		
()		Select	Files	Migration Settings	O Finish	
n		M	igration Settings	Migration Settings Permission Mapping Load from Save as	Clear all	
-			File Settings	NTFS SharePoint		
		AB	Renaming Rules		· +	
		×	Metadata Settings			
			Column Mapping			
	<	₽	Domain Mapping			>
		**	User/Group Mapping			
		2/2	Permission Mapping			
		\mathbf{V}	Filter Condition			
×		Ø	Job Scheduler			
?		× 10	v	×	Map dependents to	D

See the following sections for more information

- User Mapping
- Domain Mapping

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 conditions for File/Folder filter as shown as below.

					Dockit Migrator (Evalu	ation Version)				-	∎ x
	<u>M</u> y Jo	bs	Job History doc Mig	ration ³							
•		Select	Files		O Migration Set	lings			O Finish		
1		M	ligration Settings	Migration Settings	Filter Condition			i≣i I -¢-F	Metadata File Column File Property	C	
~		E,	File Settings	File Folder							
		AB	Renaming Rules	Property	Operator	Value		Co	onnector		
		xI	Metadata Settings		•••	·			OR 🗸	+	
								Metadata F	ile 🗆 File Property 🙁		
			Column Mapping	Title	Name	Subject	Author	Owner			
	<	47	Domain Mapping	Category	Keywords	Comments	Application Name	Byte Count			>
	•			Character Count	Character Count With Spaces	Company	Date Created	Date Modified			Č.
		(User/Group Mapping	Date Last Printed	Date Last Saved	Hidden Slide Count	Last Saved By	Line Count			
		_	Permission Mapping	Manager	Multimedia Clip Count	Note Count	Page Count	Paragraph Cour	nt		
		$\mathbf{\nabla}$	Filter Condition	Presentation Format	Revision Number	Shared Document	Slide Count	Template			
		-		Thumbnail	Total Edit Time	Version	Word Count	File Name	~		
×		Ø	Job Scheduler	·			Mirrore if the		O California - O Nata		
?		× 10					iviigrate if the	e above condition is	C Jausireu U NOT S	JUSHEU	

File Filter

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

Folder Filter

		Dockit Migrator (Evaluation Version)	_ 🗗 X
	My Jobs Job History doc	Vigration	
•	Select Files	Migration Settings	O Finish
n	Migration Settings	Migration Settings ► Filter Condition	ta File Column
U	File Settings	File Folder	
	A B Renaming Rules	Property Operator Value Connect	or
	X Metadata Settings	Folder Name	· +
	Column Mapping	Date Created Date Modified Date Modified Folder Name Containing Folder Name	ile Property
	C Mapping	Path	
	User/Group Mapping		
	Permission Mapping		
	Filter Condition		
⊁	Job Scheduler		
?	× 4	✓ Migrate if the above condition is ● Sat	isfied O Not satisfied

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.



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.

Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below

			Dockit Migrator (Evaluation Version)	-	🗗 X
	<u>M</u> y J	obs <u>J</u> ob History	New SP		
		0	O	0	
9		Select Files	Migration Settings	Finish	
1		Summary			^
		Name : New SP 0365 Job			
		Source URL : https://mars.vsslab.loca Target URL : https://m365x938794-r	ll ny.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com kit365Testsite		
	<	https://m365x938794-my.sha Site Elements	repoint.com/personal/meganb_m365x938794_onmicrosoft_com		_
		Site Permissions	✓ User Alerts ^[1]		
		Activate Site Features	✓ Top Links in Site Pages ^[2]		
		Content Types	☑ Quick Launch Links ^[2]		
		Master Page	✓ Home Page as in Source site ^[2]		
		List Elements			
		✓ List Views	Associate Web Parts		
		✓ List Permissions	Workflows ^[2]		
		Content Types	Workflow History		
		✓ Columns			
×		🗷 Maintain Same Document	ID as in Source		~
			Save & Close	Save & S	tart
?					

SharePoint On-Premises to OneDrive Migration

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

Dockit Migrator (Evaluation Version) My Jobs Job History New Job A + New 🏂 Run △ Incremental X Delete Validate View Job Instance Ø \square Edit 0 💥 🖿 🕄 Group by nam SharePoint Online Jobs (2) 1 Created Date Modified Date Last Run At Job Name Description F 2 iten 1/12/2018 5:35:55 PM 1/12/2018 5:36:14 PM 1/12/2018 5:36:14 PM FS Explorer 1 Test FS Expo Test 1/12/2018 5:43:55 PM 1/19/2018 6:43:12 PM 1/19/2018 6:43:12 PM × ?

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**
	Dockit Migrator (Evaluation Version)							
	My Jobs Job History New Job							
•	New Job							
1								
				ConeDrive				
				Enumerate perso • Current User • Multiple Users	onal site of:			
	Source SharePoint Credential			(e.g., https://contoso-my.sha	repoint.com/personal/johndoe_contoso_onmicrosoft_com)			
	Source URL			Target URL			2	
	Authentication	•		Authoritication		•	Ð	
	Windows			Federated Identity		~		
				liser name				
	VCCDDOV/ewapathan			VCCDBOluiswapathap				
				VSSPRO (VISwallaulall				
	Password		٦	Password				
	•••••			******				
16								
X						Ċc	nnect	
?								

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.

7. 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.

My Jobs Job History home		
Select Files	O Migration Settings Finish	
Image: The second se	Image: Contoso Electronics Image: Private Info Image: Contoso Play Image: Contoso Play	

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 <u>Migration Settings</u>

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
Start

to initiate the migration process.

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:

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

Destination Path: The 'Destination Path' column should contain the target location where the source gets moved.

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.



Batch file content will be added to Items to Migrate tab.

2. 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:

		Dockit Migrator (Evaluation Version)	-	∎ X
	My Jobs	Job History advc [©]		
•		Select Files Migration Settings Finish		
1	Source : × Target :	https://m365x354346-my.sharepoint.com/personal/menb_m365x54560_onmicrosoft_com/ https://m365x345031-my.sharepoint.com/carl/meguynb_m365x54766_onmicrosoft_com/		
	Source : × Target :	https://m365x56899-my.sharepoint.com/newone/rekho_m365x5334431_onmicrosoft_com/ https://m365x113331-my.sharepoint.com/visit/meganb_m365x554541_onmicrosoft_com/		
	Source : X Target :	https://m365x3542136-my.sharepoint.com/zone/menb_m365x54434_onmicrosoft_com/ https://m365x3545676-my.sharepoint.com/complete/menb_m365x545556544_onmicrosoft_com/	T	
			↑ ↓ ↓	>
⊁ ?	Explorer	Batch File Items to Migrate		3 items

3. 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 will appear depending on the items added for migration

- a. To specify migration options for site, click <u>Site Migration Options</u>
- b. To specify migration options for List/Library, click <u>List/Library Migration</u> <u>Options</u>
- 1. Click > button to proceed.

Site Migration Option



The **Site Migration Option** page will appear as shown below:

1. Select the site template to apply to the site from the list of available templates.

Note: Selecting **As in source** Option requires Dockit Migrator Server Agent to be installed in the source server as well.

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

4. **Create as sub site / replace sub site in target site** - The selected site in source location 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 source site content will be migrated to the sub-site in target location while retaining all sub-site content in the target site location.

- 5. **Merge sites** The source site content will be migrated to the target site while retaining all site content in the target site location.
 - d. Overwrite list / library this option overwrites list / library in the target location.
 - e. Retain list / library and merge contents only this option retain list / library and merge contents only in target location.
 - f. Do not overwrite list / library (leave as-is) this option will not overwrite list / library and its contents in target location.
- 6. **Replace site in 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 target site will be deleted and completely replaced by the selected source site. Otherwise, the selected site in source location will be created as a sub-site afresh in the target location.

3. Site Traversal

Dockit Migrator (Evaluation Vers	sion) 🗕 🗗 X
My Jobs Job History New SP ³	
Select Files Migration Settings	Specify site settings to use when migrating a site and its conter \mathbf{x}
	Source Web Template : STS#0
Source : Source : https://mars.vsslab.local/Dockit365Testsite	Target Web Template : STS#0
Target : 5 https://m365x938794-my.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com	Site Migration Option
	O Merge site content 1
	Overwrite list/library
	Retain list/library and merge contents
	Do not overwrite list/library (leave as-is)
	Site Traversal
	Migrate content in selected site and its subsites Migrate content in selected site only
	• Migrate content in selected site only
	Target Site Template
	As in Source V Load Web Templates
16	
T L Hama to Migrate	
? Explorer Trents to Wigrate	
	1 item

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

- 3. **Migrate contents in selected site and its subsites** This option migrates content in selected site and its sub-sites.
- Migrate contents in selected site only This option migrates content available in the selected site only. Dockit Migrator will not traverse the sub-sites within the selected site.

4. Target Site Template



By Default, **Dockit Migrator** uses the same web template as in source SharePoint to create SharePoint site in target Office 365. However, the application allows you to change the web template of your choice. For this, you need to pick one from the dropdown box.

Note: You may need to load all target web templates by clicking **Load Web Templates** button.

List Migration Option



1. The List Migration Option page will appears as shown below:

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

- a) Merge list contents This option merge the list contents only with the following options
- **b) Replace list, if it already exists** This option replaces the list in the target location, if the list already exists in the target location.

3. Select anyone of the following options given below to specify the item versions to be migrated from the source sites

a) Migrate all versions - This option migrates all versions of the item / file.

b) Migrate Latest versions only- This option migrates the latest version of the item / file only.

Migration Settings

1. Migration Settings will appear as shown below.



- 2. From this page, you can :
 - Domain Mapping 0
 - User/Group Mapping Job Scheduler 0
 - 0
 - Performance Tuner 0

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.

				Dockit Migrator (Evaluation Version	1)				_	Ð	x
	My Job	s	Job History ho	ne [©]							
		Select	Files	Migration Settings			F	- Finish			
n		M	igration Settings	Migration Settings Domain Mapping			Load from Sa	ive as	C		
		A	Domain Mapping	Source		Target					
		***	User/Group Mapping	HARVESTER	~	https://m365x93874.sharepoint.com			-		
		*		ORBIT	~	https://m365x93874.sharepoint.com			-		
		0	Job Scheduler		~				+		
		×	Performance Tuner								
	<									>	
16											
×											
?											

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...

User 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.

1. Source User

Dockit Migrator automatically loads the list of target users / group from the source OneDrive site.

				Dockit Migrator (Evalua	tion Version)					🗗 X		
	My Jol	bs	Job History hor	ne								
	Select Files Migration Settings Finish											
		M	gration Settings	Migration Settings User/Group Mapping			Load from	Save as	C			
4		A	Domain Mapping	Source		Target						
		8	~	User/Group Mapping	Viewers	~	admin@ITRAM389431@microsoft.COM	1	~	-		
							Translation Managers	~	admin@ITRAM389431@microsoft.COM	1	~	-
		\odot	Job Scheduler		~			~	+			
		×	Performance Tuner									
	<									>		
										_		
×												
?												

2. Target User

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

				Dockit Migrator (Evaluation Version)				-	∎ X
	My Job	os	Job History hor	ne Ø					
()		Select	Files	Migration Settings			O Finish		
n		Mi	igration Settings	Migration Settings User/Group Mapping		Load from	Save as	C	
\sim		A	Domain Mapping	Source	Target				
		<u>~</u>	User/Group Mapping	Viewers ~	admin@ITRAM389431@microsoft.COM	I	~	-	
				Translation Managers V	admin@ITRAM389431@microsoft.COM	1	~	-	
		\odot	Job Scheduler	·			~	+	
		×	Performance Tuner						
	<								5
×									
?									

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

Select unresolved user from source combo box to map all unresolved / unavailable users from source OneDrive user to a valid user in target OneDrive.

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.

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.



Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below

			Dockit Migrator (Evaluation Version)	_ 6 X
	<u>M</u> y J	obs <u>J</u> ob History	New SP	
S		Select Files	Migration Settings	Finish
		Summary		
				^
		Name :		
		New SP O365 Job		
		Description :		
		Source URL :		
		https://mars.vsslab.loca		
		Target URL :		
		nttps://m365X938794-r	<u>iy.snarepoint.com/personal/megano_msosx938/94_onmicrosoπ_com</u>	
		https://mars.verlab.local/Doc	vitastartin	
		https://m365x938794-my.sha	repoint.com/personal/meganb_m365x938794_onmicrosoft_com	
		Site Elements		
		Site Permissions	✓ User Alerts ^[1]	
		Activate Site Features	✓ Top Links in Site Pages ^[2]	
		Content Types	✓ Quick Launch Links ^[2]	
		Master Page	✓ Home Page as in Source site ^[2]	
		List Elements		
		✓ List Views	Associate Web Parts	
		List Permissions	Workflows ^[2]	
		Content Types	Workflow History	
		Columns		
X		Maintain Same Document	ID as in Source	~
2			Save & C	lose Save & Start
•				

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.

		Dock	kit Migrator (Evaluation Version)			- 🗗 X
	My Jobs Job History	New Job				
(1)	+ New 🖉 Edit 🦻 Run	△ Incremental X Delete	Validate 🗍 View J	ob Instance		
n	SharePoint Online Jobs (2)		Group by name	✓ Search		◙ ∷ ∎ ₴
	Job Name	Description	Created Date	Modified Date	Last Run At	
	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	
\ <u>6</u>						
×						
?	2 items					

Select OneDrive Migration from job category page as shown below.

		Dockit Migrator (Evaluation Version)		- 🗗 X
	My Jobs Job History	New Job			
•	New Job				
1		SharePoint Online (Office 365) Migration Migrate contents from file servers to SharePoint Online (Office 365) and OneDrive.		OneDrive Migration Migrate contents from OneDrive for Business to OneDrive for Business.	
	File share Migration 👻		OneDrive Migration		
				I	
	s >	SharePoint on-premises to Office 365 Migration Migrate contents from SharePoint on-premises (2007 / 2010 / 2013 and 2016) / personal sites to SharePoint Online (Office 365) and OneDrive for Business.			
	SharePoint Migration 👻				
⊁					
?					

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

		Dockit Migrato	r (Evaluation Version)		-	🗗 X
	My Jobs Job History New Job					
5	New Job					
1		Job Name				
	ConeDrive ConeDrive		ConeDrive ConeDrive			
	Enumerate personal site of:		Enumerate personal	site of:		
	Current User		 Current User 			
	O Multiple Users		 Multiple Users 			
	(e.g., https://contoso-my.sharepoint.com/personal/johndoe_contoso_onmicrosoft_co	om)	(e.g., https://contoso-my.sharepoint.c	om/personal/johndoe_contoso_onmicrosoft_com)		
	Source URL		Target URL			
		· ()			• (۲
	Authentication		Authentication			
	Windows	~	Federated Identity		~	
	User name		User name			
	· ·	~			~	
	Password		Password			
	••••••					
¥				_		
					Co	nnect
?						

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.

- 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 OneDrive site.

- 6. Click Connect button to proceed.
- 7. 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.

	Dock	kit Migrator (Evaluation Version)	- @ X
	My Jobs Job History home		
€	Select Files	O O Migration Settings Finish	
1	Image: Seven Provide the sevent Provide the seven Provide the seven Pro	Order State Provide Taylor Control Contecontrol Control Control Control Control Control Control Contr	
			28 items

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 Start

to initiate the migration process.

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:

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

Destination Path: The 'Destination Path' column should contain the target location where the source gets moved.

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.



Batch file content will be added to Items to Migrate tab.

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:

		Dockit Migrator (Evaluation Version)	-	🗗 X
	My Jobs	Job History advc [©]		
•		O O Select Files Migration Settings		
1	× Source Target :	 https://m365x354346-my.sharepoint.com/personal/menb_m365x54560_onmicrosoft_com/ https://m365x545031-my.sharepoint.com/carl/meguynb_m365x54766_onmicrosoft_com/ 		
	× Source Target :	https://m365x56899-my.sharepoint.com/newone/rekho_m365x5334431_onmicrosoft_com/ https://m365x113331-my.sharepoint.com/visit/meganb_m365x554541_onmicrosoft_com/		
	Source × Target :	 https://m365x3542136-my.sharepoint.com/zone/menb_m365x54434_onmicrosoft_com/ https://m365x3545676-my.sharepoint.com/complete/menb_m365x545556544_onmicrosoft_com/ 	-	
			T ↑ ↓	>
16				
~	Explorer	Batch File Items to Migrate		
?				3 items

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 will appear depending on the items added for migration

- c. To specify migration options for site, click Site Migration Options
- d. To specify migration options for List/Library, click <u>List/Library Migration</u> <u>Options</u>
- 3. Click > button to proceed.

Site Migration Option



The **Site Migration Option** page will appear as shown below:

1. Select the site template to apply to the site from the list of available templates.

Note: Selecting **As in source** Option requires Dockit Migrator Server Agent to be installed in the source server as well.

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

a) Create as sub site / replace sub site in target site - The selected site in source location 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 source site content will be migrated to the sub-site in target location while retaining all sub-site content in the target site location.

- **b)** Merge sites The source site content will be migrated to the target site while retaining all site content in the target site location.
 - a. Overwrite list / library this option overwrites list / library in the target location.
 - b. Retain list / library and merge contents only this option retain list / library and merge contents only in target location.
 - c. Do not overwrite list / library (leave as-is) this option will not overwrite list / library and its contents in target location.
- c) Replace site in 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 target site will be deleted and completely replaced by the selected source site. Otherwise, the selected site in source location will be created as a sub-site afresh in the target location.

3. Site Traversal



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

- a) Migrate contents in selected site and its subsites This option migrates content in selected site and its sub-sites.
- b) Migrate contents in selected site only This option migrates content available in the selected site only. Dockit Migrator will not traverse the sub-sites within the selected site.
- 4. Target Site Template



By Default, **Dockit Migrator** uses the same web template as in source site to create site in target. However, the application allows you to change the web template of your choice. For this, you need to pick one from the dropdown box.

Note: You may need to load all target web templates by clicking **Load Web Templates** button.

List Migration Option

1. The List Migration Option page will appears as shown below:



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

- a) Merge list contents This option merge the list contents only with the following options
- **b) Replace list, if it already exists** This option replaces the list in the target location, if the list already exists in the target location.

3. Select anyone of the following options given below to specify the item versions to be migrated from the source sites:

- c) Migrate all versions This option migrates all versions of the item / file.
- d) Migrate Latest versions only- This option migrates the latest version of the item / file only

Migration Settings

- Dockit Migrator (Evalu 0 My Jobs Job History A home **O** Finish Select Files • Migration Settings Domain Mapping User/Group Mapping Job Scheduler Performance Tuner
- e. Migration Settings will appear as shown below.

- f. From this page, you can :
- Domain Mapping 0
- User/Group Mapping 0
- Job Scheduler 0
- Performance Tuner 0

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.

				Dockit Migrator (Evaluation Version)				_	ð	x
	My Job	s	Job History hor	ne [©]							
		Select	Files	• Migration Settings			F	O			
n		M	igration Settings	Migration Settings Domain Mapping			Load from Sa	ve as	C		
		A	Domain Mapping	Source		Target					
		**	User/Group Mapping	HARVESTER	~	https://m365x93874.sharepoint.com			-		
		*		ORBIT	~	https://m365x93874.sharepoint.com			-		
		0	Job Scheduler		~				+		
		×	Performance Tuner								
	<									>	
<u> </u>											
×											
?											

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...

User 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.

1. Source User

Dockit Migrator automatically loads the list of target users / group from the source OneDrive site.

				Dockit Migrator (Evaluat	tion Version)				-	D X
	My Jo	bs	Job History hor	ie Ø						
•		Select	Files	Migration Settin	ngs			O Finish		
n		M	igration Settings	Migration Settings User/Group Mapping			Load from	Save as	C	
-		A	Domain Mapping	Source		Target				
		8 8	User/Group Mapping	Viewers	~	admin@ITRAM389431@microsoft.COM		~	-	
		<u>Å</u>	Job Scheduler	Translation Managers	~	admin@ITRAM389431@microsoft.COM		~	-	
			Job Scheduler		~			~	+	
		X	Performance Tuner							
	<									>
*										
?										

2. Target User

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

				Dockit Migrator (Evaluation Version)				-	∎ x
	My Jol	os	Job History hon	ne ^O					
()	Select Files			O Migration Settings	O Migration Settings Finit				
		M	igration Settings	Migration Settings User/Group Mapping		Load from	Save as	C	
		4	Domain Mapping	Source	Target				
		<u>}</u>	User/Group Mapping	Viewers ~	admin@ITRAM389431@microsoft.COM	И	~	-	
				Translation Managers 🗸 🗸	admin@ITRAM389431@microsoft.COM	И	~	-	
		\odot	Job Scheduler	·			~	+	
		×	Performance Tuner						
	<								5
⊁									
?									

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

Select unresolved user from source combo box to map all unresolved / unavailable users from source OneDrive user to a valid user in target OneDrive.

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.

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.


Job Summary

Job summary page display all configured settings and Items to migrate items. Job summary page will be appear as shown as below

	Dockit Migrator (Evaluation Version)			a x
Jobs <u>J</u> ob History	New SP			
0				
Select Files	Migration Settings		Finish	
Summary				
Name :				
New SP O365 Job				
Description :				
e comption i				
Source URL :				
https://mars.vsslab.loc	1			
Target URL :				
https://m365x938794-	ny.sharepoint.com/personal/meganb_m365x938794_onmicrosoft_com			
Cito Elemento	reponiticonitypersonaly meganu_msosx556754_onniticiosof_com			
Site Elements				
Site Permissions	User Alerts III			
Contant Types	Oviek Levels Liste [2]			
Master Page	V Quick Launch Links ···			
List Elements				
✓ List Views	Associate Web Parts			
List Permissions	Workflows ^[2]			
Content Types	Workflow History			
Columns				
Maintain Same Documen	ID as in Source			
		Save & Close	Save &	Start

How to Guide

- Import Document Versions
- Create Document Sets
- <u>Rename Documents in File System</u>
 <u>Adding new terms in Managed Metadata column in SharePoint</u>

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

1. Explorer Mode Option:

Follow the steps in the <u>Explorer Mode (Fileshare to SharePoint Migration)</u> 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\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 <u>File Settings</u> wizard step to handle file versions correctly.

2. Batch File Mode Option:

Follow the steps in <u>Batch file Mode (Fileshare to SharePoint Migration)</u> 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\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 <u>File Settings</u> 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 Folder & File Renaming rules...

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. Please note that the files are arranged with respect to their version sequence.

Select items to import						×
Select folders and files to import destination respective tree-view.	brary	or a folder location and click Add bu	itton to add items. Click Remove bu	itton to remove selected items fro	m import. Press F5 to refresh	
Source: C:\Users\adminuser1.VSSLAB	Docun	nents\Versions				
	^	Name Doc_v1 Doc_v2 Doc_v3 Doc_v4	Size 1 KB 1 KB 1 KB	Type Text Document Text Document Text Document Text Document	Modified Date 3/30/2016 5:11:13 PM 3/30/2016 5:11:21 PM 3/30/2016 5:11:20 PM 3/30/2016 5:11:33 PM	
Destinations https://stope.vovager.local/a	~	4 objects				۸dd
	~	Items added for import			× Remove / Rer	nove All
Image: Note Image: Note	~	Source C:Users\adminuser1.VSSU C:Users\adminuser1.VSSU C:Users\adminuser1.VSSL C:Users\adminuser1.VSSL C:Users\adminuser1.VSSL	AB \Documents \Versions \Doc_v1.t AB \Documents \Versions \Doc_v2.t AB \Documents \Versions \Doc_v3.t AB \Documents \Versions \Doc_v4.t	Destination https://stone.voyager.local/aa https://stone.voyager.local/aa https://stone.voyager.local/aa		
					<u>O</u> K <u>C</u> an	cel

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.

		Dockit Task Wizard	- Sample1		×	
Step 2 Select f	Step 2 of 10: Items to import Select folders or files to import by clicking 'Browse' button.					
Delete?	Source Path	Destination Location	Contains	Folder Traversal Option		
×	D:\Sample Files\Account Files	https://alpine.vsslab.local/De	60 Files, 3 Folders, 2.85 MB	Import all files and folders		
×	D:\Sample Files\Audit Files	https://alpine.vsslab.local/De	<u>10 Files, 0</u> Folders, 96.9 KB	Import all files and folders		
×	D:\Sample Files\Image Files	https://alpine.vsslab.local/De	32 Files, 1 Folders, 1.82 MB	Import all files and folders		
Total :	0 item(s), 0 KB			Refresh Size 🗁	B <u>r</u> owse	
Folder Per	g Rules:	File Depar		Dula M		
	Truncated folder names max	length 129	Truncated file	names max length		
	Turcated folder names, max		Trancated hier	names, maxiengur 120		
Perro	rm incremental Migration	/ One-way Sync	Dedit			
0.00	Last migration date: NONE)	ateu, since last migration using i	DOCKIC			
	cuments modified or newly crea	ated, since last update in Share	Point			
O Do	ocuments modified or newly crea	ated This Week V				
		<	Back Ne	ext > <u>F</u> inish	<u>C</u> ancel	

Click **Next** to proceed.

Select **Create new version** option in the <u>File Settings</u> 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.

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:

In Dockit Migrator application, create a task by clicking **Explorer mode** from **File Share migration** option in **New Job** page as shown below.

		Dockit Migrator (Evaluati	on Version)	_ = ×
	My Jobs >> New Job			
() ()	File sha	are to SharePoint Migration		Clean up Metadata Assign / undate metadata to the documents that already
	along w	The shares, local computers and personal drives the metadata to SharePoint on-premises.	Ø	exists in SharePoint document libraries (on-premise).
	File share Migration 👻	_	Clean up Metadata 👻	
	Explorer Mode Import folders, documents and metadata using explorer mode	to SharePoint Migration and lists from SharePoint server 2003 /		
	Batch file Mode Import folders, documents and metadata using batch file mode	/ 2013 and SharePoint 2016 to SharePoint		
	SharePoint Migration 👻			
×				

Note: You can also use Batch File Mode option from Import folders, files and metadata to SharePoint Libraries to create folders as new document sets from remote computer. In this section, we will discuss using the Explorer Mode option from Import folders, files and metadata to SharePoint Libraries import task option to describe how to use Dockit Task Wizard to create folders as new document sets in SharePoint.

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.

- 1. 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.

DocKIT Task Wizard	- File Import condition	×
SharePoint de	stination location	
Specify a SharePo system. Specify u	bint URL of a site / library / folder location into which you wish to import folders and files from file ser credential to connect to SharePoint when running the import task.	`
SharePoint URL:	https://www.yyapin.sharepoint.com/sites/dey/DocKIT	
Authentication:	Windows ~	
User Name:	JohnDoe 🗸	
	(johndoe@contoso.com, contoso\johndoe, johndoe)	
Password:	•••••	
	< Back Next > Finish	<u>C</u> ancel

2. In '**Items to import**' step, select and add the desired folders which you want to create as document set in SharePoint library.

- 3. Proceed with steps provided in Dockit Task Wizard.
- 4. In Mapping Templates step, click **Manage Templates...** button to create a template with the content type to create new document sets.

	Dockit Task Wizard - File share Migration								
Step 3 of 9: Column Mapping Image: Step 3 of 9: Column Mapping Map metadata properties to the desired SharePoint columns. Image: Step 3 of 9: Column Mapping						۵ ۲			
Column Mapp	oing Template:	Blank		¥			<u>S</u> ave As	+ Reset	
Source Column		Target	Colu	mn		Defau	lt Value		
Name	~	Name			×			_	^
Created by	~	Created By			~			-	
Modified by	~	Modified By			~			_	
Created	~	Created			·			-	
Modified	~	Modified			•			-	
Approval Status	~	Approval Status			×				J
Assign Content Type				Specify the	content t	ype to l	be assigned f	for documer	nt/
Document Content Type:	Content Typ	e	~	folder. You providing t	can creat	e a fold nt set o	er as docum content type	ent set by name unde	r
Folder Content Type:	Folder Conte	nt Type	~	['] Folder Con configured	itent Type in the tar <u>c</u>	'. If left jet Shai	blank, defau ePoint librar	ult content t y will be set	ype
	Approval 3	File Status	^						
	Content T Created	ype		< <u>B</u> ack	<u>N</u> ext :	>	Einish	<u>C</u> ano	el
	Created b Folder Con Modified Modified b	y ntent Type y	~						

Then the templates dialog will appear as shown below:

- 5. 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. **Specify the content type** Specify any 'Document Set' derived content type to create a document set and assign this specific content type to it. If the content type specified in the textbox does not exist, Dockit will create the folder and will assign the default content type of the library for the newly created folders.
 - b. **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.

- c. **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.
- 6. Click **Next** and proceed the subsequent steps.

Dockit provides an ability to assign a calculated value for a SharePoint column based on userdefined 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:

		Doc	kit Task Wizard		×
Step 2 of 7: Column Ma Map metadata properties to the	apping ne desired S	harePoint colu	mns.		
Column Mapping) Template:	Blank	¥	🛃 Save As 🤞	• <u>R</u> eset
Source Column		Ta	arget Column	Default Value	
Name	*	Name	×		-
	~		¥		4
Shared Document Slide Count Subject Template Thumbnail Title Total Edit Time Version Word Count Function Builder <new function=""> Document Content Type: Folder Content Type:</new>	v		 ✓ Specify the confolder. You can providing the d ✓ Folder Content configured in the d 	itent type to be assigned for create a folder as documen ocument set content type na t Type'. If left blank, default he target SharePoint library o	document / t set by ame under content type will be set.
			< <u>B</u> ack	Next > Einish	<u>C</u> ancel

1. Select <new function> under 'Function Builder' as Source from the list as shown below:

2. The Function Builder Dialog will appear as shown below:

Function Builder	x
Insert	
4	
OK Cancel	

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:

	Function Builder	×
	Insert	
=1 <i>fx</i> Left <i>fx</i> LTrim		
	OK Cancel	

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.

	Function Builder	×
	Insert	
=1 <u>f</u> x Left <u>f</u> x LTrim		
	OK Cancel	

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:

	Function Builde	er ×
		Insert
=Left("t)	Title.[FileProperty] Template*.[FileProper Thumbnail*.[FileProp Total Edit Time*.[FileF	
		OK Cancel

6. Select a property name and press Enter key or Double Click to add as a parameter for the function

Function Builder	×
	Insert
=Left ("t) Title.[FileProperty] Template*.[FileProper Thumbnail*.[FileProp Total Edit Time*.[FileF	
	OK Cancel

7. You can also provide a free text or integer as parameters for the function, if desired.

Function Builder ×
2 Insert
=Left("Title.[FileProperty]", 3)
OK Cancel

8. You can also use nested functions too as shown below:

Function Builder	x
2 Insert	
<pre>=Concatenate(Left("Title.[FileProperty]", 3), Right("Name. [FileProperty]", GetDay("Created Date.[FileProperty]")))</pre>	
OK Cancel	

9. Click the question mark image in the function builder to show the information about builtin function in Dockit.

Fund	ction Builder Help	×
Select a function from the list and click GO button to load help	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

10. Select the option to show the information about the function in Dockit.

Function Builder Help				
Select a function from the list and click GO button to load help	Concatenate GetDateDiff GetDay GetFolderName GetMonth GetString GetTime GetYear If Left Ltrim Right			
	Rtrim Split			

11. Information about the function in Function Builder Help dialog as shown below:

Function Builder Help
Select a function from the list and click GO button to load help
<u>Syntax:</u>
Concatenate(Value1, Value2, Value3,)
• Value(x) File / Metadata property or enter free text in double quotes.
Description:
Joins several texts into one string.
<u>Example:</u>
Concatenate("Hello", "World")
Result: HelloWorld

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","MMMM","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	Sampl e Metad ata file colum n Value	Sample File Property Value	Resul t	Remark s
Right("Title.[metadatafile]",5)	test value		value	Right function returns last two characte rs from the value in the metadat a file column 'Title'
Left("Title.[fileproperty]",2)		test property value	te	Left function returns the first two characte rs from the value in the file property 'Title'
RTrim ("Sample Value",5)			Sampl e	Rtrim truncate s Value from the given value Sample Value and returns Sample
LTrim ("Demo Version",5)			Versio n	LTrim function truncate

				s <i>Demo</i> from the given value and returns <i>Version</i>
GetFolderName("path.[fileproperty]" ,2)		C:\Sample Folder\Test\De mo.txt	Sampl e 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	Νον	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 differenc e between two date values.
Concatenate("Title.[FileProperty]","- ","Name.[MetadataFile]")	Conten t	Туре	Type- Conte nt	Joins several texts into one string.
If("Title.[fileproperty]","StartsWith[F ileShare]","File","Folder")		FileShare Document	File	If the condition is TRUE, it returns the True part string value.
Split("Name.[fileproperty]","_",2)		Dockit_UserMa nual_2012	UserM anual	Splits the given string based on the split characte r (_) and returns the value from the seco nd part / occurren ce.
GetString("Title.[metadatafile]"," 4}")	test case		test	Returns the string value that matches with the regular expressi on pattern.

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 <u>Folder & File Renaming</u> <u>rules...</u> section in the help document.

Adding new terms in Managed Metadata column in SharePoint

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.

In order to update Managed Metadata column from a remote computer, please visit the System Requirements section in the help file for more information.

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\Sampl	United States	Washington;California;Alask	Dockit will
e Presentation.pptx		a	search the
			specified term
			label under
			the
			associated
			term set.
			Dockit will
			assign the
			corresponding
			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\Sampl	Continent North	Continent	If there are
e Report.pdf	America Country	America Country United	duplicates in
	United States	States States Washington;	the same
		Continent	term sets, it is

AmericalCountrylUnited	recommende
States States California;	d to use
Continent	Absolute
America Country United	Term Path as
States States Alaska	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.

Use this tool to create a user profile in **Windows Stored User Names and Passwords** applet, in order to specify the user context to run Dockit migration tasks. The stored user profile will be very useful when you are trying to perform the following migration tasks in scheduled manner using Dockit:

- Migrating content from SharePoint 2003 / 2007 / 2010 / 2013 / 2016 environment to SharePoint 2007 / 2010 / 2013 / 2016 environment
- Migrating content between two different SharePoint 2007 / 2010 / 2013 / 2016 server farms
- Migrating content using Laptop / PC that is not part of the SharePoint domain

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

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

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

Profile Manager	×	
Dockit can store your logon information for SharePoint sites using Windows Stored User Names and Passwords applet / Credential Manager. To add a user profile, click Add.		
	<u>A</u> dd	
	<u>R</u> emove	
<u>O</u> K	<u>C</u> lose	

1. The **Profile Manager** dialog will be shown as below:

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

	New User Profile	x	
Create a new user profile and store it in Microsoft Windows Stored UserNames and Passwords applet / Credential Manager to connect to SharePoint.			
User name: Password:	vsslab\farmadmin_sp13-1		
Confirm Password:	•••••		
	<u>O</u> K <u>C</u> ancel		

Click OK.

3. The newly added user profile will be shown in the **Profile Manager** as below:

Profile Manager	×	
Dockit can store your logon information for SharePoint sites using Windows Stored User Names and Passwords applet / Credential Manager. To add a user profile, dick Add.		
meganb@mod799074.onmicrosoft.com voyager\farmadmin_sp13-1 vsslab\farmadmin_sp07-1 vsslab\farmadmin_sp10-1 vsslab\farmadmin_sp16-1	<u>A</u> dd <u>R</u> emove	
<u>o</u> ĸ	Close	

- 4. Henceforth, the stored user profile can be used as credential input in Dockit application in order to connect to the SharePoint environment.
- 5. Click **Close** button to close the **Profile Manager** dialog.

6. Additional References:

Behavior of stored user names and passwords http://support.microsoft.com/kb/281660

Stored User Name and Password Best practices http://technet.microsoft.com/en-us/library/cc784749(WS.10).aspx

Site Traversal Options

1. Site Traversal Options dialog will appear as shown below:



- 2. Select anyone of the following options given below to specify the content to be migrated from the source sites:
 - **Migrate contents in selected site and its subsites** This option migrates content in selected site and its sub-sites.
 - **Migrate contents in selected site only** This option migrates content available in the selected site only. Dockit will not traverse the sub-sites within the selected site.
 - **Migrate site structure only at the given source SharePoint site** This option migrates site structure only at the given source SharePoint site. Dockit will not traverse the sub-sites within the selected site.
 - Migrate the given source site and its subsites structure only This option migrates site structure only at the given source SharePoint site and its sub sites.
- 3. Click **OK** to proceed.

List Traversal Options

1. List Traversal Options dialog will appear as shown below:



- 2. Select anyone of the list traversal options given below to specify the contents to be migrated from source lists:
 - a. **Migrate all list items and folders** This options migrates folders and files exactly as they are in source SharePoint list. The source list structure will be retained in the destination location.
 - b. Migrate list items in the top level only This option migrate files available in the top-level only. Dockit will not traverse the subfolders within the top-level folders.
 - c. **Migrate folder structure and ignore other items (All folders only)** This option creates the sub-folder structure in the destination location and ignores all list items that are available within the added list and its sub-folders.
 - d. Migrate list items and ignore folder structure (All items only) This option migrates files only and ignore its source folder structure in the source SharePoint list.

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).

3. Click **OK** to proceed.

Library Traversal Options

1. Library Traversal Options dialog will appear as shown below:



- 2. Select anyone of the library traversal options given below to specify the contents to be migrated from source lists:
 - a. **Migrate all list items and folders** This options migrates folders and files exactly as they are in source SharePoint library. The source library structure will be retained in the destination location.
 - b. **Migrate list items in the top level only** This option migrate files available in the top-level only. Dockit will not traverse the subfolders within the top-level folders.
 - c. **Migrate folder structure and ignore other items (All folders only)** This option creates the sub-folder structure in the destination location and ignores all files that are available within the added library and its sub-folders.
 - d. **Migrate list items and ignore folder structure (All items only)** This option migrates files only and ignore its source folder structure in the source SharePoint library.

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).

3. Click **OK** to proceed.

Folder Traversal Options

1. Folder Migration Option dialog will appear as shown below:



- 2. Select the appropriate option to create the selected folder by selecting the option buttons (Yes / No).
- 3. Select anyone of the list traversal options given below to specify the contents to be migrated from source lists:
 - a. **Migrate list items and retain source sub-folder structure(All items and folders)** This options migrates folders and files exactly as they are in source SharePoint list. The source folder structure will be retained in the destination location.
 - b. **Migrate list items in the top-level folders only (Top level items)** This option migrate files available in the top-level folders only. Dockit will not traverse the subfolders within the top-level folders.
 - c. **Migrate sub-folder structure only and ignore all list items (All folders only)** This option creates the sub-folder structure in the destination location and ignores all list items that are available within the added folder and its sub-folders.
 - d. **Migrate list items only and ignore source sub-folder structure (All items only)** This option migrates files only and ignore its source folder structure in the source SharePoint list.

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).

4. Click **OK** to proceed.

Site Migration Options

1. Site Migration Options dialog will appear as shown below:



2. Select the site template to apply to the site from the list of available templates.

Note: Selecting **As in source** Option requires Dockit Server Agent to be installed in the source server as well.

- 3. 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.
- 4. Select the option to apply this migration settings to all selected sites.
- 5. Click **OK** to proceed.

	Site Migration Settings		
Specify site settings to use when migrating a site and its content.			
Source Web Template:	STS#0		
Target Web Template:	STS#0		
Site Migration Option: O Create as sub-site / replace sub-site in target site 🁔			
	Merge sites		
 Overwrite list / library 			
Retain list / library and merge content only			
○ Do not overwrite list / library (leave as-is)			
	 Replace site in target location (1) 		
Target Site Template:	Team Site V Load		
Apply this site migration settings to all selected sites			
	<u>O</u> K <u>C</u> ancel		
List Migration Options

1. List Migration Options dialog will appear as shown below:

List Migration Options	×
Specify List settings to use when migrating a List and its contents.	
List Migration Options	
 Replace List, if it already exists 	
Merge List content	
 Skip list item, if already exists 	
 Replace list item, if already exists 	
 Add list item as new version, if already exists 	
Apply this list migration settings to all selected Lists	
<u>O</u> K <u>C</u> ance	4

- 2. Select anyone of the list migration options given below to specify the contents to be migrated from source lists:
 - a. **Replace list, if it already exists** This option replaces the list in the target location, if the list already exists in the target location.
 - b. **Merge list contents** This option merge the list contents only with the following options
 - c. **Skip list item, if already exists** This option skips the list item in the target location, if it already exists.
 - d. **Replace list item, if already exists** This option replaces the list item in the target location, if it already exists.
 - e. **Add list item as new version, if already exists** Add the list item as new version in target location, if the list item already exists
- 3. Select this option to apply this migration settings to all selected lists.
- 4. Click **OK** to proceed.

Library Migration Options

1. Library Migration Options dialog will appear as shown below:

List Migration Options	×
Specify List settings to use when migrating a List and its contents.	
List Migration Options	
 Replace List, if it already exists Merge List content 	
 Skip list item, if already exists 	
Replace list item, if already exists	
Add list item as new version, if already exists	
Apply this list migration settings to all selected Lists	
<u>Q</u> K <u>C</u> ance	2

- 2. Select anyone of the list migration options given below to specify the contents to be migrated from source lists:
 - a. **Replace list, if it already exists** This option replaces the list in the target location, if the list already exists in the target location.
 - b. **Merge list contents** This option merge the list contents only with the following options
 - c. **Skip list item, if already exists** This option skips the list item in the target location, if it already exists.
 - d. **Replace list item, if already exists** This option replaces the list item in the target location, if it already exists.
 - e. Add list item as new version, if already exists Add the list item as new version in target location, if the list item already exists
- 3. Select this option to apply this migration settings to all selected lists.
- 4. Click **OK** to proceed.

Folder Migration Options

1. Folder Migration Option dialog will appear as shown below:

Folder Migration Options
Specify folders settings to use when migrating a folder and its contents (sub-folders and list items).
Do you want to create the selected folder in the destination list? O Yes O No
Folder Migration Options
 Replace folder, if it already exists
Merge folder content
Skip list item, if already exists
 Replace list item, if already exists
 Add list item as new version, if already exists
Apply this folder migration settings to all selected folders
<u>O</u> K <u>C</u> ancel

- Select the appropriate option to create the selected folder by selecting the option buttons (Yes / No).
- Select anyone of the list migration options given below to specify the contents to be migrated from source lists:
 - a. **Replace folder, if it already exists** This option replaces the folder in the target location, if the list already exists in the target location.
 - b. **Merge folder contents** This option merge the folder contents only with the following options
 - c. **Skip list item, if already exists** This option skips the list item in the target location, if it already exists.
 - d. **Replace list item, if already exists** This option replaces the list item in the target location, if it already exists.
 - e. **Add list item as new version, if already exists** Add the list item as new version in target location, if the list item already exists
- 4. Click **OK** to proceed.

Migration Filters

Dockit can migrate webs, lists, folders, files and list items from source SharePoint to destination SharePoint based on certain migration filters.

1. The **Migration Filters** step appears as shown below:

Migration Filters	×
Specify conditions for webs, lists, folders, items to migrate from SharePoint	
BASIC O ADVANCED	
<u>W</u> eb Level) ^
List Level)^
<u>F</u> older Level	^ ~
<u>I</u> tem Level	^ ~
Apply this filter condition to all items OK Can	cel

- 2. Select any one of the following options given below:
 - **BASIC** -Basic migration filters will be used to filter webs, lists, folders, and list items.
 - **ADVANCED** The available migration filters specified will be used to filter webs, lists, folders and list items.

- 3. You can specify migration conditions at four levels:
 - Web Level Migrate the source webs that satisfy the given migration filter.
 - List Level Migrate the source lists that satisfy the given migration filter.
 - **Folder Level** Migrate the folders that satisfy the given migration filter.
 - List Item Level Migrate the files / items that satisfy the given migration filter.
- 4. Option that has discussed below is **Folder Level Filters**.
- 5. Once you select **BASIC** and click 'Folder Level Filter...' button to specify the respective filter condition. The migration filter dialog will appear as shown below:

Folder Migration Filters (Basic) ×								
Specify condition to apply	Specify condition to apply at the folder level. For example, you can export folders when [Created By' = 'John Doe'].							
Property		Field T	уре	Operator		Value	Connec	tor
Folder Name	-	Text	Ŧ	=	•	Conference Information	Or	-
Folder Name	•	Text	Ŧ	=	•	Root Folder		- +
Clear							<u>O</u> K	<u>C</u> ancel

6. Once you specify the respective folder migration filter, the task wizard step appears as shown below:

Migration Filters	×
Specify conditions for webs, lists, folders, items to migrate from SharePoint	
BASIC O ADVANCED	
<u>W</u> eb Level	< >
List Level	~ ~
Eolder Level	^
<u>I</u> tem Level	< >
Apply this filter condition to all items OK Can	cel

7. Once you select **ADVANCED** and click 'Folder Level Filter...' button to specify the respective filter condition. The migration filter dialog will appear as shown below:

Folder Migration Filters (Advanced)					
Specify rule tha example, you ca	t must be satisfied before mi an migrate folder only when	grating item from source SharePoint. For [Created By' = 'john doe'].			
<u>F</u> ield Name	Modified Date (SharePoint	t) 🗸			
<u>O</u> perator	= \v				
<u>V</u> alue	10/20/2016				
	' <u>A</u> ND' to Filter	'O <u>R</u> ' to Filter			
Conditions:		() & x X Ø			
[Folder Name AND [Modified	(SharePoint)] = 'Employee D d Date (SharePoint)] = #10/3	Details' 20/2016#			
Migrate items i	f above condition is	\odot satisfied \bigcirc not satisfied			
		<u>O</u> K <u>C</u> ancel			

8. Click (...) button to add the SharePoint columns in Field Name dropdown. The Add Fields Dialog appears as shown below

	Add Managed F	Properties Dialo	g	x
Name:				
Type:	Text			~
		<u>A</u> dd	<u>R</u> emove	2
Column I	Name	Column Type		
		<u>O</u> K	<u>C</u> ancel	

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

9. Once you specify the respective folder migration filter, the task wizard step appears as shown below:

	Migration Filters	×
Specify conditions for	webs, lists, folders, items to migrate from SharePoint	
⊖ BASIC	ADVANCED	
<u>W</u> eb Level		
<u>Li</u> st Level		
<u>F</u> older Level	[Folder Name] = 'Conference Information' AND [Modified Date (SharePoint)] = #1/31/2017#	
<u>I</u> tem Level		
Apply this filter con	dition to all items OK Canc	el

10. Click **Next** to proceed.

Folders & File Renaming Rules

SharePoint does not permit certain characters in folder and file names. Dockit 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. You can create naming rules, save them as **Naming Rules** and re-use them in your import tasks.

Dockit provides two default renaming rules ('File Rule', 'Folder Rule') for renaming files and folders respectively. These rules will replace the invalid SharePoint characters with hyphen (-) character.

Dockit uses 'Regular Expressions' technique which enables you to create generic renaming rules in order to specify the pattern for file name conventions in Folder & File Renaming rules page. The 'regular expressions' technique is widely used in software where pattern matching is crucial.

To specify a rule for invalid character sequence to valid character sequence:

1. Select New from the Templates Tools pane. The new template will appear and enter an unique template name for the template as shown below:



- 2. Once the new renaming rule template created,
 - a. Specify the SharePoint invalid character in **Find** textbox and its valid character in **Replace** textbox, then click **Add** button.
 - b. Click **Remove** button to remove the selected naming rule.



- 3. You can Edit the existing renaming rule by selecting the appropriate rule.
- 4. If you have to order the rules in the grid using the **navigation** buttons available on the right side of the grid, click **Save** button to save the rules in that order.
- 5. The following are valid wildcard characters that can be used to create naming rules in Dockit:

* (asterisk)	Denotes any number of characters to be left
? (question mark)	Denotes at least one character position to be truncated / replaced

Sample renaming rules:

File Name	Find	Replace	Result	Remarks
SampleV1	*V1	{empty}	Sample	Truncate V1, if the file
				ends with V1
SampleV1	*V1	А	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	Iruncate V and the
				file name character
				following it
				(Infinediately
				succeeding
				names contains V and
				followed by any one
				character
Sample	2n	{emntv}	Sale	Truncate one
Sumple	·P	[empey]	Suic	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	
Sample?File	?	Text	SampleTextFile	
Hello*World	*	{empty}	HelloWorld	
Sample\$	\$	Dollar	SampleDollar	
Sample^File	^	{empty}	SampleFile	
Sample+Document	+	Plus	SamplePlusDocument	
Hello <world< td=""><td><</td><td>{empty}</td><td>HelloWorld</td><td></td></world<>	<	{empty}	HelloWorld	
Hello>World	>	{empty}	HelloWorld	
[Document		Word	WordDocument	
Word		Document	WordDocument	
(File	(Sample	SampleFile	
Sample))	Document	SampleDocument	

Reference

- Batch file structure
- Metadata file structure
 File structure for metadata
- Error Messages and Resolution
- Troubleshooting

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	Equivalent Format String	
Separator		
, (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.
- 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", "<u>http://sharepoint/site1/Lists/Contacts</u>".
- 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 site structure only at the given source SharePoint site level. This option will not migrate lists /libraries and its content (list items and folders) at the given source SharePoint site level and also its sub-sites.
.	http://sharepoint/site1/*.*	Migrate the given source site and its sub-sites structure only (excluding lists / libraries and its content).

- 6. The 'Destination Path' column of all the rows should contain the URL of the target SharePoint site / list / folder e.g., <u>http://RD65/technical documents/folder1</u>.
- 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/Sam ple File.xls	http://sharepoint/technic al documents/folder1	folder2/folder3
http://sharepoint.vyapin.com/Lists/Contacts/1 000	http://sharepoint/Emplo yee Details	Sales/Executiv es

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/Mis sion	Team Site
http://sharepoint.vyapin.com/sites/Adventur e/Estuary	http://sharepoint/sites/Mis sion/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.
- 13. 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.

Sample format of a CSV / TEXT batch 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"

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 commonly 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.	"Windows 7"
	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) 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/ch art.bmp"
Target Audiences	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers: Administrators:

(Multiple value) (Applicable only for a MOSS / Microsoft	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.	SPUsers; Contributors; Designers
SharePoint Server 2010 and above	Multiple values should be separated with ';'.	
library)	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 and above).	
Publishing Schedule Start Date (Applicable only for Collaboratio n 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 Collaboratio n 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 Collaboratio	The http URL of any picture can be given to this field. Relative URL also can be given to this field.	http://sharepoint/Pictures/ch art.bmp "Pictures/chart.bmp" <img src="/sites/collaboration</td></tr><tr><td>n Portal /
Publishing
Portal Site)</td><td></td><td>portal/PublishingImages/New
sArticleImage.jpg"/>
Publishing Hyperlink (Applicable only for Collaboratio n Portal /	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"

Publishing Portal Site)		" <a href="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"> NewsArticleImage.jpg "
Publishing HTML (Applicable only for Collaboratio n 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:100 0AX"
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	"Continent North America Country United States States Alaska" "Alaska"

	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 specified term value and assign the first matching term value for the corresponding managed metadata	"Continent North America Country United States States Washington;Co ntinent North America Country United States States California;Continent North America Country United States 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/Document s/Sample 1.doc; http://sharepoint/Documents /Sample 2.xlsx" "http://sharepoint/Lists/Custo m List/1000"

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	";#Windows Live;;#Mail;#"	Windows Live;#Mail
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 ';#'. * - 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"

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.	"Windows 7"
	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) 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/ch art.bmp"
Target Audiences	Global Audience name, Security / Distribution Group name and SharePoint	"All site users; Admins; Viewers; Administrators:

(Multiple value) (Applicable only for a MOSS / Microsoft	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.	SPUsers; Contributors; Designers
SharePoint Server 2010 and above	Multiple values should be separated with ';'.	
library)	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 and above).	
Publishing Schedule Start Date (Applicable only for Collaboratio n 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 Collaboratio n 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 Collaboratio n 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/ch art.bmp "Pictures/chart.bmp" <img src='/sites/collaboration portal/PublishingImages/New
Publishing Portal Site) Publishing Hyperlink (Applicable only for Collaboratio	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"

Publishing Portal Site)		" <a href="/sites/collaboration
portal/PublishingImages/New
sArticleImage.jpg"> NewsArticleImage.jpg "
Publishing HTML (Applicable only for Collaboratio n 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:100 0AX"
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	"Continent North America Country United States States Alaska" "Alaska"

	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 specified term value and assign the first matching term value for the corresponding managed metadata	"Continent North America Country United States States Washington;Co ntinent North America Country United States States California;Continent North America Country United States 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/Document s/Sample 1.doc; http://sharepoint/Documents /Sample 2.xlsx" "http://sharepoint/Lists/Custo m List/1000"

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	";#Windows Live;;#Mail;#"	Windows Live;#Mail
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.		

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

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"

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 <u>Troubleshooting</u> 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 Folder & File Renaming Rules 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.</field></value>	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.</field></value>	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.
<pre>'<value>' - Not a valid list item URL in the site collection.</value></pre>	Ensure that the given list item URL is a valid list item's URL. Unavailability of

	the list item causes the error.
<pre>'<value>' - Related item must be a valid list item within the site collection.</value></pre>	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></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.</fieldname>	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 <i>Dockit Server Agent</i> 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</name>	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</name>	Ensure that the list content type is derived from a 'Document' 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=""></error>	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=""></error>	Ensure that the constructed Folder / File Renaming rules is correct. The find string used in renaming rules 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.

Troubleshooting

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

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 under 'TaskHistory' folder.

2.

Activity log file - e.g., < Application Data Folder >\TaskHistory\Dockit Task\20121222-183919\logs\ActivityLog.txt

a.

Error log file - e.g., *<Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\ActivityErrors.txt

Metadata log file - e.g., *<Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\logs\MetadataErrors.txt

c.

d.

e.

b.

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 Task\20121222-183919\logs\MoveActivityLog.txt

Task settings file - e.g., <*Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\settings\Details.xml

f.

Library settings file - e.g., *<Application Data Folder*>\TaskHistory\Dockit Task\20121222-183919\settings\LibrarySettings.xml

g.

h.

Process details file - e.g., *<Application Data Folder*>\TaskHistory\Dockit 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 -> About** 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