User Manual

Dockit Archiver
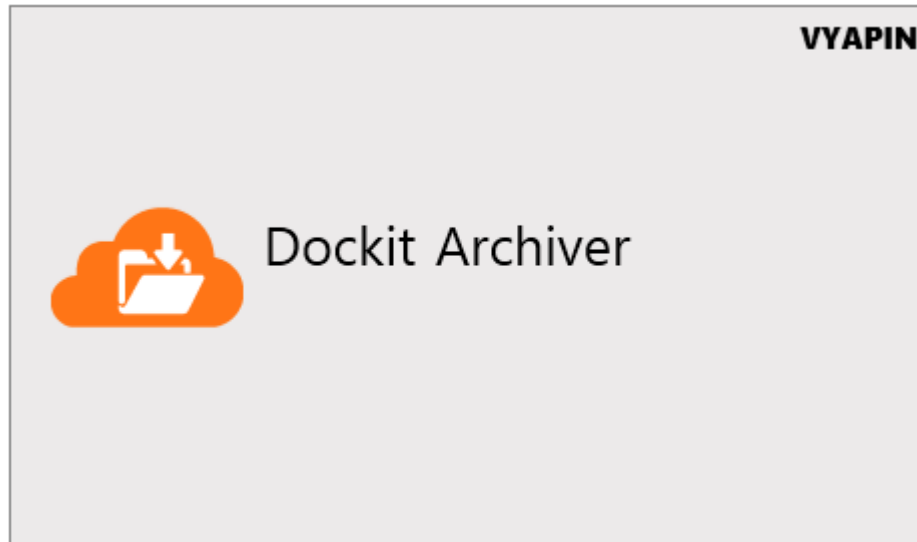
Last Updated: March 2018

Vyapin Software Systems Private Limited

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

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General Information

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How to purchase?

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

Application Data Folder Location

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

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

2) The **Product Activation** page appears as shown below:
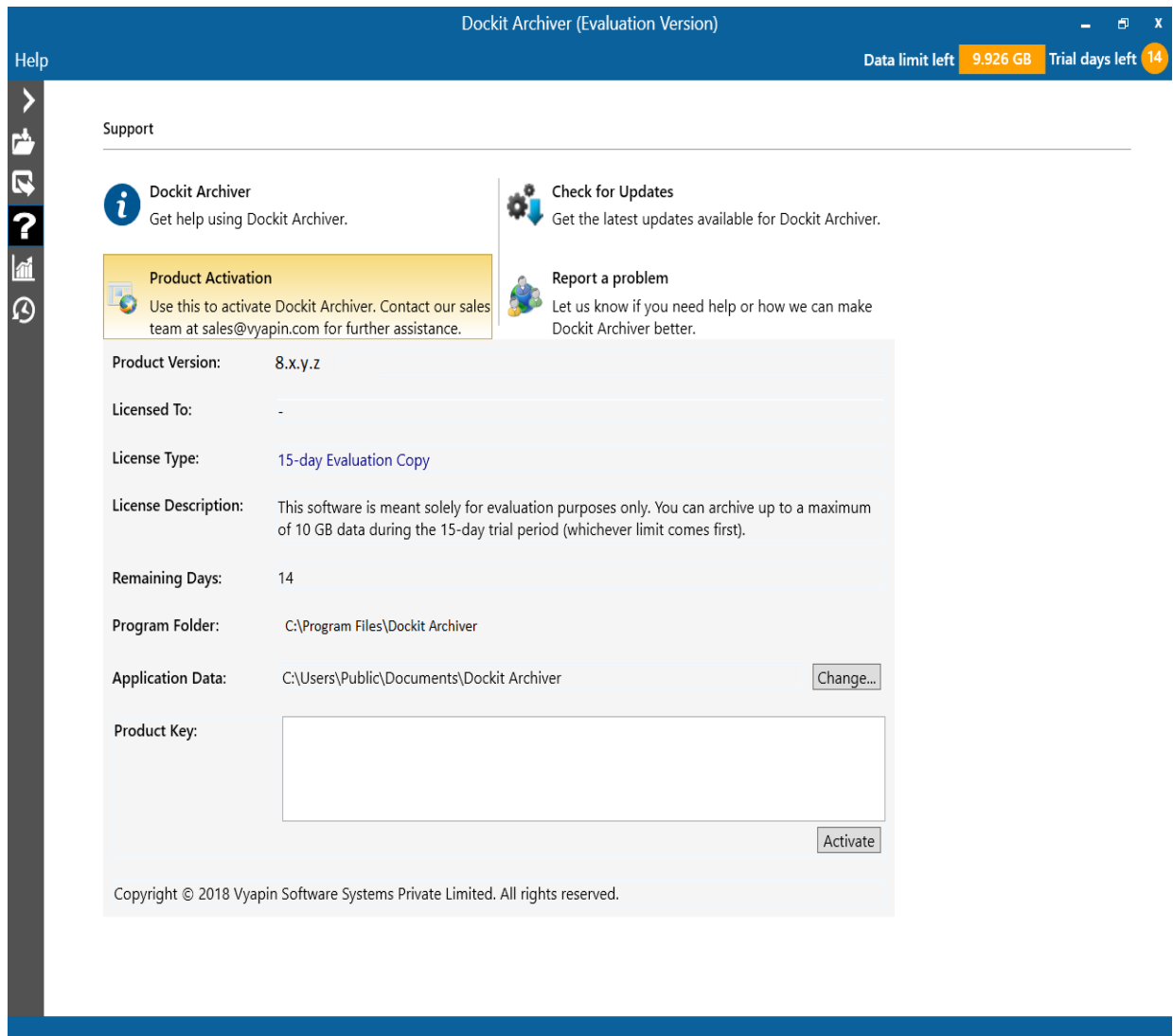
3) Click **Change** button to change **Application Data** folder location of Dockit application. The Browse for Folder location dialog will appear as shown below:

Browse For Folder ×

Select a folder from which files are to be extracted.

- 🖥️ Desktop
  - > ☁️ OneDrive
  - > 👤 adminuser1
  - > 🖥️ This PC
  - > 📚 Libraries
  - > 🖧 Network
  - > 🎛️ Control Panel

| Make New Folder | OK | Cancel |
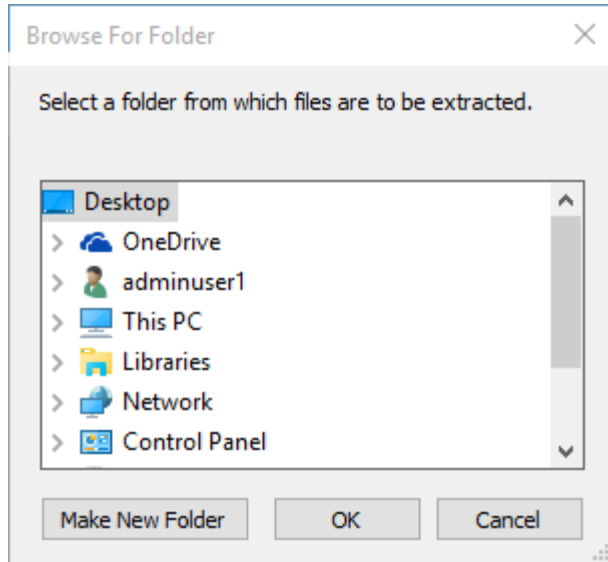
4) Select a desired folder location and Click OK. The folder location can be local drives or mapped network drives.

5) Dockit provides an option to copy or move the existing Dockit application settings 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 Move data... ⨯

The application data folder has been changed to the new folder location successfully. Do you want to Copy or Move application settings and data from the old folder location to the new folder location? Click the appropriate button below.
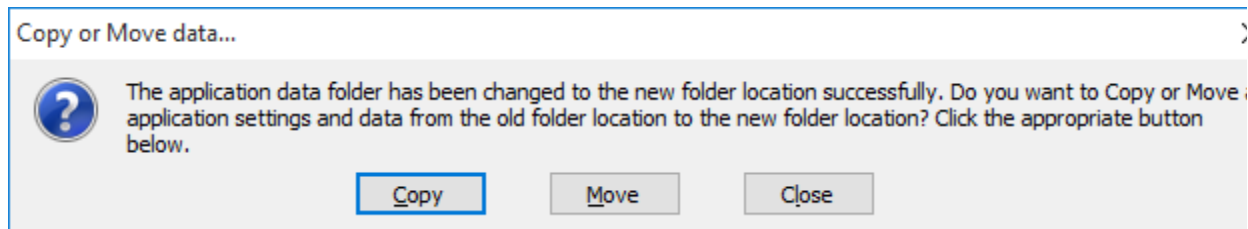
| Copy | Move | Close |

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

Technical Support

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

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

1. Version of Dockit Archiver that you are evaluating or you have registered with us. (Version information could be found by clicking ![?] **-> Product Activation**)

2. Additional services or resource consuming processes/applications (like anti-virus) running in the background on Dockit Archiver installed computer.

3. Hardware configuration of the computer where Dockit Archiver is installed.

4. Archiver_<date&timestamp>.txt" available in the common application data path of Dockit Archiver
   (e.g., *<Application Data Folder>*\Dockit Archiver\Log\Archiver <date&timestamp>.txt).

5. Dockit Archiver jobs Timestamp folder stored in the application data path. For example: *<Application Data Folder>*\Dockit Archiver\Histories*<taskname>**<timestamp>*.

Note:

<Application Data Folder> is the location where Dockit Archiver jobs and job history is stored in the computer running Dockit Archiver application. The *<Application Data Folder>* can be found by clicking ![?] **-> Product Activation**. The default path of *<Application Data Folder>* is as follows:

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

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

Help

Support

Dockit Archiver
Get help using Dockit Archiver.

Check for Updates
Get the latest updates available for Dockit Archiver.

Product Activation
Use this to activate Dockit Archiver. Contact our sales team at sales@vyapin.com for further assistance.

Report a problem
Let us know if you need help or how we can make Dockit Archiver better.

Use the form below to submit a technical question or problem to the technical support team.
(Fields marked with * are required)

Salutation*	First Name*	Last Name*
Mr.	Contoso	Smith

E-Mail*   The below field is required

Company*   User Status*
                                                     Evaluation Copy

Product*   Version*
Dockit Archiver   8.0.6615.20269

Operating System*   Service Pack*
Microsoft Windows 10 Enterprise

Problem Description*

File Attachment(s)

Browse

Send

How to Register the Software?

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

Request License Key

In case you do not receive an e-mail from our sales team after you purchase the software, please contact our sales department at sales@vyapin.com with the sales order number

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

2. The **Product Activation** page appears as shown below:
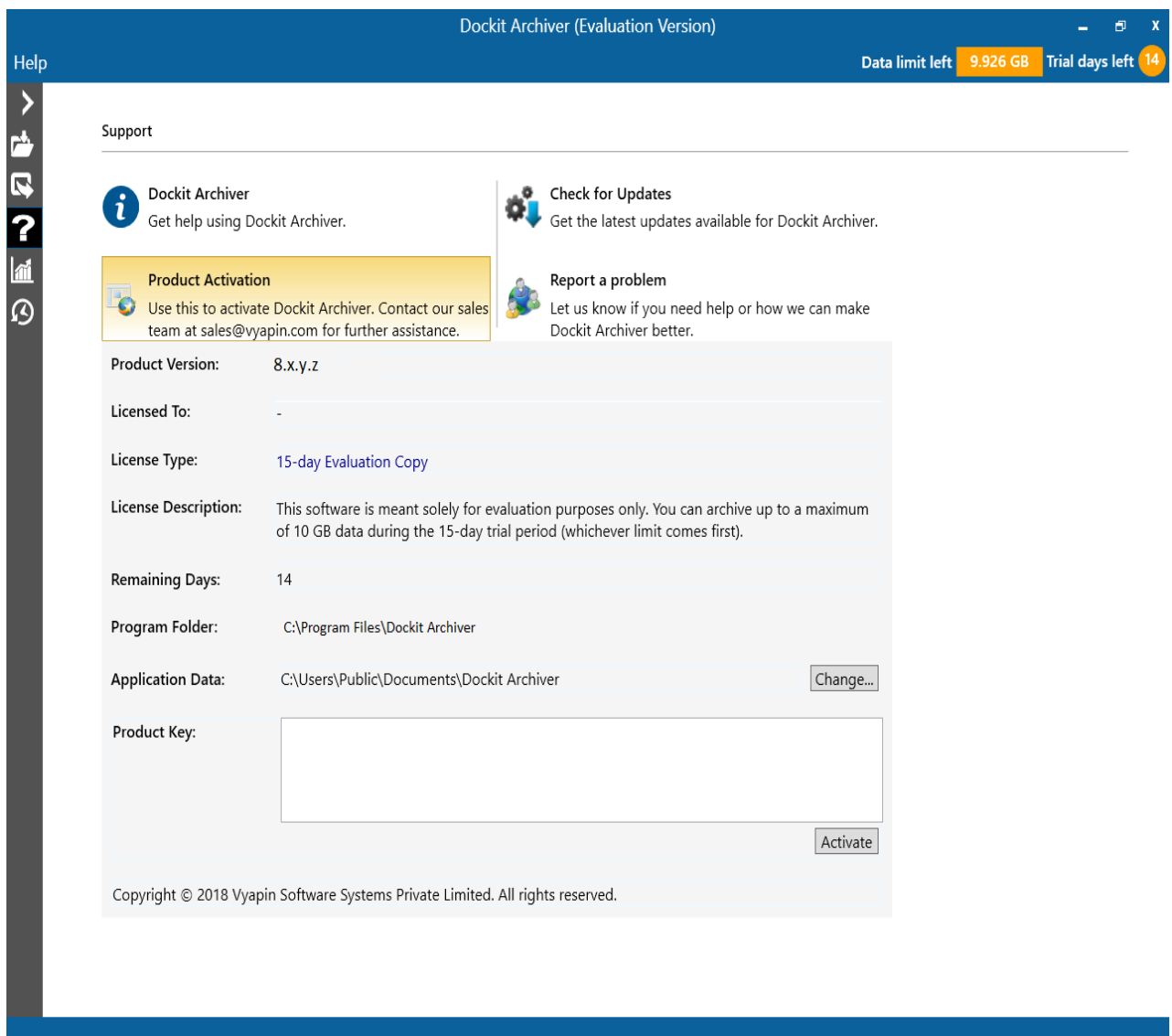
3. Once you paste the license key, click **Activate** button to apply the new license key
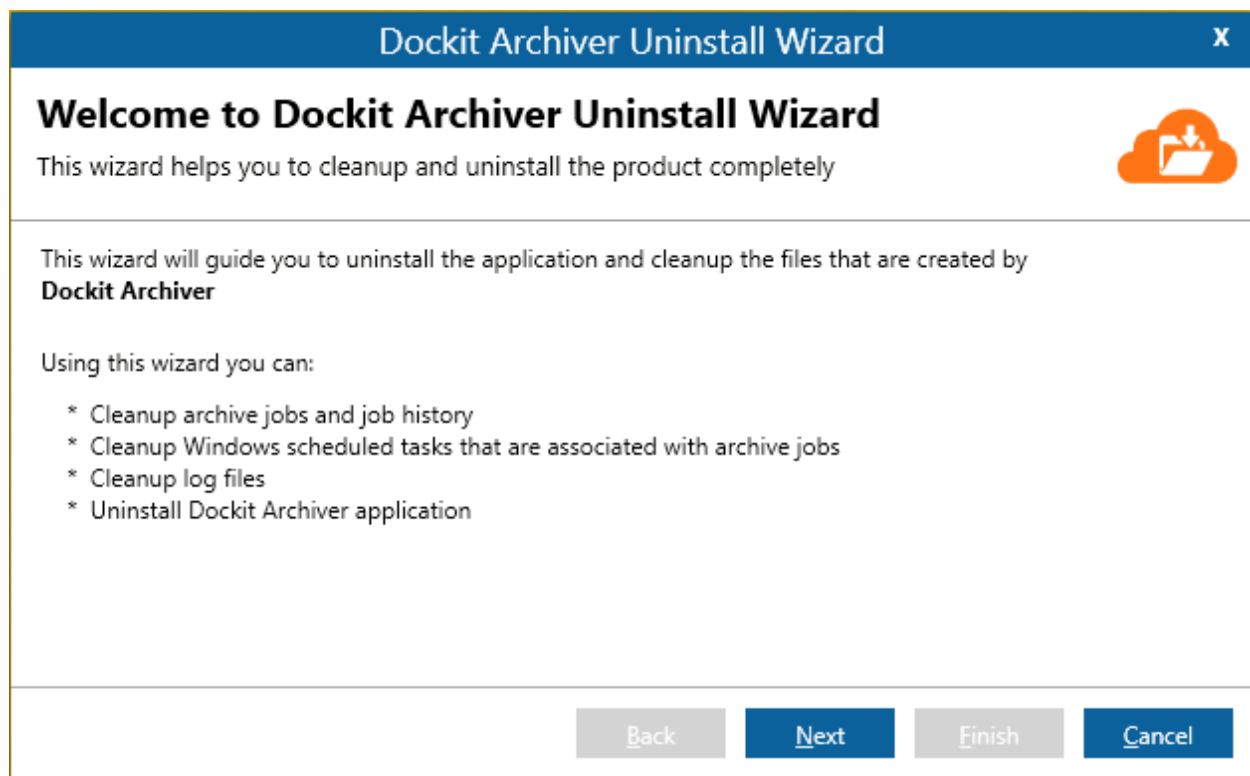
How to uninstall Dockit Archiver?

When you create SharePoint archive jobs in Dockit Archiver and schedule them, the application creates Windows Scheduled Tasks (to run the archive jobs at the specified time interval) in the computer where Dockit Archiver is installed. Archive job results for every task run instance is also maintained in the computer as application files.

When you uninstall Dockit Archiver 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 Archiver remain in the computer. In order to remove Dockit Archiver 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 that are created by Dockit Archiver application selectively and uninstall Dockit Archiver completely from the machine.

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

 Click **Next** to proceed.

2. Select required cleanup options as shown below:

Dockit Archiver Uninstall Wizard

Step 1 of 2: Cleanup Options

This wizard helps you to cleanup and uninstall the product completely

☐ **Uninstall Dockit Archiver application**
　Remove all application files and uninstall Dockit Archiver application from the machine.

☐ **Cleanup Dockit Archiver application files**
　Remove all jobs and their history and schedule task maintained by Dockit Archiver.

| Back | Next | Finish | Cancel |

Click **Next** to proceed.

3. Confirm the cleanup and/or uninstall process.

Dockit Archiver Uninstall Wizard

Step 2 of 2: Cleanup Process

This wizard helps you to cleanup and uninstall the product completely

Click 'Finish' button to proceed with the cleanup process or click 'Cancel' button to terminate the uninstall wizard.

| Back | Next | Finish | Cancel |

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

Dockit Archiver Job Manager

Job Manager

Edit an Existing Job

Delete an existing Job

Job History
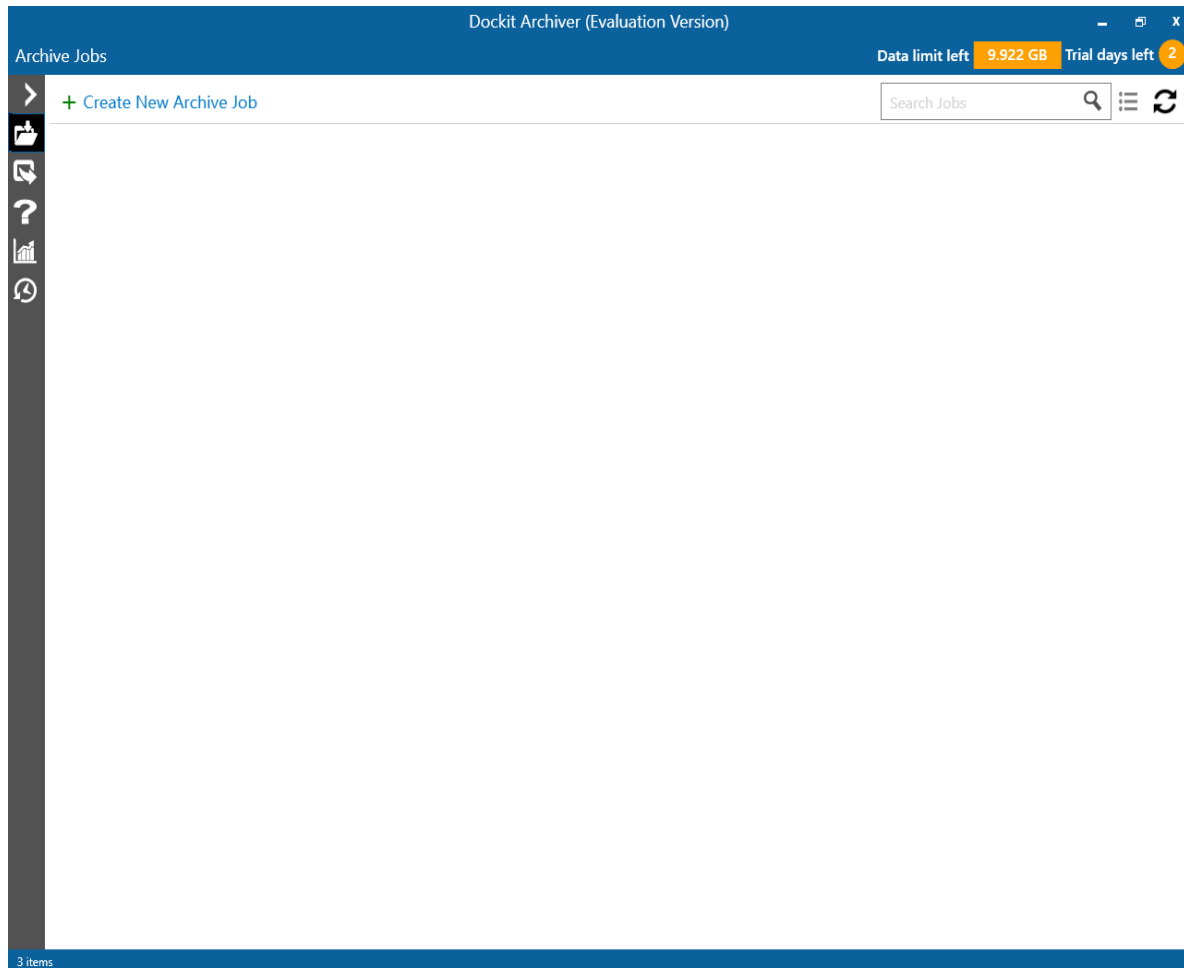
Run a Job

Activity Log

Job Manager

1. The Job Manager page will appear as shown below.

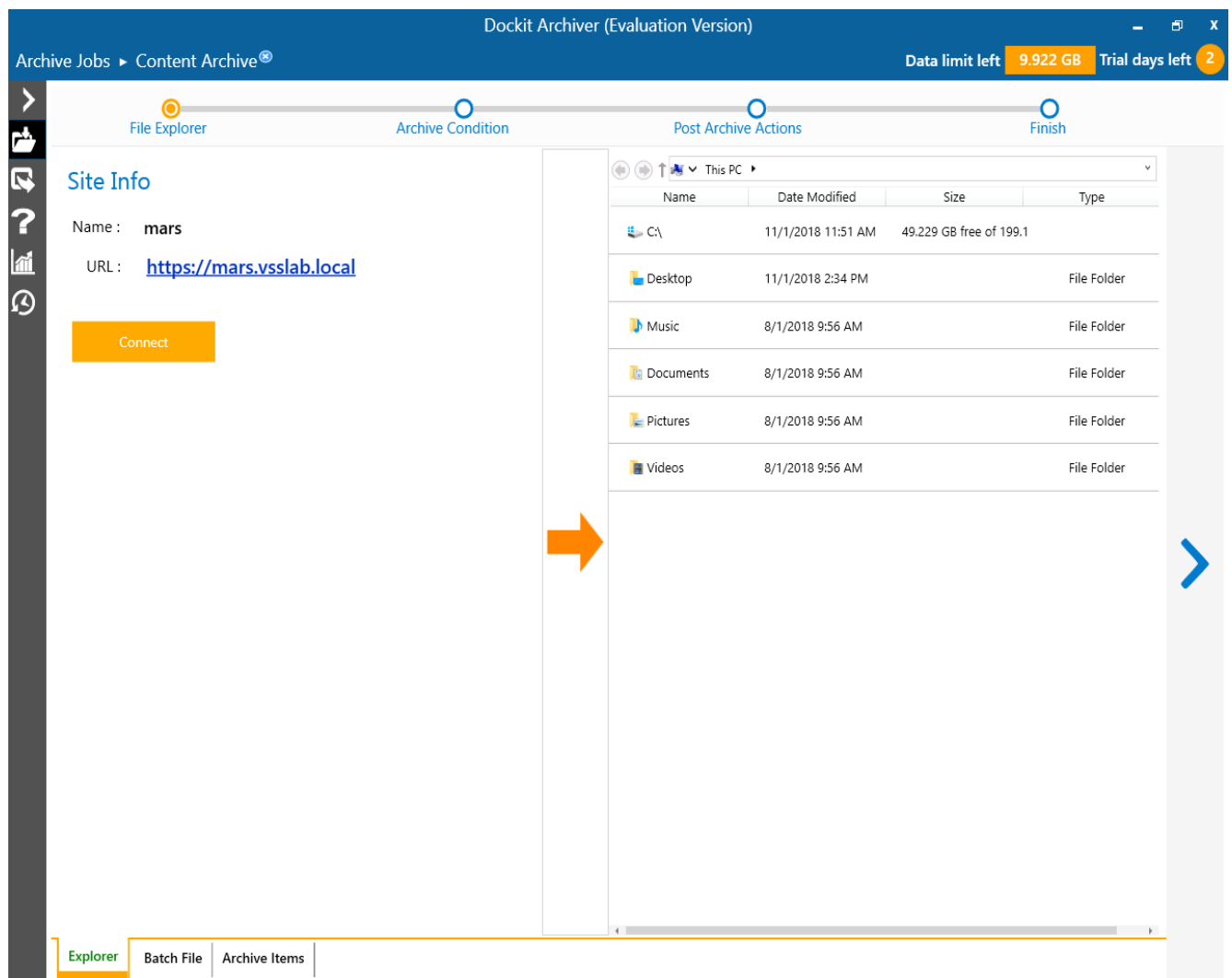2. From this page, you can:

    - Create New Archive Job

    - Run a Job

    - Edit a Job

    - Delete a Job

    - View Job History

Edit an existing job
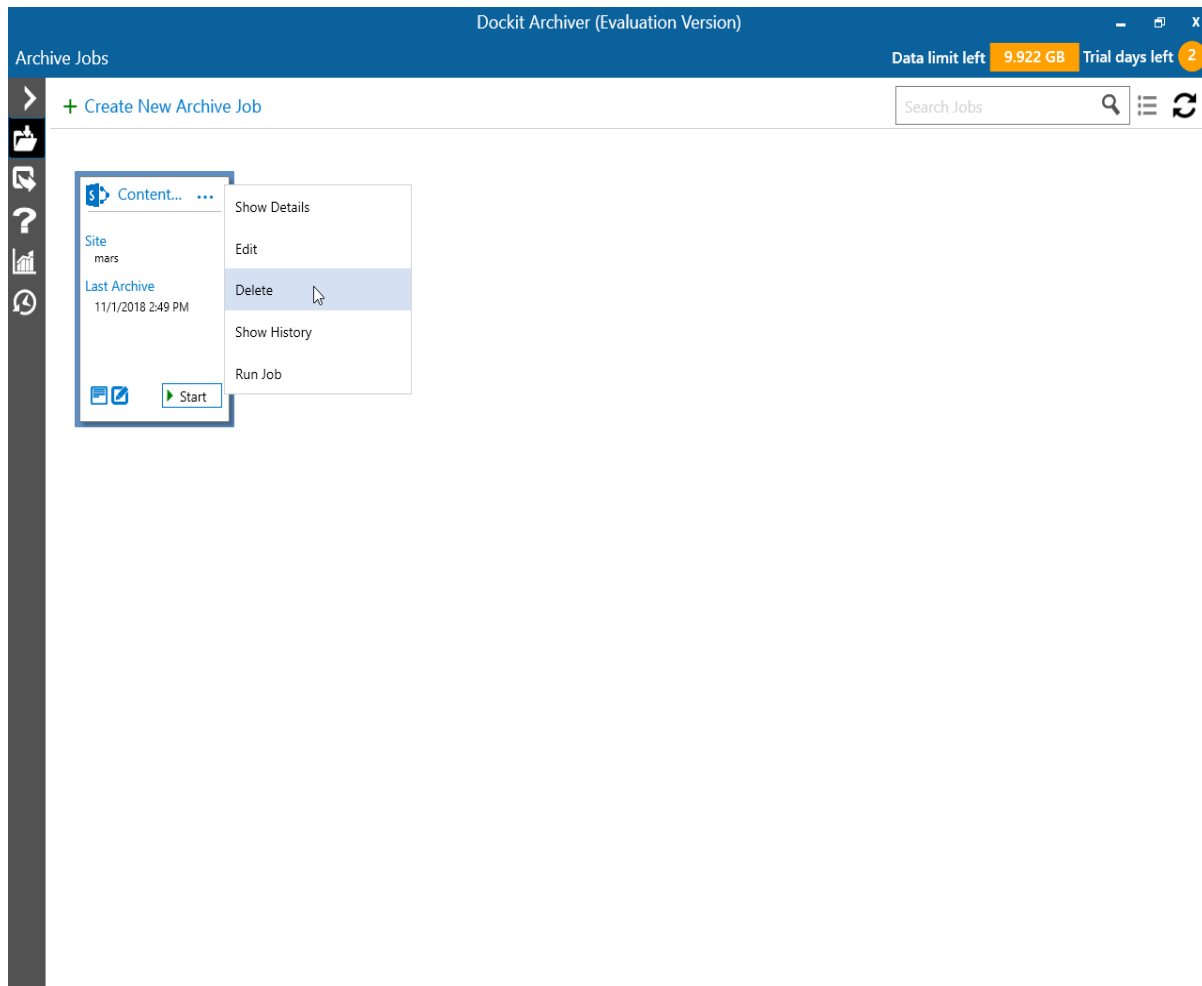
To edit an existing job:

1. Select a job from the **Job Manager** page. Click or click on icon and select **Edit**.

2. **Dockit Archiver** loads SharePoint explorer and File explorer while retaining the configured job settings.

Delete an existing job
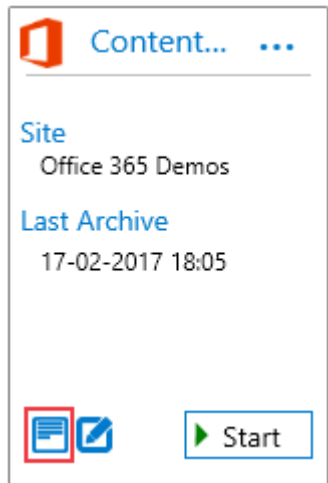
To delete an existing archive job:

1. In Job Manager Page, click icon ••• of the job and select **Delete**.

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

Job History

When a job is run in Dockit Archiver, the job information is updated in 'Job History' folder. The job history information can be viewed upon clicking

Or Click on ••• and select **Show History**.

The history of the job will be displayed as shown below.

Where

Start Time -> Date and Time a job was initiated.

End Time -> Date and Time a job completed its archive process

Elapsed Time -> Total time (hh:mm:ss) a job has taken to complete its archive process.

Status -> Brief remark about the status of archive.

Total -> Total number of files given for archive in this job.

Total Size -> Total size of files under archive job.

Action -> Deletes the logs and history details of that instance.

Possible Status	Description
Completed	Archive process was completed successfully without any errors
Incomplete	Archive process encountered certain errors

| Eval limit reached	Archive process reached the maximum allowed number of files to import in evaluation / trial version. This message is applicable for evaluation / trial version only.
Cancelled	Archive process was cancelled by the user.
Failed	The archive process could not be initiated as there were issues.

The following operations can be performed on job history items:
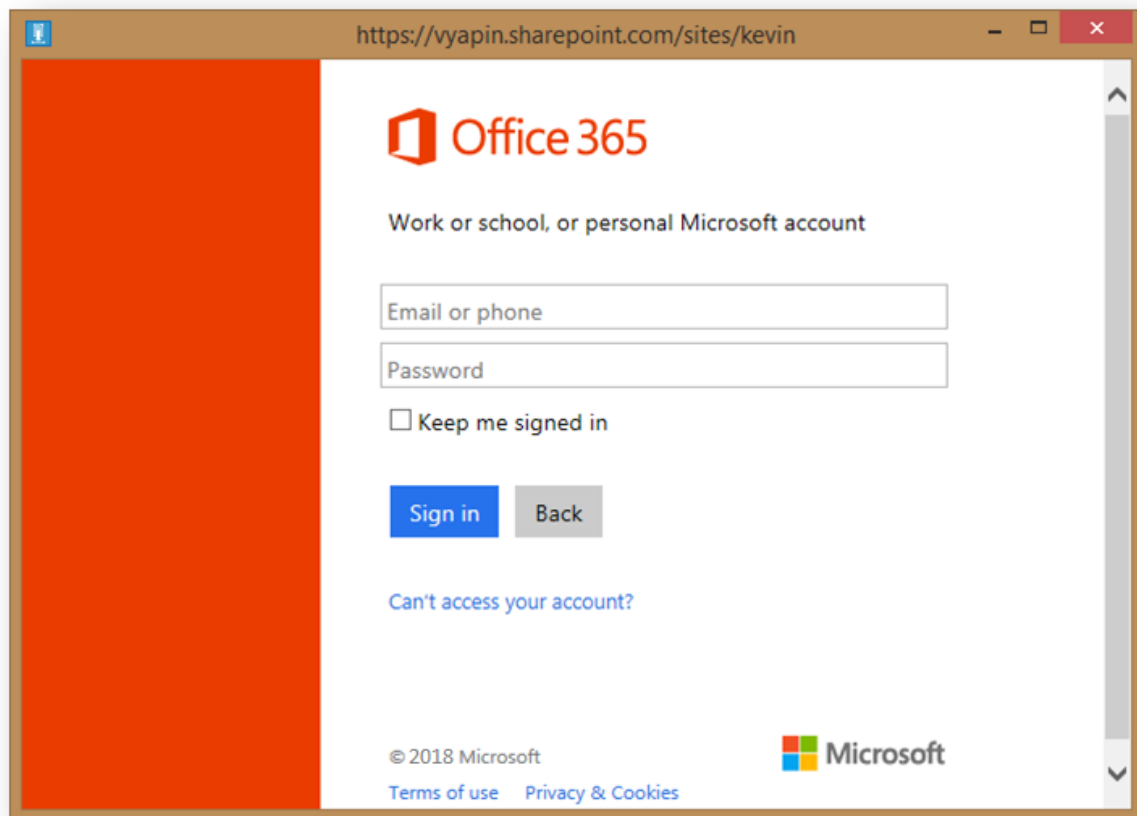
[View activity log](#)

Run a Job

'Start' option of a job in job manager page allows the user to instantiate a job any time after the job has been created. To run a Dockit Archiver job:

1. In Job Manager Page, Click **Start** option of the job or click on ••• icon and select **Run Job**
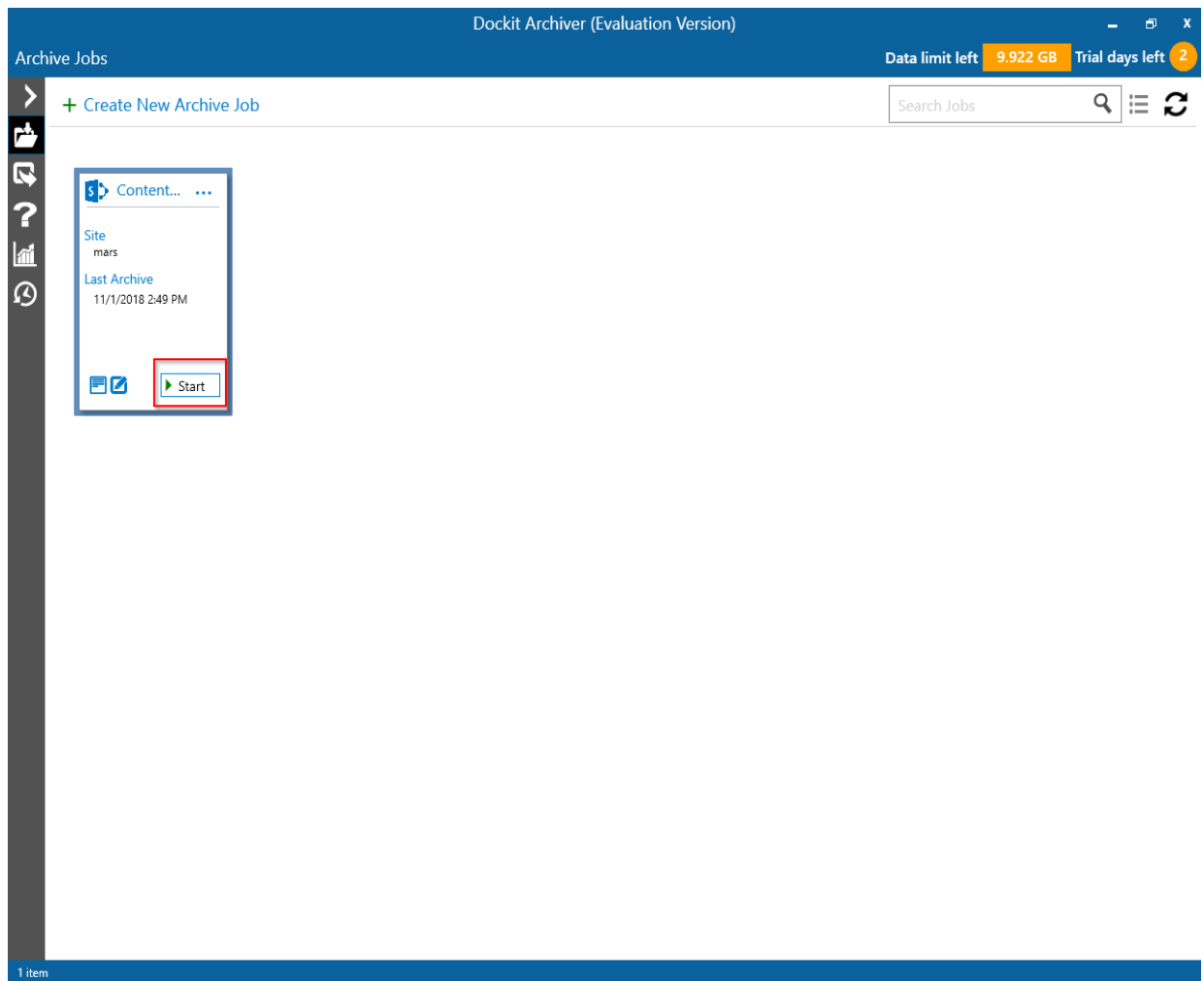
2. **Office 365 Login Dialog** to connect to SharePoint will appear as shown below.

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

3. The progress of the job will be reported as shown below:

4. It shows the files that are being archived to File share.

   Where

   Name -> Title of the file.

   Source Path -> SharePoint Location of the file.

   Size -> Size of the file.

   Target Path ->File Share location of the file.

   State -> Current State of the file (i.e. In Queue (or) Uploading (or) Completed)

   Status:
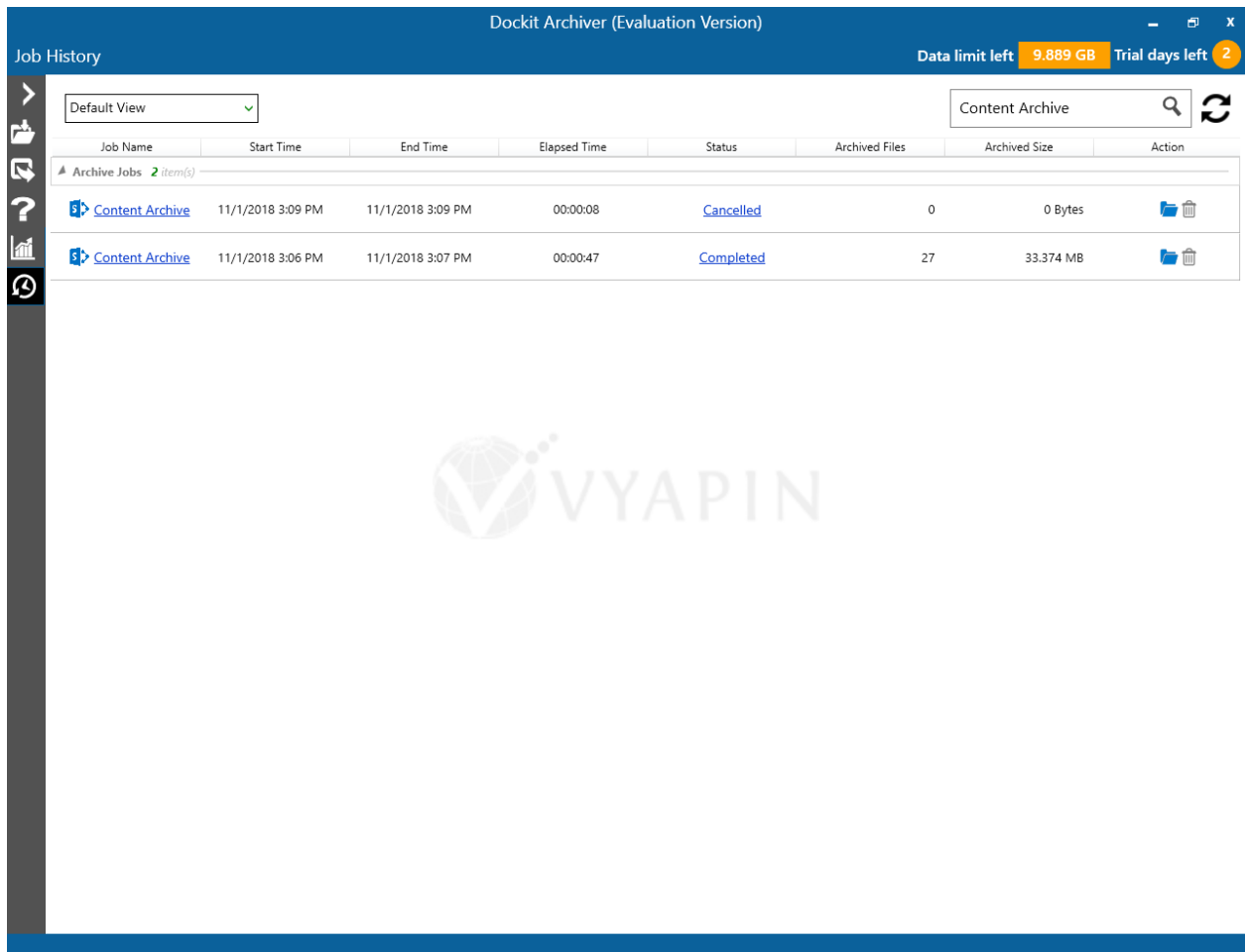
   a. **Files Archived -** Shows the total number of files archived to File Share.
   b. **Size -** Size of files Archived - Total size of files provided for archive.
   c. **% -** Shows the progress of the job in Percentage (%).

d. **Elapsed Time –** Shows the elapsed time from the instance the archive job started or commenced.

5. Once the archive job is complete, the information will be updated in **Job History** section, where you can view the archive activity performed when the job ran last.

Activity Log

To view activity log associated with a job history item:

1. Click on **Status** column value.

2. The **Activity Log Viewer** page appears as shown below.
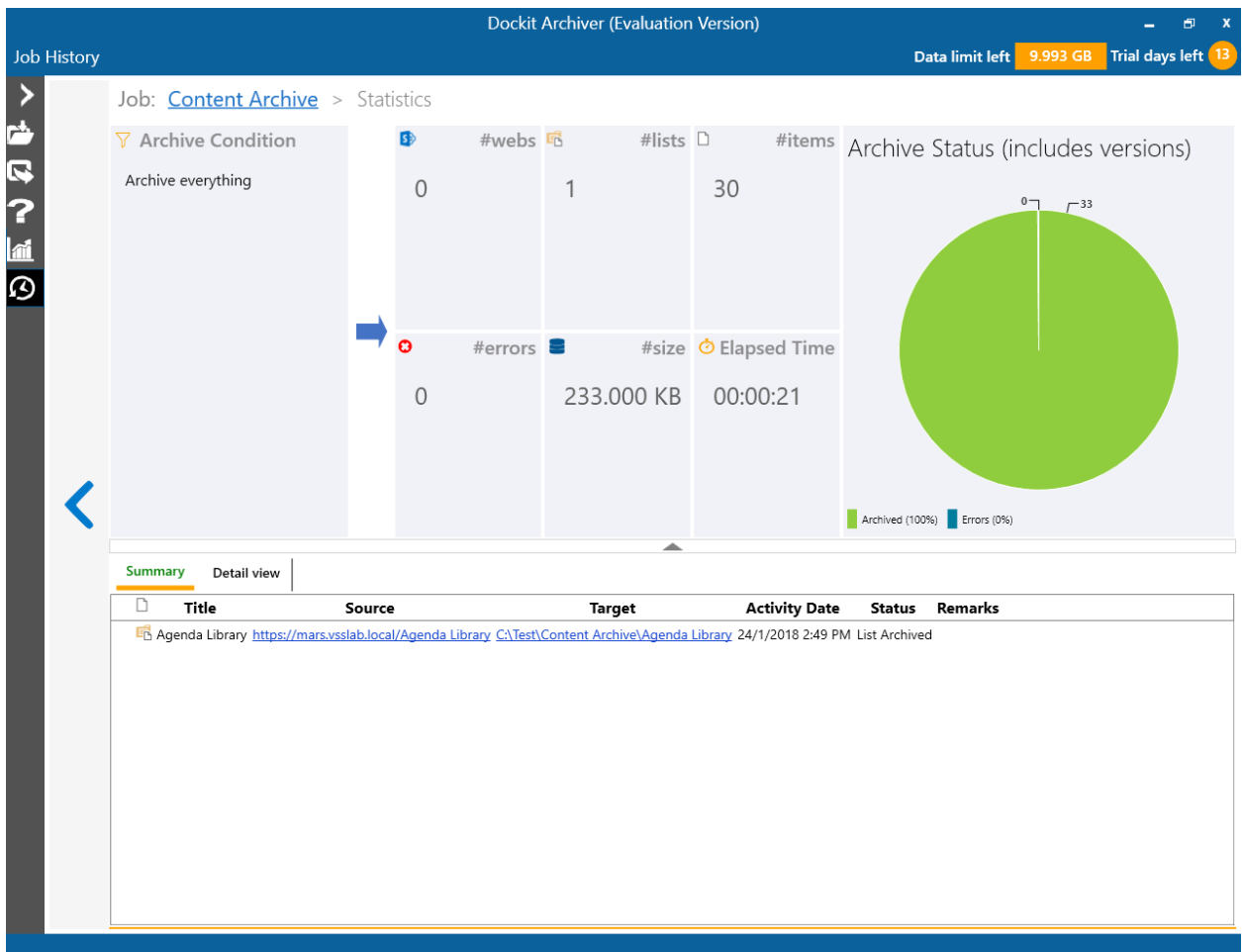
3. The activity log of a job is classified into two different categories :

   a. **Statistics**: Displays a brief summary of the archive process.
   b. **Status**: Displays the task details of the archive process.

Summary View - Displays the summary report of the archive process.

Where
Title -> SharePoint List/Web Name
Source -> SharePoint location of a file
Target -> File system location of a file.
Activity Date -> Start time of the archive job.
Status -> State of a List/Web (Archived or Failed).
Remarks -> Brief information about why the List/Web failed to archive.

Detailed View - Displays the detailed report of the archive process.

Where
Source -> SharePoint location of a file
Target -> File system location of a file.
Size ->Size of the file that is archived.
Activity Date -> Start time of the archive job.
Status -> State of a file (Archived or Failed).
Remarks -> Brief information about why the file failed to archive.
Version History -> Display the File Versions, if available.
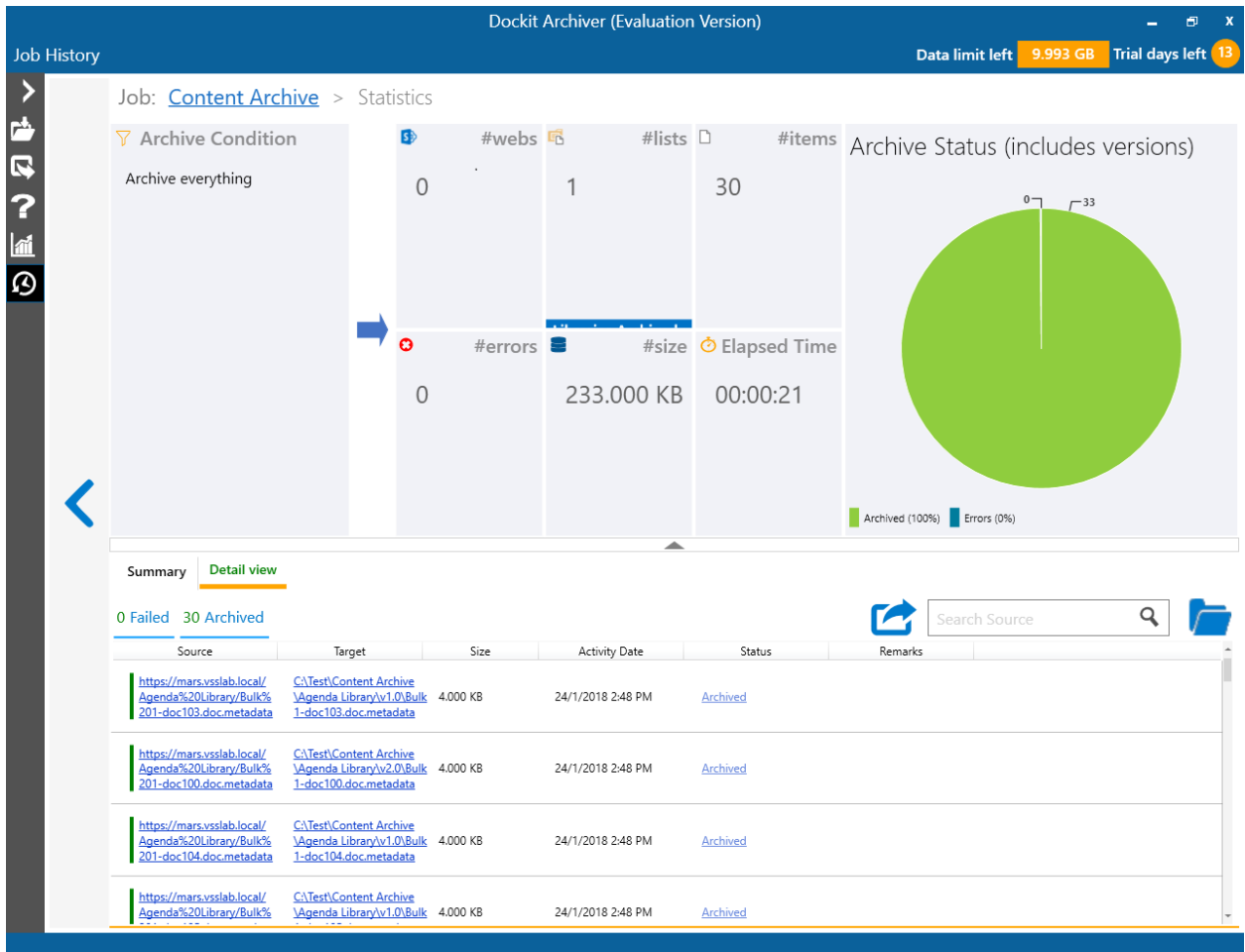
4. Additionally, user can open the file share location of activity log by clicking **Open log folder** control on top.

Create new archive job

Create new archive job

To create a new archive job to archive SharePoint Lists and Subsites along with metadata from SharePoint to File System:

1. Click **Create New Archive Job** on Job Manager Page as shown below.
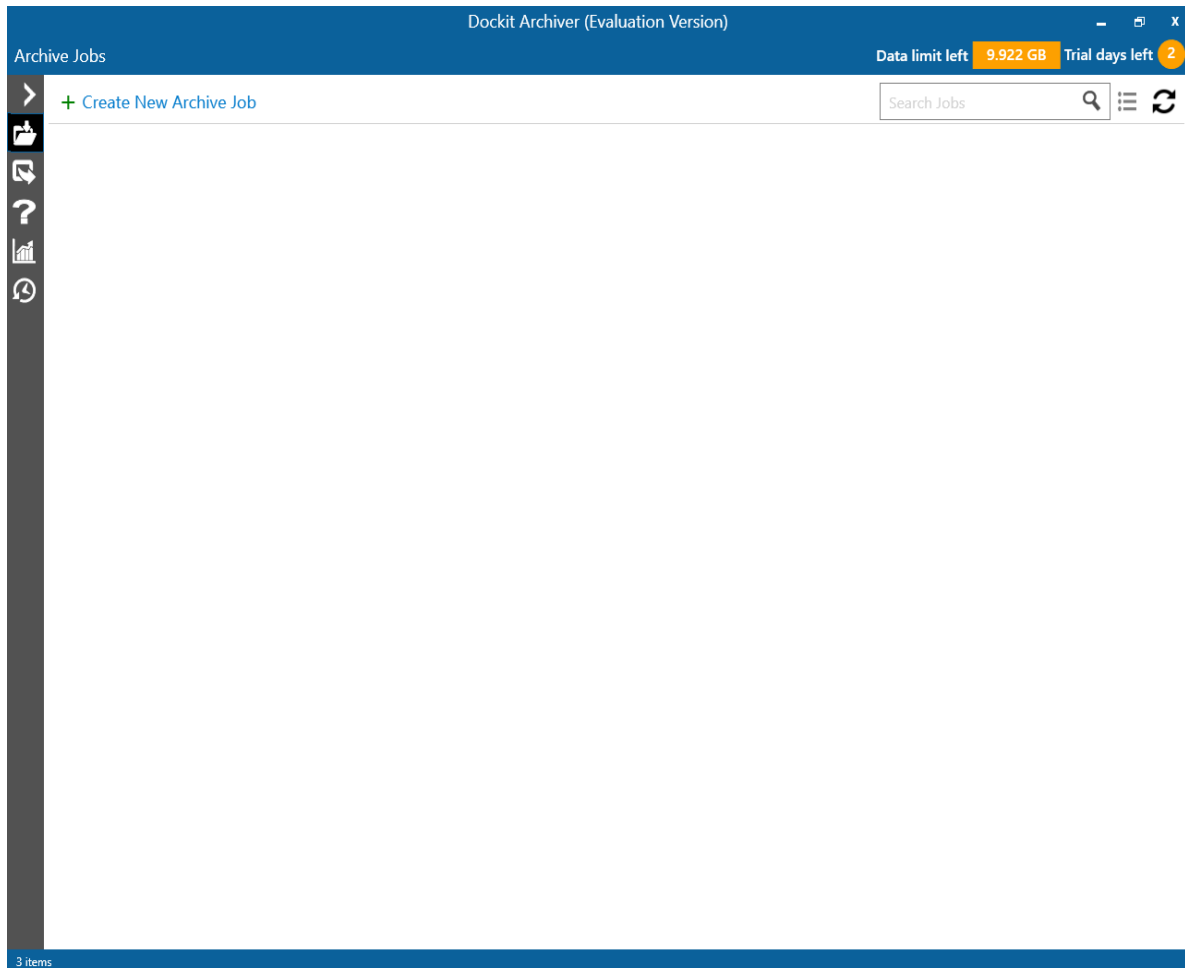
2. Select archive type from **Select Type** popup as shown below.

Select Type   X

Office 365   Archive documents from Office 365 / SharePoint
              Online to File Share

OneDrive   Archive documents from OneDrive for Business to
              File Share

SharePoint   Archive documents from SharePoint 2016 / 2013
              to File Share
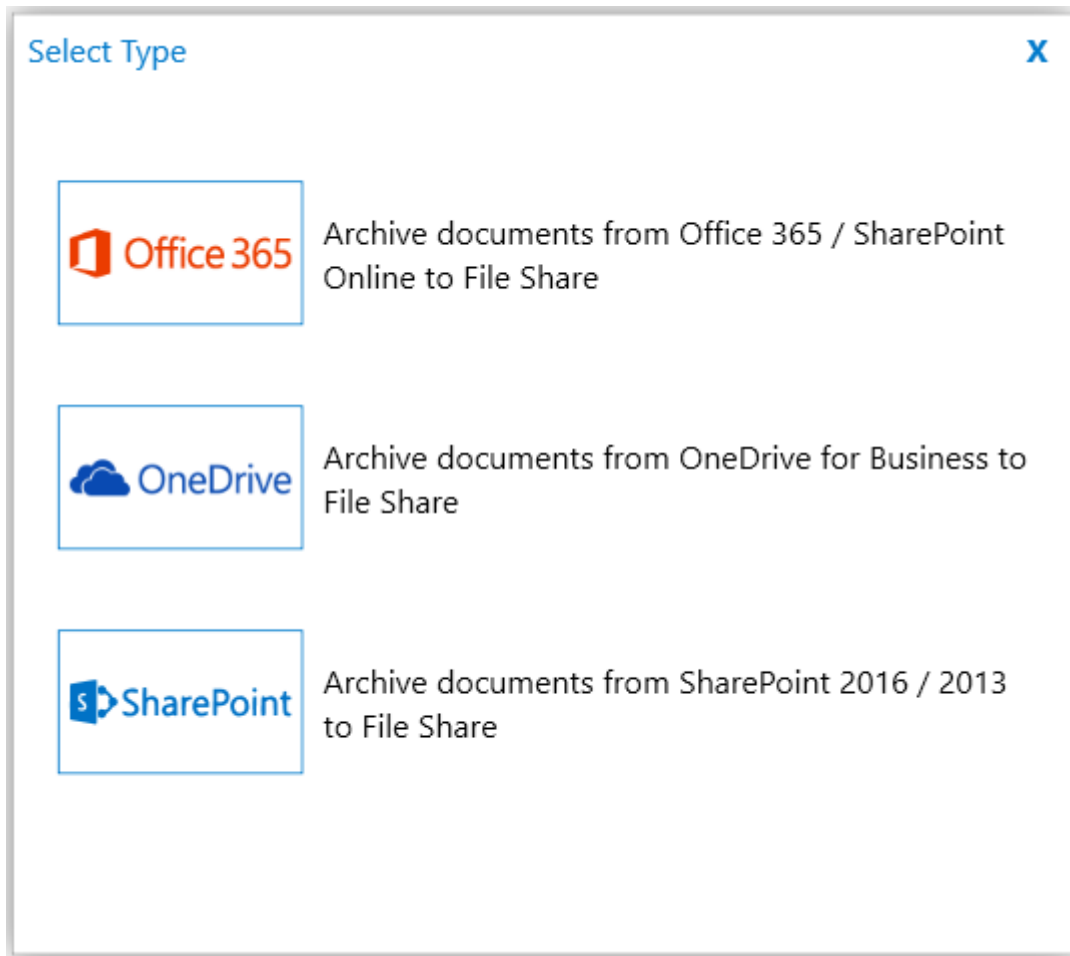
3. The **New Archive** page appears as shown below
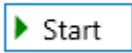
4. Enter **Job Name, Description (Optional).**
5. Specify Office 365 or On-premises site URL in the textbox and click Connect button. You need to provide a valid site administrator credentials to proceed further.
6. **Drag and Drop** SharePoint Lists from SharePoint site (Left Pane) to File share (Right Pane) or Select SharePoint Objects and Right click SharePoint Explorer, select **Archive**.
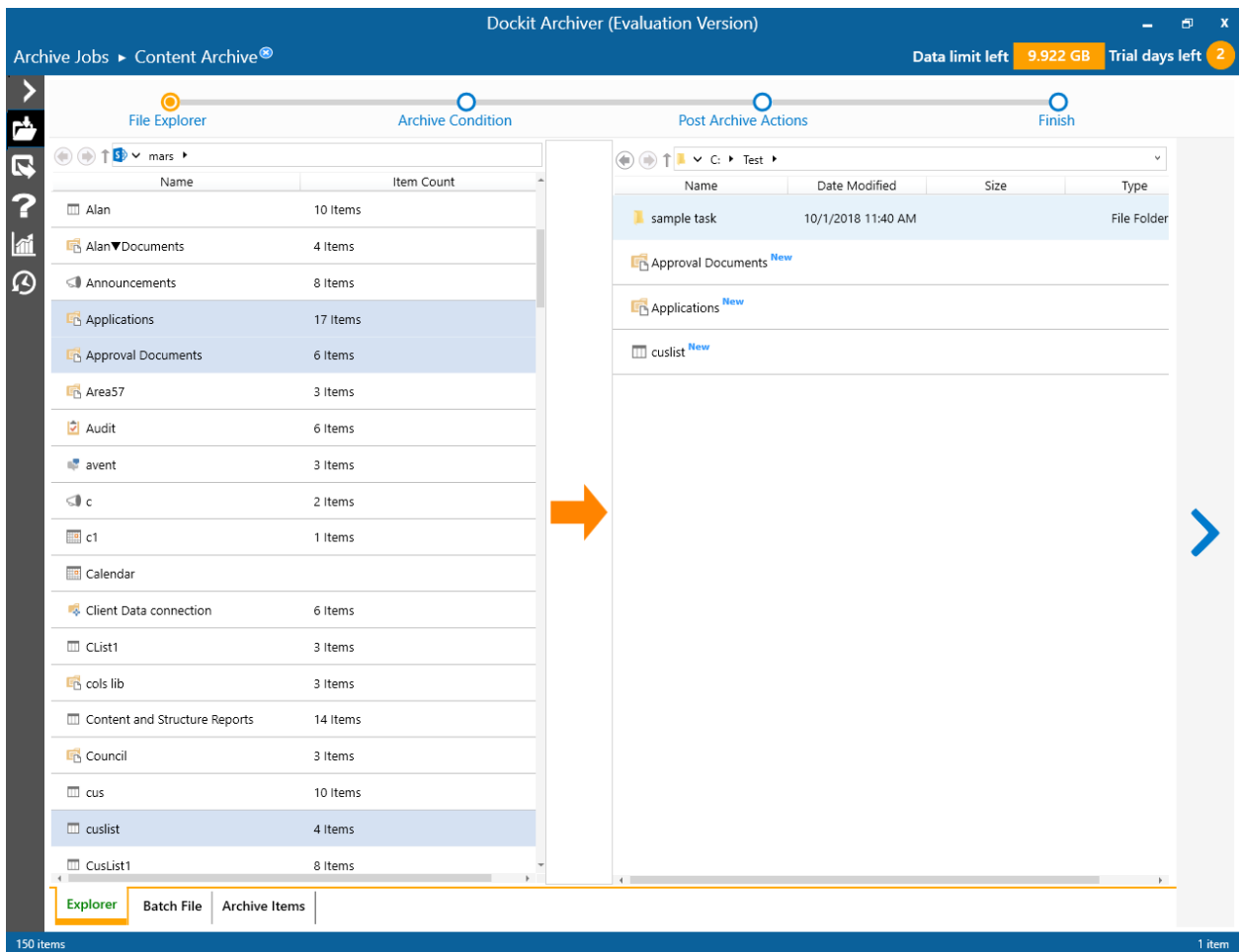
7. Click **Archive Items** on right pane to check the list of SharePoint Objects selected for archive, also you can remove SharePoint Objects by clicking the Red **X**.
8. Click **Batch File** in the right pane to archive lists, sites and metadata to target file system.
9. Specify **Archive Condition**
10. Specify **Post Archive Actions**
11. Specify **Threshold Settings**
12. Specify **Schedule Settings**
13. Click **Save** button to create the job, or click **<** button to navigate to previous page to change any job settings.

14. After saving the job, it will be listed on the Job Manager page. You can click on ▶ Start to initiate the archive process.

Batch File

The following section gives you the guidelines to create a batch file for archive lists, sites and metadata to target file system path.

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

1. **Path:** The 'Path' column should contain the path of the source list / site.

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

Path	Destination Path
http://sharepoint/technical documents/folder1	M:\My Document

Follow the steps given below to specify the lists/sites to archive in the target File System 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 Archiver (Evaluation Version)

Archive Jobs ► Content Archive ⊗

Data limit left 9.889 GB Trial days left 1

File Explorer — Archive Condition — Post Archive Actions — Finish

Copy.xlsx
Sheet1 ⌄

3 items

Path	Destination Path
https://mars.vsslab.local/Documents	C:\Products\Document Details
https://mars.vsslab.local/lists/Project list	C:\Products\Project List Details
https://mars.vsslab.local/Purchase Order	C:\Products\Project List Details

Validate

Explorer | Batch File | Archive Items

150 items

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

Archive Jobs ► Content Archive ⊗

Data limit left | 9.889 GB | Trial days left 1

File Explorer | Archiv

Copy.xlsx
Sheet1 ⌄

3 items

Path	Destinatio
https://mars.vsslab.local/Documents	C:\Products\Do
https://mars.vsslab.local/lists/Project list	C:\Products\Pr
https://mars.vsslab.local/Purchase Order	C:\Products\Pr

Source location

✓	https://mars.vsslab.local/Documents	⇨	C:\Products\Document Details
✓	https://mars.vsslab.local/lists/Project list	⇨	C:\Products\Project List Details
✗	https://mars.vsslab.local/Purchase Order Not found	⇨	C:\Products\Project List Details

Explorer | Batch File | Archive Items

Continue

150 items

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

Archive Items
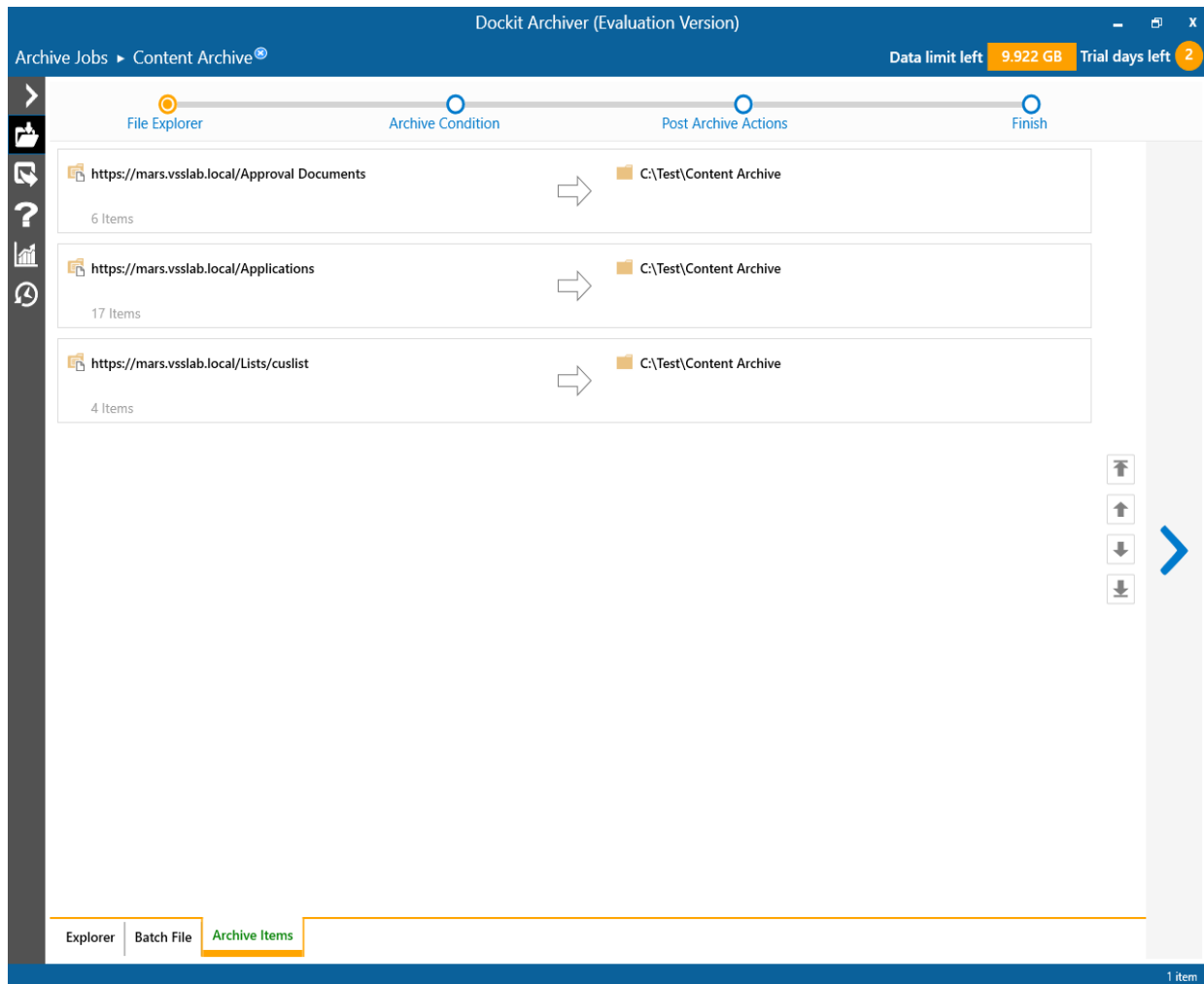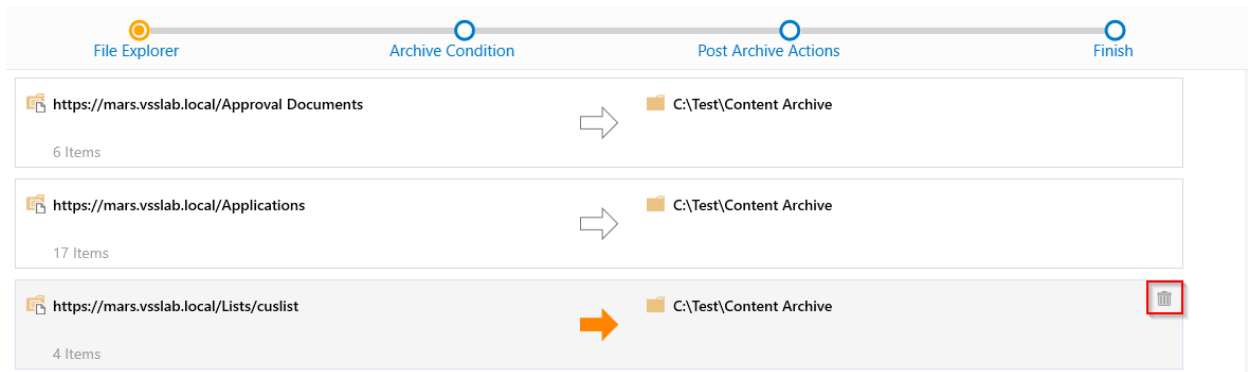
From SharePoint explorer you can either drag or drop SharePoint Objects to File explorer or simply select SharePoint Objects from SharePoint explorer Right Click and Select **Archive** to add SharePoint Objects to Archive Items.

1. The **Archive Items** appears as shown below:

2. The selected SharePoint Objects added for archive will be displayed in the **Archive Items** page. Dockit Archiver processes the top-level SharePoint Objects added for archive in the order in which it appears in the **Archive Items** page. The archive process order can be changed by the **navigation** buttons available in the right side of the page. You can remove the SharePoint Objects added for archive by clicking top right of the listed entries. The delete image appears as shown below:

File Explorer   Archive Condition   Post Archive Actions   Finish

https://mars.vsslab.local/Approval Documents   C:\Test\Content Archive

6 Items

https://mars.vsslab.local/Applications   C:\Test\Content Archive

17 Items

https://mars.vsslab.local/Lists/cuslist   C:\Test\Content Archive

4 Items

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

Archive Condition

To specify the Archive Condition to be applied by Dockit Archiver when archiving SharePoint Objects to the destination location:

1. The **Archive Conditions** appears as shown below:

2. Select any one of the following Archive Conditions as stated below:

    a. **Archive Everything** - Archives all SharePoint Objects without applying any condition or rule to filter content.

b. **Items inactive since / older than** - Archives SharePoint items that were last modified earlier than the given date.
c. **Items modified between** - Archives SharePoint items modified between from and to date. The To date is an optional value. The items that were modified in the given date range alone will be archived along with its respective item versions.
d. **Items created/modified by user** - Archives SharePoint items that were either created or modified (depending on the user selection) by the given user or set of users.
e. **Keep the following number of major versions** - Retains the specified number of major versions in SharePoint and archives document versions anything above the defined count.
f. **Files more than this size** - Archives SharePoint documents that are greater in size than the given value.
g. **Lists having more than these many documents** - Archives SharePoint Lists that have documents / files anything above the defined count.
h. **Lists inactive since / older than** - Archives SharePoint Lists that were last modified beyond the specified date.
i. **Lists modified between** - Archives SharePoint Lists that were modified between from and to date. The To date is an optional value.

3. Click to proceed.

Post Archive Actions

This page allows you to specify the Post Archive Actions to be applied by Dockit Archiver when archiving SharePoint Objects to the destination location.

1. The **Post Archive Actions** page will appear as shown below:
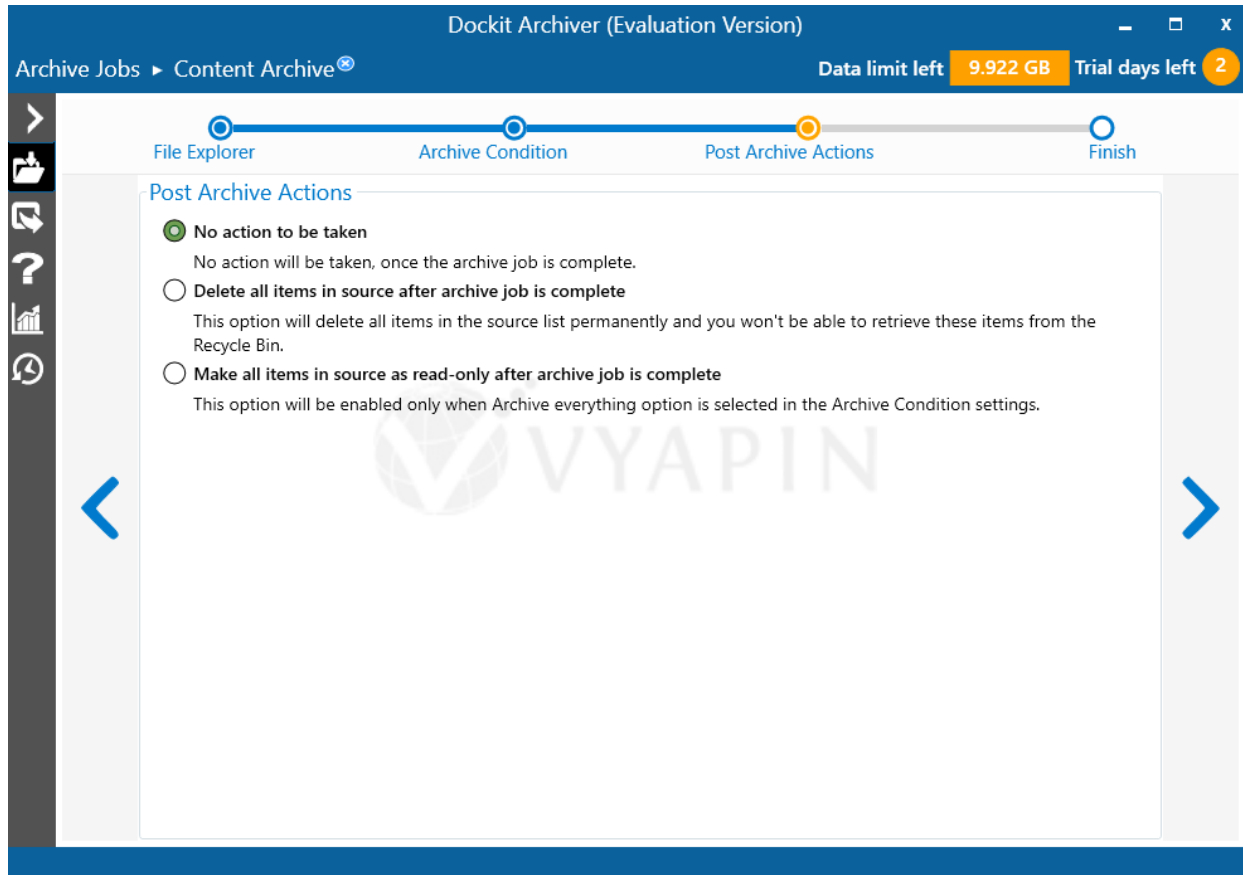
2. Select any one of the following post archive actions given below:

   a. **No action to be taken** - No action will be taken, once the archive job is complete.
   b. **Delete all items in source after archive job is complete** - Deletes the SharePoint objects that are archived. This option will delete all items in the source list permanently and you won't be able to retrieve these items from the Recycle Bin.
   c. **Make all items in source as read-only after archive job is complete** - The SharePoint objects that are added for archive will be marked as Read-only objects by altering their permissions. Any sub-scopes that are created underneath SharePoint sites or lists will be automatically set to inherit parent permissions. For example, any unique permissions defined for documents and folders underneath source SharePoint list will be changed to inherited permissions.

   Note: This option will be enabled only when Archive everything option is selected in the Archive Condition settings.
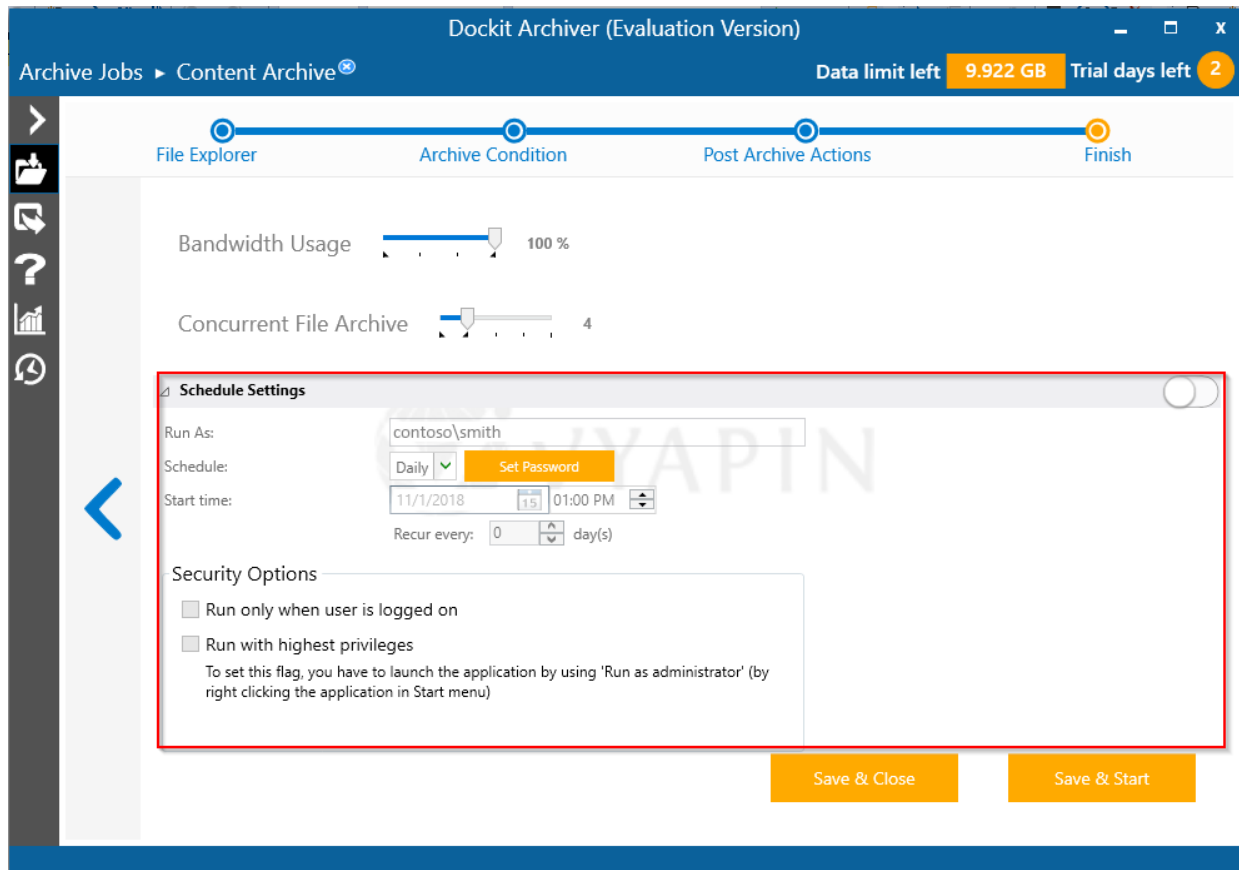
3. Click to proceed.

Threshold Settings

To set percentage of Network bandwidth that Dockit Archiver can use during archiving and number of files that can be archived concurrently to improve performance.
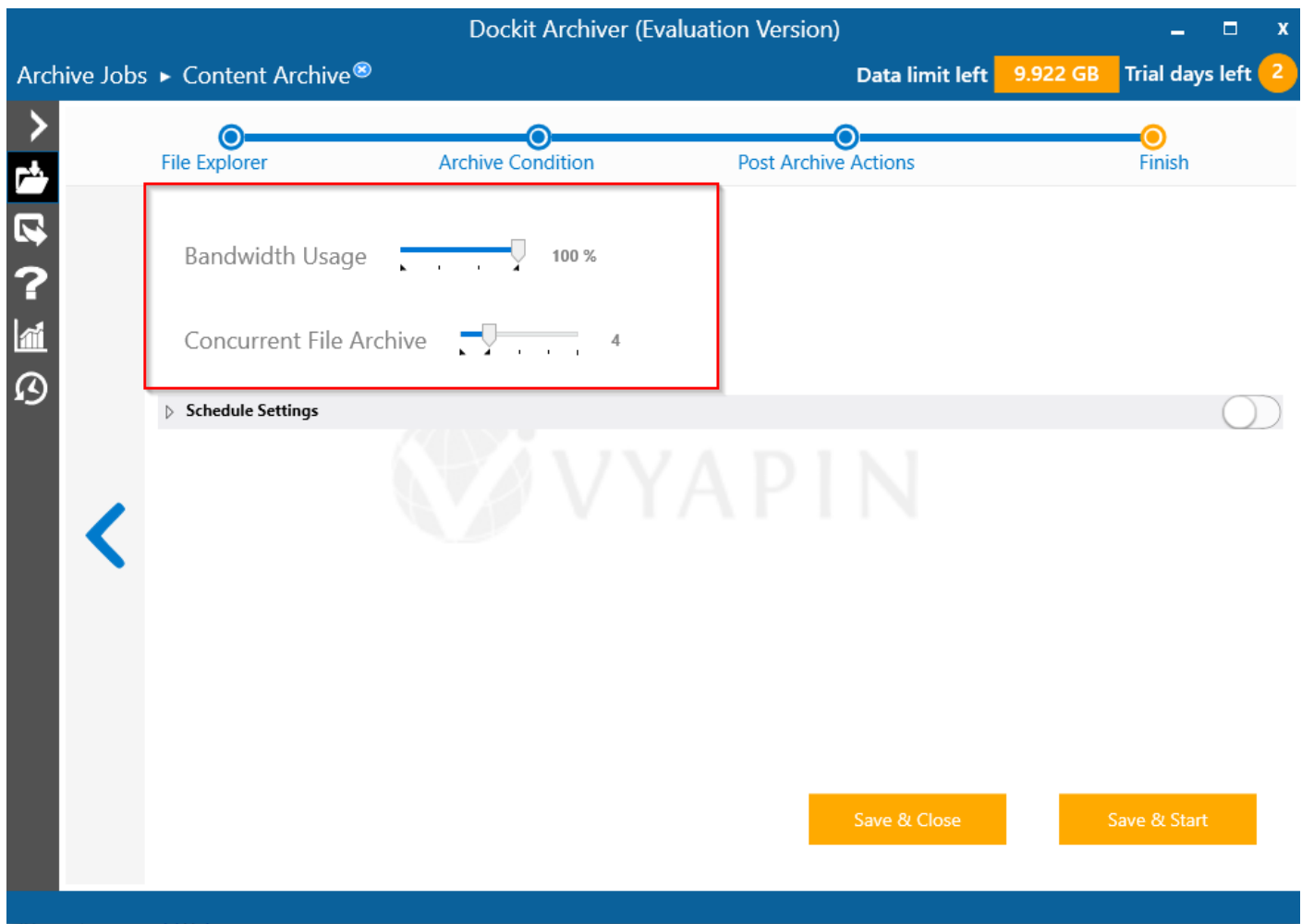
Schedule Settings

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

2. Select a Schedule type from **Schedule** drop-down menu.
3. Click **Set Password** to specify Username and Password to run the task.
4. Click **Save**, a windows scheduled task will be created.

Create new export job

Create New Export Job

Batch File

Export Items

- Version Options

- List View Options

- List Column Options

- Export Conditions
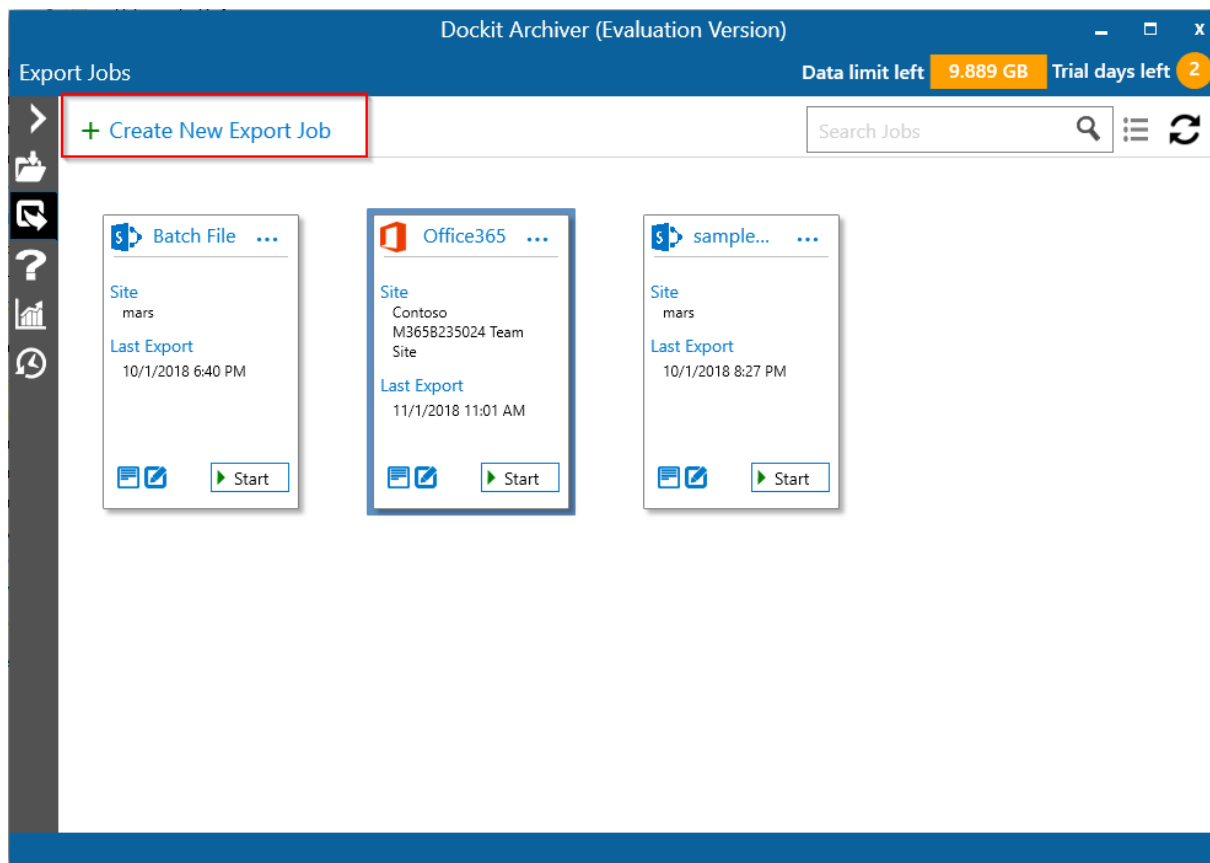
File Settings

Permission Options

Metadata File Settings

Threshold Settings

Schedule Settings

Create new export job

This page allows you to create a new export job to export SharePoint lists and Subsites along with metadata from SharePoint to File System.

1. Click **Create New Export Job** as shown below.

2. Select export type from **Select Type** popup as shown below.

Select Type   X

Office 365 — Export documents from Office 365 / SharePoint Online to File Share

OneDrive — Export documents from OneDrive for Business to File Share

**SharePoint** — Export documents from SharePoint 2016 / 2013 to File Share

3. The **New Export** page will appear as shown below

4. Enter **Job Name and Job Description** (Optional).
5. Specify Office 365 or on premise site URL in the textbox and click **Connect** button. You need to provide a valid site administrator credentials to proceed further
6. **Drag and Drop** SharePoint lists from SharePoint site (left pane) to File share (right pane) or select SharePoint Objects, right click SharePoint Explorer and select **Export** .
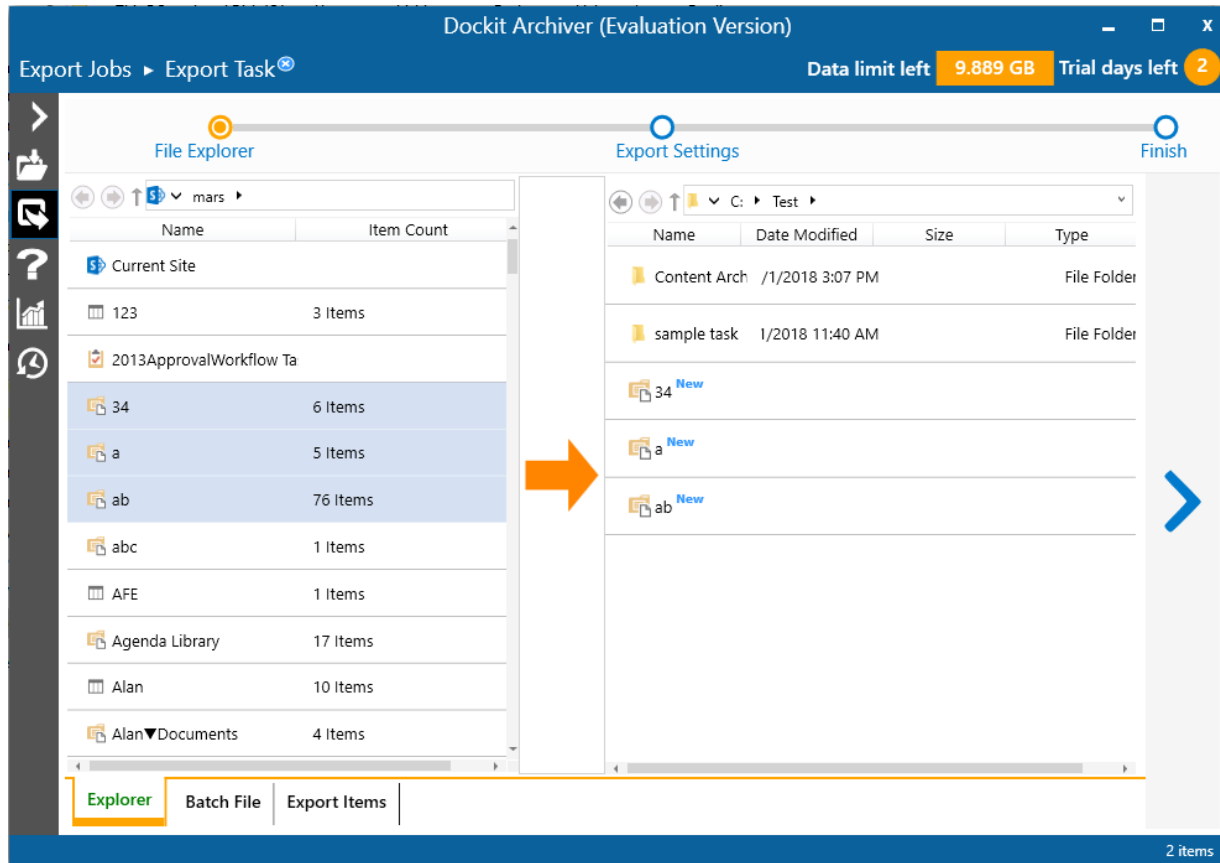
7. Click **Batch File** in the right pane to export lists, sites and metadata to target file system.
8. Click **Export Items** in the right pane to verify the list of SharePoint Objects selected for export.
9. Specify **File Settings**
10. Specify **Permission Options**
11. Specify **Metadata File Settings**
12. Specify **Threshold Settings**
13. Specify **Schedule Settings**
14. Click **Save** button to create the job, or click < button to navigate to previous page to change any job settings.

15. After saving the job, it will be listed on the Job Manager page. You can click on ▶ Start to initiate the export process.

Batch File

The following section gives you the guidelines to create a batch file for export lists, sites and metadata to target file system path.

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

1. **Path:** The 'Path' column should contain the path of the source list / site.
2. **Destination Path:** The 'Destination Path' column should contain the target location where the source gets moved.
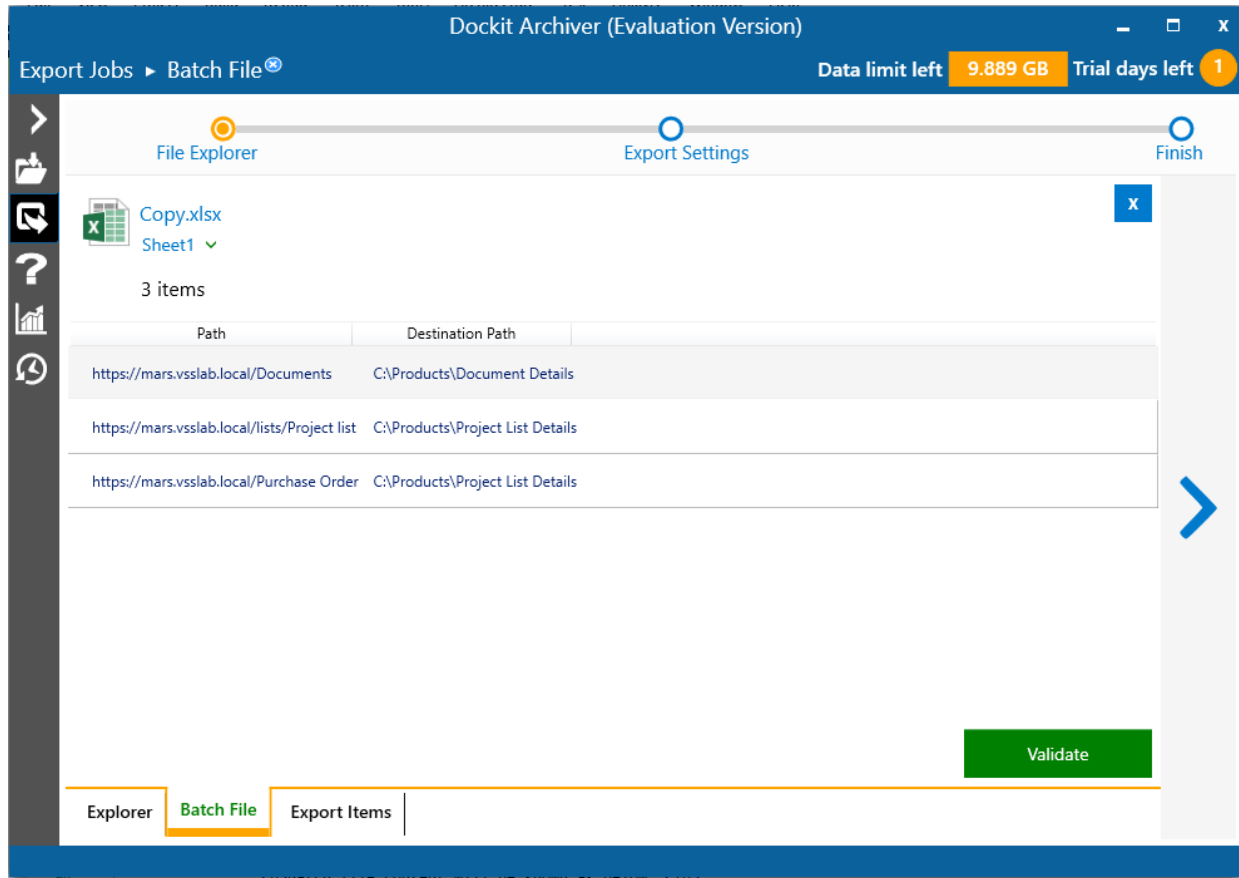
Path	Destination Path
http://sharepoint/technical documents/folder1	M:\My Document

Follow the steps given below to specify the lists/sites to export in the target File System location in the batch file
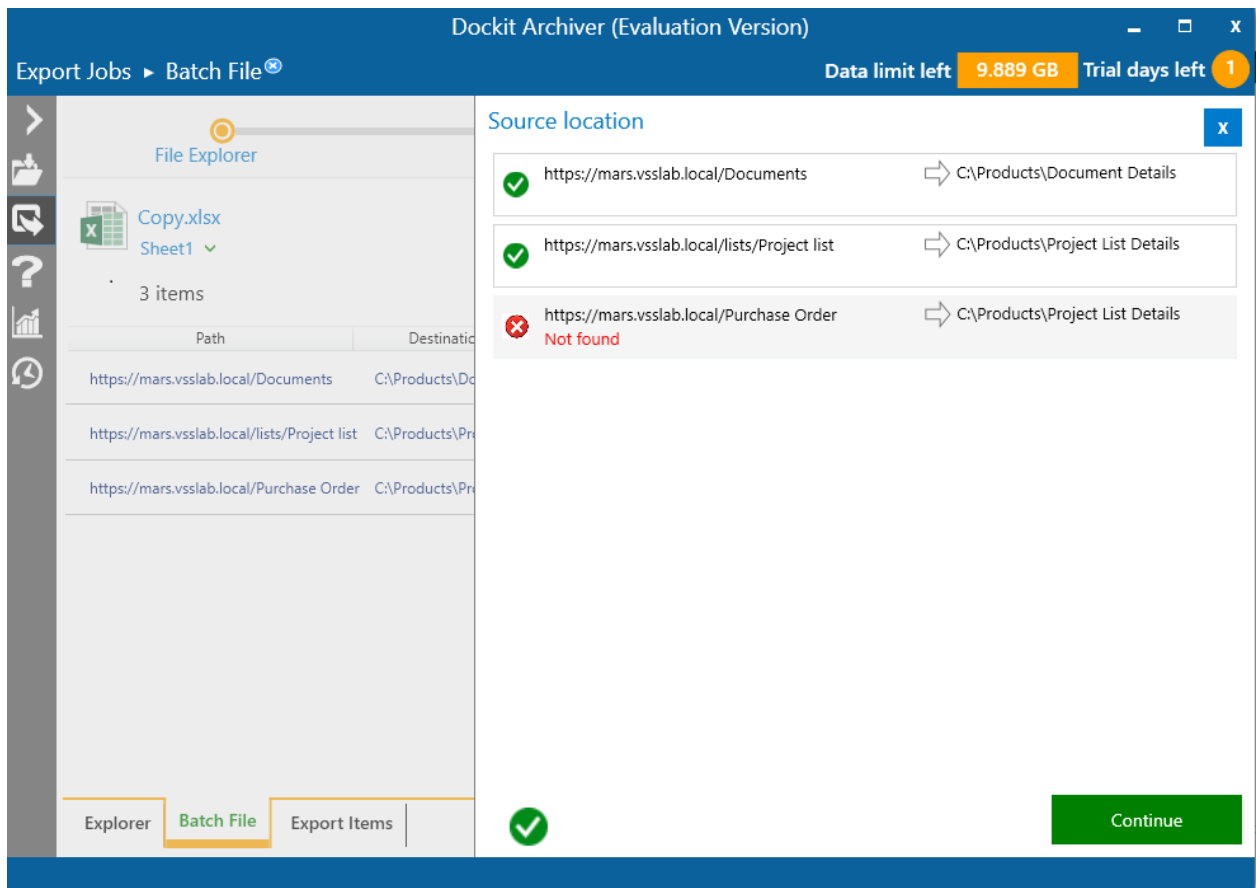
1. Drag-n-drop batch file in Batch tab from explorer. It will be shown below
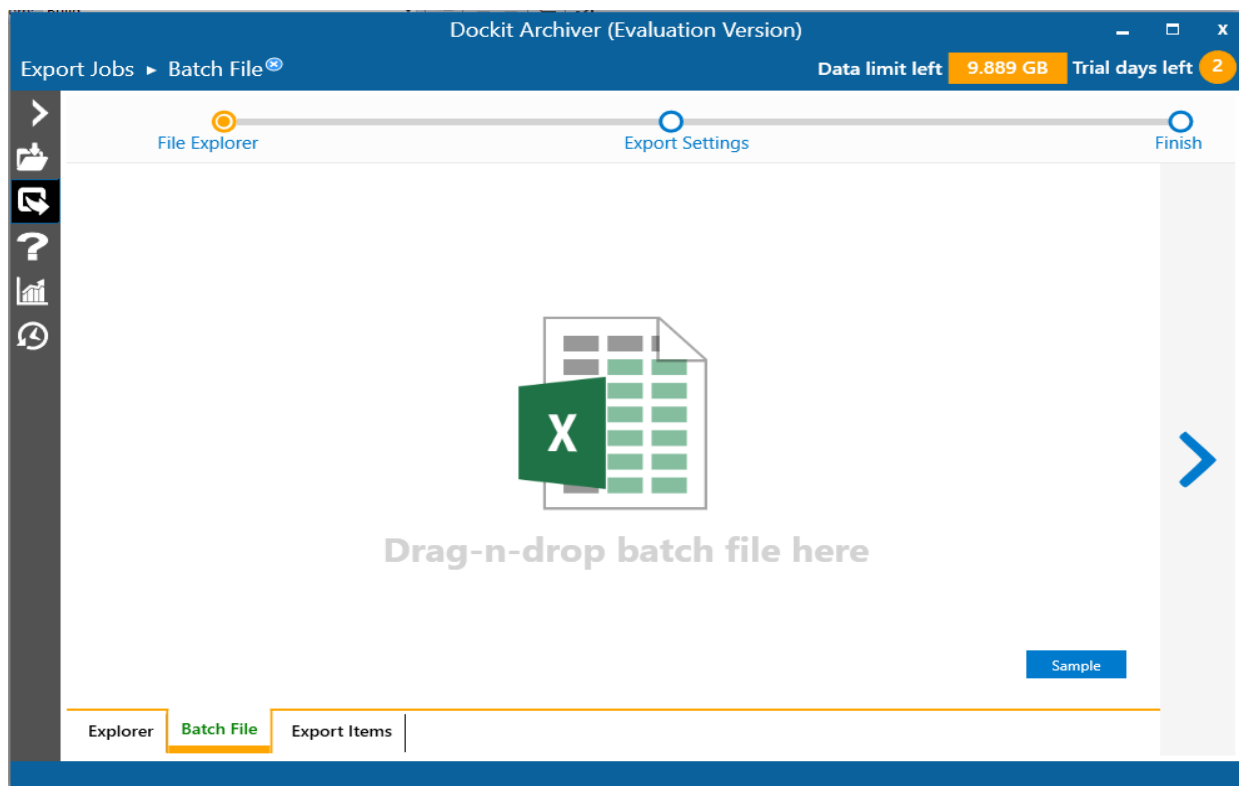
Batch file content will be shown as below.

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

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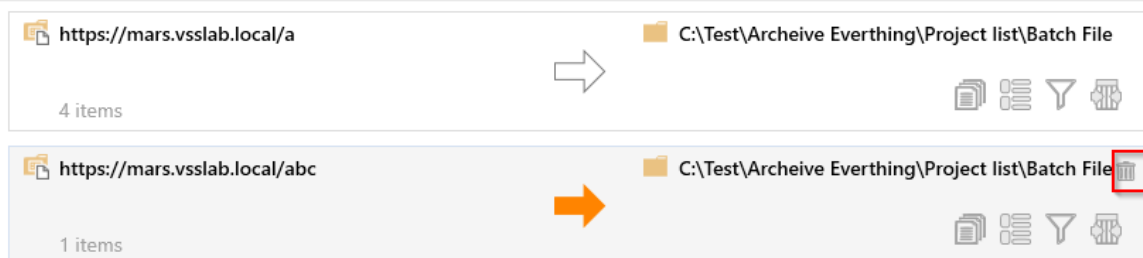
Export Items

1. In SharePoint explorer, you can either drag and drop SharePoint Objects to File explorer or simply select SharePoint Objects from SharePoint explorer, right click and select **Export** to add SharePoint Objects or select SharePoint Objects from SharePoint explorer and click ➡ to add them for Export. The **Export Items** appears as shown below:
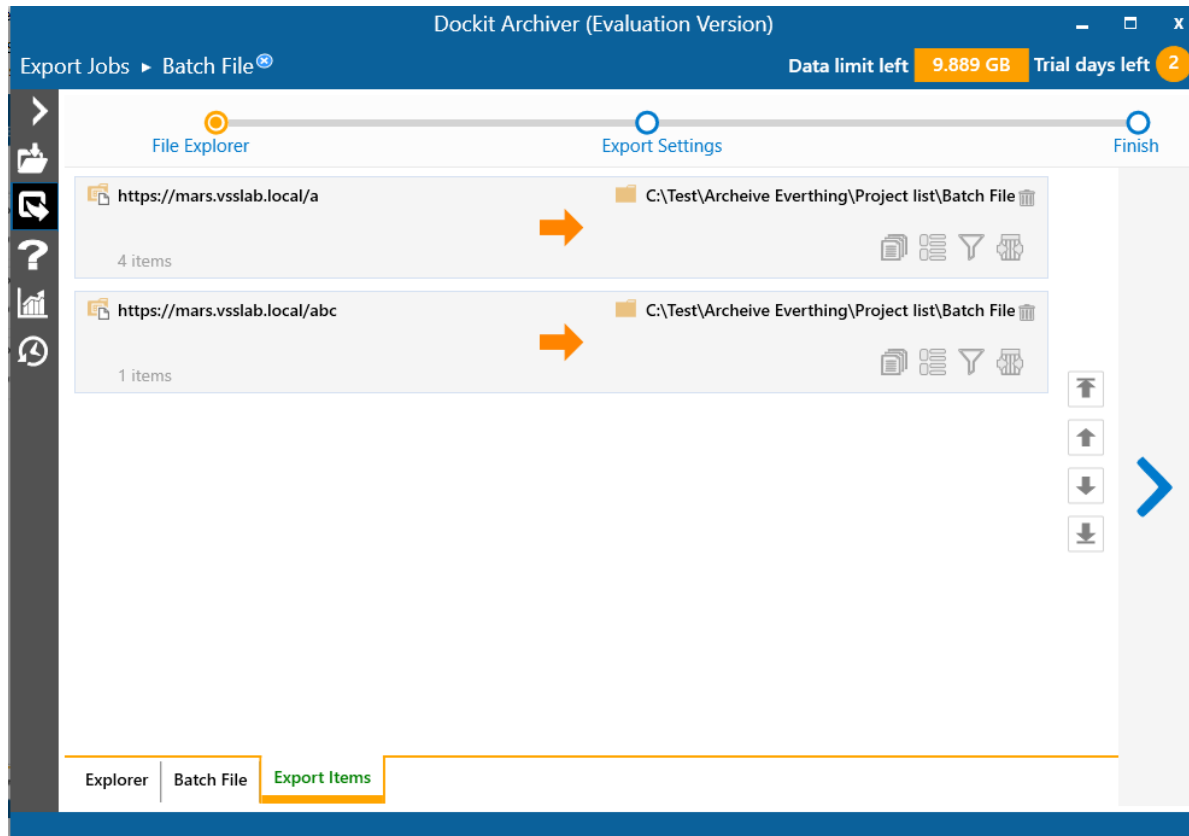
2. The selected SharePoint Objects added for export will be displayed in the **Export Items** page. Export Jobs processes the top-level SharePoint Objects added for export in the order in which they appear in the **Export Items** page. The export process order can be changed by using the **navigation** buttons available in the right side of the page. You can remove the SharePoint Objects added for export by clicking Top right of the listed entries.
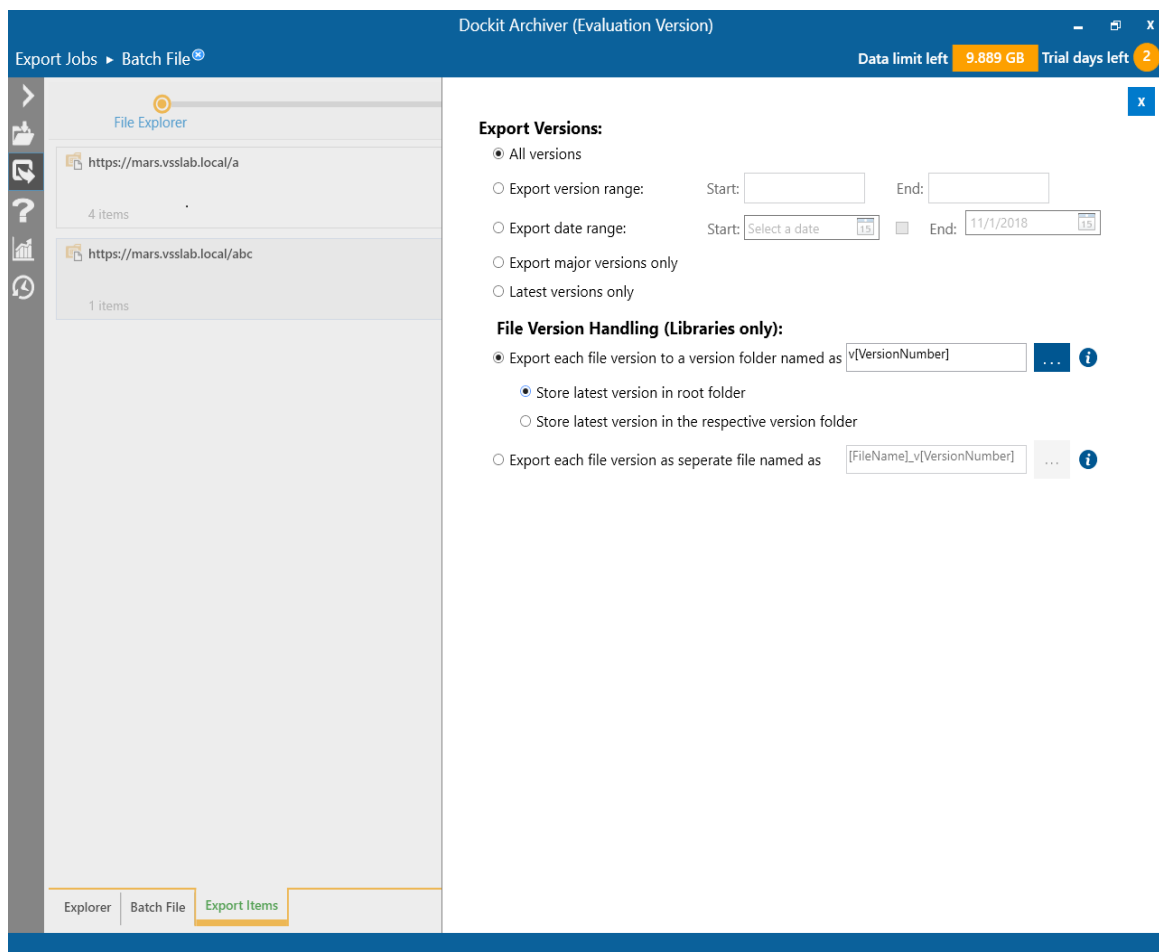
The **Delete Items** appears as shown below:

Version Option

1. To selectively export list item versions to the destination file system location: The **Version Options** step appears as shown below:

Export Versions:

By default, **All versions** option is selected. Item version settings will be used for each of the list items exported from the list. Select any one of the following version settings:

i. **All versions** - Export all list item versions available in the source list.

ii. **Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.

iii. **Export date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is Modified date of a list item.

iv. **Export major versions only** - Export the major list item version from the source.

v. **Latest version only** - Export the latest list item version from the source.

2. **File Version Handling (Libraries only):**

   Select any one of the following export options:

   i. **Export each version to a version folder named as -** This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.

      Store latest version in root folder – Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox. Version folder name mask dialog appears as shown below:

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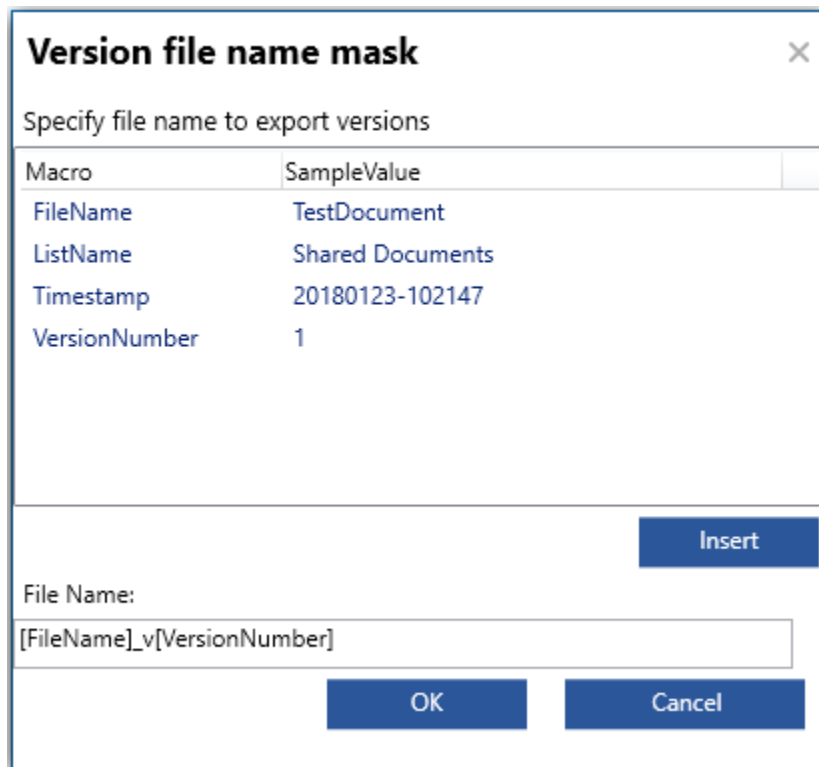**Store latest version in the respective version folder -** This option will create a version folder name based on the current file version and export the file into the version folder.

ii. **Export each file version as separate files named as -** Each file version will be exported using the file version name constructed in the file version name mask text box. To select Version file name, click the button placed next to the export version to a separate file name textbox. Version folder name mask dialog appears as shown below:
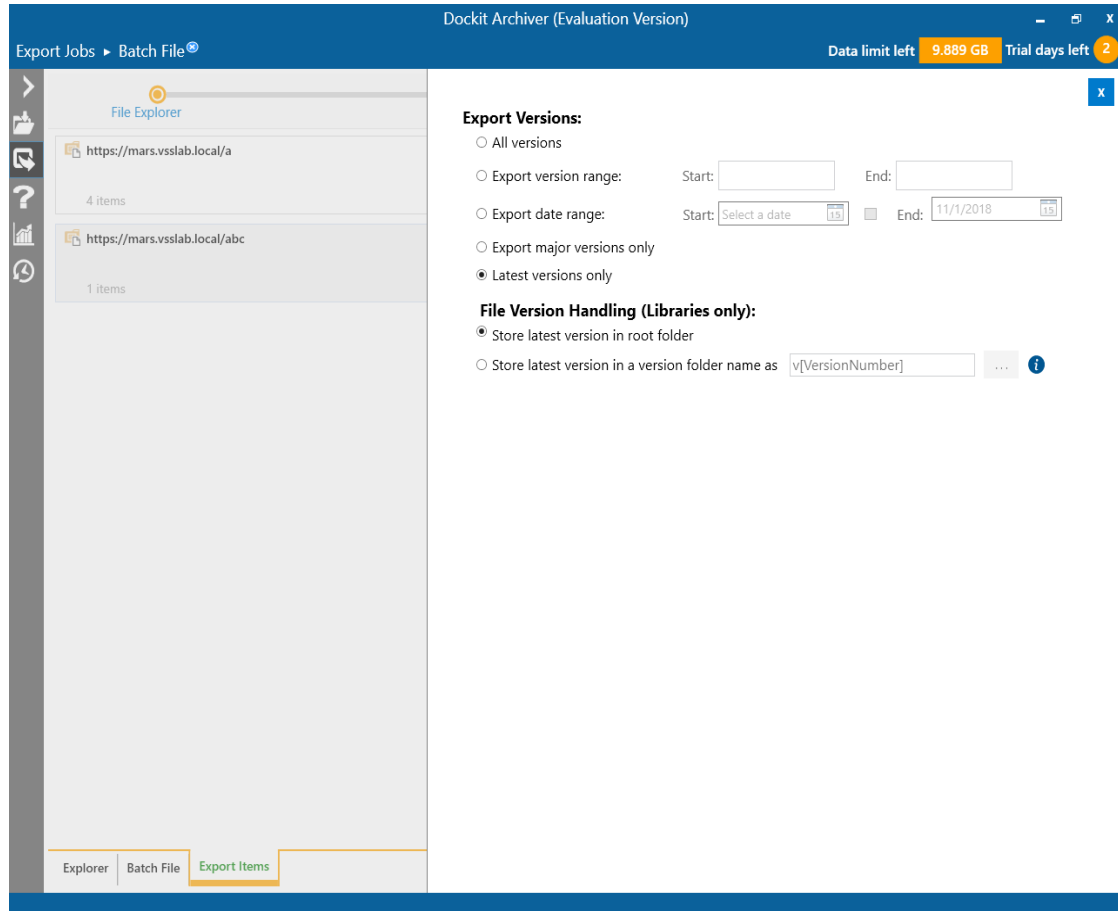

3. For **Latest version Only** option in the Export Versions, you have the option to export the latest file version to the root folder or export it to the respective version folder. The File Version Handling settings appears as shown below:

i. **Store latest version in root folder -** Export the latest version in the root folder itself

ii. **Store latest version in the respective version folder -** Creates a latest version folder and   export the latest file version in the latest version folder

4. Click button to proceed.

List View Options

You can export list items or documents based on SharePoint List views and thereby specify the SharePoint columns to export metadata.

To selectively export SharePoint Views from the list / library, follow the steps outlined below:

1. The **List View Options** wizard step appears as shown below:

   The **List View Options** wizard step appears as shown below:
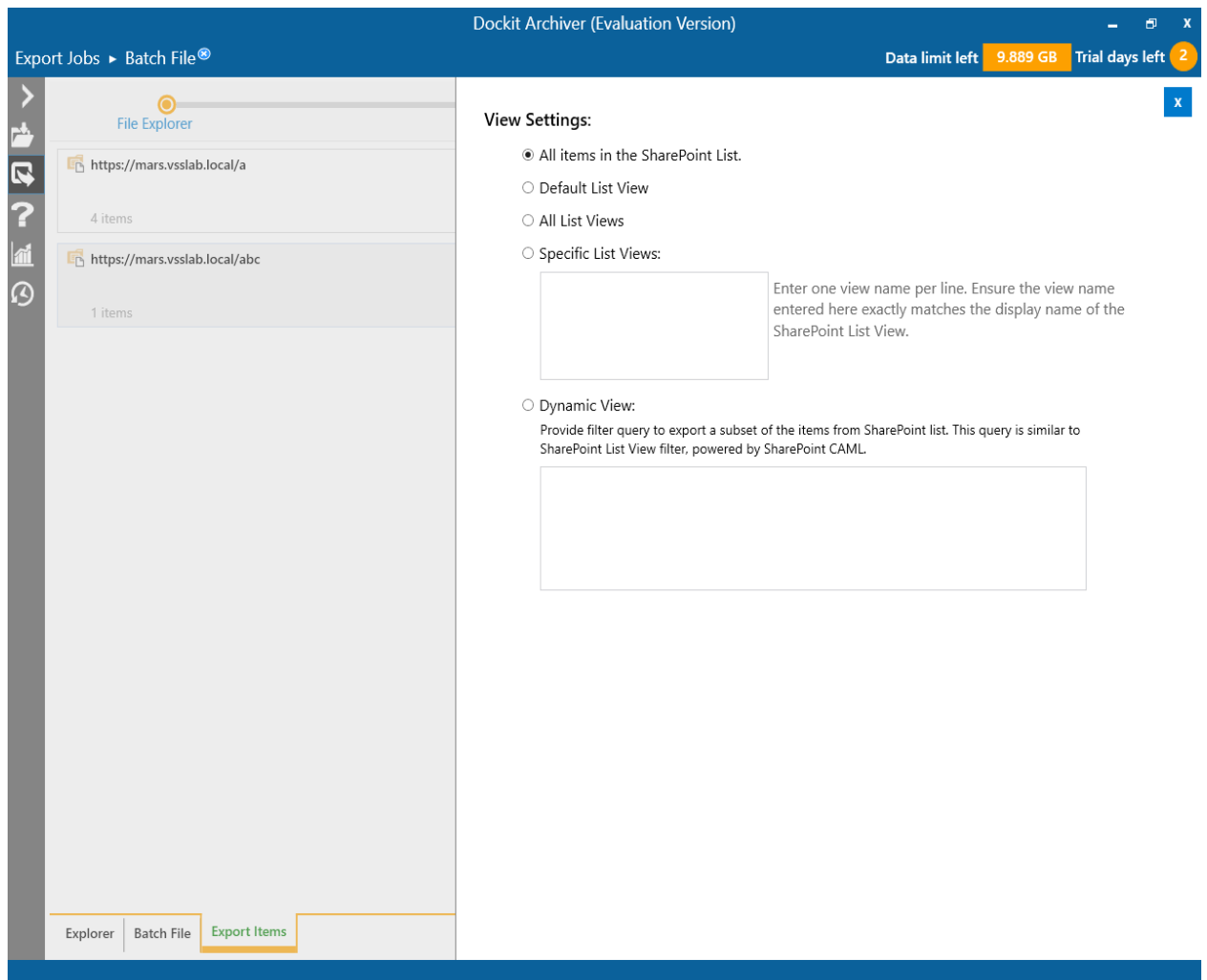
2. Select any one of the following **View Settings** given below

All items in the SharePoint List - Export all items / documents (including folders) in the list view as it appears in AllItems.aspx web page corresponding to the list.

Default List View - Exports all items (including folders) available in the Default view of the given SharePoint list. The SharePoint columns defined in the default view will be exported to the metadata file.

All List Views - all Views in the SharePoint list. The SharePoint columns defined in the respective list views will be exported to the metadata file.

Specific List Views - Exports views that are specified in the textbox. The SharePoint columns defined in the respective list views will be exported to the metadata file.

Dynamic View - Exports subset of items from SharePoint list based on CAML filter query. You can specify the required metadata columns using "List Column Options".

3. **Click** **to proceed**

List Column Options

1. You can export list items or documents based on specify the SharePoint columns to export metadata.

 i. **Export all columns** - all columns available in the source SharePoint list, including built-in SharePoint columns such as Created, Modified, Approval Status, etc.
 ii. **Export all user defined columns** - Exports all columns that are created by a SharePoint user.
 iii. **Export selected columns** - Exports columns that are specified in the textbox.
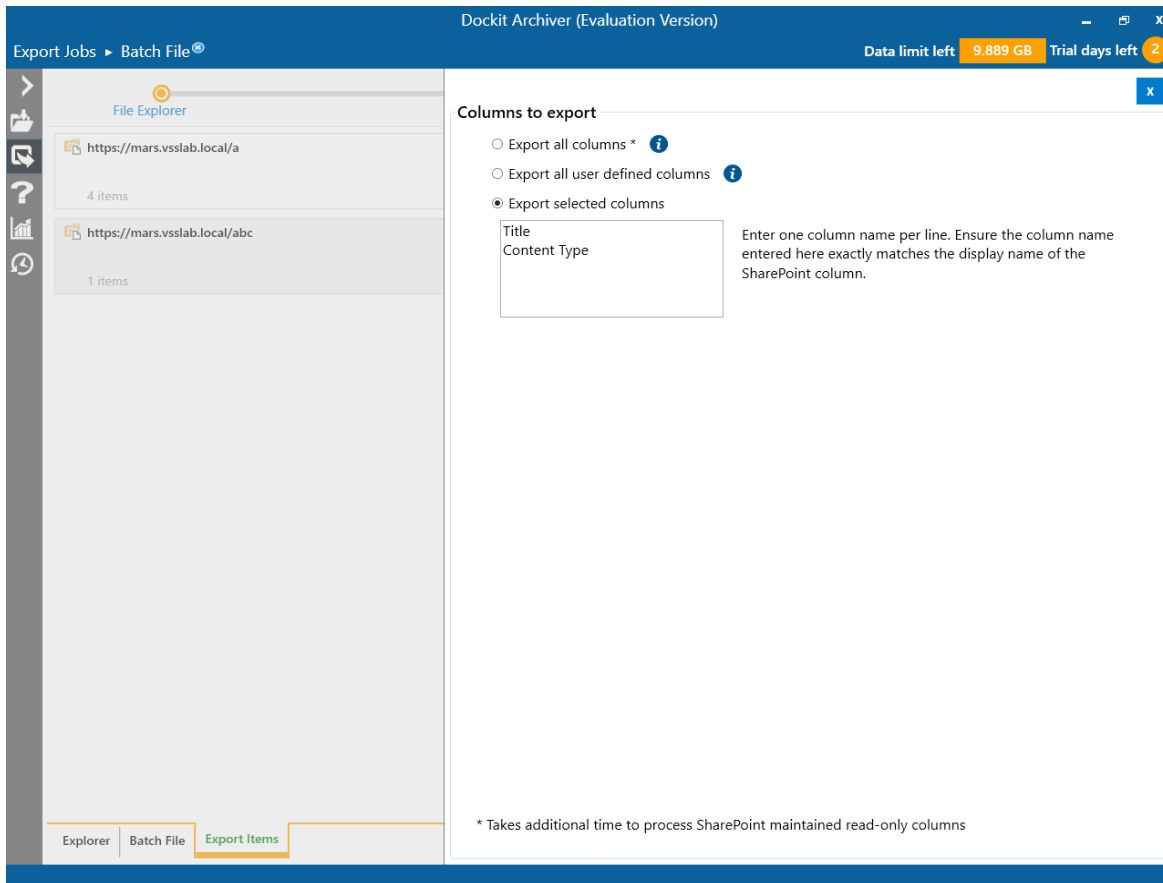
Note:

ViewName is applicable only for View based export. Export Jobs will substitute the name of the processed view wherever applicable.

Content export:

For list / library entries, it creates a new folder with the view name under the list / library name folder in the specified destination location.

For file / folder entries provided for export, it exports the content in the specified export location.

Metadata export:

For list / library entries and for files / folders within them, it exports metadata for columns present in the view.

For file / folder entries provided for export, it exports metadata for all columns (including SharePoint maintained read-only columns), instead of the view based columns.

2. Click **>** to proceed

Export Conditions

Export Jobs can export folders, files and list items (including file attachments) from a SharePoint list or library based on certain export conditions. The conditions can be created by using SharePoint columns in the source list or library.

1. The **Export Conditions** step appears as shown below:
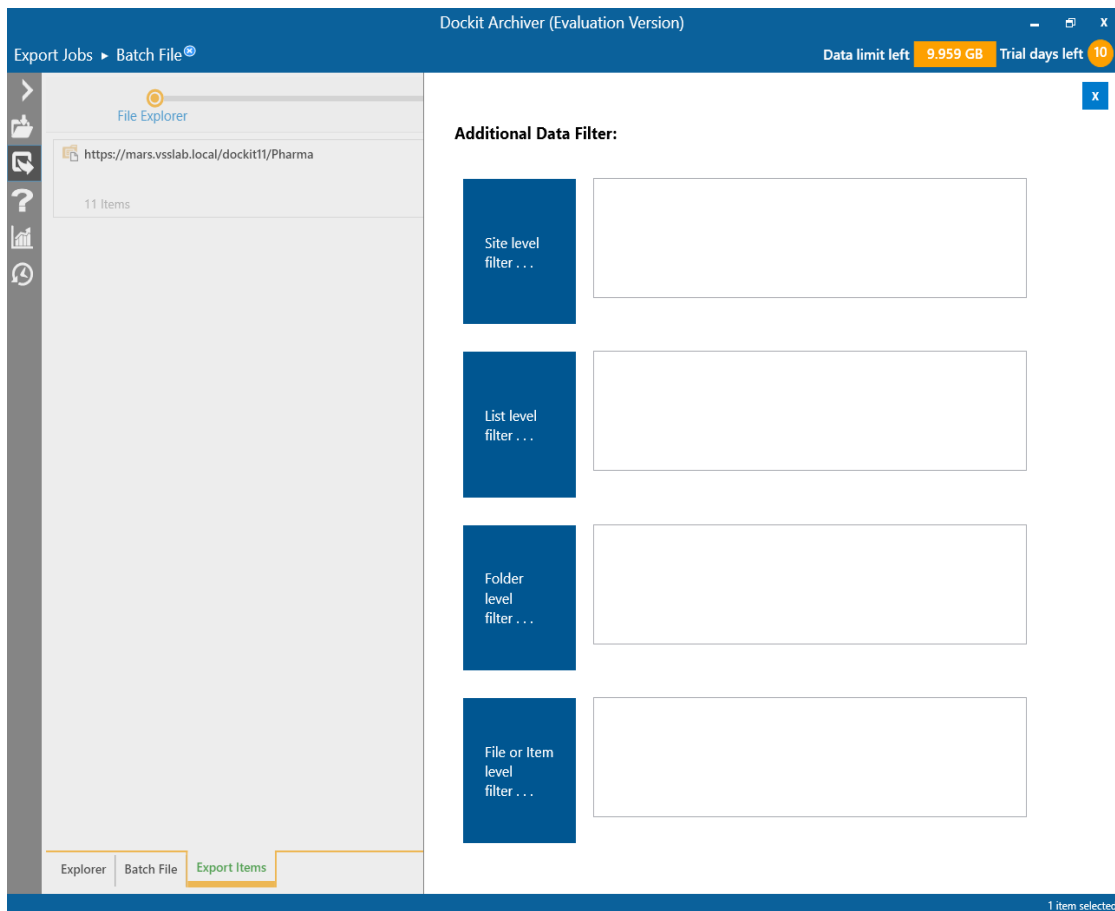
You can specify export conditions at four levels:

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2.1 Site Level Conditions

i. Click **Site level filter...** to specify the conditions. The **Site Level Filter** dialog appears as below:

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

iii.　Export Jobs will export the sites that satisfy the export condition or export the sites that do not satisfy the export condition depending on the option selected by the user:

      a) **Export sites if the above conditions are satisfied -** Sites that satisfy the condition will be marked for export

      b) **Export sites if the above conditions are not satisfied -** Sites that do not satisfy the condition will be marked for export.

2.2   List Level Conditions

i.   Click **List level filter...** to specify the conditions. The **List level filter** dialog appears as below:

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

List Level Filter

Specify rule that must be satisfied before exporting list from SharePoint. For example, you can export list only when ['List Type' = 'DocumentLibrary'].

Field Name: Base Type

Operator: =

Value: Document Library

AND to Filter   OR to Filter

Conditions: (   )   (x   )x   X   Clear

[Base Type] = 'Document Library'

Export list if the above condition is   ⦿ satisfied ◯ not satisfied

OK   Cancel

iii.   Export Jobs will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

a) **Export lists if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.

b) **Export lists if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export.

2.3   Folder Level Conditions
i.   Click **Folder level filter...** to specify the conditions. The **Folder level filter** dialog appears as below:

ii.   Click button to add the SharePoint columns in Field Name dropdown. The Add Fields dialog appears as shown below:

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.

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

Folder Level Filter   X

Specify rule that must be satisfied before exporting folder from SharePoint. For example, you can export folder only when ['Created By' = 'john doe'].

Field Name   Created   ∨   ...

Operator   <=   ∨

Value   29/1/2018   15

        AND to Filter   OR to Filter

Conditions: (   )   (x   )x   X   Clear

[Created] <= #29/1/2018#

Export folder if the above condition is   ◉ satisfied ○ not satisfied

                                                         OK   Cancel

iv.   Export Jobs will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

   a) **Export folder if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
   b) **Export folder if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

2.4   File or Item Level Conditions

i. Click **File or Item level filter...** to specify the conditions. The **File or Item level filter** dialog appears as below:

ii. Click [...] button to add the SharePoint columns in Field Name dropdown. The Add Fields dialog appears as shown below:

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.

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

iv.

Export Jobs will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

a) **Export list items if the above conditions are satisfied** - Files or list items that satisfy the condition will be marked for export.

b) **Export list items if the above conditions are not satisfied** - Files or list items that do not satisfy the condition will be marked for export.

2. Click to proceed

File Settings

To construct Alternate File Mask and to propagate Created Date and Modified Date from SharePoint Library to Windows File System, use below options:

1. **Alternate File Name Mask:**
   If the file with the same name already exist in the destination location, follow the steps outlined below:
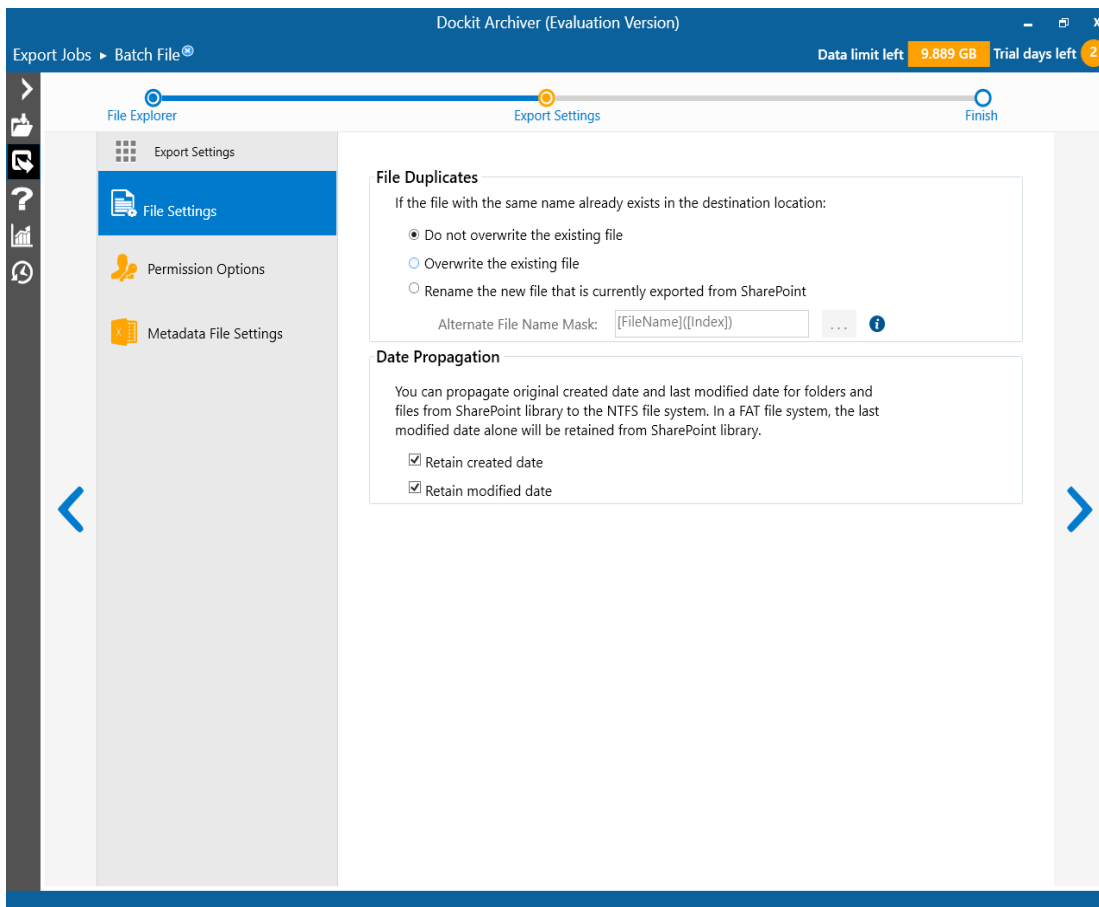
    i.   **Do not overwrite the existing file** - Skips the file without overwriting the existing file with the same name.

    ii.   **Overwrite the existing file** - Deletes the file from the destination location and exports the current source file.

    iii.   **Rename the new file that is currently exported from SharePoint** - Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

To select alternate file naming mask, click the alternate file name mask button placed next to the alternate file name mask textbox. Alternate file name mask dialog appears as shown below:

Construct alternate file naming mask with the available macros provided in the dialog. Click OK to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

2. **File System Date Settings:**
   To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:
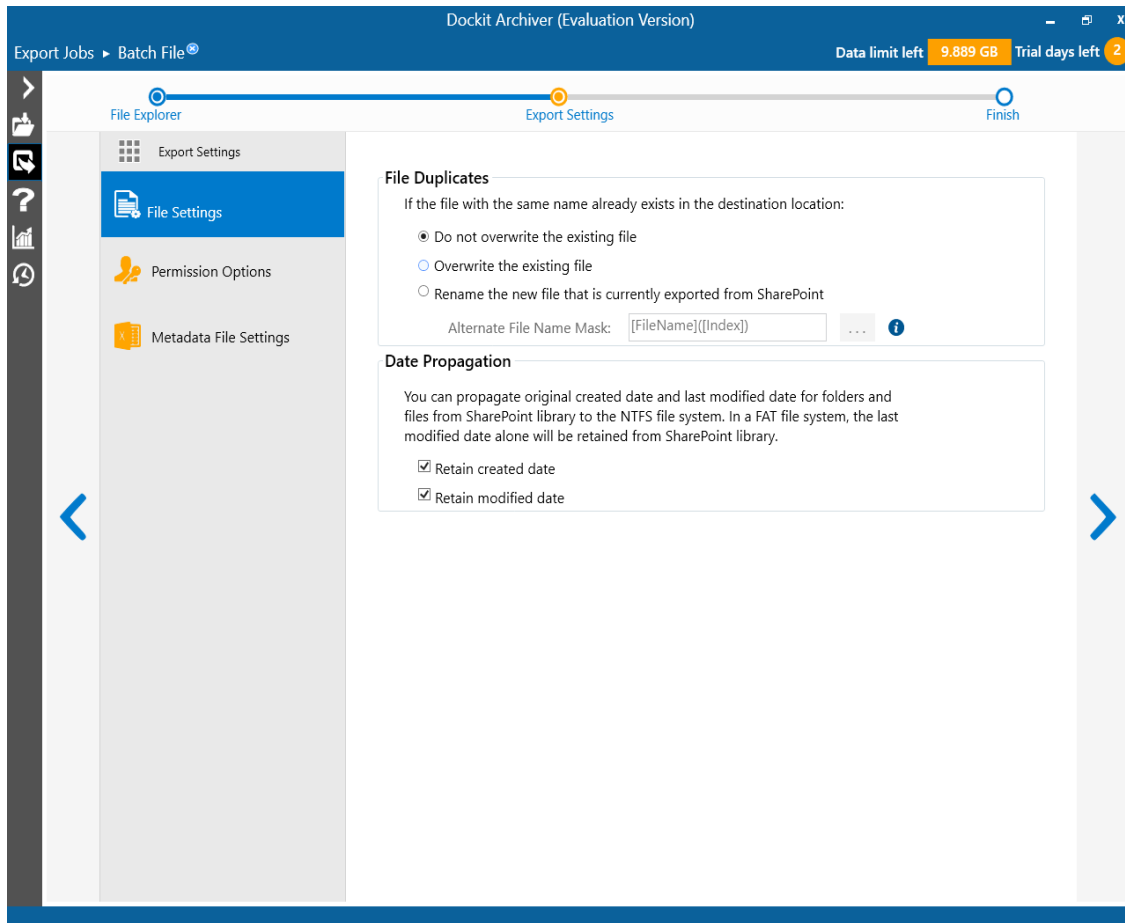
Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

i. **Retain created date -** Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.

ii. **Retain modified date -** forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

Note: You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

3. Click to proceed.

Permission Options

Export Jobs can export SharePoint site / list / list item permission information to the metadata file.

1. The **Permission Options** specification wizard step appears as shown below:
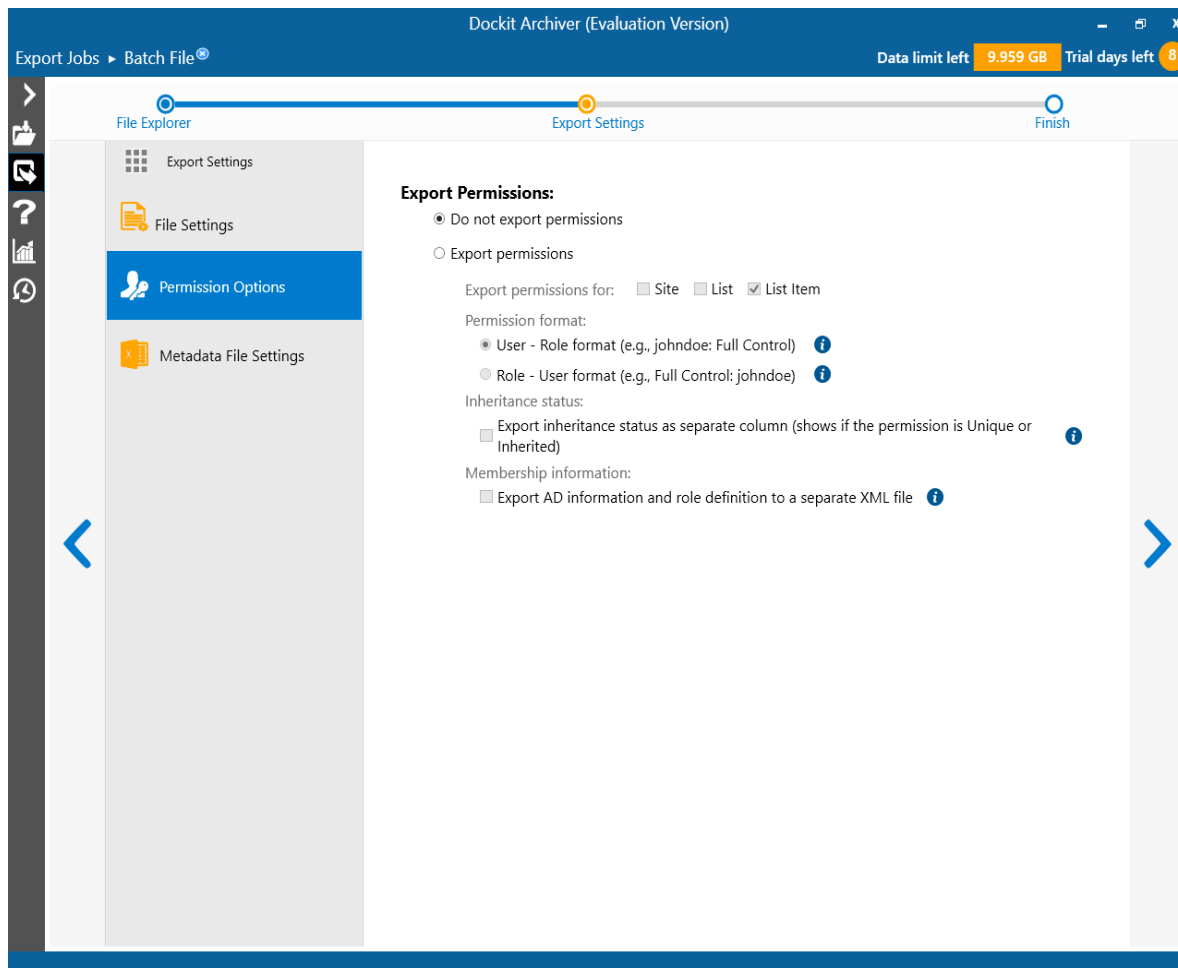
Export Permissions:

i. **Do not export permissions** - This option will not export permissions to the metadata file.

ii. **Export permissions** - This option will export permissions based on the user specified options. The export permission options appear as shown below:
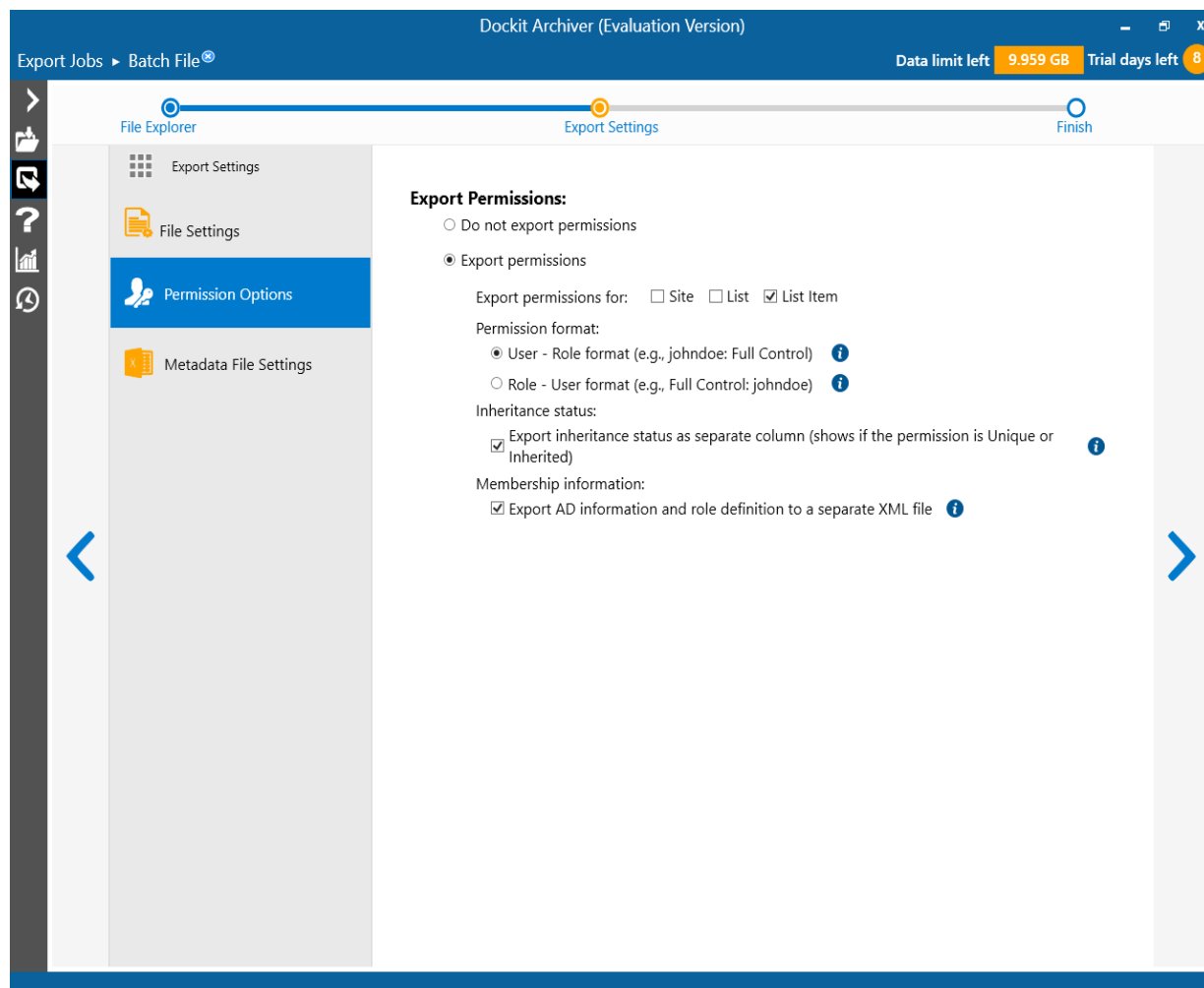
2. You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in Export permission for: options.

   Note: You can export list item permission from SharePoint 2013 or later.

3. Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:

   i. **User - Role format** – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
   ii. **Role - User format** – permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.

4. **Inheritance status** - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.

5. **Membership information** - This option exports AD information and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name _membership information and _role definition. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information. Export Jobs will enumerate only the globally declared domain groups and retrieve membership information.
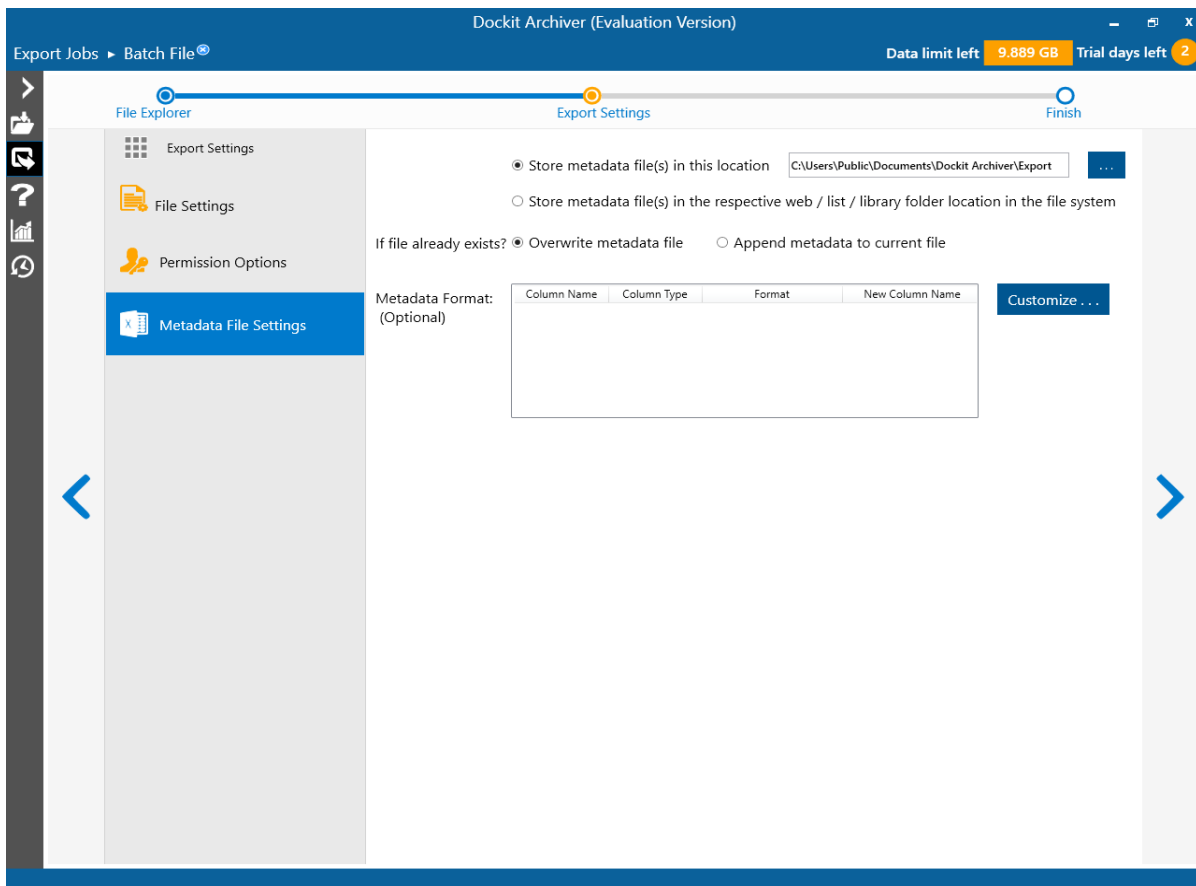
6. Click to proceed

Metadata File Settings

Export Jobs will create metadata files based on the following options given below.

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

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

2. Specify the **Metadata file location** using the options below:

    i. **Store metadata file(s) in this location:** Specify a folder path where the selected list items metadata are to be exported. You can also Click browse button to launch folder browser dialog.

    ii. **Store metadata file(s) in the respective list / library folder location in the file system:** - This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

Note: Ensure that the user context used to run the Export Jobs export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

3. If the metadata file already exists in the destination location, choose from any one of the following options:

    i. **Overwrite:** This option will overwrite the existing metadata file.

ii. **Append:** This option will append the new metadata to the existing metadata file. The new metadata will be shown in the new sheet with the name of current timestamp in XLSX file.

4. You can specify a new metadata custom format based on the column name when generating the metadata file. The format specified here overrides the application level template defined in **Metadata Format Template** tool. Also, you can specify new column names to use when generating the metadata file in the file system location. To use this feature, click the Edit button. A **Customize Metadata Format** Dialog appears as shown below:

Customize Metadata Format   ×

Enter Column Name, its type and the Format to use when exporting its value to the metadata file. You can rename SharePoint column name when exporting it to the metadata file by providing a New Column Name below.

Column Name: [   ]

Column Type: [∨]

Format: [   ] [...]

New Column Name: [   ]

Column Name	Column Type	Format	New Column Name	
				+
				—

[OK]   [Cancel]

5. Specify SharePoint column name in the **Column Name** textbox and select its type from the available **Column Type** from combo box. Click [...] button to load the available fields. Select format from the available fields. If you want to rename the SharePoint column name when exporting to the metadata file, provide a new name in the **New Column Name** text box. For example, a SharePoint column named 'Area' in the source SharePoint list can be customized and renamed as 'Location' when creating the metadata file during the export operation.

Click ![+] to add the SharePoint column name and its format in the custom metadata format list.
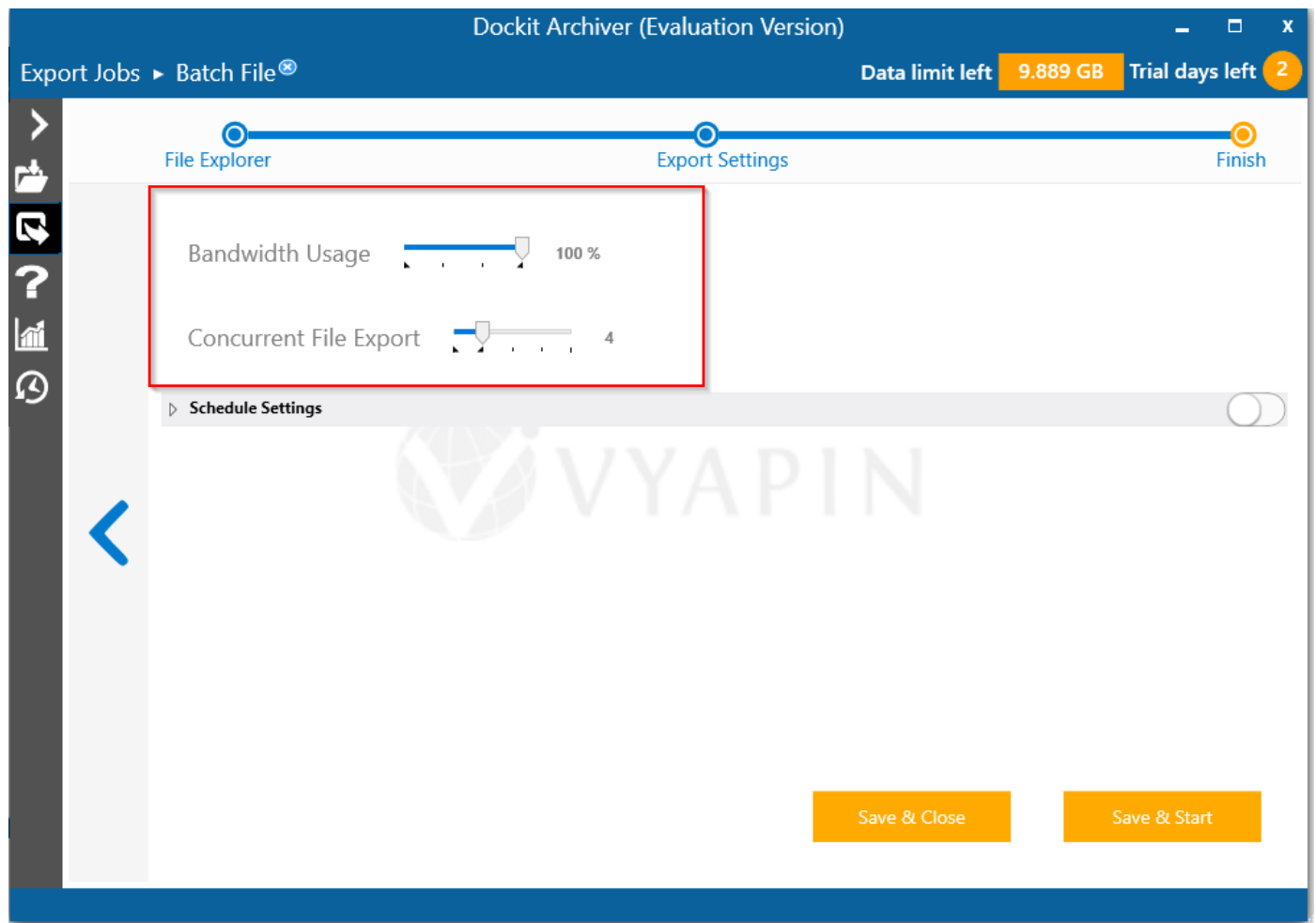
Click ![-] to remove the SharePoint column name from the custom metadata format list.
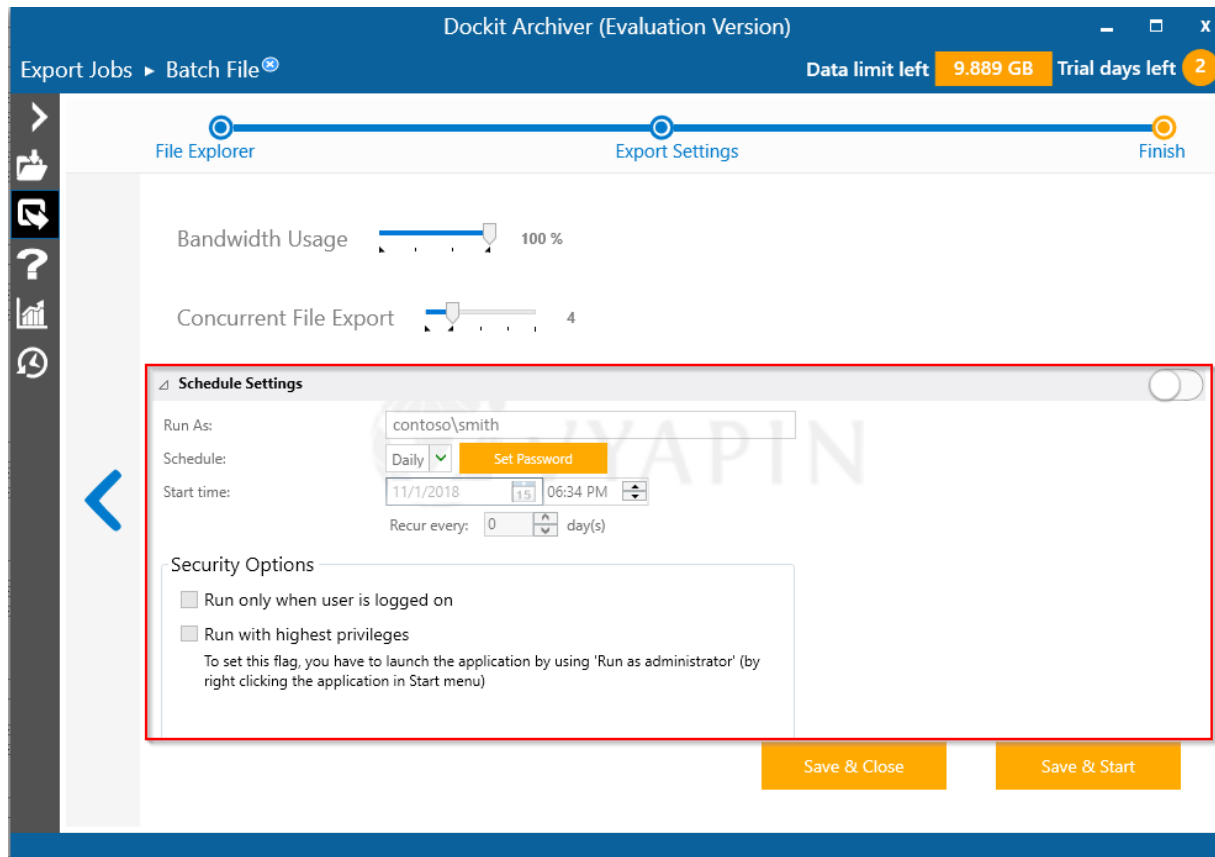
6. Click ![>] to proceed

Threshold Settings

Set percentage of Network bandwidth that Dockit Archiver can use during export and number of files that can be exported concurrently to improve performance.

Schedule Settings

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

2. Select a Schedule type from **Schedule** drop-down menu.

3. Click **Set Password** to specify Username and Password to run the task.

4. Click **Save,** a window scheduled task will be created.

Reference

Troubleshooting

Troubleshooting

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

1. *Error log file* - e.g., *<Application Data Folder>* \Dockit Archiver\Log\Dockit_*<date&time-stamp>*.txt
2. For issues while running a job, send us the date and time-stamp folder generated within the job folder name under 'JobHistory' folder. e.g., *<Application Data Folder>* \Dockit Archiver\Histories\<JobName>\<Date&Timestamp>.The date and time-stamp folder contains:

   - Activity log file (ActivityLog.csv)
   - Error log file (Archiver_20160409-134848.txt)
   - Job settings file (Detail.xml)
   - Items to Archive (Items to Archive.csv)
   - Job Execution file (JobExecution.xml)
   - Migration Statistics file (ArchiveStatistics.xml)
   - Upload Statistics file (UploadStatistics.xml)

3. The *<Application Data Folder>* is the common location where Dockit Archiver jobs and job history will be stored in the computer running Dockit Archiver application. The *<Application Data Folder>* can be found by clicking ▨ **-> Product Activation**. The default path of *<Application Data Folder>* is as follows:
Windows 10, Windows 8, Windows 7, Windows Server 2008, Windows Server 2012 - C:\Users\Public\Documents.